Design and the Formation of Taste in the British Printed Calico Industry, 1919 to 1940

Volume I

Emily Anne Baharini Baines

Thesis submitted in partial fulfilment for the degree of Doctor of Philosophy

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This thesis examines the process and structures of the formation of taste and activation of fashion change within the British printed calico industry, from 1919-1940. The approach taken was to analyse the style trends, economic conditions and strategic policy of a number of case study companies. These case studies are contextualised by analysis of the broad structural and economic conditions in the industry, the interventions of Government and the contemporary ideological construction of pattern design.

The thesis tests several historiographic views relevant to the structural analysis of taste formation. The assertion by the Balfour Committee in 1928 that the industry was divided into separate market and design style sections is investigated. A commonly held view that British interwar design was reactionary and regressive, and the general assumption that Modernism came to Britain in the 1930s as a Continental influence, is challenged. Definitions and perceptions of Modernism are closely examined. A range of contradictory claims regarding the sources of design innovation and fashion leadership in the industry are assessed.

In addition, claims that the British interwar cotton industry was not innovative in its response to economic conditions and theories of a link between macroeconomic conditions and innovation are considered.

In relation to the formation of taste, the thesis concludes that there was a separation in the fields of taste construction for furnishing and dress fabric, with different sources of design production, markets and design styles, although textile production for both sections could occur within the same company. In the case studies analysed, the main source of innovation and taste construction in printed textile design appears to have been company design studios, rather than freelance artists, architects, designers or Parisian design studios. The influence of the economic context was evident in the impact of specific cost rises, alteration of print processes used and changing market demand due to macroeconomic conditions and international competition. A switch in the basis of mass market demand from durability to fashion in textiles and clothing during the interwar period promoted a production structure of short production runs, small orders and a wide design range. A relevant factor in the construction of taste was the Modernist educational aims of the British Government during the interwar period, particularly in the impact on general and designer education. It switched to a policy of promoting exhibitions of innovative Modernist design as a basis for creating demand in the 1930s, from a strategy that emphasised vertical integration of the textile industry to increase efficiency. The British printed textiles industry was innovative in its response to severe economic conditions, in terms of design, product development and the strategies of national printed textile industry organisations. A significant finding is the active role of the British printed textiles industry in initiating debate, producing exhibitions and developing designs that by 1919 had established a Modernist approach and visual language of decorative design. This version of Modernism was related to art-based concepts of form and expression, while also considering the design criteria of fitness to function. Dress fabric design - not hitherto seen as significant in the historiography of Modernism – was shown to have been strongly Modernist in emphasis in the case study companies examined. Modernism in pattern design appears to have been popular during the interwar period, rather than - as generally assumed - restricted to a small group of consumers with highly educated aesthetic tastes. These conclusions arise from and are substantiated by extensive empirical investigation of the design style and business history of case-study companies, supported by structural analysis of the industry.
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1. Introduction

1.1 Introduction

The aim of this thesis is to examine the formation of taste and activation of fashion change within the British printed calico industry from 1919 to 1940. Printed textiles were chosen as the subject of analysis because of the scale of the industry as a system of industrial mass consumerism, and the ease and necessity of introducing new designs to it: hence its sensitivity as an indicator of changing taste. The analysis of the construction of taste will be focused on the role of textile printing companies and manufacturers, though the interaction of production and consumption processes (via particular commissioning and distribution structures) with cultural institutions is a significant theme of analysis. The 1919-40 period in Britain is particularly suitable for analysis, since there was a combination of distinct changes in style and taste, economic events and sharp adjustments in social, political and market circumstances, concentrated within a fairly brief time frame. Trading conditions were seriously affected by both world wars: the First World War had a catastrophic effect in the longer term, permanently altering the highly favourable trade conditions for British textiles previously existing. At the declaration of the Second World War, there was an initial period when production, commissioning of new designs and sales were greatly reduced. Factories were then closed or converted to other uses for the war effort under the Concentration of Industry Scheme.¹ These factors define the parameters of the period examined.

1.1.1 Sectional Division of the Industry

A division into separate systems of style type and influence between dress and furnishing textiles and home and export markets in dress was stated in the 1929 Balfour Report:

‘In the matter of design, the world market for dress goods may be roughly divided into two classes, one being mainly inspired by Paris and the other being inspired by the native tradition of the particular market. The first class includes the home market, which is more or less directly under the influence of Paris dress fashions... Furnishing fabrics are chiefly sold in the home and European markets and in the Dominions and Colonies. Fashions in these fabrics change less rapidly than in dress materials, and though many designs come from Paris, the predominating influence is British.’²

This partition of the industry (with the economic and structural implications) is not evident in most discussion of textile design in the historiography.\(^3\) It is observable that when printed textile design is the focus of analysis by Modernist and other contemporary commentators,\(^4\) furnishing design is the subject of attention: conversely, when the economic problems of the textile industry were under consideration, the only area discussed is dress fabric production (predominantly exports).\(^5\) The exclusion of printed dress fabric in contemporary Modernist writing may be due to the low cultural status of dress, considered trivial due to its association with feminine whim and transient fashion,\(^6\) while furnishing fabric was related to architecture, considered more stable in its design criteria and the highest form of art by Modernist commentators.\(^7\)

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\(^3\) Analysis of economic and industrial development by R. Robson, W. Lazonick, J.H. Porter, M. Rose and M. Dupree (see Historiography, Section 1.3.2) concentrates on overall statistics and organisations, by implication discussing the dominant production and export of dress fabric, but without analysis of sectoral division. In Mendes, V. *The Victoria & Albert Museum's Textile Collection: British Textiles from 1900 to 1937*, Victoria & Albert Museum, 1992, no differentiation between dress and furnishing fabric is made in details of illustrations given and little in the main text.


\(^5\) Analysis and reports by the Balfour Committee on Industry and Trade, the Sub-Committee on the Cotton Industry of the Committee of Civil Research, the Economic Advisory Council Committee on the Cotton Industry and publications of the Joint Committee of Cotton Trade Organisations (see Section 4.1).

The clarity of such a national division in taste formation between dress and furnishing textiles will be examined. Analysis of the distinctive design characteristics of all sectional divisions of the printed calico industry will be given in Chapter 6. In Chapter 3, the nationality of designers for printed dress and furnishing fabrics is examined, with analysis of style difference in relation to design source, and the influence of French subscription patterns and company design collections, in Chapter 6. The structural divisions within printed textile production and the related field expectations of design style, and any changes in these structures and expectations, are considered. Structural separation in production facilities and distribution system (Chapter 2), design source (Chapter 3), market and economic conditions (Chapter 4) will be investigated and the design implications indicated.

1.1.2 Impact of Economic Conditions on Design

The British calico industry suffered severe economic problems in the inter-war period, due to price competition in export markets and rising costs. An analysis of the effect of broad macroeconomic change, specific market demand and costs on company profits is given in Chapter 4, with measures taken by Government and the textile industry in response to these economic conditions examined in Chapter 5. The effect of these economic changes on design is considered in Chapters 5 and 6. There is a contrast in historiographic views on the relation of design to macroeconomic change, with alternative theories of a positive or negative effect of the 1930s depression on art and design suggested. Pevsner's statement that 'a trade boom seems detrimental, a trade slump favourable, to the artistic quality of the products of a nation' is contradicted by the views of Elizabeth Rouse, that there was a swing to conservatism in dress fashion during the depression, and by the consensus of Mellor, Harrison and Stephenson on the economic motive for a conservative trend in art in the 1930s. Business theory approaches to the reaction of organisations to economic

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7 Recommendations that the architect should be considered the primary expert on design in the community are given in Gloag, J. Industrial Art Explained, George Allen and Unwin Ltd., London, 1934, p179 and Pevsner, N. op. cit., p199.
8 Pevsner, N. op. cit., p191.
conditions are also considered in the analysis of company strategy. Kenneth E. Knight concluded that distress conditions encourage cost-cutting and organisational change, while conditions of economic success promote investment in technological development and research.¹¹ Investment in research and product development is given in Chapter 5, with an examination of the design implications of a range of cost reduction policies. Aspects of cost reduction include the tactical shift between production processes. The high cost of engraving rollers for textile printing was noted by Pevsner, who stated that it reduced risk-taking and experimentation in design.¹² A profile of changes in printed textile sales in the dress and furnishing sectors of the industry is given in Chapter 4, with response to macroeconomic changes discussed. The relation of design investment to economic change is analysed in Chapter 5 and style response in each sector to macroeconomic change compared in Chapter 6.

The debate on the role of British textile industry entrepreneurs in the decline of the textile industry is also relevant. An argument advanced by McCloskey for the rationality of decisions taken by 19th century entrepreneurs, in the context of contemporary costs of materials,¹³ was opposed by Lazonick on the grounds of differentiating between the rational decisions made, subject to existing constraints, of a good manager and the dynamic entrepreneur who changed those constraints: 'The test for a manager might be rationality, but for an entrepreneur it was innovation.'¹⁴ Lazonick claimed that entrepreneurial weakness in Britain, and particularly in the cotton industry, was shown by the failure to create large vertically combined corporations in order to make the transition from competitive to corporate capitalism.¹⁵ This thesis argues that the British printed textiles industry was innovative in its approach, in the policies adopted by industry organisations and the strategies of individual companies. The issue of vertical combination


¹² Ibid.


¹⁵ op. cit., p174.

and wider rationalisation schemes was investigated by Government and the industry as a strategic response to the economic conditions, and is discussed in Sections 5.2.2 and 5.3.4. A range of structural and financial strategies adopted by the industry are examined in Section 5.3. The entrepreneurial approach of the case study companies in response to harsh economic conditions is considered in Section 5.4, with a comparison of company strategies in investment, diversification and marketing. Another significant aspect is the new emphasis on fashion and novelty of design in the mass market. A concern expressed by industrialists during the period was that this structural change in market demand necessitated short printing runs, the high costs of which were economically disastrous. Changes in fashion demands of markets are discussed in Section 2.6, analysis of print orders in Chapter 4 and consideration of markets in design terms in Section 6.5.3.

1.1.3 Source of Innovation in Textile Design

An analysis of the construction of taste within the production structure requires an understanding of the structures of the sourcing of designs, the dominant patterns of influence, the most significant sources of innovation in design and the site of decisions over designs produced. The source of influence and design innovation in this period has been ascribed to a variety of factors: the claims for each source type will be closely examined. A dominance in style leadership of Paris design studios over British dress fabric design has been assumed by a series of Government reports and industry sources. Female freelance designers were highlighted as a source by Christine Boydell. She indicated that art school educated female freelance designers (usually from painting courses) dominated the production of designs for screen-printing and stated that screen printing was a significant element in the production of experimental work: indeed, that it was probably reserved for patterns that were experimental in nature. She also concluded that increasing numbers of designs were purchased from freelance textile designers in the 1930s, many of whom were women. A contrasting approach is the belief that innovation can be credited

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19 Ibid., p34; see also Boydell, C., ‘Women Textile Designers in the 1920s and 1930s: Marion Dorn, a Case Study’ in Attfield, J. & Kirkham, P. A View from the Interior: Feminism, Women and Design, The Women’s
to a few individuals, rather than broad structural sectors of the design source system. For example, Fiona MacCarthy stated that British industry in the interwar period produced 'good modern design' reluctantly, solely due to the efforts of a handful of Modernist architects, designers and industrialists:

'Whenever there was progress, this progress could be traced back to just one person fighting the great tide... As these were mainly architects, design for industry was a spare time occupation in nine cases out of ten.'

Professor Rothenstein (principal of the Royal College of Art) held a similar view of the salient role of a few individuals:

'There may be, at one time, only half a dozen men of marked capacity; to fail to make full use of them is to waste an asset of incalculable value, yet such men are constantly lost to industry.'

A contemporary opinion was that artists working freelance in textile design were the only significant creative force in textile design. John Chirnside claimed in 1938:

'Many modern painters have designed textiles and we may say that whatever evidence exists of a new and contemporary style in modern fabrics is due to the experiments of present day painters and sculptors.'

Pevsner also attributes artistic significance to the input from small numbers of free-lance artists. He also considers that the best method of improving the quality of design would be to employ architects on a free-lance basis. They would replace staff (studio) designers, who he considered to have 'a lack of artistic refinement' in their work and commented on 'the poor quality of so much work done by staff designers.' These critical theories are considered in the context of the role of the individual company in determining design policy and the results of case study company analysis of sources of design. The sites of

Press, 1989, p67, where it is stated that the demand for new designs was most often filled in the 1930s by freelance textile designers.
21 PRO, ED 24/608 Memorandum by Sir William Rothenstein Hon. ARCA, Principal of the Royal College of Art.
25 Ibid., p194.
design decision within individual companies, the degree of design control and strategic
direction by the company and the image of the company portrayed in advertising will be
analysed in Section 6.4, with advertising strategies discussed in Section 5.4.5. Pevsner
considered that the personal attitude of manufacturers was decisive in the artistic quality of
a company’s production.\(^{26}\) He posits that in industries with high investment costs for new
designs, such as engraved roller printing, the manufacturer will only take economic risks
on new design styles if they are prepared to do so for the benefit of the community.\(^{27}\) This
thesis will compare the ways in which stylistic change occurs within different companies
in Chapter 6: the interaction of influence will be considered, with questions of causation,
creativity and priority, innovation and imitation discussed. Comparison will be made of the
style characteristics of French, German and British freelance textile design and the design
produced in company studios of the case study companies in Section 6.5.4. This thesis will
argue that the most significant source of innovation in determining the construction of taste
was company studio design, although individual freelance designers produced some
innovative designs.

1.1.4 Significance of British Textile Design within Modernism

The widespread historiographic view that Modernism came to Britain from Continental
Europe in the early 1930s\(^{28}\) will be contested. All significant Modernist design in Britain
has been ascribed by Greenhalgh to non-British designers or their influence:

‘The handful of buildings and products devised in England which were examples
of unadulterated modern movement design were inevitably made by émigrés, or
those directly under their tutelage.’\(^{29}\)

\(^{26}\) Ibid., p183 and p189.
\(^{27}\) Ibid., p190.
\(^{28}\) For example, Fiona MacCarthy remarks: ‘the DIA held out against exoticism, strangeness and mechanism
carried to extremes. . . the Paris exhibition of 1925, with its international jazziness and cubism and fireworks,
left the DIA quite cold. . . The obvious result was that for about a decade the international movement did not
come to Britain.’ MacCarthy, F., op. cit., p86. Sir Norman Foster comments that ‘if you look down a list of
the buildings we now regard as canon’ – Finsbury Health Centre, the De la Warr Pavilion, Impington
Village College – you find that they were, almost without exception, designed by European émigrés;
sometimes they teamed up with Englishmen, but often they worked alone. I believe it is not overstating the
case that Modernism only really arrived in Britain with these émigrés.’ Forward in Loveday, D. & Feto, J.
\(^{29}\) Greenhalgh, P. ‘The English Compromise: Modern Design and National Consciousness, 1870-1940’, in
Kaplan, W. (ed.) Designing Modernity: The Arts of Reform and Persuasion, 1885-1945, Thames and
The perception that Modernist design in Britain occurred suddenly from 1930,\textsuperscript{30} when it had been well established on the Continent for some years, is challenged. Historiographic acceptance of an 'English compromise' with Modernism, a conservative revisionism or traditional moderation and balance,\textsuperscript{31} denies any significance to British design within the metanarrative of Modernist progress. Paul Greenhalgh assesses British design in the interwar period to be a combination of reactionary mythic nationalism and an appropriation of the formal language of European modernism: 'progressive form used to contain a regressive content.'\textsuperscript{32} Disparagement of British innovation in design compared with French design of the period is also well established in secondary sources, particularly in relation to discussion of the 1925 Paris International Arts Decoratifs exhibition.\textsuperscript{33} For example, Alison Adburgham states that 'In Paris, the design atmosphere immediately after the Treaty of Versailles was electric compared with that of London.'\textsuperscript{34} The vitality of textile design and intensity of discussion on design in the industry in Britain during this postwar period is ignored in such comments, giving a misleading impression. The assumption of British irrelevance to Modernism may have been initiated by contemporary Modernist views on the relatively poor showing in the Paris exhibition.\textsuperscript{35} The existence or emergence of Modernism in British textile design during the interwar period will be tested

\textsuperscript{30} Pevsner comments on the textile trade: 'The Modern Movement (including 'Modernism') in England, in spite of some early attempts such as those of the Omega Workshops, and in spite of the Paris Exhibition of 1925, had hardly any influence on the trade before about 1930.' and 'Good English prints of contemporary design are still rather unusual, less usual now perhaps than they were in the days of Voysey. What there are have all been created within the last three or four years.' in Pevsner, N. op. cit., p50 and p55. In the catalogue of the Kunstsammlungen Chemnitz, Katharina Metz comments that 'It appeared as if a conservative outlook had become the trademark of the British approach to textiles and textile design... These movements towards modern formal design... were not genuinely accepted until the early 1930s. After the Bauhaus was closed in 1933, this influence became stronger in England, as a number of former Bauhaus artists emigrated to England.' Kunstsammlungen Chemnitz, \textit{European Textile Design of the 1920s}, Edition Stemme, 2000, p22. Alan Powers states that: 'The First World War, rather than initiating Modernism in Britain as happened in almost every other European country, almost succeeded in killing what little existed of it before... Modernism, defined as the conscious desire to engage through culture with the reality of life following the process of social and economic modernisation, only broke through in Britain during the political upheaval of the early 1930s, having been deferred for a hundred years.' Powers, A. \textit{The Search for a New Reality}, in Loveday, D. & Peto, J. (eds.) op. cit., pp18-19.

\textsuperscript{31} The quote by Frank Pick that 'there should be a reasonable compromise between beauty and utility', in a letter to the Society of Industrial Artists (\textit{The Studio}, April 1931), is taken as paradigmatic of British conservatism in Pevsner, N. op. cit., p186. The 'abandonment of the grand designs of Modernism' in Britain is accepted by Alan Powers, but as a 'deliberate choice... that chooses the messy reality of life instead of a manic orderliness. Only in this way can Modernism be represented as a continuing movement rather than a historically-specific style.' Powers, A. op. cit., p39.

\textsuperscript{32} Greenhalgh, P. op. cit., p126


\textsuperscript{34} Adburgham, A. \textit{Liberty's: A Biography of a Shop}, Allen & Unwin Ltd., 1975, p104.
by an analysis of stylistic change and examination of ideological debate on design occurring within the printed textile industry. The relative production of Modernist and traditional design by case study companies is examined in Section 6.4, and the trends and fashions occurring in printed textile design delineated. Definitions of Modernism and the evolving meanings attached to Modernist and modernistic pattern design are discussed in Section 6.3.

The position of printed textile design within Modernism is anomalous: as decorative design, printed textiles are undermined by the Modernist hostility to ornament. In addition, the primacy given to architecture within Modernism has excluded mass-production dress fabric prints from critical view. The historiographical separation between fine art concepts of Modernism and architectural and design concepts marginalises all decorative design within the Modernist project. This thesis argues that the concepts of significant form, expression and the abstract relations of colour, line and shape are central to an understanding of Modernist textile design. The term Modernism is therefore used in the thesis as combining these art-based concepts and the well-established ‘fitness to function’ design criteria (see Section 6.3).

1.1.5 Popularity of Modernism

A concomitant of the ‘heroic individual’ strand of Modernist criticism is the assumption that innovative (Modernist) design was of interest only to a small elite consumer group in the 1930s, due to the low standard of taste of the populace.36

‘At present it appears to be the professional class mainly, and a small minority of wealthy merchants and industrialists who uphold the modern style. Still, their taste is bound to filter down by degrees into the semi-detached houses of the poorer middle classes, and the question now is whether these are prepared to accept the new simplicity. Most manufacturers and distributors say that their predilection for the bad, the meretricious and the showy is ineradicable.37

37 Pevsner, N. op. cit., p207.
A problem with this view was the enormous popularity of 'modernism in its jazz form', attested to by Pevsner with the quotation of a headline in a furnishing trade paper: 'West End Trade Buys Period Design. Modern Schemes Now Too Popular.'\(^{38}\) The cultural differentiation strategy (similar to that suggested by Veblen\(^ {39}\)), in the treatment of taste as a marker of class identity,\(^ {40}\) is evident. The relation of class movements in taste to the strategies of companies in reacting to the market and in attempting to construct favourable markets for their design is considered in Section 5.4, with broad changes in consumer demand discussed in Section 2.6. Popularity of Modernist and other stylistic forms of printed textile design will be investigated in Chapter 6.5.3, linking design analysis to price, market and sales where possible.

1.1.6 The Ideological Construction of Taste

Taste can be a site of closely fought ideology, and requires careful analysis of sources of influence and the exercise of cultural authority. The promotion of particular design styles in printed textile design and the actuation of new fashion movements will be examined in relation to public exhibitions, the media and the retail system in Section 6.6. The interpretation of signified meaning of these forms by various actors in the production/consumption system is considered in Section 6.7. The location of design choice in the broader production/consumption process is investigated, with analysis of the implications of change in the structures of production, distribution and consumption. Analysis of change in consumption patterns and the distribution and retail structure is given in Sections 2.5-6.

This thesis will argue that a consensus on a broadly Modernist approach existed within official, Government, cultural and industrial organisation circles, impelling a programmatic attempt to construct public taste. This is contrary to the structural assumptions of historians of Modernist design:

\(^{38}\) Ibid.


'Since few people in the relevant government circles, or in quasi-official bodies such as the Chambers of Commerce or the Schools of Art and Design had any real ideas regarding the meaning and implications of modern design, the potential for direct leadership on the matter was lost.\textsuperscript{41}

The Government pressure on industry to create a distinctively British style ('to impress a British style and British tradition of design on British made products')\textsuperscript{42} has been interpreted as a call for an insular and nostalgic approach.\textsuperscript{43} The Board of Trade, Board of Education and Department of Overseas Trade expressed concern that British design was insufficiently avant-garde, and that this conservatism was hindering trade in the highly fashion-based climate of design:

'in the eyes of many of our overseas customers, the UK does not rank as high as she should do as a creator of taste and fashion . . in certain industries the excellence and novelty of our designs falls far short of what is expected of us.'\textsuperscript{44}

This view was supported by reports from overseas officers from all parts of the world and trade missions, including one to the USA in 1939, led by the Manchester Chamber of Commerce, which stated that:

'English firms are 'behind the bus' in introducing new styles and colourings. They continue to offer the designs of yesterday when their American competitors are already busy with tomorrow's.'\textsuperscript{45}

The strategy taken, in the official positions given to Modernist designers and critics, exhibitions of approved design examples, awarding of prizes, and the restructuring of curricula is examined in Sections 3.7 and 5.2.6. The effect of these changes are assessed in Sections 6.6.3 and 6.8. The textile industry was a key grouping in these cultural organisations and Government committees, with representatives taking a highly activist

\textsuperscript{41} Greenhalgh, P. op. cit., p125.
\textsuperscript{42} Design and the Cotton Industry, Board of Education Pamphlet No. 75, Industry Series No. 8, HM Stationary Office, 1929, p8.
\textsuperscript{43} Nash, P. 'Going 'Modern' and 'Being British', The Weekend Review, 12/2/32, p333; 'During the 1930s, the Board of Overseas Trade actively worked at constructing the iconography of quintessential Englishness . . they projected a nation of stable, rural charms, of stiff upper lips, chivalry, sound values and ancient institutions. . To be fair to the English, however, they were not alone in their incomprehension of the underlying principles of Modernism.' Greenhalgh, P. (1995), op. cit., p125.
\textsuperscript{44} PRO ED 46/ 154, 17/11/39.
\textsuperscript{45} Ibid.
approach in pressing for change and defining strategic requirements for the improvement of design quality.

1.2 Methodology

1.2.1 Sources and Methods

The aim of the research process in this thesis was to examine the role of print companies in the construction of taste within the British printed textiles industry. The overall approach was to undertake a sufficiently comprehensive study to enable statistically reliable conclusions to be drawn concerning the processes of taste formation and patterns of style development within the British printed textile industry. Case studies of companies printing and manufacturing textiles were used to focus the analysis. A model of the design changes, company policy, economic conditions and structures operating within each company was created using economic data, company minutes, memoranda, advertising, textile samples and designs. The case studies have been considered within the context of the wider economic, structural and social conditions of production within the industry, including governmental interventions or cultural influences that could affect design. This strategy required a range of methodological approaches to be adopted, including extensive and detailed archival research of the records of companies, organisations and Government departments, oral history, secondary source analysis, categorisation of the characteristics of designs, construction of databases, spreadsheet data analysis, semiotic interpretation of design and the deconstruction and examination of ideological field structures, theories and debates. Different disciplinary approaches and techniques have been utilised. These include business history research into the records of particular company policies, structures and economic conditions and broader economic, political and social history approaches to interrogate a range of Governmental records and reports, archives of companies and industry organisations, trade directories and secondary source evidence to establish the conditions of the industry and the strategies of Government and industrial organisations. The design history disciplinary viewpoint is applied to the context of designer training and design organisations, analysis of style trends and the discussion of Modernist theory. In addition, cultural theory approaches were used in analysis of the ideological constructions within the industry, with semiotics applied to interpretation of designs, advertising and representations in the media.
The case studies chosen were: the Calico Printers' Association Ltd. (CPA), Ferguson Bros. Ltd., United Turkey Red Co. Ltd. (UTR), Turnbull & Stockdale Ltd., Morton Sundour Fabrics Ltd (MSF) and Stead McAlpin Ltd. (see Bibliography for full details of archival sources). These case studies were chosen on the basis that relatively good company archives for the interwar period were available; that they were all companies primarily specialising in cotton and rayon prints (rather than linen or silk); and that a range of company types were included. The company case studies were intended to include companies producing dress and furnishing textile prints; commission-processing and independent producer/merchanting companies; specialist print and vertically combined textile companies. However, these company archives are not complete: some aspects of the design, economic or minute book records were unobtainable for each case study. For example, there was a full record of designs produced for Stead McAlpin Ltd. but no economic data or company minutes, while there were detailed minute books and outline production data but limited textile samples surviving for the UTR. The deficiencies and assumptions inherent in the construction of the primary archival sources are considered in the interpretation of the material. These case studies were supported with data from secondary sources relating to other printed textile companies of the period: principally Warner & Sons Ltd., G.P. & J. Baker Ltd., Allan Walton Textiles, Cresta Silks and Cryséde Ltd.\textsuperscript{46} In addition, analysis of the records of two textile dyeing companies (J. Chadwick & Son Ltd.\textsuperscript{47} and Hawley & Johnson Ltd.\textsuperscript{48}) were undertaken, since many of the economic conditions evident from an analysis of this aspect of textile finishing would be relevant to print companies.\textsuperscript{49} The design records of A. Sanderson & Son Ltd., a wallpaper and textile print company, were also analysed (see Appendix 3), as a comparison with the

\begin{footnotesize}
\begin{itemize}
  \item Oldham Local Studies Library (document reference: 60)
  \item DE 2139, Leicestershire Record Office.
\end{itemize}
\end{footnotesize}
style trends and conditions existing in the wallpaper industry: an industry in which decorative patterns were also printed in high volume.

Analysis of design in the dress print sector was based on Ferguson Bros., the CPA and the UTR archives, supplemented by the commission-print dress fabrics of Turnbull & Stockdale Ltd at Lancashire Record Office (indicating the styles and tastes catered for by a range of merchants and manufacturers, many specialising in particular markets). However, there are significant gaps in the surviving records of the chronological sequence of designs in the case study companies. For example, the only sample books of the United Turkey Red Co. Ltd. available were a collection at the Scottish Museum in Edinburgh, dating from a narrow 1919-21 period. There are also long gaps between sample books in the 1920s for the CPA and Ferguson Bros. The Ferguson archive at Carlisle Record Office has a number of non-consecutive sample books for art silk, cotton, screen-print, etc., so that design differences may be due to fabric or print method rather than date.50

Furnishing print data on design was much more voluminous, with full sample records of Stead McAlpin Ltd. for the interwar period, giving a pattern of design developments commissioned by manufacturing companies, supported by order books for block and roller print designs and original designs. The more partial records of Turnbull and Stockdale Ltd., MSF and the Silver Studio can be compared against the Stead McAlpin series. There are photo records for selected years in the 1930s (1930, 1933, 1936-9) for Turnbull and Stockdale Ltd., while the D2 design log of MSF covered 1923-35 and A. Morton & Co. D3 design log 1914-30. Additional material included a photo-record of the D3 log and a substantial range of individual samples and photographs of designs produced for the American market. Photo records are available of the designs of Silver Studio design studio at Middlesex University.

Analysis of the structure of the printed textile industry was based on data from Board of Trade surveys and Enquiries; the Federation of Calico Printers records; co-ordination and negotiations between the Finishing Associations from the CPA archive and secondary

50 For example: Fancies 1923; Printed Cottons 1926-31; Special Screen Prints 1930-33; Art Silks 1930 and 1931; Voiles 1933-4;
sources. A Company Database of 575 companies was compiled, using data from the Register of Designs, local business directories, the British Industries Fair catalogues and other sources in order to plot the scale and operational system of the industry, with notes on print, manufacturing, retail and merchant companies who printed or commissioned textile production. The sources used for investigation of Government policy have principally been the Public Record Office archives of the Board of Trade and Board of Education. Analysis of retail and distribution structure was based on case study company minute books, trade directories, Board of Trade records and secondary sources. Analysis of the wallpaper retail structure, discussed in Appendix 4, was used as a comparison. It was based on trade directory analysis and extended with oral history interviews with Mrs Lil Smith, who worked in a wallpaper store in North Shields in the 1930s and subsequently managed wallpaper stores after the war.

Examination of the position of designers in the industry has been facilitated by wage books, design books and oral history transcripts. These sources were used to find changing rates of pay and employment conditions over the period, although information on the salaries of studio designers is meagre. A Designer Database of 1107 designers active in the industry was built up to explore the structures of geographic and demographic distribution, designer education and mobility of employment within the field of printed textile design using company design records, trade directories and other relevant contemporary sources. Analysis of the national spread of designers, distributors and retailers was complicated by conflicting information in trade directories, with a wide range in the number of businesses shown in different directories. Complications also arose in the definition of designers, since the trade directory lists of designers usually have no specific categorisation of type of designer, or may have contradictory designations to other sources. There are also 'invisible' designers who do not appear on trade directory lists, but for whom there are references in lists of freelance designs bought by companies – presumably occasional or part-time freelance designers, who did not advertise in trade directories. Designer training was investigated using a range of Board of Education and

51 Oral history transcripts of interviews with Eric Gilboy (Sanderson textile designer) on 11/4/91 and Mr James A. Haward (freelance wallpaper designer) on 18/6/91, A. Sanderson & Sons Ltd. archive.

52 For example, some of the textile designers in the list given in Hayes Marshall, H.G. British Textile Designers Today, F. Lewis, Leigh-on-Sea, 1939 are described as lace curtain designers in the Nottingham trade directories.
The economic state of the printed textiles industry has been established by comparing the national census of production with export data for printed textiles, supported by a range of statistics from individual companies to produce a more detailed picture of the situation. The companies do not have consistent series of data, and thus cannot be compared for every indicator (profit, volume of orders, etc.). They also have varying periods for which data is available. A further problem exists, in that although these companies are some of the largest and most important calico printers, they are only a small proportion of the total number of companies involved in textile printing in the period. This problem of relatively small data samples is further complicated by the combinations of market and product specialisations within the companies with available archives. However, sufficient material exists for economic trends in production, sales, costs and profits to be presented, although some areas (such as home market sales in the 1920s and total furnishing print production figures) remain imprecise.

In order to examine the construction of taste within the printed textiles industry, it was necessary for me to undertake a detailed quantitative analysis of the design styles of the case study companies. The process of analysis undertaken was to make a comprehensive photographic record of the samples in the pattern books for the interwar period and to take detailed notes of data in the order and design books of the same period. In addition, the Turnbull and Stockdale Ltd., MSF and Silver Studio photographic records and a selection of the designs in the Stead McAlpin archive were also photographed. The photographs were then scanned at high resolution and the images (of c8000 textiles) entered into a series of visual databases, to allow easy access to the entire volume of visual evidence. All the data available from these sources was entered in a database that I had specifically constructed for each company. The databases were constructed in order to allow more complex interrogation and correlation of the visual data and design records. The significance of various trends and relationships between factors could then be assessed.

53 Journal of Geraldine Baines (unpublished), Part 1, Childhood Years: 1907-26 and Part 2, Career Years:
For example, style trends could be compared against type of fabric or print process, or shown for individual designers or to reveal the difference in styles produced by separate groups of designers (by nationality, employment type, gender, etc). The size of these databases varied considerably. For example, the A. Morton & Co. database had records of 202 designs, the Stead McAlpin had 2795 designs and the Sanderson database, constructed from design books but with no samples, had a total of 7715 designs. In addition to data provided by the design records (such as designer, cost of design, print process, etc.), the design was categorised by a design code, interpreted from the sample and name of the design. This code allowed multiple combination from a series of elements: b (bird); f (floral); p (pictorial); n (nursery); h (a historical style); x (a style influenced by foreign design sources); o (other: this is combined with a qualifier, such as 'butterfly'); a (abstract); and m (Modernist). This allowed me to construct queries, selecting designs of a particular type (such as titles including 'rose' or 'Jacobean'), designs from individual companies, of different production type, etc. Consistency in categorisation of styles was a significant factor, particularly since the degree of modern or conventional stylisation differed between companies and even between sample books. For categorisation purposes, a Modernist design was one in which the forms, line and use of colour were treated as an abstract or expressive composition rather than a naturalistic representation. With this definition, the syntagm of a Modernist interpretation of a Jacobean style could be expressed as a multiple coding (see discussion of Modernist historical styles in Section 6.7.1). 'Conventional floral' is used to refer to a style of floral designs common in the dress prints examined, of small scale rose designs or floral groups in pinks, blues and pastel colour tones (Figures 6.267-8). Other terms used to define styles include Modernist floral, combination (floral and abstract pattern combined: examples are Figures 6.101, 6.138), fractal Persian (to define an abstract style exemplified by Figure 6.36), Paisley, stripe and motif (isolated feather, fruit or other non-floral motifs). Correlation of elements of the design code and other factors such as process, designer or cost was used for more complex queries. For the Stead McAlpin database, interpolation of the data-points for year divisions was needed in order to analyse these style trends over the period, since not all the samples in the design books were dated, although all had pattern numbers. A Visual Basic
The programme was developed for this interpolation process. The data was then imported into a spreadsheet and graphs of style trends produced.

In addition to the quantitative style analysis, comparative analysis of design styles and semiotic interpretation of the signifiers and syntagms within textile designs and advertisements was carried out. The most substantial body of advertisements used was the Ferguson Bros. series in the Carlisle R.O, but individual examples were found from British Industries Fair catalogues and trade journals. Occasional comments in company minute books, annual reports or letters to designers gave an insight into motives and perceptions of style change or market responsiveness, but this evidence tends to be fragmentary. Usually there was no direct source to indicate the reasons for change in the style. In addition, contemporary sources such as trade journals and popular magazines, design or decoration books and art journals and a few oral history sources have been used as supplementary sources to give a broader view of the perception of fashion trends and sources of influence on public taste within the distribution and consumption process. However, this thesis does not claim to have made a comprehensive analysis of all possible relevant journals and magazines produced during the interwar period.

1.2.2 Structure of the Thesis

The thesis is structured into three main sections: the first considers the general structure of the industry (Chapter 2), the employment and education of designers (Chapter 3) and the economic condition of the industry (Chapter 4). The second section (Chapter 5) analyses policy responses to the economic conditions, including interventions by government, strategies adopted by the calico printing industry as a whole and particular developments within individual companies. The third section (Chapter 6) gives analysis of design in the case study companies, with investigation of possible differences in design due to market, material, process or source (nationality of designer; studio or freelance designer). Broader cultural influences on design are also considered, including design exhibitions, the trade press and the approach of retail companies. This framework establishes the structure and interrelationships of design within the production/distribution/consumption system in the

54 The programme was written by Dr Martin Smith, then a research fellow at the Institute of Energy and Sustainable Development, DeMontfort University.
printed textile industry as the most fundamental aspect of the study. Design change is presented for analysis after the economic conditions of the industry and the business and industrial strategy have been examined, indicating that stylistic trends are analysed in the context of the broader structural, economic and political aspects of the industry. The implications of structural, political, economic or strategic change for the construction of taste and development of design styles are indicated throughout the thesis. Key arguments and findings are summarised in the conclusion to each subsidiary section within a chapter, with the significance of these aspects against the overall research aims developed to a greater depth in the chapter conclusions.

The appendices provide contextual and comparative data relevant to the analysis given in the main text. Appendix 1 is a statement of the organisations and their functions active within the interwar textile industry. Appendix 2 provides an examination of the economic context, wage negotiations and broad employment patterns in the period. Appendix 3 gives a short summary of economic data on the British wallpaper industry, some of which is referred to in the main text for comparative purposes. It also presents the results of my detailed database compilation and analysis of the design records of Arthur Sanderson and Sons Ltd. The records are predominantly of wallpaper designs bought or produced in the studio. The design trends, geographic and employment trends of designers produced by this research are relevant to the printed textile industry, since many of the designers worked in both fields and individual designs were sometimes produced in both media. The data is more complete than in many of the textile company archives and can be used as a comparative dataset for the smaller design databases arising out of the printed textile research. In addition, an inventory of Ferguson Bros. Ltd. investment in the period (Appendix 4.1); and a contemporary definition of the production process for printing textiles (Appendix 4.2) are supplied.

I produced all the graphs given in the thesis, unless otherwise stated. The data source — whether archival, from secondary sources or compiled from analysis of databases formed from primary source research — is stated in the textual analysis. All illustrations of textiles given that relate to the CPA, Ferguson Bros. Ltd., the UTR, Turnbull & Stockdale Ltd., A. Morton & Co. Ltd. and Stead McAlpin Ltd. are my original photographs, previously
unpublished, although textiles from the Victoria & Albert Museum textile collection have been previously illustrated. References are given as footnotes, with full details stated. Each chapter is treated as a separate document for referencing, with referral to previously cited reference details only within that chapter.

1.3 Historiography

This section will present an analysis of the approaches taken in this thesis, relative to debates within a range of discourses relevant to the British interwar printed textile industry, indicating key sources. It will also discuss the current state of research in the subject area. The field of textile history is principally covered from the two distinctive subject positions of economic history and design history approaches, discussed in Sections 1.3.1 and 1.3.2. The employment of cultural theory analysis within the thesis is considered in Section 1.3.3 and its position within fashion theory and Modernist discourse indicated in Sections 1.3.4-5.

1.3.1 Design History

The design history subject position is shown in the Journal of Design History, Things and the Journals of the Decorative Arts Society and Twentieth Century Society. Much of the relevant material written from a design history standpoint focuses on the textile design, describing stylistic change, with some comment on print process or social change as context. This is presented in the form of broad chronologies of textile design, general interior design histories, source books for interior decoration, design studies on the 1920s and 1930s or Art Deco or in biographies of designers or commercial design

groups. Others are predominantly picture books, produced as pattern design sources or by museums to publicise their collections, though an introductory analysis of design developments may be given. There are also some relevant studies of retail outlets (Heals, Liberty's, Gordon Russell Ltd.), taking a design history approach. Recent academic design history has a more analytical approach, is applied to wider issues of the conditions of production and consumption and supported by a stronger basis of evidence. For example, Sarah Foster looked at the design implications of the introduction of screen-printing, using a case study of the textile firm of Allan Walton Ltd., while Christine Boydell analysed developments in the employment and work of freelance designers employed at Warner & Sons Ltd. and G.P. & J. Bakers Ltd. as a contextual background to a study of the work of Marion Dorn. This thesis is also intended to provide a stylistic analysis of design, but based on a rigorous quantitative analysis of case study companies, rather than broad generalisations and impressions of design change. The design analysis will be categorised by all key structural differences such as use, fabric, production type, market, employment and nationality of designer, as an evidential base to examining the significance of different types of design. It will also be supported by a detailed examination of economic development, company policy, designer education and retail change, allowing contextual and causal factors to be investigated. Structural and causal analysis of textile industry design in the interwar period was given by N. Pevsner in his 1937 Enquiry Into Industrial Art in England, taking a Modernist standpoint from which to

make a qualitative assessment. It will be used as a key reference point, to compare and question the conclusions drawn on the factors influential in style change.

Within design history, analysis of the impact of economic, social and political influences on design has been a common approach to the contextualisation of design and movement away from a connoisseurial attitude to artefacts. This approach was pioneered in art history by T.J. Clark (laying particular emphasis on patronage and the economic structures of production that form the conditions of artistic creation) and developed as a design history approach by Adrian Forty. The contextual factors for innovation and influence in design have recently come under consideration within design history, in the 1999 Design History Society Conference, particularly the symposium on silk design in the 18th century. Matthew Craske analysed the competition between France and Britain and the economic pressure for British design improvement, with discussion of how the industrial transition occurred. This strand of design history is the primary approach underlying the analysis within this thesis.

A key aspect of much design history of the 1980s and 1990s has been feminist analysis, arising from a polemical attempt to restructure the patriarchal construction of art history—in which female artists are ignored or patronised as inferior—common prior to their intervention. The ‘new art history’ developed from the radical approach of Roszika Parker, Grizelda Pollock, Anthea Callen, Judy Attfield, Pat Kirkham and others has formed the basis of much design history research since then. Analysis of power relationships, the social construction of femininity, structural differences in training, employment and salary and the economic role of women are the fundamental aspects of this approach, although

simply writing up the ‘missing’ female history of creative artists and designs has been an important function. This body of research has been a strong influence on the development of the analytical approach within this thesis - an examination of social structure and ideological construction, based on thorough empirical evidence.

1.3.2 Economic History and Business Theories

Economic history as a discipline has been used to examine structures and trends of the entire production of an industry within a certain period.\(^74\) The methodological emphasis in this thesis on business archives and quantitative analysis comes from this strand of historical research, rather than mainstream design historical practice. The emphasis of this approach, when applied to the textile industry, is on the spinning and weaving industry rather than print production. For example, William Lazonick considers economic decline in relation to structural, management and technology issues, but in relation to the manufacturing industry.\(^75\) Relevant analysis of the business strategy of the interwar textile industry is given in the essays edited by M. Rose in *International Competition and Strategic Response in the Textile Industries since 1870*\(^76\) and the study of the role of the Manchester Chamber of Commerce by M. Dupree.\(^77\) A Ph.D. thesis by S. Pitt analysed the business strategies of the Calico Printers Association, concentrating particularly on distribution structures and difficulties with markets.\(^78\) Detailed business history analysis has also been made of textile manufacturing companies (Hollins Ltd. and Courtaulds Ltd.) and the Bleachers’ Association.\(^79\) Business history company monographs are also available for individual companies, although they tend to be produced by the company and have a rather uncritical and narrative approach. Commemorative works exist for Warner & Sons


Ltd., Calico Printers Association, Ferguson Bros. Ltd and A. Sanderson & Sons Ltd. The G.P. & J. Baker Ltd. company history (given in a V. & A. exhibition catalogue), shows a combination of design history and business monograph approaches, while a semi-biographical company history of Morton Sundour Fabrics Ltd was produced by Joscelyn Morton, conceived as a study of the industrial entrepreneur. A key text written in the period, giving a detailed view of the technology, industrial relations, cost problems and proposed restructuring schemes of the industry, is *A History of the Calico Printing Industry of Great Britain* by G. Turnbull (director of Turnbull & Stockdale Ltd). A wider selection of macroeconomic and social history is also applicable. However, the focus of this research is on the relationship between design, economic change, industrial structure and business policy, so reference to abstract economic theory will be kept to a minimum.

Business theory debate on innovation in economic development is relevant to the comparative analysis of company and industrial policy in response to its environmental conditions, given in Chapter 5. The environmental conditions influencing an organisation — its 'mega-environment' — were divided by Tushman and Anderson into five elements: the technological element (‘the current state of knowledge regarding the production of goods and services in an industry’); the economic element (factors such as inflation and interest rates); the international element (international competition, tariffs, etc.); the legal-political element and the social-cultural element. Theorists of business studies have compared the

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81 Hinchcliffe, F. *From East to West: Textiles from G.P. & J. Baker*, V. & A. Museum, catalogue for exhibition 9/5-14/10/84.


rate and scale of innovations introduced in organisations and examined the factors that predispose organisations to innovate. The emphasis on innovation was based on research by Mansfield, Knight and others, suggesting that successful companies made more frequent and radical product and process innovations.\textsuperscript{87} Selwyn W. Becker and Thomas L. Whisler differentiate between organisational and technological innovation, asserting that organisational change is more difficult to accomplish and discussing leadership style as a factor.\textsuperscript{88} This analysis relates to debate on the degree of entrepreneurialism in the British cotton industry as a causal factor in industrial decline. The slow rate of technological improvement in the later 19\textsuperscript{th} century was initially ascribed to lack of entrepreneurialism; McCloskey and Sandberg argued that the investment strategies undertaken were rational in the context of the known economic conditions,\textsuperscript{89} while Lazonick and Mass have argued that the failure to replace old technology and rationalise production was due to an inability to abandon the existing structure of myriads of small family firms and form large vertically integrated corporations.\textsuperscript{90} This lack of structural change is attributed to a failure of entrepreneurialism: cost decisions on technological investment are considered merely a managerial level of response. Organisational change in response to turbulent economic environments has been related to the success or failure of companies by Tushman, Newman and Romanelli in 1986.\textsuperscript{91} Becker and Stafford have proposed that a diminution in growth rate provides the incentive to innovate,\textsuperscript{92} while Knight relates the perception of success – or ‘slack’ – within the company, conditioned by the company’s past record, to the rate of innovation. He assumed (based partly on the research of Cyert and March\textsuperscript{93}) that under ‘slack’ conditions, investment in research, education and technical development


will occur, while 'distress' conditions will encourage cost-cutting measures and organisational change. Knight's analysis will be compared in the thesis to the views of Pevsner on the effect of macroeconomic conditions on design innovation.

1.3.3 Material Culture and Semiotic Theory

Cultural studies is a disciplinary specialism concerned with contemporary popular culture, particularly the media. This approach was spearheaded by the Birmingham University Centre for Contemporary Culture. It uses Post-Marxist critical theory and Structuralist techniques in the deconstruction of popular texts and images. It has led to some relevant research, such as the analysis of women's magazines in the 1930s by F. Hackney. Structuralists use analysis of conceptual structures and antitheses combined with an understanding of the arbitrary and socially defined natures of signs and signifiers. This is developed and undermined by Post-Structuralists, who are interested in difference, indeterminate and mobile meanings, fragmented realities and deconstruction of implicit metanarrative. The writing of history has in recent years been reshaped by the Postmodern uncertainties of evidential reliability, authorial relevance and the freedom for reinterpretation by readers promoted by Barthes, Wolfe and others.

94 Knight, K.E., op. cit., pp147-8.
articulated as an approach to history by Jenkins. Historiographical debate on the possibility of producing any reliable knowledge of history rather than competing sets of arbitrary representations of the past is summarised by Adrian Wilson, indicating methodological strategies of ensuring rigour in source and concept analysis. Foucault applies Post-Structural theory to the detailed contextual analysis of concepts in history, emphasising the broader ideological and structural context of particular practices. The concept of power developed by Foucault considers the ideological paradigms that order and normalise these activities, creating a field of assumptions within which ideas are debated. Once the field conditions have been defined, the problematisations of theory and strategy and ‘the practices on which these problematisations are formed’ can be analysed. This aspect is considered by Dreyfus, using Foucault’s analysis of the paradigm of science that underlies modern society. The approach of examining the establishment of ideological fields will be applied in this thesis (particularly in Chapters 2, 3 and 6), to deconstruct the way in which ideological assumptions on the part of Government, Modernist critics and key actors within the textile industry structured their actions.

The cultural studies approach has been applied to material culture of artefacts and their social significance. The application of anthropology to objects and consumption was developed by Daniel Miller, and has encouraged a wider application of material culture theory to consumption studies. He discussed the possibility of identification with an artefact as part of the self-projection of a personality, in relation to the theories of Munn and Hegel. This is the process of sublation, which divides personal objects from the externalised multiplicity of artefacts available. The consumer-orientated approach to economic history was developed in The Birth of a Consumer Society: The Commercialisation of Eighteenth Century England by N. McKendrick, J. Brewer and J.H. Plumb, but aspects of the analysis (a Veblen-type postulation that social emulation of style

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103 Foucault, M. *The History of Sexuality II: The Use of Pleasure*, Vintage, 1986, p11
led to increasing demand and thus increased production) have since been refuted by B. Fine and E. Leopold.\textsuperscript{108}

Barthes took a Structuralist approach in the construction of his fashion system, based on the language used to describe female clothing in a selection of fashion magazines during one year, which does not explain fashion change. In contrast to fashion in clothing, there is no contiguous discourse of regular commentary on furnishing pattern, or consistent written vocabulary that would give a stable identity to sign labels. Comment in magazines is not sufficiently regular to evolve a universally recognised terminology, nor does the phraseology of designers flow down the retail structure to the general public. Pattern books usually identified the designs with a number, not titles. Names for colour shades may be consistent, and style labels may have a loose affiliation of meaning that is understood, but there are no constant equivalents of the 'vestimentary features' suggested by Barthes, that could be identified in a written system of signification. This system refuses to allow verbal communication a dominant place over symbolic form\textsuperscript{109} with written discourse as the constitution of Fashion, uttering individual products. Baudrillard discussed fashion's compulsion to innovate signs, its apparently arbitrary and perpetual production of meaning, but considered that only the differential relation (of signs in fashion) had significance.\textsuperscript{110} The signs (e.g. a short rather than a long skirt) performed a differential function of exchange within a sign economy, but had no absolute value in themselves. He considered that symbolic codes form 'a metaconsumption in which it is the differential social relations which are being consumed'.\textsuperscript{111} The codes are highly effective disciplinary structures that function as an unconscious ideological apparatus.\textsuperscript{112} Bourdieu analysed symbolic codes as subtle indicators of social distinctions, defining these distinctions as based on cultural rather than economic capital.\textsuperscript{113} Sahlins proposed the interpretation of culture as one of entirely symbolic meaning, rather than a limited symbolic system

\textsuperscript{109} Barthes, R., op. cit.
\textsuperscript{112} Gane, M. ibid.
associated with ritual. The idea of a consumer society in which 'the whole culture becomes a combinatorial machine', with fields of differences or strategic possibilities from which individuals can construct their cultural identity is applied within this thesis. Design history studies have used semiotics to analyse the social construction of meaning in the design and consumption of artefacts. Matrix, Colin Cunningham and Katie Scott have applied it to architectural history while Lee Wright considered the changing meanings applied to a stiletto heel by different social groups. This approach has been applied to textile design by Lou Taylor, considering the weight of fabric, colours chosen and brightness of design from a gendered perspective. Dick Hebdige analysed the construction of identity by sub-cultural youth groups, examining the ideological significance of particular aspects of material culture such as clothing, hairstyles, etc. Use of semiotics is well established in dress history analysis, the importance of which has been emphasised by Kaja Silverman, who described clothing as a way of making the body a culturally visible form with which to articulate the psyche. The commodification of symbolic forms within pattern design of printed textiles or wallpaper is a pristine example of the Post-Structural hypothesis of the consumption of signs rather than products from an 'image-system', in which it is 'the meaning which sells'. The interpretation of signifiers within the consumption system is an approach adopted within this thesis: particular signifiers are discussed in Section 6.7. However, it is necessary if possible to recover the meaning encoded by designers and decoded by the intermediaries of agents, buyers and sales staff within the retail and distribution chain and consumers.

1.3.4 Fashion Theory

Theories of the causes of fashion change have multiplied, from Veblen's conflicting principles of conspicuous waste, conspicuous leisure and aesthetic perfection¹²³ to Barthes' formalised semiotic structures in his Fashion System.¹²⁴ This thesis is concerned with the formation of taste and causality in the activation of fashion change. Explanations based on motivations in human nature (e.g. female sexuality or modesty¹²⁵) fail to explain why fashion change operates principally in some types of social and political structures. Another difficulty with many theories is the explanation for a different system and frequency of fashion change for male and female clothing, particularly in the 19th and 20th centuries. Quentin Bell proposed an explanation of fashion change as one of class struggles, supporting his argument with the assertion that the French Revolution and the English Civil War caused stylistic change but wars between nations did not.¹²⁶ Veblen explained fashion as class emulation and a distinctive display of status, requiring a society in which social stratification and status mobility were both present.¹²⁷ He proposed the concept of vicarious consumption as a mechanism for the continuance of conspicuous consumption and leisure display in the new class structure created by the Industrial Revolution, in which businessmen became more likely than land-owning aristocrats to be the dominant wealthy group.¹²⁸ The reduction or removal in the 20th century of debilitation devices in female apparel intended as markers of conspicuous leisure (such as the crinoline, corset and hobble skirt) appeared to undermine Veblen's theory. Quentin Bell considered that the emancipation of women, freeing them from the economic dependency that brought this bondage of material status display for their husband, replaced vicarious consumption by personal consumer display.¹²⁹ Theories of class differentiation or emulation as a causal factor in fashion change are relevant to the examination of the popularity of Modernism among different social groups (see Section 6.5.3.2). In the thesis, patterns of consumer choice are analysed, with design style compared against price to

¹²⁶ Bell, Q. On Human Finery, Allison & Busby, 1974 ed.
¹²⁷ Veblen, T. op. cit.
¹²⁸ Ibid., pp169-182. Discussed in Bell, Q., ibid., p141.
¹²⁹ Bell, Q., op. cit., p164.
indicate whether there was a differentiation in styles designed for different classes or markets.

The relation of economic change to fashion as the primary causatory factor has been considered by a number of dress theorists. The relation suggested between disappearance of corsets, moral laxity and high inflation made by James Laver was demolished by Quentin Bell by examining broader comparative periods of inflation and corset-wearing. Elizabeth Wilson castigates the attempt to align cultural phenomena and the economy as inescapably reductionist. She focuses particularly on the conservative and unpostmodern project of defining a Zeitgeist, implicit in the analysis of postmodernism by John Urry and Scott Lash. Elizabeth Rouse discussed a linking of stock exchange prices and the height of hemlines by Suzy Menkes and dismissed it as a facile argument, using similar comparative analysis as Bell. However, she does use a linking of economy and zeitgeist in her comments on women’s dress fashion in the interwar period. She suggests that the switch from a perfectly straight almost tubular silhouette in the 1920s, to longer, more tailored clothes in the 1930s was linked to a change in the economic climate, which resulted in reactionary social attitudes:

‘The shock of the Wall Street Crash in 1929 marked a shift in mood from the gaiety and progressivism of the twenties to the conservative, even reactionary values which dominated the greater part of the thirties . . . It seems that the return to more traditional attitudes in the roles of men and women, the breadwinner and the little woman in the home, is paralleled by a return to stereotypically more masculine and feminine physiques and styles.’

The distinct nature of the change in dress fashion discussed is shown by the advertisements of Ferguson Bros. Ltd. (Figures 6.68-9). This Zeitgeist view of the 1920s as a fun-loving, Jazz Age, compared to the 1930s as a dour period dominated by unemployment, is a

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131 Bury, H. op. cit., p57.
135 Ibid., p161 and 167.
136 Ibid.
frequent one in social histories of the period. The thirties were considered more serious, responsible and socially concerned, particularly by writers and artists of the period (the movement of painters into documentary film units and candid photo-reportage, or the alternative persona of Mass Observers in Bolton, was characterised by Myfanwy Piper in 1937: 'We are more serious now, not really playboys but agents'). This view is refuted by Lucas in *The Radical Twenties*, who points to the National Strike, the Jarrow march and other protests and the first two Labour Governments as evidence of the political activism of the 1920s.

Marxist historians use economic determinism as a ‘main factor’ theory, in which design as an ideological superstructure is determined by a base of economics, following Engels: ‘economic relations, however much they may be influenced by political and ideological relations, are still ultimately the decisive ones.’ A common approach to examination of the influence of the economic base on fashion is to simply consider the volume and price level of goods bought as the key impact of economic change. The effect of macro-economic conditions on market demand, price and costs is discussed in Chapter 4, while the impact of specific cost changes on design is considered in Chapter 5. A useful range of studies that examine the relation of the economy to style change in art were the analyses of British art during the interwar slump by Stephenson, Mellor and Harrison. They considered that conditions of employment, purchasing patterns and structural responses were causal factors to a change in style. A discussion of the correlation of macroeconomic change with style change is given in Section 6.4.

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The mapping of fashion cycles, their recurrence and reception in later years and the mass psychological mood swings behind these changes appears to have been a popular approach in the late 1930s. Agnes Young presented an analysis in 1937 of cyclic fashions for tubular, bell-shaped and other silhouettes, allowing predictions.142 Richardson and Krober made a quantitative analysis of fashion change in the dimensions of women’s formal dress.143 They found cyclic swings between the extremes of dimensions occurring and considered that economic and social change (such as wars) actuated the style changes, but did not define which style will result. James Laver published a chart indicating the psychological receptivity towards a style, also in 1937, with responses varying from considering it indecent ten years before its time, daring a year before, chic when at its peak of contemporary seductiveness, dowdy three years later, hideous twenty years later, amusing thirty years later and romantic a hundred years afterwards.144 This approach was applied to fashions in textile design by Aldred Barker (Vice-President of the Textile Institute and Professor of Textiles at the University of Leeds), who produced graphs in 1930 showing a wave pattern of the periodicity of textile fashions in texture, figured and plain styles, luminosity and colour.145 The analysis of cyclic patterns developed in the 1930s (such as Young’s and Barker’s) has been queried by Rouse on a number of grounds: the complexity of different variants possible, change in the length of cycles, simultaneous existence of different points in a cycle (e.g. skirt length), disappearance of some variables or introduction of new ones, change in society and the nature of the fashion industry and the restriction to fashion plates as evidence.146

An awareness of the importance of fashion change in furnishing textiles was shown by companies in the 1930s in the appointment of style directors, co-ordinators and advisors, perhaps due to the swing to Modern design in the early 1930s and back to conventional floral and ‘period’ designs in the later 1930s. Alastair Morton (style director of MSF Ltd.) analysed trends in textile design, assuming swings in popular taste through different moods. In a lecture to the DIA in 1938, he stated:

144 Laver, J., op. cit.
145 Barker, A. Ornamentation and Textile Design, Methuen & Co Ltd., 1930, plate XCII.
146 Rouse, E. op. cit., p89.
'The modern movement in this country started in a very masculine way with square chairs and rough textures. This style was generally popular. The natural development from this was towards more elegant shapes and smoother textures and popular taste moved in this direction.'

He analysed symbols and treatment, colours and tone in relation to a system of male/female, sophisticated/normal/vulgar variations of four moods: rest/gaiety/dignity/vigour. This type of differential semiotic analysis is close to the Structuralism of Levi-Strauss, given in his myth analysis. Retail buyers were highly aware of such movements in popular taste. The revival of interest in natural designs, including leaves and flowers, in 1935 was ascribed to a reaction against geometrical modernist designs:

'...the latter appeal particularly because they are the antithesis of the straight lines and angles of the modernist design, and so form a relieving contrast.'

1.3.5 Issues in Modernist Historiography

A principal emphasis in the historiography of design in this period is on the Modernist avant-garde. The Modernist standpoint assumes that objects and designers are important to the historical record if they are part of a teleological evolution of the Modernist movement, or if they follow generally accepted Modernist design criteria of purity of form, functional effectiveness and truth to material. This viewpoint also privileges certain media and areas of design history above others. For example, architecture was seen as the most important, followed by furniture design, ceramic and product design. The scale of importance ranges from the most durable to most transient and frivolous: hence dress fabric is least significant - as most subject to fashion. Printed fabric is a matter of surface decoration, and so disapproved of by many Modernists, who preferred woven fabrics or rugs, in which the decoration arises out of the character of the materials and technique. The movement

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147 GD 326/164: Lecture on Furnishing Fabrics at DIA meeting for retail buyers and salesmen in Manchester, 13/12/38.
148 An example is Levi-Strauss, The Origin of Table Manners, Jonathan Cape, 1978 (first published 1968).
149 C.W. Mountain of Brewis & Co. in Leeds. 'Tendencies in Fabric design by Ten Well Known Buyers', Cabinet Maker and Complete House Furnisher, 4 May 1935, p182.
151 For example, the Bauhaus had a weave workshop but no printed textile design. Modernist interiors designed by architects usually show woven rather than printed upholstery.
away from this Modernist historiography can be seen in the views of Elizabeth Wilson, who considers that adornment or decoration is necessary because it is superfluous and so can be used to create meaning. This can be contrasted with the Diogenes principle of Corbusier ('to identify the superfluous and throw it away').

Textile designers who have received study are often already well known as fine artists or graphic designers. These designers were primarily utilised for screen print, which was a medium seen as suitable for artistic expression and valorised by Pevsner and others as a vehicle for authentic Modernist design. The relation between screen print and Modernism has been discussed by Sarah Foster and Christine Boydell. Edinburgh Weavers, the subsidiary of Morton Sundour Fabrics Ltd. involved in Modernist screen print and weaves, has been the subject of extensive critical attention. Block prints produced by small craft workshops were also accepted as both of high cultural value, due to the direct involvement of the artist in creating the design, and as more Modernist, due to the restricted range of colours and abstract patterns used. There are monograph papers on block print designers, particularly Phyllis Barron and Dorothy Larcher on the

153 As demonstrated by 'houses free from decoration where the problems of proportion and structure are posed' in Le Corbusier, *The Decorative Art of Today*, first published by Editions Cres, Paris, 1925.
155 Pevsner, N., op. cit.
Footprints craft workshop\textsuperscript{160} and on specialist shops selling craft products,\textsuperscript{161} while a broader approach is taken to the history of block print by Alan Powers.\textsuperscript{162} Marion Dorn is one of the few Modernist textile designers not a fine artist or working within a hand-block print workshop to receive historiographical attention, but is particularly known for screen print designs, as well as weave and rug design.\textsuperscript{163}

Modernism has been subject to considerable re-analysis since the late 1980s, with the acceptance of Postmodernism as an emergent design movement. The key aspects of its design approach have been itemised and discussed. Paul Greenhalgh lists these aspects as: decompartmentalisation, social morality, truth, the total work of art, technology, function, progress, anti-historicism, abstraction, universality and internationalism, transformation of consciousness and theology.\textsuperscript{164} Fashion is discussed by Sherwin Simmons and Peter Wollen as a new dimension to the ‘alternative modernism’ of masquerade and the play with signifiers of identity in the pre-war period, conceived by Maria Martin in 1917 (before women had a vote in Germany) as a subversive female weapon against the male bourgeoisie.\textsuperscript{165} Analysis of Modernism has divided it into developmental periods, such as Pioneer Modernism, c.1914 - 1932 followed by International Style Modernism from c.1932 to the end of the 1970s\textsuperscript{166} or a period of abstract and experimental theorising in the 1930s, contrasted with sudden power in the post-war period.\textsuperscript{167} There have also been

\begin{footnotes}
\item[166] Greenhalgh, P. ‘Introduction.’ op. cit.
\end{footnotes}
attempts to subdivide Modernism in Britain by giving it a variety of sub-group style labels: 'medieval modern' proposed by Michael Saler (a DIA-centred continuation of the ethics of the arts and crafts movement, but based within industry), while Mary Schoeser uses 'streamline-modern', 'rustic-modern' and 'baroque-modern' categories. Subtleties of different inflections of Modernism evident within the printed textile design analysed in the thesis are discussed in Chapter 6 and highlighted by the methodological approach of design coding used in the databases. The historiography of the 'functionalist' misinterpretation of Modernism by English critics was analysed by Tim Benton. Its relation to earlier developments such as the Arts and Crafts Movement has also been the subject of debate. The role of furnishing textiles within the Modernist house was discussed by Christine Boydell, with the use of rugs and fabrics as limited areas of pattern to provide a focus to the room. The definitions and understanding of Modernism by members of the textile industry or others involved in the debate on textile design is given in Section 6.3, with consideration of the wider issue of ornament within Modernism implicit in the very attempt to produce Modernist pattern in printed textiles.

Modernism has also been analysed as a philosophical approach. The promotion of a modern 'comprehensible artefact' is discussed by M. Krieger, as a development of the Kantian philosophical tradition that attempts to regard the 'thing in itself'. Worringer considers this in Modernist/ Cubist painting and print, as an approach in which objects are often compressed, to remove any suggestion of perspectival space. The removal of space cuts the links with other objects. The significance of this type of aesthetic separation of object from its context is that it becomes easier to perceive. The principles of simplicity in form and honesty in construction and material of Modernist design produce a 'comprehensible artefact'. This aspect of the philosophical base to Modernism may be a contributing factor to the establishment of a strong prejudice against decoration and ornament within Modernist ideology (see Section 6.3.2).

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169 Benton, T. op. cit.
172 Krieger, M. Arts on the Level: the Fall of the Elite Object, University of Tennessee, Knoxville, 1981.

37
The nature of the avant-garde and the position of Modernism within it has also been discussed. The concept of originality within Modernism was criticised by Pat Gilmour, who considers "the perpetuation of the idea at the heart of Modernism, that artistic creativity is a form of spontaneous combustion." It has also been criticised as a totalising, repressive ideology by Postmodern commentators. Bourdieu analysed artistic value as an ideal of cultural marginality with a model of continual extremism due to status. The issue of defining the avant-garde in design (or source of innovation) is a key one within the thesis. Analysis of the ideological and marketing techniques utilised to associate the status of greatest artistic value, attaching to such an avant-garde position, is given in Section 5.4.5.

This thesis also takes issue with a range of assertions on the quality, volume, source and popularity of Modernist design in the interwar period (see Section 1.1.4). For example, Paul Greenhalgh assesses British design as insignificant within the development of Modernism and characterised by an 'English compromise' of progressive form used to mask regressive and reactionary mythic nationalism. More general assumptions that the 1920s in Britain was a time of little significance for Modernist design and that Modernism in art and design was a taste accessible only to a small group of aesthetically sophisticated and highly educated consumers, will also be challenged.

180 In McCarthy, F., op. cit., Pevsner, N. op. cit. and implicit in the frequent discussion during the period of the need to improve the taste of the public and the standard of industrial design. Class assumptions of a difference in taste are shown by John de la Valette, who stated that 'it is much less easy to stir this simple emotion [response to beauty] among the uncultured sections of so-called civilised peoples, whom constant immersion in squalor and ugliness has coated with a kindly crust of insensitiveness.' 'For Glory and For Joy' in De la Valette, J. The Conquest of Ugliness, Methuen & Co. Ltd., 1935, p4.
2. Industrial Structure

2.1 Introduction

This chapter will examine the structural conditions of production in the British calico printing industry in the interwar period. Characteristics of the particular structural context may condition the formation of ideas within the field analysed and the interaction with other fields. Identification of the sites of design ownership within the production system, and therefore the power to form the taste and style of the company's products, is of prime importance. The relation of the printing and finishing industries to textile manufacturers, merchants, wholesalers and retailers is analysed, with patronage issues clarified in the order, commission and sales structures current. An understanding of the way that the industry worked as a whole and the interaction of different specialist sections with customers and suppliers is critical to any broader consideration of design change and the formation of taste.

The structure and scale of the industry is examined, considering the level of product and market specialisation and vertical combination of processes within companies. Such an analysis indicates the degree of separation into distinct fields or interaction of overlapping specialist areas within the industry. A physical separation of the production for dress and furnishing textiles or for market specialisation would increase the probability of a separation in taste terms. If production was not physically separated, but occurred within a firm, any differentiation into distinct taste systems would require a continuous ideological maintenance to reinforce the cultural categories. The role of individual companies within separate sections of the industry defines the strategies required and possibilities available to individual designers and directors. Common structures and organisations of the industry will also be delineated, within which national strategy and inter-company negotiation was conducted. A more detailed presentation of the role and activity of organisations active within the interwar printed textile industry is given in Appendix 1.

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1 This analytical approach is developed from T.J. Clark, 'The Conditions of Artistic Creation', Times Literary Supplement, 24/5/74, pp561-2 and Bourdieu, P. The Field of Cultural Production, Polity Press, 1993. The particular conditions of employment and education of designers are considered in Chapter 3.
Changes in the distribution and commissioning structure and in the relation of print companies to merchants, wholesalers and retailers are examined. More direct distribution chains, or a transition in the size and policies of one part of this connection between producer and consumer, could alter the accessibility of some types of design and the conditions under which it is perceived. Market changes, such as the introduction of credit structures or a rise in the wealth or level of disposable income of consumers, are also significant. Living standards and income levels are analysed in Appendix 2. Consumer priorities, such as a demand for durability, cheapness or fashionability in fabrics, are examined in Section 2.6.
2.2 Organisation, Size and Management of the Industry

2.2.1 Organisation within the Industry

The British textile industries were controlled by cartels, combines and organisations to co-ordinate the industry, in the inter-war period. Each of the main horizontal specialisations of finishing - bleaching, dyeing and printing - had a combine of companies working as an economic unit and also a Federation to co-ordinate action in the trade. The Federations worked together in the Allied Association of Bleachers, Dyers, Printers and Finishers. The textile manufacturing side of the industry was represented by the Federation of British Furnishing Textile Manufacturers. The activities of the Federations, Allied Association and other organisations in price control (through minimum price agreements within the trade), as employers associations (to negotiate wage agreements) and in co-ordination of the industry are detailed in Appendix 1. Further analysis on the activities of industry organisations is given where relevant in Chapters 3 and 5. Manchester Chamber of Commerce was the principal body that represented the industry nationally and internationally and in which negotiation on distribution and merchanting between various specialities and sectors of the industry occurred. Cotton spinning, as the sector of the textile industry under greater pressure, became increasingly tightly controlled by the Federation of Master Cotton Spinners, Cotton Yarn Association (formed 1927), Combined Egyptian Mills (for fine spinning mills, formed 1929) and the Lancashire Cotton Corporation (formed 1929 and financed by the Bank of England for two years to give financial support). The Textile Machinery Makers Ltd., formed in 1931, brought a combined front to this industry. The need for co-ordination of information on the industry and for consultation and analysis of the problems of the industry resulted in the formation of the Joint Committee of Cotton Trade Organisations in 1924, a common textile industry and government body which carried out reports, produced statistics and considered policy. Other organisations involved were the Textile Institute (formed in 1909 and acting as a centre for research, information and meetings for common textile industry problems) and the Shirley Institute, a research organisation. The activities of merchants in buying and ordering cotton goods was controlled by the Manchester Royal Exchange, for fabrics, and the Liverpool Cotton Exchange, for regulating the import and purchase of cotton. Some vertical specialisation organisations also existed, for co-ordinating the manufacture and marketing to a specific market, such as the Eastern Textile Association, but this type of link was usually carried out more informally in the Manchester Chamber of Commerce,
between the Federations. Co-ordination of initiatives on design education and discussion of design issues in the industry occurred primarily within the Design Association (DIA), the Federation of British Industry Industrial Art Committee and Federation of Calico Printers Industrial Art Committee, and is discussed in Chapters 3 and 6.

2.2.2 Number and Size of Print Companies Active

Although the industry was dominated by the Calico Printers' Association, there were many smaller companies involved in calico printing. A database of calico printing companies compiled during this research gives a total of 123 companies active during 1919-40. This total does not include silk, linen or velvet printers, small workshops or subsidiaries where the main company is included. It may include some converter companies (merchants or manufacturers that commissioned printers), but 68 of the companies are corroborated sufficiently for confidence. Those listed as calico printers and merchants, such as K. Funduklian are most likely to come into this category. This discrepancy may partially explain why the United Turkey Red Ltd. representative could claim that the Federation of Calico Printers had 97-8% of calico printing firms as members in 1935, although in the 1925 List of Members (the only full list found), there were only 42 companies. It is probable that they did not include some of the smaller companies, listed in local trade directories or other sources. There also seems to have been considerable change in the print companies active, with many of the pre-war companies (such as Schmidlin Brown and Owen, Son & Co.) not registering designs in the later samples and print companies such as Know Mill Printing Co. and Sackville & Swallow Ltd. or vertically combined manufacturer/ printers like T.F. Firth & Sons, Warner & Sons Ltd. and Donald Bros. appearing in the interwar samples. The number of printing companies in the January samples of registered designs is higher in 1911-14 (15-20 companies), halving in 1915 to

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2 Database sources were: January samples of the Register of Designs; the Manchester and other trade directories; the December 1935 list given in Turnbull, G. A History of the Calico Printing Industry of Great Britain, J. Sherratt & Son, 1951, Appendix 3, and other references. It may be an understatement of the total, since commission-processing print companies will not have registered designs under their names: the designs will have been registered under the name of the merchant or manufacturer. Some of these companies closed down early in the inter-war period. Others only sent in designs for a short period in the samples taken, so it is unclear how many continued to operate during this time.

3 K. Funduklian gave trial orders to the UTR for flannelettes, winceyettes and indigo printing in 1935.

4 M751 1922-8/19.6 List of FCP Members, May 1925.

5 Examples are: Cheadle Fabric Printing Co. Ltd., Eild Calico Printing Co. Ltd., Fabric Printers Ltd., Fallows & Keymer Ltd., Holcombe Brook Printing Co. and Melvar Printed Fabrics Ltd.
9, dropping to a low point of 4 companies in 1920, rising to 10 for 1923-4 and remaining at below 10 until 1934.

An impression of the scale of these enterprises can be gained from the 1930 Census of Production, which gives a table of the size of firms in the Textile Finishing Trades:

<table>
<thead>
<tr>
<th>Size of Firm (average number employed)</th>
<th>Number of Returns</th>
</tr>
</thead>
<tbody>
<tr>
<td>11-24</td>
<td>111</td>
</tr>
<tr>
<td>25-49</td>
<td>196</td>
</tr>
<tr>
<td>50-99</td>
<td>179</td>
</tr>
<tr>
<td>100-199</td>
<td>154</td>
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<tr>
<td>200-299</td>
<td>53</td>
</tr>
<tr>
<td>300-399</td>
<td>22</td>
</tr>
<tr>
<td>400-499</td>
<td>9</td>
</tr>
<tr>
<td>500-749</td>
<td>15</td>
</tr>
<tr>
<td>750 and over</td>
<td>9</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>745</strong></td>
</tr>
</tbody>
</table>

The majority of the companies were fairly small. However, this table includes dyeing and bleaching works, so the proportions of calico printers of various size are not differentiated. Of the total number of 745 companies listed in textile finishing, many will be small dyeing works. As an example, 19 dyers are listed in Leicester, in the 1925 Kelly's Directory, some of which are also bleachers. This includes specialists in hosiery dyeing for the local industry, as well as those concentrating on cotton, silk, wool and worsted dyeing. In the 1935 Census of Production, an increase of textile finishing companies in the West Riding

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6 1930 Census of Production table of the size of firms in the Textile Finishing Trades given in Turnbull, G.,
of Yorkshire (from 158 in 1930 to 188 in 1935) and in Northern Ireland is shown (from 68 to 78), while the total for Lancashire, Cheshire and the New Mills District of Derbyshire fell (from 376 to 367).

A number of small artist-directed block printing companies and workshops were established in the 1920s, such as Footprints Ltd., the Rainbow Workshop, Mael, Pouk Press, Handprints, Barron and Larcher’s workshop, Cresta and Crysede Ltd. (mainly silk prints). Some designers also set up their own companies, to commission and sell their own designs. Examples of this are Eileen Hunter Ltd. and Marion Dorn.

2.2.3 Management Approach of Printed Textile Firms

Textile companies continued to be predominantly based on dynastic family control, as had been the case in the 18th and 19th centuries. For example, MSF was primarily directed by the Morton family, UTR by the Christie family, Ferguson Bros. by the Chance family and Turnbull & Stockdale Ltd. by the Turnbull family. The exception was the CPA, which had a combination of new managers and managers from the previous family directors of the companies within the Association. The family dominance was comparable to other industries: 55% of the largest British firms had family board members in 1919; rising to 70% in 1930. The continuance of a family firm structure of industry in Britain is considered by Lazonick and Elbaum to be a key factor in the relative decline of the British economy. They stated that:

"successful capital development in twentieth century Germany, Japan and the United States demonstrates the ubiquitous importance of the visible hand of corporate bureaucratic management... Vested interests in the old structures, however, proved to be formidable obstacles to the transition from competitive to corporate modes of industrial organisation... even when horizontal amalgamation did take place, the directors of the participating firms insisted on retaining operational autonomy [of their family firms]."
The position of importance in land-ownership and employment within a local area (often rural) of many family textile firms, and limited state social support, resulted in an attitude of paternalistic social responsibility by many companies. They supported specific employee benefits, wide charitable donation and one-off payments for workers, dependants and widows of workers. Housing for employees was often owned by the textile company, and rented cheaply. Employee benefits often included dining halls, sports and social facilities: MSF established a social club for workers, with hall, recreation room and canteen immediately that suitable buildings were vacated by the hospital occupying them during World War I, with choirs, an orchestra, a bowling green and tennis courts established soon after. A transferable Endowment Insurance Scheme was also made available for all employees. Ferguson Bros. Ltd. also established pensions for employees. These workers benefit and pension funds were supported by heavy donations by the company during profitable years. Contributions to the funds of £2-3,000 p.a. were safeguarded, with supplements from reserves when insufficient profits were available. In the profitable years of 1924-5 at Ferguson Bros. Ltd., funds were spent on purchasing a sports field and surfacing tennis courts. During the 1920s, Ferguson Bros. Ltd. also broadened the ownership of the company with shares made available to employees and an additional 1.5% bonus on Preference Shares owned by workpeople from 1921-9.

9 DB 110/228, Ferguson Bros. Minute Book of Directors' meetings 1919-28: Ferguson Bros. Ltd. gave £250 to Cumberland Infirmary in 1920 and 1921; £50 to the Haig Pit Disaster Whitehaven Relief Fund in September 1922; £100 to the Lord Mayor's Japanese Relief Fund in September 1923 and £500 to Cumberland Infirmary Building Fund in October 1926. The minutes of the Financial Committee of Tootal Broadhurst Lee & Co. Ltd. (M461/33) note frequent donations, initially to war causes in 1918, then to educational, medical, and other causes (some examples are: £150 p.a. to the Department of Industrial Administration at Manchester College of Technology in 1918; £25 for the Cornish Mine Disaster and £50 of material to Lady Muriel Paget's Mission in Czechoslovakia in November 1919; £200 p.a. to the National Institute of Psychology and Physiology for 5 years in March 1920; £50 to Russian refugees in August 1922, £100 to the Lord Mayor's Unemployment Fund in 1922 and 1925; £50 to a Home for Blind Women in November 1925; £250 to the Manchester Committee on Cancer Research in December 1925). Tootals note a donation of £250 over 5 years for the widow of a Department 4 worker in December 1919 (Ibid.).


11 Ibid.

12 A non-contributory pension scheme was established in 1913 and revised in 1955: archive notes 'About The Company', Cumbria Record Office (Carlisle), January 1963. Contributions to Workmen's Pensions occur in the accounts from at least 1917 and Staff Pensions from 1926: DB 110/69.

13 £4000 contributions (15%) are noted in 1918 and 1919: DB 110/69.

14 DB 110/228 1919-28 Directors' Minutes, 16/10/24 and 6/1/25.

15 DB 110/70.
A sense of personal responsibility to the family business encouraged directors to be more self-sacrificing in periods of economic crisis. The ethical sense of responsibility to workforce and local area felt by James Morton is stated in Jocelyn Morton’s business history of Morton Sundour Ltd., quoting Ruskin:

‘a manufacturer, ‘as a captain of a ship is bound to be the last man to leave his ship in case of wreck’ might feel bound ‘in any commercial crisis or distress . . to take the suffering of it . . more for himself than he allows his men to feel.’”17

Costs were reduced by a reduction in directors’ fees, suspension of directors’ bonuses and restraint in living expenses. For example, the Ferguson directors entitled to 'contingent bonuses on profits' voluntarily relinquished a proportion of the amount due for 1930 (accepting £250 if due £400 and £125 if due £200).18 This appears to have resulted in the Director’s Bonus being discontinued in 1932.19 Fees to Directors fell from £3000 in 1929 to £1000 in 1931, rising again to 1940 (£2100). Mr Fred. Chance, the Managing Director ‘relinquished all remuneration after 193020 and the Ferguson Bros. and Goldberger directors on Eden Vale Ltd. waived their director's fees for 1939 and 1938.21 Directors’ fees at MSF were also reduced, when a pay cut in staff salaries was announced.22 The Craigiehall house of the Morton family was ‘mothballed’ during the depression, to minimise expenditure, with a move to their small holiday home in the Lake District.

Business management was seen as a male sphere of activity: no female directors are listed for the case study companies. The gender assumptions are stated clearly by Jocelyn Morton in his discussion of the nature of family firms:

‘Can a family business go on generating such promising initiatives . . what happens if it grows too big to be managed effectively; if either there are not enough sons prepared to dedicate themselves to it, or daughters able to ‘pick’ suitable sons-in-law: or, even if there is enough inherited talent, if it comes out in the wrong ‘mixture’.”23

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18 DB 110/ 229, Ferguson Bros. Ltd. Minute Book of Directors' Meetings 1928-37, 9/3/31. The cuts in staff salaries and Directors' Remuneration were restored in July 1937.
19 1921-30 dividends and bonuses given in DB 110/ 70; 1929, 1931-41 annual reports, showing directors fees, in DB 110/ 78.
In the case of Morton Sundour Fabrics Ltd., there were four daughters of James Morton, the managing director, of whom Guenevere, the eldest, was actively interested in design. Exceptions to this pattern of female exclusion were Eliza Jane Hall, eldest daughter of Samuel Taylor, who became a director of J. & S. Taylor in 1929 and Prudence Maufe, who became a director of Heals in 1939. Many of the smaller textile printing companies were part of large landed estates, and continued to have a link with the family. This could mean a number of women in the powerful position of owners, due to their inheritance of the companies. For example, the CPA bought Furness Vale Works from Dame Mary Cotton-Jodrell and Mrs Dorothy Ramsden-Jodrell, while the Love Clough Works was bought from Mrs S.H. Holt and Mrs Mary Holt. The degree of involvement in management decisions is unknown. In Leicester, Mrs Emma Hawley held the mortgage of the Hawley & Johnson Ltd. dyeing company, which she had previously owned, but the Managing Director and other Directors on the Board were male.

The CPA was not a family firm, although subsidiary companies retained an element of family control by the original owners. The paternalistic responsibility for housing the managers and workers continued, a range of leisure activities, including Staff Balls and the Annual Picnics at individual works were supported and the Employees Benefit Fund provided pensions, payments to widows and relief of distress cases at individual works. Another aspect of CPA company provision was education (see Section 3.6). This included subscriptions to the local Technical College and University, formal education for young workers, particular training courses for employees and general lectures to the workers, salesmen or managers. For example, a course of economics lectures was arranged at Manchester University for men returning from the Forces and technical education fees

24 Ibid., p465.
25 Ibid. Guenevere had an Edinburgh College of Art training, and is listed in the July 1930 DIA Journal as a new member; Jean studied medicine; no details of the training of Beatrice are stated; Helen was a nurse at Truby King Hospital.
26 Goodden, S. At the Sign of the Fourposter: A History of Heal's, Heal & Son Ltd., 1984, p44 and 104. Prudence Maufe joined Heals in 1915 as exhibition organiser for the Mansard Gallery and consultant interior designer and was a joint manager of the textiles department in the 1930s. She became Lady Maufe when her husband Edward Maufe (architect of Guildford Cathedral and of a new building for Heals in 1937) was knighted.
27 Leicestershire Record Office, DE 2139.
28 At the CPA cases of distress were dealt with by works managers, who made recommendations to the Employees Benefit Fund (M75, Directors' Minute Book 7, 10/4/21). In April 1921, £1000 was authorised for the relief of distress in the Low Mill area (Ibid., 19/4/21).
were paid for 93 students in 1918/19. The Economic Study Club of Manchester offered to give six lectures to the workpeople in their time on economic questions: this was tried out at one of the Works to test the enthusiasm for such exercises. There was also provision made for the continuing education of employees: the CPA decided to set up classrooms for the education of their young employees in October 1920. The 1918 Fisher Act required them to release all 14-16 year olds for education during working hours (320 hours a year): at that date there were 130 of this age employed in the main Manchester offices. The estimated expenditure of the CPA on general and advanced education for the year ending June 1926, was £6,600.

2.2.4 Conclusion: Organisational Structure, Demographics and Management

The textile printing industry was dominated by the CPA, with approximately 50 additional medium sized companies and at least 20 smaller companies, though fluctuations in the number of businesses trading and unclear references indicate a further 50-60 companies that may be textile printers. The main production capacity in the industry was co-ordinated by the Federation of Calico Printers, which set minimum price levels for product types. A series of other supra-industry bodies existed, to set prices and represent sections of the trade (Furnishing Textile Manufacturers, Lining Printers), for wage agreements (Allied Association of Bleachers, Dyers, Calico Printers and Finishers), co-ordinate with the wider manufacturing and distribution sectors (JCCTO, Manchester Chamber of Commerce) or with other industries (Federation of British Industry). These organisations are discussed in Appendix 1. The management ethic of textile print companies in the period, at least as indicated by the case study companies, was paternalist, with direction maintained by the male members of a family dynasty and social benefits provided for employees. This structure meant that the personal characteristics and views of a few directors – such as their interest or otherwise in design – could have a decisive effect on company policy and the strategic direction of the industry.

29 M75/ Directors' Minute Book No. 5, 11/2/19.
30 M75/ Directors' Minute Book No. 6, 22/6/20.
31 Ibid., 12/10/20.
32 Mowat, C.L. Britain Between the Wars, 1918-1940, Methuen & Co., 1955, p208.
33 M75/ Directors' Minute Book No. 9, 21/7/25.
2.3 Sectional Divisions in the Industry

2.3.1 Furnishing and Dress Fabric Divisions

The division between dress and furnishing fabric sections of the industry is clarified by the annual British Industries Fair catalogue, in which exhibiting companies are listed separately under specific textile products. There are also manufacturing companies who commission prints and retailers, listed under the specialised categories. Print companies listed under both dress and furnishing fabrics are G.P. & J. Baker Ltd., the CPA, Davis & Luke, Alex. Drew & Sons Ltd., Eton Rural Fabrics (part of Sandersons), T.F. Firth & Sons Ltd., Morton Sundour Fabrics, Simpson & Godlee Ltd. and F. Steiner & Co. Ltd. Exhibiting in dress fabrics only are Ferguson Bros. Ltd. and S. Finburgh & Sons Ltd. Furnishing fabrics only are Turnbull & Stockdale Ltd., W. Foxton Ltd. and Ramsden Wood Print Works. The curtains and casements category includes Morton Sundour Fabrics, Ramsden Wood Print Works, Simpson & Godlee Ltd., Turnbull & Stockdale Ltd. and Warner & Sons. There is thus considerable cross-over between specialities - most printing companies who merchant their own production use a variety of dress and furnishing cottons or artificial silks. Turnbull & Stockdale Ltd., although printing furnishing fabrics to be sold under its own name, and a number of other furnishing prints for manufacturers and retailers, such as Liberty, Story and Heals (shown in the Bury Photo Books34), also printed dress fabrics on commission (listed in the Order Books).35

2.3.2 Process and Fabric Divisions

Certain processes, such as Turkey Red dyeing and printing, indigo, batik or velveteen printing, required specialist technical skills. The Federation of Calico Printers initially had several specialist Associations of printers, who continued to work as sub-sections of the FCP: the Wide Split Printers' Society, the Flannelette Printers' Association, the Indigo Printers' Association and the Aniline Black and Tannic Discharges Section.36 Some firms concentrated on one such process, while others combined several specialities. For example, a number of firms combined indigo and other processes, including the CPA, the

36 Minute books at Manchester Record Office, B14/ 6.
Furthermore, although the calico printing industry was principally based on cotton fabrics, with an increasing transition to artificial silks, there was a broadening into linen and silk printing industries by some companies. Linen was used as a print fabric by G.P. & J. Baker Ltd., Eton Rural Fabrics, Morton Sundour Fabrics Ltd., Ramsden Wood Print Works, Turnbull and Stockdale Ltd. and Warner & Sons Ltd., as shown by their exhibition at the British Industries Fair in 1936 under this category. Donald Brothers, a linen printing company and manufacturer, blurred categories further by printing on cotton to some degree. G.P. & J. Bakers and Morton Sundour Fabrics Ltd. printed on silk, while the CPA developed Birch Vale works as an experimental foray in this market in the 1920s (see Section 5.4.1). The expansion into artificial silk printing was widespread across the calico print industry, and is discussed in Section 5.4.2.2.

Some of the entrepreneurial companies were vertically integrated (e.g. Morton Sundour Fabrics and Ferguson Bros. Ltd.) with all the processes from spinning to finishing within one company. United Turkey Red Ltd. was initially formed as a dyeing company and had branched out into printing (and to a smaller extent garment manufacture and hosiery). Morton Sundour Fabrics was divided into departments for each type of product (carpet, net, velour, dye, print, etc.). A broad range of specialisms spread the risks, and allowed economic fluctuations in the various specialist areas to be balanced out. Others had some independent production at intermediate stages of specialisation, but mainly wove, bleached or dyed for their printing works (Ferguson Bros. and Turnbull & Stockdale Ltd.). The CPA was a partly vertically integrated combine, since it included some mills and shipping merchants, but most of their cloth buying and shipping was done externally.

37 Others are: Alex. Drew & Sons Ltd. (indigo, India export), F. Steiner & Co. Ltd. (indigo, twills, Indian export), Samuel Finburgh & Co. (indigos, chintz, white ground, home trade specialities), Mark Fletcher & Sons Ltd. (indigos, silesias, fast prints) and K Funduklian & Co. (indigos, flannelettes, winceyettes, white discharge).
40 G.P. & J. Baker Ltd. listed under ‘Dress Fabrics – Silk’ in 1935 British Industries Fair catalogue, p29; Morton Sundour Fabrics Ltd. Advertisement 135 in 1933 British Industries Fair catalogue states that they were manufacturers of ‘hand and machine printed silks, linens and cretonnes’.
2.3.3 Market Divisions

There was some specialisation in particular markets, but divisions were mainly based on process speciality. For example, a number of print companies specialised in the African market, especially indigo prints. This includes: African Prints Ltd.; Joseph Bridge & Co. Ltd., who regularly registered designs during the period; Benjamin Crompton; Logan, Muckelt & Co. Ltd.; and Hubert J. Barrett (calico printers and merchants, who were involved in prints for the West African market). Simpson & Godlee Ltd., Know Mill Printing Co. Ltd. and Marples Printing Co. Ltd. seem to have been active in the Congo market. George Kay & Co. Ltd. and Alexander Drew & Sons Ltd. were also noted as doing United Africa Co. work (West African specials) in June 1932. The Indigo Printers’ Association had a General List and an African List of prices (some styles were on both, but the African had higher prices due to greater damage and losses), with African and General sections to the Association. These companies were served by specialist merchants, such as Blakeley & Beving Ltd., G.B. Ollivant & Co. Ltd., The United Africa Co. Ltd., the British West African Trading Company Ltd., or G.T. Greaves & Co. Ltd. (based in Lagos, Nigeria). However, the independent position of the sector was emphasised at a meeting in 1935: fourteen firms involved in the West African trade, represented by Mr Frank Crompton and Mr Mycock, objected to the plans for a quota system (see Section 5.3), stating that they did not print on commission.

F. Steiner & Co. Ltd. was strongly represented in the Indian market, as indicated by the plan to form a joint works with the CPA and UTR, with a pooling arrangement. Steiner, the UTR and Alexander Drew & Sons Ltd. had selling organisations in India, with marks

41 Described as 'manufacturers of specialities for the African market, including coloured woven goods, scarves, white and dyed brocades, satteens, domestics, prints, velvets and velveteens' in the 1937 Kelly's Directory.
42 Described as 'indigo blue dyers and printers for all kinds of specialities for the African markets' in the 1937 Kelly's Directory.
43 Simpson & Godlee Ltd. was reported by the UTR to be doing a large trade in pintades and allied styles and offering keen competition in the Congo market in Feb-March 1928, while Know Mill was noted as very busy with pintades in August 1929 and Marples as doing pintades in January 1932. UGD 13/5/6, 8/2/28, 14/3/28, 21/8/29 and 13/1/32.
44 Ibid., 15/6/32.
well established.\textsuperscript{49} Glen Printing & Finishing Co. Ltd. was noted as 'undercutting the Agreement price for Sarries in Calcutta.'\textsuperscript{50} Many companies had a wide spread of export markets to balance out losses and recoveries (see Section 4.7.1). Furnishing print companies more frequently specialised in the USA or Australia: G.P. & J. Baker Ltd. had a wholesale branch in the USA; A.H. Lee & Sons had a New York subsidiary; Story & Co. Ltd. ordered designs suitable for the American market from the Silver Studio and Morton Sundour Fabrics Ltd. had subsidiaries in the United States and Canada. Section 3.3.4, discusses the market specialisation of the case study companies in depth.

2.3.4 Conclusion: Sectional Divisions within the Industry

The existence of complex structural divisions within the industry are underlined by a comment from the organisers of a textile exhibition by the DIA in 1919:

'The mass and variety [of textiles found] were, in fact, a surprise, even to those who could claim considerable inside knowledge of the trade: a fact which illustrates the way in which the textile trade, like many other industries, is subdivided into a number of watertight compartments.'\textsuperscript{51}

Companies often specialised in particular markets or distinct types of dye or fabric print, which could be linked to specific markets (such as wax block prints, flannelette and lining fabrics or indigo and turkey red dyes). The calico print industry did not restrict itself to cotton printing: there was a conventional use of linen to a small degree by furnishing printers, while individual companies diversified into silk printing, but a broad trend of the industry was an expansion into artificial silk and artificial silk mixture fabrics. The division between dress and furnishing sectors was not clear, with many companies involved in both areas, though they often specialised mainly in one type. Vertical integration was common, within finishing specialities or into manufacturing, allowing a balance of risks between different trades, control over the production of distinct brands and maximisation of profit within the company. However, it did mean that the printing industry was vulnerable to poorer economic performance by manufacturing or other finishing sections of the textile industry.

\textsuperscript{48} M75/ Directors' Minute Book No. 6, 13/7/20-21/12/20.
\textsuperscript{49} M75/ Directors' Minute Book No. 5, 18/2/19.
\textsuperscript{50} UGD 13/ S/ 6, 18/8/26.
\textsuperscript{51} GD 326/ 60/ 15.
2.4 Commission Structure

2.4.1 Commissioning and Converter-Producer Models

Most of the British bleaching, dyeing, printing and finishing companies were dependent on commissions (orders from merchants). There were a variety of different commission models in common practice within the printed textiles industry: ordering from a range of designs prepared by the print company (in which sales risk of the fabric was taken by the merchant or manufacturer); ‘job’ printing (when the design was owned and risk taken by the merchants or manufacturers giving the order); consignment orders (as ‘job’, but consigned for sale abroad); and indent orders (where the risk was taken by the foreign dealer, not the Manchester merchant). Print companies competed for export orders from an office in Manchester, wherever their works production was based (95 such firms are listed in the 1932 Kelly's Directory of Manchester). This gave them access to shipping agents and the Manchester Royal Exchange, and to the trade information and political representation of the Manchester Chamber of Commerce. Although the bulk of the finishing industry acted as a passive service sector to textile manufacturers or agents, the role of a significant proportion of printing companies was far more active, as entrepreneurial businesses that designed, developed and marketed their own products. This was stated in 1924, in a letter from the FCP to the Board of Trade:

'You are correct in your surmise that the great bulk of calico printing is still done on commission, but there is a fair amount done on cloth which is the property of the printer, who himself acts virtually as a merchant in regard to that part of his business.'52

In 1929, Mr Forrest Hewit confirmed that the major part of the trade acted on a service basis, printing on fabric supplied, but stated that some firms were making and printing their own cloth and selling it as a finished article.53 Ferguson Bros. Ltd. acted in this way, merchanting their own, branded fabrics. Mr Hewit also commented that:

'In other countries – except France and possibly America – the method is for the printer to sell his own goods. He does not usually print for a merchant who in turn sells the goods.'

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52 BT 70/ 4/s2008/ 24.
53 BT 55/18 Evidence given to the Cotton Industry Sub-Committee of the Economic Advisory Council by the FCP, 12/2/30.
A transition from merchant to printer as the owner of designs is indicated by Geoffrey Turnbull:

'Before the First World War, it was the practice for merchants to supply the majority of the patterns in their ranges. It was the intensity of competition after the 1st World war that led some printers to succumb to the temptation of seeking business by carrying a big stock of available designs at their own expense. Some even went to the extent of engraving designs speculatively.'

Ownership of designs is indicated by the registration of designs, although the proportion of new designs registered varied between companies. However, the perception that print companies did not produce designs before the war is not supported by analysis of design registration, either in the number of designs registered or the number of print companies registering designs. Samples taken each January from the Register of Designs indicate that print companies had consistently the largest proportion of designs registered in the 1920s (usually about 75%), but fell in the 1930s, to less than half of the designs registered in 1934 (see Figure 2.1). The CPA registered the majority of designs until 1933. When the CPA is plotted separately, the pattern of registration is clearer, with a fall in 1931-2 by the CPA, a gradual increase in registration from 1932 to 1937 by the remaining print companies and a sharper rise in the registration of designs by other sources in 1932-5 (Figure 2.2). Those not registered by print companies are principally divided between cotton manufacturers and merchants, although some retailers and individual designers also registered designs. The high proportion registered by the CPA is similar to their proportion of production in the printed textile industry, implying that they had an order (and possibly 'engaged design') system, rather than any significant degree of commission printing.

Companies varied greatly in the proportion of commissioned 'job' printing compared to their own speculative production. Some printers acted almost entirely as commission processors, with the majority of their production taken up by one or several cotton weaving

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55 Register of Textile Designs: PRO BT 52.
56 The January samples of the Register of Designs do not reveal all those companies actively producing new printed textile designs. For example, no designs were registered by W. Foxton Ltd., Morton Sundour Fabrics or Tootal, Broadhurst & Lee in these samples. United Turkey Red Ltd. only has six designs in the samples, in 1933. Warners only has designs registered in the 1933 and 1934 samples, when they had their own print works and were involved in experimental hand screen printing.
companies. Several printing companies were bought by weaving companies as subsidiaries, to reserve production capacity at a good rate. Stead McAlpin is one of the few commission-processor companies to have any archives surviving. Their order and sample books show the great majority of their commissions (all furnishing prints) from manufacturers, as well as a few retailers, designers and merchants.

Two other order systems were used, particularly when dealing with export merchants for dress fabric: consignment and indent orders. Mr Swallow, of Sackville & Swallow Ltd., commented in evidence to the Economic Advisory Council Sub-Committee that the orders they got were indent orders. These were orders where a foreign dealer gave an order to a Manchester merchant, who got quotations for the printing from the calico printer. It is not clear whether they were orders from standard types produced by the print company or whether the foreign dealer held the ownership of the design, which could have been designed in that country. Consignment orders were those given speculatively by the merchant and consigned abroad for sale. However, this practice 'which prevailed to an important extent for certain markets before the war, has greatly diminished, and most of the cloth produced is only made after the order has been received from abroad.'60 Consignment sales - where a quantity of goods was sent out at the company's risk to a merchant or bid for at regular auctions - were undertaken by some print companies.

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57 Standfast and Scottish Dyers and Printers were subsidiaries of Morton Sundour Fabrics, while Seedhill was bought by Hollins.
58 Stead McAlpin sample book analysis: see Section 6.4.2.7.2. In analysis of the Block Print order book during 1919-1921, about 54% of block print orders were from companies, 40% from Harry Wearne, a New York designer, and 3% were 'open'.
59 BT 55/18, op. cit., C.11.
60 Ibid.
2.4.2 Case Study Companies

The Turnbull & Stockdale Ltd. books of new textile designs show the majority were owned and produced for their own company, with a number of their designs ‘engaged’ by and printed for other companies (in 1930, the proportion was 60% for their own sales, while 40% were for other companies). The hostility to design ownership by print companies and lack of any mention of the merchanting side of print companies in the comment by Geoffrey Turnbull seems to be undermined by the practice of the company and its history of interest in design. The CPA also had some ‘engaged’ designs, as shown by the 1934-8 engraving book. These include B. Mfg. Co., John Taylor, E & W. Brook, AC R & S and J.G. (Robes). A few of the Ferguson Bros. Ltd. designs shown in the 1937-49 trial book appear to be ‘engaged’, although it is unclear whether some of the names are designers or clients. Some designs are stated to be for C.J. Doshi and Jebb & Waddington, while Marks & Spencer is noted against others. The orders-based system appears to be the main type occurring at UTR, with the merchant either ordering from the designs available, or specifying a quantity in a general style. This system is shown by a note in October 1920 that ‘the Printed Shirtings and Cretonne range should be completed as soon as possible and book got ready for issue in view of business developing quickly.’

In March 1921, 'D' Department was given permission to print up a portion of the new range of Cretonnes, and at the January 1931 meeting, they were instructed to prepare a new range of printed shirting samples. An example of their relation with merchants is given in January 1925, when Mr Urquhart of A department noted that Ralli were working up a Jean business in Calcutta and that we [A dept] were keeping them well supplied with new designs.

The UTR also took some ‘job printing’ commissions from merchants, such as that by United Africa Co. in May 1931, while regular orders with designs supplied are taken for Department D. For example, Hayken & Co. Ltd. had a total of 58 designs held at UTR in

62 MT 7 Green No. 1333 Engraving Book, 1934-8: held at Manchester Library Archives.
64 UGD 13/ 5/ 6, Directors’ Minute Book, 1920-30, 13/10/20.
65 Ibid., 7/3/21 and UGD 13/ 5/ 7 Directors’ Minute Book, 1930-36, 14/1/31.
66 UGD 13/ 5/ 6, op. cit., 24/1/25.
November 1924, available for their frequent small batik orders. The different manufacturing customers had varying standards, which could affect profits: the UTR took print orders from W. Foxton Ltd. in the early 1920s, but stopped in August 1925, as 'allowances for damage eat up profit.' The proportion of job printing was 16% in December 1920, analysed in terms of the cloth stocks at the main Alexandria works. Turnbull & Stockdale Ltd. also appear to have done job printing of dress fabrics, since the 1935-40 order books show a range of samples with the merchants, prices and order size noted, of very varying design types, unconnected to the furnishing designs in the photo books. Design numbers are non-consecutive, but within the same system. The CPA silk print works at Birch Vale could also be job or engaged design orders: each sample has an order number, details of the machine used, type of silk, width of fabric, etc., but also includes a design number.

The United Turkey Red Company had a considerable proportion of their business, particularly for the Indian markets, under the indent system. For example, B Department took a total of 8,200 lps indent business in January 1926 and 13,600 lps in February. The UTR also consigned a proportion of its goods abroad for sale. The main destinations for consignment sales were China and India (Calcutta, Bombay and Karachi), with some buying at these sales for other markets. They were sold in cases of particular 'tickets', the prices reached being periodically stated in the UTR minutes: e.g. 'Pahshindoo' was 6d/yd in December 1921. The number of pieces sold in this way increased from 7,107 in 1926 to a height of 50,785 pieces in 1929, part of the trade recovered in 1931 after the crash, and then declined to 150 pieces in 1938 (see Figure 4.10). High volumes were also sold in 1921-3, with the maximum sale recorded of 2116 cases in the China auctions in December 1922, and in March 1921 (after reducing prices) 180 cases in Bombay and 100 cases in Calcutta. The CPA also consigned some goods. In January 1919, they received a cable from one of their representatives, stating that very good business was offering in Siberia and asking the Association to consign 200 bales to Messrs. Reid. This was supplied from

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68 UGD 13/5/6, op. cit., 11/24.
69 UGD 13/5/6, op. cit., 8/25.
70 UGD 13/5/6, op. cit., 8/12/20.
71 Ibid., 11/2/26 and 10/3/26.
72 Ibid., 14/12/21.
73 Ibid., 5/23 and 8/3/22
unused stock. The Brubro Department was their main vehicle for consignments to China: total sales from the commencement to March 1919 were 204,903 pieces. However, in April the Bradley & Co. Branch proposed a handkerchief agency to China with Messrs. James Shaw on Brubro lines, consigning £10,000 worth of handkerchiefs.

2.4.3 Conclusion: Ownership of Designs and Commission Structure

There was a change in the pattern of ownership and registration of textile design in the interwar period, from a dominance by the CPA in the 1920s (especially 1923-6 and 1928-9) to a rise in registration by manufacturers and merchants to a pre-eminent position in 1934-6 and 1938-9. Patronage structures in design and ordering were different for dress and furnishing sectors, export and home market: a passive, commission-processing 'job' or indent system of orders by merchants was common for dress fabric export markets, with a smaller volume of consignment sales. However, the CPA took orders for their own export designs. Home market dress fabrics could be job print orders, orders or 'engaged design' commissions from their own designs (CPA, UTR) or direct merchanting of their own fabric (Ferguson Bros. Ltd.). Furnishing prints were often commissioned by manufacturers (as the Stead McAlpin prints were), though others were engaged or ordered from printers' designs.

74 M75/ Directors' Minute Book No. 5, 7/1/19.
75 Ibid., 18/3/19 and 8/4/19.
2.5 Structure of Distribution

2.5.1 Home Market

2.5.1.1 Wholesalers and Merchants

The central position in design choice within mass market retailing was taken by wholesalers, who gave orders to producers and supplied goods on credit to the retailers. However, the number of wholesalers active in the home market is unclear, due to the small number categorised as wholesalers rather than general merchants in the trade directories.\textsuperscript{76} Some transition in their role is indicated by S. Pitt, who states that wholesalers had partly integrated backwards into manufacturing in the 1930s.\textsuperscript{77} It was an accepted strategy for printers to attempt to reach advantageous agreements with wholesalers. For example, the most high-priced range of CPA furnishing prints – Grafton’s Cretonnes - was exclusively distributed through the wholesalers Cassey & Harrington, of Oxford Street, London (see Figure 5.25). Merchants also acted as intermediaries, as well as carrying the commercial risk of commissioning and selling dress goods within the home market. An example is the Cavendish Buying Agency, who appear to have supplied John Lewis with designs.\textsuperscript{78} The number of textile merchants active in the home market is not evident from trade directories: the categories given are merchants, shipping merchants and manufacturers’ agents. However, a total of 167,259 home buyers was given, who visited the 1931 White City British Industries Fair textiles exhibition: this would include retail buyers, wholesale and merchant buyers.\textsuperscript{79} The merchant agencies and wholesalers were often supported by generous terms of credit from printers, resulting in severe debts and bankruptcies.\textsuperscript{80}

\textsuperscript{76} For example, four textile merchants are listed separately as wholesalers in the 1926 Manchester Kelly’s Directory. The list of merchants (most of which will have been textile merchants, in Manchester) has 570 entries. A dinner for representatives of the furnishing wholesale houses in 1931 was attended by 68 representatives: The Cabinet Maker & Complete Home Furnisher, 10/1/31, p52.


\textsuperscript{78} They purchased designs from the Silver Studio: note on connection with Lewis’s in 1934-5 Diaries, Silver Studio archive, Museum of Domestic Design and Architecture, Middlesex University, 31/12/34.

\textsuperscript{79} The Drapers’ Record, 7/3/31, p17.

\textsuperscript{80} Lists of bankruptcies are given each month in the minutes of Tootal Broadhurst & Lee; the CPA also took on a management role of companies taken into receivership, for which they were major creditors.
2.5.1.2 Direct Trading

It was common for textile manufacturers to take on a converter/merchant role and advertise their products directly, rather than being dependent on wholesalers or merchants. This is seen by the proportion of designs registered by manufacturers, print orders given to the case study companies and advertising at the BIF fairs by manufacturers. The production and promotion of branded lines by manufacturers, selling at fixed retail prices, was a developing trend during the interwar period.

"Branded lines are being multiplied rapidly, and the problem of their distribution in sufficient volume to be profitable in view of the advertising necessitated is one which all manufacturers have to face."\(^{81}\)

The practice started in 1912, but spread in the later 1920s and was given official support in 1930, with the announcement by the Lord Chancellor's Committee that resale price maintenance was to the consumer's benefit.\(^{82}\) Branding and fixed retail prices as policies adopted by the case study companies are discussed in Section 4.3.5. Some manufacturers combined the conversion and merchanting of their own products with distribution/merchanting activities for other manufacturers. An example of this is William O'Hanlon Ltd, a manufacturing company that ordered from Stead McAlpin and UTR and were distributors to the retail trade of Simpson & Godlee Ltd.'s 'Judy' range of fadeless cotton and art silk dress fabrics (see Figure 2.3).

Retailers were also increasingly establishing direct trading relationships with producers, without the intermediary level of wholesalers. This change in the distribution structure is substantiated by comments of Mr Charles Jarvis, chairman and managing director of the wholesalers Stapley & Smith Ltd., reported in The Drapers' Record in February 1931:

"He referred to the loss of many valuable accounts through the policy adopted by large retail traders, who were going direct to the manufacturer and cutting out the wholesaler."\(^{83}\)

This trend, and the case for the wholesaler in drapery distribution, remained a controversial issue within the trade press for some weeks.\(^{84}\) Direct trading was established practice for

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\(^{81}\) 'Retailing Branded Goods', The Drapers' Record, 21/2/31.

large department stores, with some taking on the role of converters, with their own design policy, production or purchase of designs and commissioning of printing. Some multiple retail chains could act independently from the wholesalers, such as the Co-operative Society, who had their own wholesale organisation and production facilities, including clothing factories and weaving mills (producing yarn-dyed shirtings, handkerchiefs, rayon linings, cotton cloth for corsets, bed ticking and towels).\(^8\) Direct trading was also adopted by Marks & Spencer. They announced a new merchandising policy in 1926, of creating a series of trading relationships to produce textile goods in sufficient volume to allow a maximum price limit of 5 shillings to be set.\(^8\) In November 1937, they approached the CPA with such an offer (Section 5.4.5.1). The Wholesale Textile Association was highly influential in attempting to prevent direct trading between retailers and manufacturers, as was the feeling by manufacturers that such a relationship was almost unethical.\(^8\) Tootals was a manufacturing company that took the approach of forming direct distribution links to retailers. However, the continuing importance of wholesalers within dress fabric distribution is indicated by the levying of the purchase tax in October 1940 on wholesale price rather than retail price: a specific exemption was arranged for Marks & Spencer, that cost prices be notionally increased by 12.5\%.\(^8\) The tendency to deal direct was also shown by those manufacturers who had previously used merchants as intermediaries. Merchants had to adapt to the new structures: for example, Mr H. Smith, who received a rebate on business booked with UTR, unsuccessfully attempted to gain additional rebate from the directly booked orders of Horrocks & Crewdson (dress manufacturers), with whom he claimed influence.\(^8\) Some manufacturers removed their dependence on the distribution structure by establishing public showrooms or shops, such as Edinburgh Weavers, or buying wholesale, merchant or retail companies (Section 5.4.5). Merchant printers and manufacturers retained their independence by employing a system of highly salaried salesmen, each covering a geographic area of the country or a particular branch of the trade. Some of their pay would be commission, dependant on the volume of sales they were responsible for, but with a minimum level of commission guaranteed.

\(^8\) 'Company News', The Drapers' Record, 7/2/31.
84 'The Case for the Wholesaler', The Drapers' Record, 14/2/31; 'Wholesalers and Export Markets', The Drapers' Record, 14/3/31, p21.
87 Ibid., p104-5.
88 Ibid., p133.
89 UGD 13/5/7, 14/11/34.
There were significant changes in the retail structure during the interwar period. In general, there was a reduction in independent stores from 82% of the retail market in 1915 to 65% in 1939, while department and chain stores, co-operatives and mail order increased.\(^{90}\) The scale of increase in the Co-operative Wholesale Society production, wholesaling and retail in the interwar period is indicated by the rise in sales from £81 million in 1931 to £119.8 million in 1937\(^{91}\) (total retail turnover of co-operative societies in 1910 was £72 million\(^{92}\)).

Chain stores expanded dramatically in the interwar period, from 24,713 total branches of multiple shops in 1920 to 44,487 in 1939.\(^{93}\) Some chain stores, such as Marks & Spencer, Woolworth’s, and Lipton’s, had established branches in most towns by the Second World War.\(^{94}\) Very few multiple shop retailers specialised in drapery, but there were a range of large multiple firms specialising in women’s outerwear.\(^{95}\) Marks & Spencer repositioned itself in the interwar period, under competitive threat from Woolworth’s, from a ‘Penny Bazaar’ to a quality clothing multiple aimed at upper working and lower middle class customers (with a 5 shilling price ceiling to goods sold, applied in 1924).\(^{96}\) There was also a change of policy by the Co-operative Society Special Congress in 1920, to establish large emporia in city centres in addition to the local outlets in working class areas.\(^{97}\) Previously, local stores had been operated as separate units by neighbourhood co-operative retail societies: it was recommended that societies should join together to open the new stores. The expansion of chain stores and the Co-operative Wholesale Society shops concentrated power in design choices in the hands of a small number of buyers. Each local co-operative retail society was supplied by the CWS central buying agency, which owned a range of factories producing many of the products sold. National policy and management of production facilities in textiles was undertaken by the Drapery Committee, while the ordering of drapery was reorganised in the 1930s.\(^{98}\) A Cotton Textile Department was

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\(^{91}\) Redfern, P. op. cit., p469.


\(^{95}\) In 1939 there were 28 firms in the women’s and girls’ wear trade with more than 10 branches, of which 35-40% were outerwear and 48-52% underwear and hosiery specialists. Jefferys, J. op. cit., pp337-339.

\(^{96}\) Rees, G. op. cit...\(^{97}\) Lancaster, B. op. cit., p89.

\(^{97}\) Redfern, P. op. cit., p335. Control of women’s wear was taken on by three chiefs, Messrs. Jackson (Manchester), Bell (Newcastle) and James (London, Cardiff and Bristol). Men’s wear was centralised under Mr George Hay in London until 1937, then Mr Hartley in Manchester. New drapery warehouses were opened in the three main centres of Newcastle, Manchester and London, with frequent extensions in space...
established in 1934 to centralise the management of the weaving production: it distributed CWS orders to the mills and gave ‘instructions for the finishing of each different fabric ordered.’ Scotland had a separate C.W.S. organisation, with administration and wholesale sales centralised in Glasgow. Sales of CWS-produced clothing were promoted with fashion shows and ‘overall evenings’ organised by local guild secretaries, in which members modelled the garments.

Established department stores faced competition from new clothing chains, such as C. & A. and British Home Stores, as well as the re-focused Marks & Spencer. There was a decline in profitability from the mid 1920s onward, although consumption levels rose. Advantages of the chain stores were lower overheads (due partly to fewer services provided), a reduced range which minimised losses and larger scale mass-production, allowing cost reduction due to economies of scale. The department stores reacted by expanding into chains of outlets and embarking on a series of take-overs. This established a more cost-effective wholesale distribution system within a more complex department store structure. Traditionally, the buyers of individual departments in department stores had great power and autonomy in their orders, effectively defining the design policy of their section of the store through their choice of fashions to be available.

99 Ibid., p377.
101 Barkers took over Pontings and Derry & Toms; Harrods took over Dickins & Jones and in 1919 Debenhams merged with Harvey Nichols and Marshall & Snelgrove. The United Drapery Stores Group was formed of Hawes Bros., Hinds & Co., Blundell, Carton & Co., Shinners, Walker & Penistons, Young and Glave’s, all in London. A Drapery Trust of provincial department stores was formed by Clarence Hatry by 1927, including Curs of Norwich, Dawson Bros., H.C. Russell, Staddons (London), Kennards of Croydon, Marshall (a Yorkshire group), Pettigrew & Stephens (Glasgow), Plummer Roddis (a South Coast group), Frank Drury (Manchester), Margaret Marks (Knightsbridge), Warwick House (Birmingham), Selincourt & Sons and interests in Bon Marche of Gloucester, Bobby & Co. (a chain from Torquay to Leamington Spar), the Scottish Drapary Corporation (which included Patrick Thompson of Edinburgh, D.M. Brown of Dundee and Watt & Grant of Aberdeen), Footman, Pretty & Co. (Ipswich), Handleys (Southsea), Jones & Co. (Bristol), Wellsteeds (Reading), Edwin Jones (Southampton), Spooners (Plymouth) and Smiths (Stratford on Avon), with Swan & Edgar added in 1927. Selfridges established the Selfridge Provincial Stores grouping of Jones Bros. (London), John Barnes (London), George Henry Lee (Liverpool), Cole Bros. (Sheffield), Bull (Reading), Brown, Thomas & Co. (Dublin), Blinkhorm (Gloucester), C.J. Hardy (Leeds), Caleys (Windsor), Brice & Son (Northampton), Needham & Sons (Brighton), Trewin Bros. (Watford), Thomson’s (Peterborough) and Dorell (St Albans) during 1926 and Whiteley’s of London in 1927. In November 1927, Debenhams Securities agreed to buy at least 75% of Drapery Trust shares: complicated control structures were simplified in January 1928, when Debenhams Ltd. took control of the Trust, buying 99.8% of the Drapery Trust Ordinary capital. Corina, M. Fine Silks and Oak Counters: Debenhams 1778-1978, Hutchinson Benham, 1978, pp92-102.
displayed. 102 Liberty operated in this way through the interwar period. 103 The consolidation of the department store sector of retailing into large groups (such as the Drapery Trust group of provincial stores owned by Debenhams) increased the centralisation of purchasing. 104 Debenham & Freebody was established as a wholesaler for the provincial department stores within the Drapery Trust, but it was also common for department stores to allow smaller retailers or dressmakers to use them as wholesalers. 105 A further policy - adopted by Fenwick, Ltd. from 1926 - was to refocus their consumer profile and pricing policy, to appeal to women of more moderate means (who would otherwise shop at chain stores or the small dressmaker and women’s wear - ‘madame’ - shops). 106 Closer co-operation between retailers and manufacturers of branded lines in developing promotion campaigns was also taken up as a strategy against chain-store competition. 107 However, the high costs of retailing dress piece goods, due to the wide range necessary, restricted the retailers specialising in this field, with department stores taking almost half the trade by 1939. 108 There was a general trend towards buying more ready-to-wear garments and less piece goods for making up at home. 109 Competition in clothing remained strong, with multiple shop retailers increasing their share of the market dramatically, especially in the late 1930s. 110 Changes in style of clothing fashion also affected demand of textiles, with the volume of material needed for a woman’s complete outfit dropping from over 20 yards in 1913 to under 10 yards in 1925. 111 These changes resulted in the purchase of smaller quantities, more frequently, from a greater variety of fabrics.

102 For example, Sir Woodman Burbidge, Bart. (chairman of Harrods Ltd.) stated in the Buyers’ Bulletin that: ‘The department is always, and always will be, the lengthened shadow of its buyer, whether he knows it or not.’ The Drapers’ Record, 11/7/31, p31.
104 Debenhams Limited Manufacturing and Supplies (DLMS) was established in the 1930s as a central buying agency. Corina, M. op. cit., p115.
105 Ibid., p83.
107 A convention between Schneider & Son (London clothing manufacturers) and the retailers of their products is discussed as a model of such co-operation in ‘Retailing Branded Goods’, The Drapers’ Record, 21/2/31.
109 Ibid., p332.
110 Sales of women’s and girls’ wear by department stores increased from 14-16% in 1920 to 19-23% in 1939; co-operatives from 6-7.5% in 1920 to 8-9% in 1939; while multiple shop retailers expanded from 1-2% in 1920 to 16-18% in 1939 (increasing from 9-10% in 1935). Data from Jefferys, J., ibid., p349.
2.5.1.3.1 Credit

Another factor was the adoption of hire purchase as a standard consumption structure in the interwar period. The use of hire purchase increased by a factor of twenty from 1918 to 1938, enabling furniture and other durable household products to be purchased by classes previously excluded from these markets. Good quality furnishing fabrics therefore had to appeal to a wider market of social classes. It was a standard system in furniture and electrical chain stores, but was introduced more cautiously in department stores, with greater emphasis on references and higher deposits. Credit had traditionally been the means of purchase in the upper class market, and had been introduced to department stores in the late 19th century with a monthly account system. Co-operative societies established 'mutuality clubs' in the 1920s, making the higher status products sold to cash paying customers available to credit customers on a 20-weeks payment scheme. A pattern in which clothing and shoes, particularly for children, was funded through 'the never-never' through the co-operative retail society was common. Clothing was also purchased on credit using 'clothing club' cheques bought from an agent, at designated stores in which the cheques could be used. This system was developed particularly by drapery businesses in the 1930s depression: the Newcastle stores of Shepherd's and Parish's expanded and opened branch stores in the mid 1930s, based on a network of neighbourhood agents. The increasing acceptability of credit in middle class households is indicated by articles on using credit in magazines such as Good Housekeeping in the early 1930s. A new retail form established in the interwar period, that depended on credit, was mail order. An example is Kays, which was established in 1928 in Worcester by Gilmore Kay, whose father was a 'Scots draper' (selling clothes on credit). It sold some fashions (though mainly concerned with hardware, with curtains sold made up from

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111 Ibid., p331.
112 Ibid.
117 Lancaster, B. op. cit., p99.
118 Benson, J. op. cit.
119 Paper given by Mr Arbuckle to Worcester United Reform Church Thursday group, March 1994, based on research at the Kays archive.
1937. Goods were delivered by rail or post to local agents, who often arranged club credit schemes.\textsuperscript{120}

\subsection*{2.5.1.4 Case Study Companies}

The CPA was divided into merchant and production branches, with the merchant branches using a variety of sales or order structures. Printing prices were charged to the merchant branches by production branches, subject to regulations on the maximum concessions to be allowed and based on FCP or Convention price lists.\textsuperscript{121} The merchant branches then distributed via wholesalers and other merchants. The UTR also distributed in the home market via wholesalers. Other print or manufacturing companies (Turnbull & Stockdale Ltd., Ferguson Bros. Ltd. and Morton Sundour Fabrics Ltd.) sold direct to retailers via travelling salesmen\textsuperscript{122} and showrooms. MSF did establish their Carlan line of goods specifically for sale via wholesalers, but were careful to disassociate it from their usual fabrics (Section 5.4.5). Such companies would expect to spend a percentage of turnover on advertising: Wm. Hollins & Co. Ltd. allowed its established lines 5\%, with additional monies voted to launch new lines or break into new markets.\textsuperscript{123} It was usual to have a London showroom, a Manchester office and often a works showroom. The personal involvement of directors in the establishment of new products was a strategy of moderate sized companies. For example, when the new washable, fadeless bookcloths were developed by MSF, they were initially presented to leading publishers by James Morton. An incident in the mid 1930s relating to Turnbull & Stockdale Ltd. was recalled by Ambrose Heal in their company history, in which William Turnbull called to show him their new Spring range, but was sold a group of textile designs by Christopher Heal.\textsuperscript{124}

\begin{footnotes}
\item[120] Ibid. Groups of 20 paid a shilling a week and took turns for £1 worth of goods though orders had to be signed by the husband.
\item[121] M75/1922-8/19.6 notes on FCP Minimum Price Committee, 20/12/28.
\item[122] Turnbull & Stockdale Ltd. categorised their home trade sales figures under 'London, West, Harper, Sharman, Stevenson, Boyd and Sundries' in 1928-33, implying particular agents employed in the home market.
\end{footnotes}
2.5.2 Export Markets Distribution

2.5.2.1 Merchants and Shippers

The main commission-processing sector of the textile printing industry relied on merchants for orders and the merchants were therefore responsible for distribution. The merchants would usually only commission when they had received orders. Dress fabric exporters would often specialise in a particular market, employing designers and commissioned job printing from their own designs. There were 67 merchants in the January samples of registered designs: this will be an underestimate of the number of merchant companies working in this way. They would have representatives visiting or permanently resident in a market, who would take the orders. In this case, the merchants act as Lancashire's "intelligence department, advertising agents, salesmen and the arbiters of public taste."\(^{125}\)

The Economic Advisory Council's Cotton Inquiry Committee was concerned that the conflicting interests of the merchants left the industry without any independent intelligence or advertising and entirely dependant on the merchants for the size, time and nature of orders. The multiplicity of competing merchants tended to reduce the size and price of orders. In some markets, the Inquiry found, 'the number of merchants' representatives visiting a market so far exceed requirements that the orders obtained are insufficient even to cover the cost of the representatives employed.'\(^{126}\) These merchant companies sold textiles using their own export tickets and stamps, and therefore acted as guarantors of their quality. The number of textile shipping merchants in the 1926 Manchester Kelly's Directory is 726, of which 22 specifically stated that they deal in printed textiles. In the 1932 Kelly's Directory, 17 shipping merchants are listed as trading in printed textiles. Most merchants dealt in a broad range of textile goods (directory descriptions such as 'Cotton Piece Goods', 'Manchester Goods' or 'Textiles' of their goods were given).

Manufacturers and printers also had agents directly employed to sell their goods, as middlemen within the distribution structure who owed a loyalty to particular British production companies. An approximate estimate of the number of such agents can be formed from trade directories: in the 1926 Manchester Kelly's Directory there are 860 manufacturers' agents listed, though they will not all be textile agents. Merchant printers

\(^{125}\) BT 55/18, op. cit.
\(^{126}\) Ibid.
often had a distribution network of agency agreements for their export markets: the agent would take orders, receive the piece goods from shippers and distribute to retailers, bearing the commercial risk until the customer paid. A standard agency contract of the interwar period would have rates of 2-3% net commission. 127

2.5.2.2 Direct Trading

A parallel development to the reduction of the role of wholesalers in the home market was the direct trading of manufacturers with overseas markets. The intensity of resentment by the distribution trade is indicated by an article in *The Drapers' Record* in 1931, in which a sudden change to direct trading in 1927 was blamed for the collapse of the export market:

'The cause of this chronic dislocation of the export markets was due to the action of the English manufacturing units. It is said, with regard to Empire markets in particular, that these units have dealt directly with the retailers, and sold commodities at cost-of-production prices.' 128

An example of elimination of large Manchester merchants from the distribution chain, is evident in the decision of Ollivant to deal direct with the UTR in July 1930. 129 They had previously acted through Hayken & Co. Ltd. in ordering wax block prints for export to West Africa.

2.5.2.3 Case Study Companies

The CPA had a network of agents covering the export markets (varying during the interwar period, but up to 100130) combined with showrooms based in the principal markets.131 Drawbacks of the showrooms were the partial range of CPA production available as samples and a prohibition on quoting merchant prices, which disadvantaged the company against independent merchant agencies, in cases where the company had no direct selling representation.132 Ferguson Bros. Ltd. had a series of agency distributors,133

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127 Pitt, S. op. cit., p103.
129 UGD 13/5/6, 9/7/30.
130 Pitt, S. op. cit., p103.
132 Discussed in Pitt, S., op. cit., p105: showroom comment in letter from CPA representative, 25/11/25, in M75/1922-1928/Box 1182, fol. 27.1

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and representatives based in different markets. Morton Sundour had subsidiaries in America and Canada (Morton Sundour Co. Inc. in the USA and Morton Sundour Canada Ltd.) and representatives in other markets. The subsidiaries acted as agents, with the freedom to import and sell the products of other companies.

2.5.3 Conclusion: Distribution Structure

The dress fabric home market distribution system was dominated by wholesalers, though some manufacturers and printers sold directly to retailers, using a network of salesmen and a considerable expenditure on advertising (such as Ferguson Bros. Ltd. or Hollins). Furnishing print distribution was similar, with a combination of direct sale (Turnbull & Stockdale Ltd. and MSF) and wholesalers. Wholesale seems to have generally been associated with cheaper goods (indicated by MSF’s Carlan line and the UTR, which sold to the poorer end of the market via wholesalers), though some exclusive goods wholesalers existed, as indicated by the CPA distribution of Grafton Cretonnes. The retail structure in the home market changed significantly during the period, with the expansion of chain stores, establishment of manufacturers’ brands (supported by fixed retail prices) and broadening of access to consumer goods through the increasing availability of credit. A concentration of drapery sales in department stores, due to the costs of carrying a wide variety of lines, was intensified by the amalgamation of department stores by Debenhams, focusing its purchasing as an independent wholesaler/retailer. Further concentration of wholesale purchase power (and thus influence in the formation of taste and fashion) occurred with the expansion of the Co-operative retail stores. Direct trading links with manufacturers were established by some retailers, such as Marks & Spencer, while some department stores (Heals, Liberty’s) took on a merchanting role and commissioned textile prints. The case study companies (except UTR) exported their goods in an arms-length form of direct distribution, with agents, showrooms and subsidiary companies. However, much of the export dress print sector was controlled by shipping merchants, who received orders from their market agents and commissioned print companies.

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133 Messrs. Isherwood & Bartlett Pty, Ltd. in Australia, with addresses in Sydney, Melbourne, Adelaide and Brisbane; Mr R.B. Scott in Canada and the USA, with addresses in Madison Avenue, New York and in the Board of Trade Buildings in Montreal.

134 They had representatives in New Zealand, Buenos Aires, West Africa and South Africa. Turnbull & Stockdale Ltd. advertised representatives in Paris, Cologne, Berlin, Vienna, Genoa, Zurich, Prague, Budapest, Amsterdam, Oslo, Copenhagen, Bucharest, Sydney, Melbourne, Toronto, Capetown, Johannesburg, Cairo, Japan, Siam, Shanghai, Straits Settlement, Buenos Aires and Rio-de-Janeiro.
2.6 Fashion Structures in the Consumption of Textiles

2.6.1 Home Market

2.6.1.1 Dress Fabric

There was a broad transition of the mass home market in dress from a model based on durability to one of fashion, as had been common in the more exclusive market. Mr E.H. Symonds, managing director of Reville Ltd., commented on the post-war rapidity with which fashion had become an integral part of the everyday life of the masses:

'Any retailer who in these times advertised that his dress materials were so good that they would last for years would be taking the quickest and surest road to the bankruptcy court. All that most women now required was a reasonably good standard of quality that would not outlast the lifetime of modern fashion.'\(^{135}\)

The acknowledgement of this by mass-market retailers is indicated in an advertisement of the Leicester Co-operative Society in 1935:

'It is not long since FASHIONABLE Clothing was the prerogative of the few who could afford to pay high prices. But the L.C.S. has changed all that. In the magnificent new BARGAIN BASEMENT recently opened at 40-70, KING STREET, you can buy the season’s most fashionable modes at prices which will amaze you.'\(^{136}\)

The transition in emphasis from durability to fashion, with the promotion of the new season’s colours and shapes, is discussed by Nava and noted by Graves and Hodge.\(^{137}\) The fashion ‘time-lag’ expected of at least a full season in the pre-war years, for the distribution and emulation of styles from its couture or ‘darlings of society’ initiators to the popular trade, also collapsed in the interwar period.\(^{138}\) This change was attributed by the editor of The Drapers’ Record to the far greater proportion of women who were wage-earners, in comparison to pre-war days.\(^{139}\) Copies of new couture styles could be produced within 48 hours for the mass market.

\(^{135}\) ‘Fashion Dictates Fabric Trend’, The Drapers’ Record, 10/1/31, p18.


\(^{139}\) Ibid.
The FCP commented on this change in 1930:

'It has changed enormously. It came about in the war. It seemed to loosen people’s outlook upon these things and they are more apt to buy any new thing that comes along and then drop it... The service given is very largely different. The styles have altered. They are much more elaborate styles. The public have to be tempted and coaxed, they want richer food so to speak.'

The new fashion basis greatly increased the volatility of the market: buyers had the difficult task of predicting the likely trends of consumer behaviour, based on minimal, informal customer research and intuition, with some sales data. It also resulted in smaller orders and thus far shorter runs, increasing costs and sales risk to manufacturers and retailers. This development was described to the Economic Advisory Council Committee on the Cotton Industry in February 1930:

'The sort of fabrics we are printing are enormously more expensive than we used to print before the war, artificial silks and things like that, and all that means much shorter running because people will not take the risk of putting down such big stocks because they may get landed with too much, and the fashions are changing so rapidly, the fashions are in and out enormously.'

The commercial alarm felt by the reliance on design as a dynamic of fashion (and the consequent short runs) is shown by Geoffrey Turnbull, a director of Turnbull & Stockdale Ltd., who wrote a history of the industry in the late 1930s. He stated: 'If the demand for novelty is carried to extremes, damage to the trade as a whole results.' The British Colour Council was established to predict and define the fashions, at least in the colours of the following year, to improve the industry co-ordination of retailers and wholesalers in presenting their fashions. For example, in August 1931, its predictions of the colours for the following spring were published (lighter and brighter colour tones, contrasted with beige and grey).

140 BT 55/18, op. cit.
142 BT 55/18, op. cit.
143 Turnbull, G. op. cit., p336
144 The Drapers' Record, 29/8/31, p55.
The range of designs and colourways of fabrics newly available in drapers as a result of this change is indicated by Mr Spedan Lewis (Chairman of John Lewis Partnership Ltd.) in 1935:

'Consider how a generation ago a draper kept very few colours and those harsh, and how he assumed, not mistakenly, that, if he were a not incompetent salesman, he would succeed in persuading almost every customer to accept one or other of them. Now he keeps, in a single fabric, as many as eighty tones of pink, let us say, and the customer goes elsewhere because he has not got the exact colour that she wants, and this, mark me, in fabrics for modest purses.'

A clear change in the ordering practices of retailers, upholsterers and others is stated by Mary Schoeser to have occurred in 1921. She comments that a general trend towards ordering smaller quantities and holding less stocks of fabrics had been developing in the Edwardian period, but was briefly reversed in 1919-21, as stocks were rebuilt after the war. As the post-war boom collapsed, severe losses were incurred, as textiles bought by the retailer at a high price had to be sold off cheaply. Subsequently, minimal orders were placed, with some only ordering when a customer had given an order, to facilitate high turnover and minimalise risk. The change in pattern in 1921 is substantiated by the UTR minutes: bookings for months ahead were noted in 1920, a dearth of business from February 1921, references to small orders from September 1921 and a comment in October 1922 that 'Home Trade very dull, Glasgow buyers not allowed to buy for stock.' However, there was variation in the willingness to place significant wholesale stock orders, as economic conditions change: by October 1923, home trade stock orders were coming in.

'Where it was usual for the wholesale drapery purchases of 1913 to be made in due season, with sober replacements following, there are buyers in 1938 who will order a little at a time, and look in at the warehouse to say “I saw that last week. I want something new!”'

147 UGD 13/1920-30 Directors' Minutes.
148 Ibid.
149 'Smaller Clearances in the Cotton Market', The Drapers' Record, 11/7/31, p25.
This practice is reported in the UTR minutes as a reaction to severe economic pressures. In November 1921 ‘Wholesale Houses not buying at present’. Small orders were common to October 1923, when an improvement occurs, continuing until the coal strike difficulties of August 1926: ‘Wholesale Houses not selling much and only buying hand to mouth.’\footnote{UGD 13/5/6, 18/8/26: Dept. E (handkerchiefs, etc).}

2.6.1.2 Furnishing Fabric

The fashionability of furnishings is discussed by Peter McNeil, with particular attention to the high profile of interior designers in the interwar period.\footnote{McNeil, P. ‘Designing Women: Gender, Sexuality and the Interior Decorator, c.1890-1940’, \textit{Art History}, Vol. 17, No. 4, Dec. 1994, pp631-657.} The treatment of decoration schemes in the same terms as dress fashion is ascribed to a perception of the feminisation of the profession of interior designers. Individuals such as Elsie de Wolfe, Eileen Gray, Margaret Jourdain, Betty Joel, Eyre de Lanux and Evelyn Wyld established reputations for furnishing and interior design in the 1920s. Following the 1929 crash, the formalisation as a business of the traditional female role of decoration of the home became a common strategy of upper class women.\footnote{Ibid. Adverse criticism by Virginia Woolf (in letters to Ethel Smyth and Vanessa Bell during November 1930) of the adoption of this policy by Sybil Colefax is noted.} This feminine association is highlighted with a quote from \textit{Leisure} magazine in 1936:

‘The vogue in furniture changes almost as suddenly as in fashion. Last season, white and navy blue was the chic modern scheme. This season it is to be olive green and white – very lovely and unusual . . . when the familiar feminine urge to change our colour scheme overtakes us the furniture will still be right.’

A deliberate attempt by retailers to define popular taste was advocated in May 1935, by imposing a fashion structure on furnishing textiles, as in the drapery and millinery trades.\footnote{‘Fashion in the Soft Furnishing Trade: Is a ‘New Style a Season’ Campaign Wanted?’ by a special correspondent, \textit{The Cabinet Maker & Complete Home Furnisher}, 4/5/35, pp179-80.} Either a central committee of one of the trade associations would prepare a ‘style sheet’, to be circulated throughout the trade, or individual departments could introduce a new style every season. The retail buyer is instructed to examine the latest fabrics offered by the more enterprising manufacturers and work out methods of emphasising their novel features. This is complemented by a strategy of designing a type of curtain or loose cover on entirely different lines to the most popular type at the moment. The writer concludes:
'Make as striking a contrast a possible, so that the older style seems out of date, even to the casual observer.'

2.6.2 Export Fabrics

The view of export fabrics as a field in which there was a demand for particular styles which remained fairly static over long periods and thus needed less investment in design is common, and implied as a structural assumption by the categorisation in particular styles (e.g. comparison of UTR work in the 'Para Red and Yellow Scarf style' to the CPA work or references to sales of 'Alizarine Red, Pink and White Sarries' or the revival of the 'Imitation Lead Plate work' (see Section 6.5.3.1). Fashion changes were noted by the UTR, however, with 'red shirtings gone out of fashion' in Calcutta in February 1925 and 'prints were out of fashion in the Bombay market' in March 1926. There was a transition in the model of market structure demand, as many export markets were moving to Western-influenced designs from the traditional pattern types. This situation was commented on by the UTR in its 1930 Yearbook:

'The tendency for novelties still continues both in the Home markets and the Colonies and is developing rapidly in the Eastern markets. Today there is practically no difference between a Turkey Red print works and a calico print works. Both not only have to meet the demand for novelties but must anticipate them. This latter aspect has led to the development of departments within the print works in production of novelty cloths and effects.'

A change in the market demand for colours was also occurring:

'There is a perfect revolution taking place in the better end of the market, the variety of colour that is taken, the appreciation of colour is enormously greater today than it was. You get the most delicate and new shades applied, whereas before the war it was a very conventional thing, you never went out of certain colours. It is what is taking place throughout the world.'

Furnishing textile exports became dependent on design in the international depression, to overcome the price differential against their product:

156 Ibid., 11/2/25, 10/3/26.
157 UGD 13/ Statement from Yearbook for Shareholders, 8/9/30.
158 Ibid.
'Thus the path to successful exporting lies through a morass of bogs and quicksands; yet some British firms, by pertinacity and the sheer merit of their goods, make their way through this morass, creating a demand overseas for British woven and printed goods. Here we are concerned not so much with quality, or even price, but with a firm's individual product – cretonne, for example, or printed linen, or high grade tapestry or moquette – which by reason of its artistry and suitability of colour and design appeals so powerfully as to encourage the consumer to pay much more for this than he need pay for the native product. Thus the manufacturer not only functions as an exporter, but as an ambassador of art, proving that good though the products of a new country may be, Britain can still offer fabrics exclusive, individual, distinctive, such as are demanded by discerning people irrespective of nationality, tariff walls and artificial trade barriers of other descriptions.\textsuperscript{159}

2.6.3 Conclusion: Fashion Structures

A fundamental change in the production/consumption process was the widening of the relevance of fashionability to all classes of textiles and consequent displacement of the ideal of durability for cheaper fabrics. The increase in fashionability emphasis in export dress and furnishing textiles was a significant change, with a direct effect on design style (see Chapter 6). Quality of design became highly significant in the creation of demand, rather than traditional selling points of the quality of cloth or cheapness of the product. The establishment of a fashionability model for all price levels of dress fabric raised the significance of design in mass-market printed dress fabrics. The taste of the mass of the population thus became a central concern of production companies and retailers, who needed to predict changes in fashion and attract a more style conscious and volatile consumer. Design and industry organisations and the Government also needed to re-orientate their approach to deal with the economic implications of frequent mass changes in taste.

\textsuperscript{159} Quote from a 'Special Correspondent', in 'Three Views on Textile Tariffs: Reactions on Home and Export Trade', \textit{The Cabinet Maker and Complete House Furnisher}, 13/5/33, p230.
2.7 Conclusion: Structure Chapter

The calico printing industry consisted of a broad range of fairly small textile finishing companies, but was dominated by the Calico Printing Association. There were a moderate number of medium sized entrepreneurial companies that produced textiles printed to their own or bought designs, but the majority of those outside the CPA were commission processors. This dominant position in the industry emphasises the significance of the analysis of CPA design strategy, sourcing and investment, since the actions of the CPA could change the field conditions of the entire printed textile industry, in economic or design terms or institutional working practices. However, the increase in design registration by manufacturers and merchants indicates a shift in design patronage away from the CPA in the 1930s. The emphasis on direct sales and orders (rather than 'job prints') in furnishing textiles and by some dress fabric companies, combined with the widespread vertical integration of finishing processes or manufacturing, indicates that a significant proportion of the industry had the entrepreneurial freedom and flexibility to adapt their strategic approach to conditions.

The purely commission-processing sector would have been far more vulnerable to economic and structural changes. It required a common strategic defence to problems, both within the printing sector and by co-ordination with other sectors of the industry, supported by Government. The co-ordination of the industry through supra-company bodies was very considerable. Issues of rationalisation or sharing of the trade, pricing, export policy, labour agreements, trade agreements with other industry organisations, insurance schemes, standard contracts and political strategies to pressure the Government were agreed in such bodies. These structures established a protective artificial environment to prevent the harsh free-market competition implicit in the commissioning and merchant system of Manchester from exerting such strong price controls that no investment in research and design development would be possible. The price agreements on particular standards and types of production required a general consensus on the existence of these types, and may have formalised these categories of design styles. The existence of these structures and the experience of acting as a body in national negotiations and political lobbying was helpful in forming common strategies in response to the very severe economic pressures of the period and in mobilising in support of particular political interventions in both economic and design areas.
The division of the industry into commission and entrepreneurial roles (although sometimes combining both in one company) often resulted in separate design systems for export and home market fabrics, with commissioning by merchants for most export dress and some home market dress production. However, home market designs were also applied to Europe, the USA, Dominion and South American markets. Furnishing commissions to printers were mainly from manufacturers (and some retailers), who carried the entrepreneurial risk, provided the design and arranged the distribution and merchanting. There was no sharp division between dress and furnishing fabric production, with many print firms working in both sectors of the market. This implies a probable greater conjunction in taste between dress and furnishing taste systems than home and export markets: if this is not the case, it indicates that the ideological categories and perceptions of taste for each system were very strongly defined. Analysis in Chapter 6 will assess the design differences between sectors.

The structure of the home market distribution system changed during the interwar period, with an increasing emphasis on larger retail units in department and co-operative stores and rise of chain stores, combined with increased availability of credit and higher value of disposable income within the mass market. However, the restructuring of mass market demand to fashion and design novelty rather than durability, tended to concentrate the sale of drapery piece goods in a smaller number of outlets, mainly department stores that could afford the high risk and overheads of stocking a very wide range of fabrics. This change in market demand led to a highly unstable market, with retailers and wholesalers giving large numbers of very small orders, to provide a broad choice of designs and colourways. This was a production/consumption structure that was very uneconomic for print companies, but design quality and innovation became far more significant in all areas of the industry. A transition from long runs of identical goods to much shorter runs for less predictable, increasingly fluid target populations has been discussed as a recent phenomenon characteristic of postmodernism by Daniel Miller. 160 The operation of this production structure in a period of Modernist design complicates the received concepts of modernity and Postmodernism.

3. Conditions of Employment and Education Context of Designers

3.1 Introduction

This chapter will examine the structure of the employment of designers in the printed textiles industry, to determine whether the conditions of design production had a definable effect on the designs produced. The employment patterns of designers within broad sectors of the industry are of prime significance in establishing the key sources of design and centres of style construction. The dominant position in design innovation has been ascribed to freelance textile designers\(^1\), to painters\(^2\) or architects\(^3\) working freelance or to French commercial studios\(^4\): this analysis is intended to clarify the actual established practice and individual strategies of production companies. Comparisons of the approach taken by the case study companies are made to sourcing designs for dress and furnishing textiles, with analysis of differences in supplying for the home and export market and within merchant/ manufacturing/ print divisions in the industry. Analysis of the freelance and studio employment of designers within these divisions is given in Section 3.3, with types of design produced by studio and freelance designers considered in Section 6.5.4.1. Demographic analysis of the nationality, geographical distribution and gender divisions of printed textile designers, and the implications of change in these demographic patterns on the formation of taste, will be considered in Section 3.4. Gender bias in wage levels or employment type is analysed and consideration given to any significant change in gender balance. The dominance of Paris within dress fabric design, asserted by the Balfour Report,\(^5\) will be investigated, with analysis of design in Section 6.5.4.2, to ascertain stylistic difference on the basis of national source and evidence of influence.

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1. Pevsner, N. 'The Designer in Industry. 2. Furnishing Textiles', *Architectural Review*, Vol. 79, 1936, p291; Chris Boydell argues that there were increasing numbers of furnishing print designs purchased from freelance designers during the 1930s and indicates that the entry of art school educated (usually in painting) female freelance designers was significant in the production of experimental designs for screen-printing. Boydell, C., 'Free-lance Textile Design in the 1930s: An Improving Prospect?,' *Journal of Design History*, Vol. 8, No. 1, 1995, p34, p38 and p40. In Boydell, C., 'Women Textile Designers in the 1920s and 1930s: Marion Dorn, a Case Study' in Attfield, J. & Kirkham, P. *A View from the Interior: Feminism, Women and Design*, The Women’s Press, 1989, p67 she states that the increasing demand for new designs was most often filled by freelance designers.


Interventions by key textile industry figures in the established conditions of production for
designers, via cultural, industry and business organisations (Section 3.2) and by Government
(in Section 3.7) are discussed. In particular, the campaigns to alter designer education and the
employment and professional status of designers will be investigated. The intention of these
changes (often stated in very Modernist terms) to effect a new construction of taste, design
approach and a higher standard of design will be related to outcome, in actual change in
conditions of employment and in education, as far as the evidence allows. The salary level of
studio designers, other contractual structures and freelance payments for designs during the
interwar period is investigated (Section 3.5). Developments in the education and training of
designers will be considered in broad terms in Section 3.6, since any change in educational
approach or in the proportion of designers being art school educated would have a strong
impact on the type of design produced. This examination of the ‘conditions and relations of
artistic production’ in the interwar printed textiles industry is fundamental to an
understanding of the changes in design during the period.

3.2 Organisations Influential in Issues of Designer Status and Training

3.2.1 National Organisation of Designers

The Society of Industrial Artists (SIA) and Guild of British Textile Designers (GBTD) were
the key national bodies to which printed textile designers belonged. The SIA was established
in 1930 as part of an effort among designers to raise their status to a professional level. Its aim
was ‘to advance and protect the interests of Industrial Artists and raise the standard of
Industrial Art in this country, both from an economic and cultural standpoint.’ It worked with
educational authorities to ensure adequate courses and facilities were available. Membership
was intended to guarantee the standard of qualification and professional practice of designers,
with professional status indicated by the use of the initials MSIA by Members and FSIA by
Fellows (such as Jaqueline Groag). Initial involvement of the textile industry is indicated by
the presence of James Morton as a signatory to the original Articles of Association in 26th

\[^{5}\text{Ibid.}\]
\[^{8}\text{1934 Annual Report, Ibid., p2.}\]
September 1930; Paul Nash was President of the society 1932-4; Allan Walton served on the Council in 1932-3; and Alec Hunter (head designer of Warner & Sons Ltd. from 1932), was an original member. A Manchester branch was formed, indicating a likely focus on textile design, following the establishment of North Staffordshire and Birmingham branches. There was a Textile Committee, chaired by Alec Hunter in 1936-7. The emphasis on education of designers is shown by the election of Percy Jowett (who had been Principal of Beckenham College of Art, the LCC Central School of Art and was to be Principal of the RCA) as President in 1935-6, followed by Clive Gardiner (Principal of Goldsmiths School of Art) in 1937-8. The overlapping aims of raising the standard of design and professional status of designers of the DIA and SIA were co-ordinated by a joint committee, established in 1934.

The Guild of British Textile Designers was a later arrival as a designer association, founded in Manchester in 1938. It was a more specialist professional association for textile designers, which also acted as a guarantee of the standard of qualification of its members, allowing members to use the initials GBTD after their name. It requested buyers of designs to give preference to British productions whenever possible. It is likely that the personal contacts formed within these organisations as well as the expectation of a higher standard of design education would increase the employment opportunities of individual designers. In the exhibition catalogue of Warner & Sons Ltd., Hester Bury states that: 'It was probably through Alec Hunter’s membership of the SIA that Warner & Sons did buy designs from a number of established and well-known designers. These included Louise Aldred, Margaret Simeon, Marion Dorn and Eva Aufseeser.' However, Alec Hunter had known Marion Dorn since working as production manager at Edinburgh Weavers, in 1928-32.

10 Ibid., p46.
11 Ibid., p4.
13 Ibid.
15 Information from Dr Christine Boydell.
3.2.2 Design and Art Organisations

The DIA is discussed in more detail in Section 6.2. It was formed as a body to increase the cooperation between artists and industry, and acted as a forum for discussion in the textile industry, particularly in the Textile Sub-Committee and the talks arranged at the Manchester and London branches. There was also a textile design competition organised jointly by the CPA and the Manchester section of the DIA in 1917-8. Individual textile designers (Reginald Silver, Minnie McLeish, Olive Bilbie, Dora Batty, Albert Griffiths, Mrs and Mr Barraclough, Karl Hagedorn, Mrs G.S. Maufe and others) were members, but it is likely that the greatest impact on designers was via the company and art school membership, exhibitions and publications. One of the original aims of the DIA, stated in 1915, was to increase the status of designers by crediting them for their work in mass-production companies:

"In order to attract the best brains it is necessary to associate the name of the designer with the article produced, and this should be recognised as a commercial asset to both Manufacturer and Distributor."

The 'symbolic capital' of admired artist-designers is then made overt by publishing the designer's name with the fabric, so that the manufacturer captures or accrues the value to its own brand name. The DIA was highly influential in the development of art education in the interwar period, with membership by significant numbers of art schools and discussions on the issue of education of the designer, salesmen and others. A key Memorandum, produced by the DIA in 1933 and published by Herbert Read in his book *Art and Industry*, proposed that the Royal College of Art be reorganised as a university-level institution for teaching industrial design. This concept formed the basis for the Board of Education Hambledon Report of 1936.

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16 DIA Journal V Oct 1917 and VI Jan 1918. Miss Dorothy Hutton, Miss Marion Ellis, Mrs G.S. Maufe, Mr Lovat Frazer, Miss Elzie Morton and Mrs Isabel Pick were shortlisted, and the winning entries were by Miss Dorothy Hutton and Mrs Isabel Pick.
17 Designer to Blakeley & Beving, export merchants to Africa.
19 GD 325/60/1.
21 Frayling, C. & Catterall, C. (eds.) *The Royal College of Art: One Hundred and Fifty Years of Art and Design,*
The Royal Society of Arts also became actively involved in promoting high standards of design and the role of the designer. Mr Lennox Lee (Chairman of the CPA), Ernest Goodale (Managing Director of Warner & Sons from 1930) and Frank Warner were members. Fellows of the Royal Society of Arts could use the initials FRSA after their name. The Royal Society of Arts established the Faculty of Royal Designers in 1936, as an equivalent level to Royal Academicians (Reco Capey and Enid Marx were elected as RDI). The establishment and sponsorship of an open Annual Competition for Industrial Designs (for textiles, furniture, metalwork and jewellery, pottery, glass, wallpaper, architectural decoration and book production) in 1923, from which selected designs were entered in an exhibition, was initiated and co-ordinated by Frank Warner, who was Chairman of the Industrial Design Committee.

The competition was divided into designs by students of the State Aided Schools of Art; designs by students of the Royal College of Art, the Royal Academy Schools and the Slade Schools; and designs by other individual competitors. The designs were required to be 'of a practical nature and suitable for the materials for which they are intended', were not debarred from being sold by their Authors and were judged by a Section Committee made up of leading members of the trade and one or more representatives of the RSA.

For example, Mr Lennox Lee was invited to be a member of the Textile Section Committee. It would therefore have brought to the attention of the textile trade the highest quality work of students and other hopeful designers. The competition was revived and modified in 1938, to:

'provide studentships and scholarships to be held by promising students in design, instead of giving students what was sometimes thought to be false encouragement by awarding them large monetary prizes for what, in the early stages of their career, cannot be finished work suitable for commercial reproduction.'

Barrie & Jenkins Ltd., 1987, p115.

22 Other designers elected as a Royal Designer for Industry by the Faculty of Royal Designers were Edward Bawden, Eric Gill, Ambrose Heal, Edward McKnight Kauffer, Keith Murray, Harold Stabler and C.F.A. Voysey. Some textile designers were members of the Royal Academy (and could use the initials RA), including Charles Shannon (who designed for Foxton: earlier an ARA) and Sir Frank Brangwyn (designed rugs and furnishing fabrics for MSF, Templeton's and Warings).

23 Letter inviting Mr Lennox Lee (managing director of CPA) to serve on Textile Section Committee, with Draft Competition Scheme, M7S/1922-28/19.2, 11/1/23.

24 Ibid.

3.2.3 Industrial Organisations

The Federation of British Industry’s Industrial Art Committee (est. 1921) took an active interest in designer education and employment. Printed textile industry representatives on the committee were: Capt. W. Turnbull (Turnbull & Stockdale Ltd.), R. May (Burgess, Ledward & Co. Ltd.) and J.L Edmondson (FCP Secretary).26 There was a domination of the committee by pattern design industries, with representatives from the Silk Association, Carpet Manufacturers’ Association, Furnishing Textile Manufacturers’ Association (Lister & Co. Ltd.) and Wallpaper Manufacturers Employers Association. An approach taken to improve the accessibility and professionalisation of designers was the creation of a Designers Register and Employment Bureau, opened by the FBI in 1924. Pevsner states that jobs were found for 50-80 students a year (half commercial artists) via this Bureau, and freelance designers brought in touch with relevant firms.27 The FBI Industrial Art Committee also established a College of Art Sketch Club competition for designs for printed calico.28 In 1930, the Committee stated that ‘during the past few years contact has been continually maintained’ with the authorities and students of the RCA.29 It also pressured the Board of Education to investigate industrial art training and produced a Memorandum on State-aided Art Education.30 In this report, they stated that they ‘consider it important to differentiate clearly between the draughtsman or craftsman and the designer and potential Art Director’, feeling that ‘there is a serious shortage of Industrial Designers of real originality.’ They recommended that there should be progression from the Junior Art Departments to Art Schools and the establishment of central art schools specialising in different industries. Institutional links with industry should be formed, with Advisory Councils of representatives of the industries taught for each art school, regular visits to industrial works and courses on commercial conditions, salesmanship and publicity given. The Royal College of Art (‘the apex of the art education system’) needed more technical equipment and closer links to industry. An ‘informal and fluid committee’ was formed in 1933 with representatives of the Industrial Art Committee and the Board of Education, following up the 1930 Memorandum and Crowe Committee recommendations.

26 PRO ED 24/608, List of the membership of the FCP Industrial Art Committee, 6/12/30.
28 B14/ 6/2/1 FCP Minute book, 8/8/24: The FCP made a donation to the prize fund of £5, for printed calico designs.
30 PRO ED 24/ 608: Note on request for enquiry by FBI, 7/4/30. Memorandum on State-aided Art Education by
(Section 3.7). \textsuperscript{31} This committee discussed the reform of the RCA and Central School of Art and Crafts, considering examples of alternative models in Munich, Prague and Leipzig. \textsuperscript{32} In November 1934 a meeting was organised with DIA representatives to arrange experimental industrial courses at the RCA. \textsuperscript{33} Refresher courses for industrial designers were arranged at the RCA and instructional notes on several industries distributed to art schools. \textsuperscript{34} A further memorandum was produced in 1935, on the industrial art training of management staff, foremen, travellers and salesmen. \textsuperscript{35} There were joint meetings in 1935 with the Council of Art and Industry, Royal Academy and Royal Society of Arts to co-ordinate work on the Royal Academy ‘Exhibition of British Art in Industry’, \textsuperscript{36} followed by a report on the final exhibition (considered ‘very sound’ by Pevsner). \textsuperscript{37} It also introduced a series of substantial prizes for work in various departments of the RCA in 1937, which ‘inevitably affected the orientation of the work exhibited at the summer show of the Design School’. \textsuperscript{38}

The Joint Standing Committee (Industry and Research) of the British Cotton Industry Research Association was established in June 1924, in order to:

‘to consider the method of training (a) in the works, (b) in the schools, of young persons engaged in occupations of various grades in the industry.’ \textsuperscript{39}

The committee was chaired by Mr Forrest Hewit, of the FCP, and had a panel of industry representatives, a panel of Lancashire education authority representatives, representatives of operative amalgamations and additional co-opted and non-panel members serving on the committee, supported by consultative representatives. \textsuperscript{40} A report on \textit{Design and the Cotton Industry} of the Federation of British Industry, 13/6/30.

\textsuperscript{31} PRO ED 46/25: Notes on committee, 30/5/33.
\textsuperscript{32} PRO ED 46/25: Notes on Munich, Prague and Leipzig schools of industrial art, 9/3/34.
\textsuperscript{33} PRO ED 46/25: Meeting arranged at Board of Education, 26/11/34. FBI representatives included Mr Edmondson (secretary of the FCP) and Mr R.D. Simpson (designer at MSF).
\textsuperscript{34} Pevsner, N. op. cit.
\textsuperscript{35} Ibid.
\textsuperscript{36} PRO BT 57/7.
\textsuperscript{37} Pevsner, N. op. cit., p156.
\textsuperscript{38} Frayling, C. & Catterall, C. (eds.) op. cit., p121.
\textsuperscript{39} \textit{Design and the Cotton Industry}, Board of Education Pamphlet No. 75, Industry Series No. 8, HM Stationary Office, 1929, p1.
\textsuperscript{40} Ibid., pp45-47. Printed textile industry representatives were Mr W. Turnbull of Turnbull & Stockdale Ltd., Mr Astington and Mr Lord of the CPA and Mr Bentley of the FCP. Other cotton industry firms represented were: Tootal Broadhurst Lee Co. Ltd., D. Marshall & Co. Ltd., Horrockses, Crewdson & Co. Ltd., James Chadwick & Brother Ltd., Slater & Co. Ltd. and the BDA.
Industry was produced by Board of Education inspectors in 1929 on the existing facilities in Lancashire and France for the training of textile designers. The report was received with appreciation, but also a "strong expression of opinion on the part of calico printers that the output of art schools as at present constituted is not acceptable to their section of the industry." They stated that they were in general agreement with the recommendations of the inspectors for part-time continuation classes for apprentice designers; for an annual exhibition of work done in art schools throughout Lancashire; and for an Advisory Committee of industry, studio, LEA and art school representatives, which would advise particularly on the existing ordinary part-time courses, on the effectiveness of the part-time courses for merchants and salesmen and the means whereby professional designers could attend classes and become more involved with the art school. In addition, the Joint Standing Committee recommended that industrial representatives should be co-opted on to the controlling committee of the art school (as did Manchester Municipal College of Technology) and that the head of the school of art and teachers of textile design should be first class practising designers. They also proposed a scheme for the establishment of a central school for the textile printing industry, stating the frequency of visiting designers, technical demonstrations, lectures and drawing classes. Classes for buyers and salespeople, intended to 'develop a sense of good design and colour', were also recommended.

The Industrial Art Committee of the Federation of Calico Printers received a questionnaire from the Board of Education on 'the supply, prospects and training of young designers' in December 1924. Captain W. Turnbull and Mr Rogers (of the CPA Designs Department) responded, on behalf of the committee, that South Kensington should be encouraged to cater for the needs of trade as much as possible. Support for design education also came from other trade institutions. For example, the London Chamber of Commerce had a Commercial Education Department, which awarded prizes for proficiency in textiles and other skills at

41 Ibid., p48.
42 'The best available' designer for cretonnes, for printed dress fabrics and for woven fabrics - all of which to be actually working in the industry but not on the staff of any industrial concern - to visit two days a week. Ibid., p55.
43 Ibid., pp54-7.
44 B14/6/2/1: FCP minute book, 12/12/24.
Higher Certificate stage.\textsuperscript{45}

The Textile Institute also took an interest in the question of design and designer education on occasion, as can be seen by the conference in 1938 on the training of textile designers.\textsuperscript{46} The active involvement by leading figures in the printed textile industry in a broad range of industrial and cultural organisations, all of which were being mobilised to put pressure on the Government to intervene directly in the education and broader status of designers, demonstrates a clear intention to construct the conditions for the formation of taste. The policies formed by these organisations were often adopted by education authorities and Government departments (further evidence and analysis is given in the following sections). Effective independent interventions by these organisations, such as establishing prizes, organising exhibitions and a Designers Register and Employment Bureau, were also made. Publications such as that by Hayes Marshall in 1939,\textsuperscript{47} which included a directory of textile designers with addresses, also increased the profile and accessibility of designers, as did the published membership lists of the DIA and other sources.

3.2.4 Conclusion: Organisations Active in Issues of Designer Status and Training

There was a wide range of organisations involved in the reform of the design education system during the interwar period, involved in initiatives to professionalise designers and patronage of design competitions. Many of these campaigns were dominated by textile industry representatives, who were thus able to establish or influence the formation of cultural and economic structures, which would shape the type of design produced. Involvement by art schools in design organisations and in campaigns to raise the status of designers indicates the significance accorded to design, in an environment that had traditionally prioritised fine art. The active engagement of directors from printed textile companies in such campaigns via a disparate range of industry and cultural bodies (particularly the ubiquitous Capt. Turnbull) indicates the depth of their interest in design and the degree of influence they were able to exert on Government and art schools to change the national approach to design education.

3.3 Structure of Designer Employment

3.3.1 National Employment of Designers

A summary of the total number of pattern designers available in Britain was made by the Registrar of the National Register of Industrial Art Designers for the Board of Trade in 1943. It stated that there were around 9,000 designers and drawing office staff in British industry. In the furnishing textile industries, there were about 60 firms, employing about 120 designers in the studios, with about 40 first rate freelance designers and probably another 5-600 freelancers who sold designs to the industry occasionally. Detailed figures for dress fabric companies were not given, but it was stated that there were about 20 big firms such as Tootal Broadhurst paying a high salary to their studio principal (see Section 2.5). The total number of freelancers was unknown, but there were about 30 independent design studios in the Manchester area, employing a total of 400 designers and assistants, and 14 freelance studios in the London area, employing about 150 designers. In wallpaper design, 120 worked in company studios with 4-500 supplying freelance designs. There was considerable cross-over in wallpaper and furnishing textile design, with freelancers supplying both markets and designs sold to be used for either media (31 freelancers and 4 studio designers working in both areas occur in the Designers Database). This common base in design source (and similarity of design) is also indicated in the advertisement by the Textile Studio, in Figure 3.1. There were also 10,000 artists registered in the 1931 census, many of which were partly employed in design areas during the depression. Hayes Marshall lists 240 freelance designers in 1939. Of the 848 British designers noted in the Designers Database, 580 are known to be printed textile designers. Of these, 118 were studio designers. However, studio designers are rarely credited individually or listed, so many are not known.

48 PRO: BT 64/ 3464 Letter from the Registrar of the National Register of Industrial Art Designers, 15/12/43.
52 Printed textile design attribution from references in company design records, material in museum collections or if listed as a textile designer or calico print designer in trade directories, DIA membership lists or by Hayes
The proportions of textile designs registered by print companies, manufacturing companies and merchants in the 1919-40 January samples, shown in Figure 2.2, gives some indication of the sources of designer employment. This indicates that there was an initial domination of design by the print companies, especially the CPA, though manufacturers and merchants supplied an increasing proportion of textile designs in the 1930s. Dress print companies required higher levels of design than furnishing textile companies. This is indicated by the case study companies: Ferguson Bros. Ltd. does not state new designs, but has an average annual range of 289.3 designs over 1930-4 and 1936-9 (designs will only last a year or two, so many of these will be new). Total figures of design production are not available for the CPA, but if the January registered designs are representative, an indication of annual production in 1919-40 would be 5,970. No data on UTR design totals is available. For furnishing textiles, A. Morton & Co. block print designs annual average production is 12.8 over 1919-30; MSF Ltd. produced an average of 20.2 roller print designs from 1923-35; while Turnbull & Stockdale Ltd. an annual average of 116.8 designs (engaged and own production, over 1930, 1933, 1936, 1938 and 1939). The design totals given by Christine Boydell for Warner & Sons Ltd. indicate that an annual average of 7.25 freelance designs were produced from 1929-40 (see Section 2.4.3). The Balfour report stated that most furnishing textile firms produce from 20 to 200 designs a year, though this will include woven textiles. The total number of designs bought by wallpaper manufacturers appears to be greater than that by furnishing textile printers: the Sanderson archive lists almost 3000 freelance designs bought in the interwar period (see Appendix 3).

The fundamental difference was between those designers employed as part of an in-house resource, in a studio or alone, with a monthly salary, and those acting as freelancers. The proportion of designs produced and designers employed on a freelance against a studio basis is difficult to determine precisely. The Balfour Committee Report of 1929 compiled statistics from fourteen calico-printing companies who mainly dealt with the home market. It stated that 42% of designs were produced by studio staff, 13% from Manchester ateliers, 42% from


53DB 110/213.


55Committee on Industry and Trade, Survey of Textile Industries, 1928, p353.
Paris ateliers and 3% from freelance designers from London and elsewhere. The same figures were given by Captain W. Turnbull for the textile industry in his study.\textsuperscript{56} A figure of 3% of printed textile designs produced by freelance artists was given by the British Institute of Industrial Art.\textsuperscript{57} These figures all seem to have been based on the Balfour analysis of 14 firms. However, these firms may have been predominantly dress fabric print companies: a comment was made that only two of the firms buy any quantity of their designs from London, and that these were mainly for furnishing fabrics.\textsuperscript{58} The proportions stated appear to be similar to dress fabric source patterns, but not to furnishing, in the dependence on Manchester rather than London or scattered freelance studios and the significant proportion of French sources (see detailed analysis in Section 2.4.2). Nikolaus Pevsner, in his 1937 survey of design in British industry, was informed by a large dress fabric producer that 25% of their designs were studio, 75% bought from outside; by a manufacturer of printed fabrics that 20% was studio, 80% from outside; and by a mass producer of furnishing fabrics that 70% was studio and 30% from outside for printed designs.\textsuperscript{59} He also asked three progressive textile manufacturers for an estimate of their sourcing of designs. Company A said that about 50% were studio designed and 50% bought; B said 40% were studio designed for prints and 95% for weaves; C said that the majority were bought for prints, while for weaves the majority were worked out between director and manager. One of these companies is likely to have been Morton Sundour Fabrics, since he refers in detail to their best selling designs and their subsidiary Edinburgh Weavers. In 1944 the Hankey Committee used Nikolaus Pevsner's survey of industrial art as a statistical basis for decisions and predictions of the need for designers in different industries after the Second World War.\textsuperscript{60}

However, the Balfour study was stated to be distorted by the home market emphasis, since export markets would use few Paris designers, concentrating on studio staff and some specialist freelancers.\textsuperscript{61} The report states that ‘the majority of designs in ‘native’ styles are produced in Manchester. Books and native examples are used to some extent, but these


\textsuperscript{57} Design and the Cotton Industry, op. cit., p8.

\textsuperscript{58} Survey of Textile Industries, op. cit.


\textsuperscript{60} PRO, BT 64/ 3464/49/44.

\textsuperscript{61} Ibid., p353.
designs are usually traditional and done by a designer who has become thoroughly accustomed to working in the native manner.' These figures highlight the significance of the company studio as a centre for the formation of new style, but also indicate a wide disparity in the sourcing policy of different companies. These differences may be due to structural divisions, such as dress/ furnishing or home/ export market, suggesting that separate systems of taste formation were functioning.

3.3.1.1 Freelance Design

Independent design studios were bought from on a freelance basis. The main independent British studio was the Silver Studio, although smaller family firms, such as the Haward Studio, or partnerships such as Bowden & Barclay (Miss W.M. Barclay Smith and Miss M.A. Bowden) existed. The usual practice would have been for a freelance designer or studio representative to visit the company with designs. Hayes Marshall advised young designers on the best technique of presenting their folio of designs to the studio buyer in 1939. Some freelance designers regularly supplied designs to a company and developed a close working relationship, paying periodic visits to the company to show new designs or being visited by company representatives. For example, James Haward of the Haward studio would visit companies to sell designs: in about 1932 Simpson & Godlee gave the Haward Studio an order for over £1,000 worth of designs. This working relationship is indicated by the frequency with which companies buy from particular British designers (e.g. Ormrod, Hunton, SGB/GGB and S. Rigby at Turnbull & Stockdale Ltd.; Willis at Liberty; J.S and S. Rigby, S. G. Mawson and Haward at A. Morton & Co. block prints; Plaskett and Newbould & Houghton at Ferguson Bros.; N & H at the CPA). The larger studios may have had a more professional business organisation, in arranging frequent visits.

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63 Notes of interview with Mr James A. Haward, 18/6/91, A. Sanderson & Sons Ltd. archive.
64 These are probably Frank Ormrod N.R.D. (listed by Hayes Marshall; designs in Victoria & Albert Museum) and Mrs Gordon Hunton (listed by Hayes Marshall).
65 In the Stead McAlpin order book, 7/11 orders from Liberty, where the designer is stated, are from Willis. This is probably George H. Willis NRD, who had a studio at Ealing, though a Miss Rosamund Willis NRD is also listed by Hayes Marshall.
66 Probably Sidney M. Plaskett G.B.T.D. (who is listed by Hayes Marshall and in the 1920-38 Manchester Kelly's Directories). Newbould & Houghton are also listed in the 1920-38 Manchester Kelly's Directories.
Some freelance designs were sent speculatively to companies, although these were rarely accepted. For example, Miss W. Ernestine Cole sent 10 designs for approval to the CPA in February 1928, enclosing stamps for return if not required. They were returned a month later, 'as they are of no interest to any of the Branches of the Association.' An enquiry by Miss Joyce Hutchin, a lecturer at the Royal College of Art, on behalf of a student led to a request for specimens of designs. Miss Lillyanne Wilson then sent 10 designs in July 1928. They were returned on the 6th July: 'The designs in question have been shown to our various Caterers who I am sorry to say have found them unsuitable for their requirements.' However, the Secretary did say that the CPA would be pleased to see any other sketches that she would like to place before them from time to time. A letter from an agent (Joseph Thorp) on behalf of Miss Syrett, living in Paris, who was stated to be a regular freelance designer for Tootal Broadhurst & Lee, was responded to by an invitation for Miss Syrett to call upon Mr G.H. Kipping, the head of the Paris Atelier. A more unconventional approach was implied by the invitation of Mr Meakin to a meeting with Mr Hollinghurst, of the Design Department, with specimens of his work. In the letter of 25th September 1928, the Secretary writes to the Union Club asking for Mr Meakin 'who I understand from the Chairman is a waiter at the Union Club and spends his spare time in drawing designs.'

3.3.1.2 Contracts and Royalties

Some companies gave short contracts or royalties on designs to freelance designers, as an intermediary stage between in-house studio and the chance supply of the freelance market. Warner and Sons paid a royalty to designers on some designs, instead of a flat fee. Contracts were given by Arthur Sanderson & Sons Ltd and the CPA. The CPA made exclusive arrangements with freelance designers whereby they were paid a basic retainer and guaranteed

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68 M75/ 1922-8/ 93, Letter, 15/2/28.
69 Ibid., 16/3/28.
70 Ibid., 26/6/28.
71 Ibid., 1/7/28.
72 Ibid., 24/2/23.
73 Ibid., 25/9/28.
74 Boydell, C. Marion Dorn: A Study of the Working Methods of the Female Professional Textile Designer in the 1920s and 1930s, Huddersfield University, 1992 (PhD thesis), p178.
75 Freelance design book, A. Sanderson & Sons Ltd. archive. Designers noted as being 'on contract': J.H. Gibbons January 1919 to December 1934, Beatrice M. Martin from January 1919 to January 1923 and A.B. Wild August 1923 to January 1924.

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work to a certain value, partly for strategic competitive reasons:

‘the numbers of these designers was limited and their exclusive engagement would benefit the Association by removing them from the sphere of its customers, to whom they also sold designs which in some cases were resold to the Association’s Branches, who have no knowledge of the origin.’

In October 1939, eighteen French designers agreed to an arrangement in which any new ideas they were working on were submitted for the consideration of the Designs Department, as a way of overcoming the difficulties of Branch representatives visiting Paris. Individuals were also occasionally employed as a design advisor, sometimes for a particular market.

3.3.1.3 Designers as Converters

Some designers formed their own converting businesses, commissioning companies to produce their work and marketing it. An example is Eileen Hunter Fabrics, which was founded in 1933, employed a salesman to travel round the country, exported to France, Holland, USA and Canada, and ran a wholesale company until 1934. Another designer entrepreneur is Marion Dorn. A further group was the designer producers, who had their own craft print workshops. Some designers would design on a freelance basis as well as operating a block print workshop, such as Michael O’Connell N.R.D., Mrs Margaret Calkin James N.R.D. and Enid Marx. A few, such as Paul Nash, supplied their designs to craft workshops as well as industrial fabric print companies on a commission basis.

3.3.2 Company Case Studies

The employment of designers in the case study companies is analysed, considering the relative use of studio, contract and freelance designers and other company strategies in sourcing designs. The purchase of French subscription designs (where an annual subscription is paid to an agency such as J. Claude Fréres to provide a selection of the new season’s designs) is considered in Section 6.5.4.2. Consideration of the economic treatment of designers in the

76 M75/ Directors’ Minute Book No. 15, 16/5/33.
77 M75/ 1929-39/ 1.82.
78 Hand block workshops were established by Phyllis Barron and Dorothy Larcher, Mr John S. Tunnard A.R.C.A., Miss Smithers (‘Handprints’) and Elspeth Little (‘Footprints’).
case study companies is given in Section 3.5, investigating their practice in salary levels, contracts and freelance design payments. Comparison with the wallpaper industry (Appendix 3) is used as relevant, to give a broader context to contemporary pattern design. The case study analysis is applied to a focused examination of nationality, gender and geographical distribution of designers in Section 3.4.

3.3.2.1 Dress Print Design

3.3.2.1.1 The CPA

Very few of the CPA designs can be certainly attributed to a particular designer, making it difficult to give a studio/ freelance balance overall. In the 1934-9 Potter's Engraving Book, however, there are designers noted by some samples, although they are not described as such: N & H, Libert, Helder and others were noted by the sample. By 'designer', only a code number is given (such as D104), which does not correlate to a particular designer. From the records of the Silver Studio and the Haward Studio, regular visits to the Manchester offices of the CPA by studio representatives are noted, but this relation is not mentioned in the CPA minutes or surviving design records. It is likely that British freelancers were used more widely, but no relevant records survive, unless a contract was agreed (Section 3.5.2). An innovative approach in design sourcing can be seen with the purchase of the rights to a drawing by Edward McKnight Kauffer in 1927 and the negotiations with the Pathé film company for the rights of cartoon characters (Felix the Cat and Jerry the Troublesome Tyke) to be adapted by their studio designers. In October 1939, the freelance system was formalised by the CPA, with an arrangement for the eighteen French designers considered most useful to send their new designs direct to the CPA. This would have been due to difficulties in maintaining direct contact with French designers, after the declaration of war in September.

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79 Silver Studio archive, Museum of Domestic Design and Architecture, Middlesex University.
80 Interview with Mr James A. Haward by Eleanor Gawne, 18/6/91, A. Sanderson & Son Ltd. archive.
81 These consist of correspondence and internal memoranda, but survival of material is random rather than systematic.
82 Assignment of copyright of 'Telas Espejo' drawing, 16/9/27, in M75/ 1922-28/ 93.5.
83 M75/ 1921-28/ 93.2.
84 M75/ 1922-28/ 11.
The CPA employed 99 studio designers in 1928.\textsuperscript{85} This includes the Joint Managers of the Atelier Department, but not Mr G. H. Kipping of the Paris Atelier or Mr Hollinghurst of the Designs Department, who are presumably therefore managers not designers. Mr G. Rogers was appointed as a Designs Advisor (memo of 5th May 1923), but died on the 23rd July 1928.\textsuperscript{86} The majority of designers were in the Atelier Department, while the Design Department had two designers, Cretonnes had five, Printed Linings had two, the Glasgow Office had two and the others were spread among the subsidiary companies.\textsuperscript{87} Of these, F.W. Grafton, which had a well established reputation for good design, had six designers. The remaining eighteen companies varied between one designer (Hoyles Prints and Dinting Vale) and four designers (Thornliebank). Much of the work of designers in the subsidiary companies may have been the routine work of new colourways, small modifications to designs, and so on. This supposition is supported by the competition established in October 1928 by the CPA Board, the notice for which states:

'To all Designers: The Directors think it possible that there may be Designers in this Building who are so fully occupied with routine work that they have no opportunity to reveal any special artistic talents they may possess and in order to give them all an equal chance of displaying these have decided to inaugurate a competition.'\textsuperscript{88}

The CPA did not subscribe to the DIA practice of publicly crediting designs to the designer, although the atelier was credited in its display at the 1935 'British Art in Industry' Exhibition. Mr L. Lee explained their policy at the CAI Inquiry into 'Design and the Designer in Industry':

'It is important to have in mind that the creation of ideas is not the exclusive possession of any single person. It is the combined endeavour of a group or team of people, each experienced in a particular branch, working together, who influence the producer. The manufacturer, the designer, the engraver, the colourist, the stylist and the research chemist all play their part.'\textsuperscript{89}

The export trade was mainly subject to commissioning from merchants, which would require in-house CPA studio staff to work with the customer. Many export markets had a much slower pace of fashion change, and needed designers who knew the requirements of the market to

\textsuperscript{85} M75/1922-28/93.
\textsuperscript{86} M75/1922-28/3.82
\textsuperscript{87} M75/1922-28/93
\textsuperscript{88} M75/1922-28/93.4
\textsuperscript{89} GD 325/ 59 Design and the Designer in Industry, Council for Art and Industry, 20/1/1937.

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make smaller changes to existing lines. In the design competition for salesmen run by the CPA in 1926, it was divided into different categories for the markets served. This did not mean that salesmen who specialised in that market were the most successful: Mr Sharwin of South Arthurlie Branch won prizes for Markets 2 (India and Ceylon), 3 (Rangoon Straits and Java), 4 (Levant, Balkans and Egypt) and 8 (East and West Africa).\(^90\) Due to the apprenticeship system, designers often entered the company at a young age and remained with it for their entire career. In 1934, two CPA designers were given gold presentation watches for 50 years of service (one of whom was 71 years old).\(^91\)

### 3.3.2.1.2 Ferguson Bros. Ltd.

The 1925 company book of Ferguson Bros. indicates that there is an active design studio:

"In another well-equipped department is the Firm's staff of designers busily engaged upon original designs for the coming season, or adapting to the Firm's needs the latest designs from Paris."\(^92\)

There is also a minute of the employment of one specific designer, George Cape, in 1935.\(^93\) This designer is named among others who are clearly freelance (such as Libert, a major Paris atelier) against design samples in the 1937-50 trial book (the only Ferguson Bros. Ltd. design source where the samples have a designer named). It is therefore unclear how many of those listed are studio or freelance. More detailed analysis of designers given in the trial book is given in Section 3.4. However, a large proportion of designs in the other sample books appear to come from a studio source, due to the close similarity of style of large series of designs (see Section 6.4.1.2).

### 3.3.2.1.3 Other dress fabric printers

The United Turkey Red Co. Ltd. minutes frequently refer to new designs being produced, but the only specific mention of the employment of designers is on the 13\(^{th}\) October 1931, which

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\(^90\) M75/1922-28/93.4.

\(^91\) M75/ Directors' Minute Book No. 15, 8/5/34 and 26/6/34.

\(^92\) *Centenary: Ferguson Brothers*, Holme Head Works, Carlisle 1824-1924, Charles Thurnam, 1924, p62.

\(^93\) DB 110/229, Directors' and Head of Departments' Minutes, 22/1/35.
states that a designer from the art school in Manchester was appointed. None of the UTR samples at the Royal Museum of Scotland have any designer information. The UTR orders appear to be mainly of a style type, from a limited range held by their agent for that market (see Section 2.6.2 and 6.5.3.1). The Turnbull & Stockdale Ltd. order books show samples with no details of designer, but clearly dress fabrics, rather than the furnishing fabric designs shown in the design books. They seem to be job printed, with the commissioning companies supplying designs. Many are close to CPA or Ferguson designs, and may be copies produced by a studio designer or regular freelance designer employed by the merchants or manufacturers ordering designs. Some studio designers were also employed by merchants, or semi-freelance designers who worked closely with the company. For example, Karl Hagedorn is noted as a designer for Blakeley and Beving (African textile merchants) in the 1917/8 DIA membership list. Merchants also used their resources in the export markets to produce designs or sources for adaptation as designs. For example, two pictorial designs sent to the United Turkey Red Co. for job printing by the United Africa Company were stated to have been designed by one of the company’s coast agents. The Balfour Report stated that:

'agents with a large native market, such as China or India, have native draughtsmen who draw designs to send to the printers as suggestions.'

3.3.2.2 Furnishing Print Design

A small proportion of the Stead McAlpin commissioned designs listed (mainly in 1934) have the designer and design price noted - 47 in total - but no details are available for whether they were employed on a freelance or studio basis by the commissioning companies. More significant results can be found from the Morton Sundour Fabrics design books and Turnbull & Stockdale engraving books, discussed below. No details are given of the studio designers in these sources, but the balance between studio and freelance designers and the type of freelance sources bought from are shown.

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94 UGD 13/5/7, Directors' and Heads of Departments' Minute Book, 13/10/31.
95 Ibid., 8/7/31.
3.3.2.2.1 Turnbull & Stockdale Ltd.

The main source of designs at Turnbull & Stockdale Ltd., according to the 1930s photo books, appears to be freelance designers. However, for some of the engraved designs, 'T & S' is noted in the photo books as the designer, with other designs described as bought from a freelancer and adapted by T & S.

Table 2.1

<table>
<thead>
<tr>
<th></th>
<th>1930</th>
<th>1933</th>
<th>1936</th>
<th>1937</th>
<th>1938</th>
<th>1939</th>
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<tbody>
<tr>
<td>Designed by T &amp; S</td>
<td>1</td>
<td>4</td>
<td>9</td>
<td>1</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>Adapted by T &amp; S</td>
<td>6</td>
<td>5</td>
<td>5</td>
<td>0</td>
<td>9</td>
<td>5</td>
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This list indicates a very small studio. However, some designs have no designer listed, and may also be studio designs. 'KS' (possibly K. Seabright) is noted as having redrawn designs from freelance studios or individuals, as though with a loose studio arrangement. The volume of designs from 'SGB' also implies a close arrangement with the company (16 in 1930, 15 in 1933, 27 in 1936, 10 in 1937, 20 in 1938 and 18 in 1939). There was also a Miss M. Turnbull and Miss Edith Turnbull (probably the same as Miss E.M. Turnbull, listed in 1933) employed as freelancers, who may be daughters of the directors.

3.3.2.2.2 Morton Sundour Fabrics Ltd.

The balance between studio and freelance designs at Morton Sundour Fabrics is shown in Figure 3.2. It indicates that there was a switch in policy towards using studio rather than freelance designers in the 1930s. A number of studio designers were employed before the establishment of the London studio in 1926: Ronald Simpson, Charles Paine in 1923-8 and Frank Gibson.97 George Walton was given a retainer from July 1927 to September 1930.98 The only reference to studio designers in the minutes was the offer of a position to Mr

Ronald D. Simpson in May 1936, on a year on year basis contract at his present salary. The London studio provided many of the designs, with two from an Edinburgh studio. This indicates that design was produced and a design approach given at a company level, with perhaps only small adaptations, scaling or colouring changes being made at the subsidiary print and dyeing companies of Standfast Dyers’ and Printers’ Ltd. and Scottish Dyers’ and Printers’ Ltd.

A. Morton & Co. Ltd. had 51% of its designs produced from freelance designers, 16% from studio designers, 31% from old documents and 2% in outside commissions over 1919-30. The annual data (Figure 3.2) shows studio designs only in 1923-4 and 1926-30, with the greatest number produced in 1926-7. The majority of the studio designs were produced by F.R. Gibson/ the London office, but three were sent from the Carlisle office in 1927 and two designed by A.B. Hunter for Edinburgh Weavers in 1929. There were also a considerable number produced from ‘old documents’, particularly in 1922-3, presumably adapted and sized by the studio. The commissions were from Story’s in 1925-6 (and 1916) and Hodge’s in 1922.

3.3.2.2.3 Other Furnishing Print Producers and Commissioners

A. Sanderson & Sons Ltd. printed furnishing fabrics, but it is not clear if any of designs noted in the Freelance Design Book were used for textiles, or whether they were entirely for the wallpaper studio (analysis of freelance and studio design production is given in Appendix 3, Figure A3.1). G.P. & J. Baker Ltd. produced mainly block print furnishing fabrics. The records of G.P. & J. Baker for block print designs between 1930 and 1939 show that: 51 designs were from the internal studio; 62 from freelancers or external studios; and 16 with nothing recorded (probably commissions).

3.3.3 Conclusion: Employment of Designers

Dress fabric print designs for the home market were needed in far greater volume per year than furnishing (closer to the design demand of wallpaper). Total numbers of studio designers are not available – the Register of Designers referred to 670 furnishing studio and independent

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99 GD 326/ 228 Directors’ Minutes, 5/5/36.
100 Information from Audrey Duck, archivist to G.P. & J. Baker, in letter of 2/3/93.
dress studio designers, but did not indicate dress fabric company studio designers. The number of full-time freelance printed textile designers working independently in the interwar period seems to have been fairly small: the Register of Designers referred to 40 such furnishing designers (though this is clearly an underestimate of the number of highly active independent designers) and in the case studies a limited number of designers recur frequently. However, there was also a large field of textile designers, decorative designers and artists who occasionally supplied designs to the industry. Some freelance designers supply designs to the wallpaper and furnishing textile industries, but very rarely combine these fields with dress fabric designing.

The proportion of designs produced by the studio and bought from freelance designers or studios varied from company to company. A small design studio would be needed for all print companies, for colourways, adaptation and other draughtsmanship, but the number of designers producing original designs in the studio is unclear (though the CPA had a large number of studio designers). Manufacturing companies usually seem to have had a design studio, with weave designs produced almost entirely by the studio and a significant proportion (though varying according to company policy) for print designs. There is little evidence for the usual practice of merchants, but since they were usually concerned with the dress fabric trade, they are likely to have used the freelance Manchester studios, possibly supplemented by studio designers. In the case studies, the dress fabric companies appear to have used their company studio to produce the majority of designs for the home market, with the remainder supplied by Parisian commercial studios and a limited number of British commercial studios and freelancers. Use of studio design in furnishing textile companies varied considerably, from minimal at Turnbull & Stockdale Ltd. to total production of roller designs by 1934 at MSF Ltd. Export market prints seem to have been produced by a fairly small group of specialist freelance designers and by specialist studio designers employed by print companies and merchants that had a particular market focus. Merchants supplemented their studio designs by sketches from agents or 'native draughtsmen' working in the market.
3.4 Demographic Analysis of Designers

3.4.1 Nationality

The perception of French dominance in printed dress fabric design was a consistent factor in examinations of design in the textile industry (see Sections 1.1.3 and 6.5.4.2). In the *Design and the Cotton Industry* report of 1929, an analysis of this condition of dominance was undertaken. The aim of this analysis was stated clearly:

‘If, as is urged, an attempt is to be made to counteract the tendency to rely unduly on foreign sources for design, so as to impress a British style and British tradition of design on British made products, it will be necessary, as a first step, to discover the reasons for French superiority in designs for dress fabrics.’

The current supremacy of French design in dress fabric was ascribed to six factors. A fundamental determinant was the longevity of French supremacy in textile design. French designers were also considered to have a psychological aptitude for designs of a type which are ‘subject to rapid changes of fashion and must be delicate, dainty and essentially feminine’, while the dominance of the British in furnishing textile design is due to the French ‘lack of superiority in designs which are durable, strong and forceful.’ This characterisation of national temperament was a long-standing stereotype, as shown in Paul Greenhalgh’s analysis of national profiles in the 1908 Franco-British Exhibition. The position of Paris as the centre of fashion was noted by the report as a further advantage of French designers, who were aided by seeing new and beautiful applied art, especially textiles, every day. A further possible factor was the opinion stated in Paris that there was a more intensive study of natural forms in the training of the French designer. Finally, the geographical concentration of Paris ateliers within a restricted area was said to be a distinct advantage in encouraging buyers to visit, in comparison with Britain, where commercial design studios had no such concentration. Analysis of actual design differences and trends related to national source of the case study companies, is given in Chapter 6. The Balfour report stated that the reason given by managers for buying printed textile designs from Paris was that Paris was the centre of design, as Manchester for manufacturing. The environment was indicated as the explanation of this:

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102 Ibid., pp9-10.
'the Manchester designers have little chance of seeing fashion or beauty, whereas the Parisian has only to walk along the streets or look into shop windows to gain inspiration. Frenchmen working in Manchester are said to lose their native gifts after three or four years.'

In the furnishing textile case study companies, the great majority of designs were purchased from British freelance designers. Analysis of the Turnbull & Stockdale Ltd. design photo books (1930, 1933, 1936, 1937, 1938 and 1939) indicates that 78% of the designs were produced by British designers (Figure 3.4). Some designs (6.5%) were bought from German designers such as Prof. Aufseeser and Willy Herrmann, with 10% of the designs supplied from the Paris studios of Libert, Wolfsperger, Feldman and others. A sudden increase in purchase of French and German designs is shown in 1937 (Figure 3.3). A. Morton & Co. Ltd. design details are available from 1919-30 (Figures 3.5-6). They show a higher proportion of freelance designs supplied from Parisian sources (35/79, or 44%), with the remaining 56% from British freelance studios. This may be partly due to the difference in period covered (an emphasis on British design and production was common in the 1930s, promoted by the Government through the 'Buy British' campaign), but also to company policy (the Englishness of their designs was publicised by Turnbull & Stockdale Ltd. in their advertising: see Section 5.4.5). Morton Sundour Fabrics Ltd. had 30% French designs (26/87), 7% German (6/87) and 63% British designs, in the freelance designs from 1923-34 for which a designer could be identified (Figure 3.8). Of the commissioned prints produced by Stead McAlpin, very few have a designer noted for particular designs (Figures 3.9-10). Of these, 27% (12/45) were French, 2% German (1/45) and the others English (71%), over the 1932-4 period. It can be seen in Figure 3.8 that some companies were more interested in French designs (Stead McAlpin Open designs, Denby, W. O’Hanlon, Ramm and RDS), while others (particularly Liberty) used entirely British designs. However, this sample should be treated with caution, due to the small size of the samples for each company.

105 Fauser & Gaudioz (12), Libert (5), Paul Dupont (5), Mme de Streel (4), R. Ruepp (3), Floquin (2), Wilhelm & Wolfsperger (1), Defosse (1) and Auguste Logeat (1).
Ferguson Bros. Ltd. has designers noted in semi-legible scribbles in the trial book. Analysis of the entries is shown in Figure 3.11. Of the 313 designs with a designer noted from October 1937 to 1940, 135 were French, 22 were probably French (total French 63% of legible entries), 89 were British (38 by G. Cape, the studio designer), 3 were probably British (total British 37%) and the remaining entries are unclear. When only the legible freelance designers are considered, 76% of the designs were French and 24% British. From this evidence, Ferguson Bros. appears to have a higher use of French designers than the CPA. However, the lack of any designer details for the sample books, in which the similarity of style implies a majority of designs were produced by a studio source, makes this a tentative conclusion.

For the CPA, only the 1934-9 Potter's Engraving Book had any designers noted. For a period in March 1934, clear names of identifiable designers are given, while for a significant proportion of the remainder scrawled initials are given. ‘N & H’, or Newbould & Haughton, is a designer, but some of the others may refer to companies (‘A’ could be Amazon, a company engaging designs). In the 1934 period, of a total of 58 designs with named designers, 35 were from French designers, 6 probably French (Levy, Landwerlin), 16 from British designers (all N & H), one redrawn by N & H and one by ‘C Atelier’, which may be a studio design. This implies a very high proportion of French freelance design sources. Of the freelance designers referred to in the minutes and other records, 27 were Paris studios. However, overall analysis of the Engraving Book, including scrawled notes, gives 19% with a possible designer given, of which 4% were French, 7% were N & H and 7% were unidentified initials. Analysis of design source of those samples with designers given is shown in Figure 3.12. If the samples with no designer noted are by studio designers, it would indicate that most designs were studio produced, with some supplied by one independent British studio, others from a small number of possible additional studios and a smaller group from a range of French sources.

107 Mainly Libert, Mey, Schweitzer, Kittler and Du Helden.
108 The nearest interpretation of the handwriting is Sternbludgn and Schoch. Other examples are Kuny, Schunyer Alham, Rihomoni and Odgay: no information on these or more probable similar names has occurred during the research.
These examples can be compared with Pevsner's figures on the proportion of foreign designs used by the textile companies he surveyed. He states that they were: 5%; 5-10%; 35%; 65% (a dress fabric company – these designs were almost all French) and almost 100%.\textsuperscript{110} The variation between companies and greater emphasis on French design in dress fabric companies was supported by the case study analysis. Comparison with the Sanderson analysis of wallpaper design books shows use of many of the same British freelancers and French and German studios as the furnishing textile sector. International sources of freelance designs were: 58% British, 25% French, 15% German and 2% other (Austrian, Belgian, Dutch, Swiss, Swedish, Japanese, Canadian, American), given in Appendix 3, Figures A3.13-14. The printed furnishing textile and wallpaper systems of taste formation overlap, in using some of the same sources of designs. Comparison of the differences in design terms between printed dress and furnishing fabrics is given in Chapter 6.

3.4.2 Geographic Distribution of British Designers

The Designers Database gives a detailed and individual description of the evolving contemporary professional situation of textile designers in the period. Analysis of the 330 textile designers in Britain with known addresses, who worked in printed textile design, or for whom there is no clear data on whether they are printed or woven textile specialists, reveals a concentration of designers in London (144), with a secondary cluster in Manchester (69). The Scottish printed textiles industry produced a group of five designers in Glasgow, four in Edinburgh and eight from other areas of Scotland. There are no printed textile designers listed in Wales and only one in Northern Ireland. Some small clusters are due to related trades, where designers may work in a freelance capacity in more than one industry, in Nottingham (8) for lace and Kidderminster (2) for carpets. The distribution of the remaining designers is fairly widespread, although there is a concentration in the counties around London and near Manchester. A county division of the remaining designers gives: Surrey (15), Middlesex (11), Essex (9), Hertfordshire (8), Berkshire (6), Kent (6), Yorkshire (6), Cheshire (6), Lancashire (5), Suffolk (5), Sussex (4), Buckinghamshire (3), Oxfordshire (3), Cambridgeshire (2), Worcestershire (2), Staffordshire (2), Cornwall (2), Derbyshire (1), Avon (1), Hampshire (1), Dorsetshire (1), Somerset (1) and Devon (1). There are no textile designers listed in Wiltshire, Bedfordshire, Norfolk, Northamptonshire, Gloucestershire, Herefordshire, Shropshire,

\textsuperscript{110}Pevsner, N. op. cit., p50.
Warwickshire, Leicestershire, Lincolnshire, Humberside, County Durham, Cumbria and Northumbria. However, for most studio designers (111/120 British printed textile studio designers listed) there is no address given in the company records, giving a partial impression of the overall distribution.

Within Manchester, the majority of designers were located in a fairly small area in the centre of the city, around Portland and Oxford Streets.\footnote{There were 8 in Oxford Street (3 in Imperial Buildings), 5 in Portland Street, 5 in Mosley Street, 2 in York Street (the continuation of Mosley Street), 4 in George Street and 22 others in the immediately neighbouring streets.} This is the same key area in which textile merchants, production companies and print companies also had offices. Only five designers were based outside the centre of the city. This is similar to the situation in Nottingham, where many of the (lace industry) designers were concentrated in the central street area, often in chambers.\footnote{There were 8 in Oxford Street (3 in Imperial Buildings), 5 in Portland Street, 5 in Mosley Street, 2 in York Street (the continuation of Mosley Street), 4 in George Street and 22 others in the immediately neighbouring streets.} In London, the pattern is less nucleated, but there were designers working in the centre (13 in W.1, 6 in W.2, 8 in WC.1) and groups in Chiswick (14 in W.4, 6 in W.5), Holland Park (6 in W.11, 6 in W.14), Chelsea (11 in SW.3), and Hampstead (10 in NW.3). This implies that there was in Manchester, and to some extent in London, a geographical concentration of designers. Ease of access due to locality would be a greater advantage to the Manchester designers than the Paris ateliers discussed in the *Design and the Cotton Industry* report.

Analysis of the geographic distribution of freelance designers employed by the case study companies indicates use of a small number of Manchester studios to produce the majority of the British freelance dress designs. In the Ferguson Bros. Ltd. trial book, 26/53 of the designs from British designers were sourced from Manchester (Sidney Plaskett and Newbould & Haughton), with 4 designs from London (Mabel Lucy Attwell), probably 2 from other (if Frank Ormrod, Berkshire and if Morris is Cedric Morris, of Essex) and 17 from designers with no known address: see Figure 3.11. Overall, 81% of Ferguson Bros. British freelance designs with a known address were sourced from Manchester. Of the three British designers noted in the CPA Engraving Book, two were from Manchester (Newbould & Haughton and Miss Muriel Orton), with one design from Campbell (a J.C.T. Campbell, textile designer, is based in Greenock). Thus, 98.8% of the known CPA British freelance designs came from
Manchester (Figure 3.12). By contrast, sources of furnishing textile prints were primarily from London and the surrounding Home counties. MSF Ltd. had 42% of its British freelance designs supplied from London designers, 7% from Manchester (Miss D. Hutton and Headon Designs) and 46% from other British sources (S. Mawson and J.R. Cary in Surrey, J.S. Wheelwright in Hertfordshire). A. Morton & Co. Ltd. had 70% of its British freelance designs supplied from London designers, none from Manchester and 16% from other British sources in Surrey and Kent. Of their designs with a British freelance designer of known address listed, Turnbull & Stockdale Ltd. had 61% of designs sourced from London, 1% from Manchester and 38% from other sources (three designers in Berkshire, in Surrey and in Middlesex; two in Buckinghamshire, in Essex and in Kent; and one in Oxfordshire).

3.4.3 Gender

The only overall indication of gender proportions of textile designers is given by the National Register of Industrial Art Designers: their analysis stated that 85% of the designers were female in the 30 independent Manchester design studios producing for the dress fabric industry, although the heads of studios were almost always male.\(^{113}\) However, the 1943 date could be an indication of a greater proportion of female designers at this time than was usual during the interwar period due to the wartime date. In the Designer Database, of the individual textile designers listed, 212 were female, 188 male, 137 not defined (surname and initials given: majority likely to be male) and 30 commercial studios within Britain. The proportion of known female textile designers working in Britain can therefore be given as 37% of the total. However, this should not be taken as an absolute figure: designers working in company and commercial studios are often not named individually and designers working freelance on a small scale or concentrating on companies not covered in the case studies may not have appeared during the research. An increase in numbers of active female freelance designers is shown during the interwar period, using this database (1917-24: 24 designers; 1925-9: 30 designers; 1930-4: 31 designers; 1935-40: 106 designers). However, this data is biased by the Hayes Marshall list, which gives detailed information for 1939. Christine Boydell has stated that the ratio of men and women working in the textile industry was roughly equal in the

\(^{112}\) Of the 30 designers in Nottingham, 15 were in the central area (6 in chambers).

\(^{113}\) PRO BT 64/3464, Letter from the Registrar of the National Register of Industrial Art Designers, 15/12/43.
interwar period,

though she also comments that women were only making an impact as designers of textiles for industry from about 1934. The evidence given is an analysis of the index of freelance designers given by Hayes Marshall in 1939, in which 103/240 designers could be identified as female, and case study analysis of printed textile designs purchased from freelance designers by furnishing textile companies in the 1930s.

Case study analysis of the gender balance of pattern designers in employment, pay levels and differentiation in type of print process has been given by Christine Boydell at Warner & Sons Ltd. Christine Boydell states that probably as many women as men were designing textiles in the 1930s, but they were mainly freelancers, and since they were working especially in screen print, were paid less on average than men. Screen print designs paid less than roller print, perhaps because less technical knowledge and experience was needed. They needed much less investment than block or roller prints and so made much shorter print runs more profitable. The only evidence of this gender bias in production type is from Warner & Sons Ltd. At Warners between 1929-40,

43 designs were bought from 17 women and 9 designs from 4 men for screen prints;
7 designs from 5 women and 13 designs from 9 men for roller print;
6 designs from 7 women and 9 designs from 5 men in block print.

There was therefore a total of 56 designs by female freelancers and 31 by male, in Warner and Sons between 1929-1940. Any broad gender inequality throughout the industry is unproven. Enid Marx comments that she was paid less than male colleagues for freelance design, giving an example of book jacket designs rather than textile design. A differential in the status, volume of work and pay of male and female freelance graphic designers at the Curwen Press is indicated by Fiona Hackney: however, the differential appears to have been primarily due to

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116 Ibid.
118 Ibid., pp403-7.
the prominence and expertise of the designer, rather than their gender. This analysis can be compared to the data from the Designer Database and case study companies.

Analysis of the furnishing case study design records shows that: in the A. Morton design book, there were 16 male freelance designers and 3 female listed between 1918 and 1930, with a total of 57 designs by male designers, 6 by female and 31 by freelance studios. The Morton Sundour design book has 17 male freelance designers and 4 female designers from 1923 to 1934, with a total of 70 designs by male designers, 8 by female and 19 by studios. In the Stead McAlpin records, only surnames or names of studios are noted. They are fairly common designer names however, so a reasonable interpretation is that: 10 commercial studios were used (25 designs), 9 male designers (19 designs) and one female designer (if ‘Hunton’ is Mrs Gordon Hunton: 2 designs). At Turnbull & Stockdale Ltd., the design photo books state designers, but often only as surnames, resulting in a fairly low level of safe attribution (see Figures 3.3-4). For the designs with a fairly high degree of certainty of attribution (Figure 3.13), there was a 54% male/ 46% female division over the 1930s (the division in number of designers was very similar: 55% male/ 45% female).

At the CPA, the list of studio designers in 1928 shows that there were 9 women out of a total of 37 designers in the Atelier Department and 30 out of a total of 62 in the other departments. This may imply that there was a higher proportion of women in lower level design jobs: the subsidiary companies would have required new colourways, sizing designs up or down and other such modifications of designs. The engraving book gives some designer names, but all studios, rather than individual freelancers: either French commercial studios or the Manchester Newbould & Haughton studio. Some freelancers were used (Section 3.3.2.1.1), but no adequate data samples are available. Ferguson Bros. Ltd. trial book notes a range of French and British studios and freelancers, but of those individual freelancers with attributable gender, there is one female designer (Mabel Lucie Attwell: 4 designs) and two male designers (John Armstrong and Sidney M. Plaskett: 15 designs).

122 M75/ 1922-28/ 93.
At Arthur Sanderson and Sons Ltd., the position of Head of Studio for the Uxbridge fabric studio was filled by Miss Mea Angerer (previously a freelance designer in Vienna, with the Wiener Werkstatte) from 1928-9, who was paid 80s per week initially, later rising to 100s.123 The other three designers – one female, two male - with wages noted during 1927-9 (the period in which they appear in the Wages Book) were paid between 15 and 40s. Barton Thomas became Head of Studio during the early 1930s, but no wage figures are available. Eric Gilboy, who worked in the textile studio 1933-9, began as an apprentice in the wallpaper studio at 10s/week.124 This indicates that pay is based on experience, with no gender differential. In the design books (which appear to be for the Perivale wallpaper section), the proportion of designs bought from women at (12.18%) is considerably higher than those produced by women in the studio (1.5%). In total, there were 3 female studio designers and 49 male designers listed; 80 female freelancers and 199 male freelancers (Sandersons had 303 designs by female freelance designers and 1569 by male in this period). There appears to have been no difference in pay for freelance designs due to gender: the difference appears to be due to quality and complexity of the design - there is a loose relationship between number of colours and price of design.

3.4.4 Conclusion: Demographic Analysis of Designers

Overall, furnishing print has a far lower proportion of French design sources than dress print design (as was stated in the Balfour Report), with the majority sourced from established British design studios. Dress print design has a significant proportion of designs sourced from Paris, but the unknown number of studio designs makes it difficult to make any definitive assessment. The British freelance designers supplying the printed furnishing textile industry were based in London or the counties around London, while the dress fabric print industry was supplied by freelance designers predominantly based in Manchester. This establishes that the sources of design were separate (apart from occasional examples, such as the Libert studio, which supplied both sectors) and that the constructions of taste and influence functioning in dress and furnishing prints were independent.

An indication of the relative proportions of female to male printed textile designers active in

123 Wages Book, A. Sanderson & Sons Ltd. archive.
the interwar period as 37% is given by the Designers Database, though the proportion of female designers appears to have increased during the interwar period. Gender analysis demonstrates that there was a great variation between companies in the proportion and seniority of male and female designers. In the small studios of MSF and Ferguson, named designers were male; in the Sanderson fabric studio, the proportion of female to male designers was equal during the period for which accurate records exist. The Register of Designers analysis of independent dress fabric studios and the variation between the CPA Atelier and other studios indicates that there it was more common for female designers to work at a lower level in the studio. It is likely that many of the female designers were newly trained (see gender statistics in art school education) and were therefore less experienced and well established. In analysis of freelance designers used by the case-study examples, Warner Bros. is the only company to have a greater number of freelance designs supplied by female designers. A. Morton, MSF and Stead McAlpin had far lower proportions of designs by women, implying dependence on a small number of (mainly male) designers throughout the period. Of the attributable designs at Turnbull & Stockdale Ltd., the gender division was far closer, though still with a male majority. The small number of attributable British freelance designs for Ferguson Bros. Ltd. and the CPA, and dependence on studios rather than individual designers, limits the relevance of gender analysis of freelance designers in this sector.

124 Oral history transcript, interview 11/4/91, A. Sanderson & Sons Ltd. archive.
3.5 Salary of Designers

3.5.1 Studio designers

The 1928 Balfour Committee reported that at a design studio (such as the Silver Studio) an apprentice started at a salary of 8-10s a week.\(^{125}\) By 23, a full wage as a designer would be paid, of about £3 10s a week. Regular increases and bonuses could bring this to a maximum of £6 per week (£336 per year).\(^{126}\) The finishers were paid £2 17s 6d per week (£161 per year). The Report also stated that studio designers attached to companies are paid at the same rates and work under the same conditions as those at the freelance studios. In the report by the Council for Art and Industry, *Design and the Designer in Industry* in 1937 (following the Inquiry into Art in Industry, established in February 1935), similar levels of pay are quoted.\(^{127}\)

An apprentice would start at 10s/ week, rising to £2-3/ week as they become useful. Fully trained designers were paid between £3 and £6 per week, according to ability and length of service. Some higher posts were available, with salaries of £350-500 a year, with a few posts as chief designer in the large design rooms of £800-1,000 a year. The National Register of Designers analysis of studio designer employment in the dress fabric sector stated that there were about 20 big firms, who paid their studio principals up to £750, with around 50 studio designers paid at the £3-400 level.\(^{128}\) This indicates that the top level of salary attainable by designers rose over the inter-war period. The CAI Report recommended that a greater number of posts for high level designers should be made available, on salaries of £350-500, since many talented art school students were choosing teaching for economic reasons. It also advised that ‘in all industries where artistic design plays a really important part, a highly trained industrial artist should be given a post of primary importance in the formulation of the manufacturing and commercial policy of the firm.’\(^{129}\)

\(^{126}\) These figures are also quoted in *Design and the Cotton Industry*, op. cit., p7.
\(^{128}\) BT 64/ 3464 letter from Registrar of the National Register of Designers, 15/12/43.
\(^{129}\) GD 325/ 59, op. cit.
A comparison can be made between these rates given and the wages of designers in the case study companies studied. Some of the studio designers at Sandersons appear in the wages book, from 1927. Mr Cook was paid 30 shillings per week (£1 10s) from 17th February 1927, and Mr Randall was paid 15 s. When Mr Randall left on 27th October, Mr Cook’s pay was increased to 40 s. (£2) per week. On 12th April 1928 Mea Angerer became Head Designer of Eton Rural Fabrics at a rate of 80 s (£4) per week, which was increased to 100 s (£5) on 5th July. On the 5th August Mr Cook left, and Miss Thomas started, being paid 19s 8d (almost £1) per week. Mea left on 11th April 1929, and Miss Thomas on 4th July 1929. In the oral history interview with Sanderson archivists, Eric Gilboy stated that he was paid 10s per week as an apprentice in 1932 (stretching canvases and mixing colours for Walter Francis, head of the wallpaper design studio) and £3 (60s) as a full wage from 1933/4. 130 This indicates that Miss Thomas and Mr Randall were also apprentices, although with more experience. Mea Angerer would have been given a higher position and wage due to her art school education and her prestige as a Wiener Werkstatte designer. The importance given to design was emphasised further when Barton Thomas joined as Head of Design at ERF in late 1929. He was invited in when Ivan Sanderson took over the Fabrics side of Sandersons at Uxbridge, but insisted on a share in the profits. This indicates that he must have been given a significant number of shares, an unusual development in a family company.

At Ferguson Bros., there was apparently a studio of designers, but the only one with salary details given is Mr George Cape, who is noted in the minutes on the 22nd January 1936 as being put on the staff as a designer at a salary of £232 per year. He was also awarded a pension scheme annuity of £200, of which 58% would be paid by the firm. This is equivalent to £4 2s 10d per week, with the pension in addition, and indicates that he was an experienced designer when he joined the company staff. Ferguson Bros. seems to have been unusual in providing pension schemes.

130 Oral history transcript of interview, 11/4/91, A. Sanderson & Sons Ltd. archive.
Managers of the Atelier Department at the CPA were given a Counterpart Service Agreement. These agreements do not give the salary or length of employment. A memo on 5th December 1923 states that Hugh G. Davidson and Frank Goldthorp have been appointed Joint Managers, but the Counterpart Agreements date from 19th May 1924, 21st May 1927 and 28th March 1928: presumably Frank Goldthorp continued to be employed, since there is a note in 1935 that he was in bed with severe influenza.\(^{131}\) Henry Whatham, previously a freelance designer specialising in African styles, was appointed to Broad Oak Atelier at a salary of £250 p.a. in May 1933. In July 1933, D. Hodgkinson was given a two-year contract as Head Designer at Rossendale Printing Co. Ltd., at £275 p.a. for the first year and £300 for the second.\(^{132}\) Mr A.S.F. Watson, a designer in the Scottish Atelier (the Love Clough Printing Co. Ltd.), was retired in 1930, from a salary of £400 p.a.\(^{133}\) Length of service within the company is indicated by the presentation of gold watches to commemorate 50 years of service, to Mr H. Bate (designer at Schwabe, aged 71) and Mr G. Lee (designer in the Cretonne department) in 1934.\(^{134}\)

Turnbull & Stockdale Ltd. records include total wage/ salary figures, but no specific information on designer’s salaries. The Morton Sundour Fabrics minutes state on 5th May 1936 that Mr R.D. Simpson was offered a new year on year basis contract at his present salary, but no figures are given. George Walton was given a retainer for three years from 1927, at £500 p.a.\(^{135}\) The usual salary for a high quality designer appears to have been £230-300, from this sample (£300 for D. Hodgkinson, £280 for Mea Angerer, £250 for Henry Whatham and £232 with pension contributions for George Cape), comparatively low for the figures given by the CAI. The maximum salary for a studio designer is the £400 for Mr Watson, at the CPA. However, the retainer of £500 in 1928-30 paid to George Walton is the maximum paid to a designer by the case study companies. In comparison, salesmen, engineers and managers were paid £400-500 at Ferguson Bros. Ltd. (see Appendix 2.2). At the CPA, a member of the Advertising Department was paid £500 p.a., although it is not clear whether she was a designer or administrator/ manager, while Miss Bohn received £575 p.a. for sending advice.

\(^{131}\) M75/ 1929-39/ 1.82, 31/5/35.
\(^{132}\) M75/ Director’s Minute Book, No. 15, 31/7/33.
\(^{133}\) M75/ 1929-39/ 1.82, 3/10/31 and 10/11/32.
\(^{134}\) M75/ Director’s Minute Book, No. 16, 8/5/34 and 26/6/34.
\(^{135}\) Moon, K. op. cit., p172.
and information on the trend of fashions in America.\textsuperscript{136} Mr Kipping, manager of the Paris Atelier, was retired in 1933, paid half his salary for the following year and £300 p.a. thereafter as a retiring allowance: implying that his salary was more than £600.\textsuperscript{137}

3.5.2 Contracts and Royalties

No information on the economic cost of the Sanderson contracts is given in the design books. Examples of the CPA short-term contracts are the exclusive contracts given in 1933 to R.N. Eaton and Henry Whatham in Manchester and Pateau et Cie (F. Paiton and two daughters) who were specialist African style designers, and to Guest & Leyland who were Indian market designers.\textsuperscript{138} The contract with Guest & Leyland guaranteed £250 p.a. minimum value of work for two years. R.N. Eaton was guaranteed work of a value of £4 per week and Pateau et Cie work to a value of £600 p.a. with an additional retainer of £50 p.a.: both three year agreements.

At Warners, royalties were paid to Marion Dorn (in 1934 she received 3d/ yard sold, rising to 6d in 1937), J.S. Wheelwright (in 1932 he was paid a 10% royalty on several screen prints) and Alice H. Umpleby (who was paid a royalty of 6d/ yard for one design in 1936.\textsuperscript{139} The royalties were only given for screen prints: J.S. Wheelwright was paid a flat fee for roller print designs.

3.5.3 Freelance Payments

The report on the \textit{Design and the Cotton Industry} in 1929 stated that a normal price for printed dress fabric designs was £4, while furnishing fabric print designs were about £12 or £15.\textsuperscript{140} Pevsner reports that in his visit to two dress fabric producers, he was told that prices for

\begin{itemize}
  \item [\textsuperscript{136}]M75/ Director’s Minute Book, No. 15, 21/11/33 and 5/9/33.
  \item [\textsuperscript{137}]Ibid., 26/9/33 and 1922-8/93.
  \item [\textsuperscript{138}]M75/ Director’s Minute Book, No. 15, 16/5/33.
  \item [\textsuperscript{139}]Boydell, C. \textit{Marion Dorn: A Study of the Working Methods of the Female Professional Textile Designer in the 1920s and 1930s}, Huddersfield University, 1992 (PhD thesis).
  \item [\textsuperscript{140}]\textit{Design and the Cotton Industry}, op. cit., p8.
\end{itemize}
designs varied from £3-20, with sketches fetching £1-2.\textsuperscript{141} For furnishing fabrics, four companies were visited. The prices of designs were generally £7-10 in one company, with some up to £15; varied from £3 to £15, but generally £7-10 in another; £5-15 in another; and £8-10 in the last company. The highest fees were paid to freelance artists of some renown, who would usually receive £18-20 for designs.\textsuperscript{142} A price of £5 6s for student freelance designs is quoted in the advertisement by the Textile Studio in 1937 (Figure 3.1). Based on analysis of freelance designs purchased by Warner & Sons from 1929-40, Christine Boydell states that a higher price was paid for roller print designs than screen print designs.\textsuperscript{143} She also states that since female designers dominated the production of designs for screen print textiles, women were, on average, earning less than their male counterparts.\textsuperscript{144}

In the design records of the case study companies, the proportion of designs or samples with the cost of the design noted is small. In the 1930 Turnbull & Stockdale photo books, cost is given for 36 of the engraved print designs. They vary from £4 8s to £23 2s (the most common payments were 18, 9, 10 or 12 guineas). The highest price designs were produced by the Haward studio, J.S. Rigby, (Mrs) Hunton and the Libert studio. There appears to be a link between higher prices of designs and the number of colours in the design, implying greater expense in printing and possibly greater complexity of the design (average price of designs of 5-8 colours was £9 2s; of 10-12 colours was £15 7s). The later photo books do not have cost of design noted. However, the cost of the 1933 Modernist designs of Christopher Heal is given in an incident noted by Susanna Goodden. She states that Mr Turnbull was shown some textile designs (by Christopher Heal, who was then at Cambridge) when he called on Ambrose Heal with their new spring range. He offered 8 guineas per design (£8 8s), ‘the top price an established designer could expect at the time.’\textsuperscript{145} A similar range of design prices occurs in the Stead McAlpin order book, of which 33 entries have design cost noted. These vary from £2 2s 6d to £18 18s, with the most common prices 8, 10, 12 and 14 guineas. The A. Morton & Co. block print design book has 24 designs with design cost noted. These were generally at a higher price level, varying from £4 4s to £50: the highest prices went to designs by Mme de Streel, followed by the Haward studio and Paul Dupont. The most common price was £29 8s,

\textsuperscript{141} Pevsner, N. op. cit., p49.
\textsuperscript{142} Ibid., p50.
\textsuperscript{143} Boydell, C. op. cit., p168.
\textsuperscript{144} Ibid., pp170-171.
with 12 falling from £20-29, and 5 from £30-37. 68 of the MSF Ltd. designs for engraving are
given with prices, varying from £2 2s to £42, with the highest prices going for designs by JS
Wheelwright, followed by the Haward studio and Mlle Bricard (with one design in the £14+
range from the Libert and Dupont studios). The most common prices were 12 and 10 guineas.
Unfortunately, there was very little information on freelance dress print designs. Ferguson
Bros. has prices listed by designs in the 1937-50 trial book, but they appear to be engraving
costs rather than design costs. The CPA sample books do not state design costs. No examples
of prices of design for roller and screen print processes purchased by the same company are
available from these case studies (to compare with the Warner findings by Christine Boydell).
Comparison of block and roller print designs by the two Morton companies (clearly operating
in co-operation, since F.R. Gibson works for both, in the London studio), indicates that block
print designs were usually more expensive than engraved roller print designs.

A broader sample of freelance pattern design prices is given in the analysis of the Sanderson
design book (given in Appendix 3). This indicates that prices of freelance wallpaper designs
were generally cheaper than the Turnbull & Stockdale textile designs. They varied between 1s
and £105, but the most common price was £6 6s, with prices generally between £2 and £8 8s
(see Figure A.3.8).

3.5.4 Conclusion: Salary and Freelance Payment of Designers

The standard level of pay for an experienced studio textile designer appears to have been
£230-300 during the interwar period, but the level paid to studio heads and studio managers
rose significantly. The lower proportion of female designers in senior posts (Section 3.4)
would result in lower average pay, but there is no evidence for a systematic lower rate for
women, as was usual in the interwar period (see Appendix 2.2). There appears to have been a
higher level of prices for freelance designs of printed furnishing textiles than dress fabrics, as
stated by the 1929 Design and the Cotton Industry report and corroborated by the furnishing
textile design costs, but dress fabric design prices were not available from the case studies.
There were significant differences in the price level paid for designs by different furnishing

print companies, with an approximate link between the complexity in number of colours/rollers and price. A variation between price of designs for roller and screen print processes at Warner & Sons is indicated by Christine Boydell, with contrasting average prices for block and engraved roller prints indicated from the Morton records, but insufficient evidence is available to extend the analysis to other companies.
3.6 Training of Designers

3.6.1 Industrial Training

Traditionally, designers were trained as apprentices within a company, entering direct from Elementary Schools. The *Design and the Cotton Industry* report in 1929 stated that:

>'As a rule, neither the heads of studios nor their designers have had full-time art school training, and some of them have had no art school training at all.' \(^{146}\)

This is supported by Capt. W. Turnbull:

>'In the main, the textile printer has not in the past looked to the art schools to supply him with recruits for his own studio — in lesser degree, the same can be said of the commercial outside studios. The reason given is that the teaching is not sufficiently practical.' \(^{147}\)

Apprentices would be trained by being set to draw flowers, copy designs and do odd jobs in the studio, becoming designers at a full rate of pay in five or six years. \(^{148}\) Eric Gilboy came when 15 as apprentice to A. Sanderson & Sons Ltd. in 1932, initially stretching canvases and mixing colours for the wallpaper studio. \(^{149}\) He was sent to the Victoria & Albert Museum to study textiles and to the more design-conscious department stores (Waring & Gillow, John Lewis Partnership, Heals) to see 'a wider scope of things.' \(^{150}\) There was also an informal education in art and design from the head of the textile studio, Barton Thomas, who showed and talked to him about William Morris designs, Turner paintings and the Impressionists. \(^{151}\) Improvements in the facilities for training of the CPA were agreed in March 1924, with funds allocated for the provision and furnishing of a room for training colourists, where the effects of new furnishing or dress fabrics could be studied. \(^{152}\) This type of industrial training would often be supplemented with part-time art school classes of at least 6 hours per week, usually in the evenings. In 1927/8, there were 19,501 such part-time industrial students attending art

\(^{146}\) _Design and the Cotton Industry_, op. cit., p7.


\(^{148}\) _Design and the Cotton Industry_, op. cit., p7.

\(^{149}\) Oral history transcript of interview with Eric Gilboy (textile designer), 11/4/91, A. Sanderson & Sons Ltd. archive.

\(^{150}\) Ibid., p27.

\(^{151}\) Ibid., p7 and p10

\(^{152}\) M75/ Director's Minute Book, No. 8, 18/3/24.
In 1926-7, there were approximately 1,300 evening students, already engaged in industry, enrolled in textile design classes at the 31 art schools of Lancashire and Cheshire and many others taking similar classes in the Technical Schools. However, these courses were a subsidiary part of a technical training in woven textiles, which led up to the Final Examinations, Section A (Applied Design) of the City and Guilds of London Institute. At Manchester Art School, there were 47 part-time evening and 2 part-time day students in 1926-7 employed as textile designers or engravers (41 cotton print designers). In 1935, there were 39 part-time students in cotton print design at the Manchester School of Art.

Many freelance designers seem to have been trained as part of a family trade. Extended designer families may improve the chances of a woman becoming a designer. For example, Miss Thomas of the Sanderson textile studio may be a relation of Barton Thomas (a freelancer who became Head of Design) or of James, Harold and Gerald Thomas (all at the same address) who worked freelance for Sanderson's. There are also married designers, in which both work as freelancers: examples are Gladys and James Barraclough, Olive and Joseph Bilbie and Lucy and John Revel. There are other groups with the same surnames that may be related, but no information is available. However, in Nottingham where extensive designer families are shown in the trade directories (Binns, Elliott, Holmes, Underwood and Wragg families at the same address; further investigation would be needed to find family members living apart), there is an unusually low proportion of female designers. This could be due to traditional male domination of the lace trade, although as often both partners are listed in the electoral register at the office address, it implies that the woman is not trained as a designer although working in the business. The social status as breadwinner and the occupation of other family members is shown by the local business/residential/partner vote given in the electoral register.

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153 PRO ED 24/608: Notes by the Principal Assistant Secretary on English Art Schools.
155 Ibid., p20.
156 Pevsner, N. op. cit., p142.
An informal route into freelance furnishing textile design is indicated in the advertisement in *The Studio* in 1937 (Figure 3.1). Postal tuition in cretonne designing was offered to anyone who could paint flowers, by a freelance textile studio, which would also sell the designs. Access to work as a freelance designer on an independent, casual basis for those readers of *The Studio* with the traditional feminine accomplishment of the artistically inclined amateur (flower painting) opened the field to a wide constituency of middle class women without a formal apprenticeship or art school training in design.

### 3.6.2 Art School Education

#### 3.6.2.1 Structure of Art School Education

The development of Junior Art Departments, which took pupils from elementary schools till they left at 16 to become apprentices, was an attempt to improve the quality of industry trained designers (in 1923-4, only 12.6% of children leaving elementary school continued with full-time education¹⁵⁷). By 1927/8, about 30 Junior Art Departments had been established (there were 225 state-aided art schools in 1929/30), with a total of 1,909 students.¹⁵⁸ The Manchester Art School established an Art Industries' Preparatory course in 1915 for 14-16 year olds (i.e. equivalent to Junior Art Departments). In 1926-7, there were 29 students in the first year and 31 in the second year.¹⁵⁹ There was a small but steady demand every session for students from this course as apprentice designers, ‘but the industry as a whole does not appear to be fully alive to the usefulness of such a course in providing selected apprentices.’¹⁶⁰ The acceptance of apprenticeship as standard practice is indicated by the example of Morris Dupont of Paris, who sent his son Mars to the Silver Studio in England for a year’s apprenticeship.¹⁶¹

Senior students usually attended their local art schools from 16, 17 or 18, transferring from Secondary school or the Junior Art Departments, though there were some older students. For entrance to Croydon School of Art in 1924, six School Certificates were required, samples of artwork had to be shown and a ‘sitting test’ taken.¹⁶² A significant development was the far

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¹⁵⁸ PRO ED 24/ 608, op. cit.
¹⁶⁰ Ibid.
greater involvement of female designers during the period, with more female students than male at art school in 1927/8 and significantly more full time senior students.\footnote{In 1927/8, there were more female students attending art school than male (27,490 female: 26,536 male), and there were more full-time senior students (3,402 female: 1,510 male): most of the male students were part-time industrial apprentices (16,419). Notes by the Principal Assistant Secretary to the Board of Education on English Art Schools: Public Record Office, ED 24/608.} After an initial training, able students were expected to be passed on from small provincial art schools to larger ‘well-found’ art schools for specialist training, though this was frequently prevented due to the lack of LEA funding.\footnote{Design and the Cotton Industry, op. cit., p27.} There were two classes for textile design in the senior department of the Manchester School of Art: for the creative artist (taught by a freelance textile designer) and for the designer craftsman/finisher (the teacher was previously employed in a calico-printing firm’s studio).\footnote{Ibid., p21.} Cost of art school fees was a barrier to poorer students, who would be paid wages as an apprentice, although at a low rate. The education of female students could also fall a victim to the priority in funding given to male education: Geraldine Baines (née Fisher) was withdrawn from full-time art school after the Intermediate Arts Exam (three further years of full-time study were needed for an Art Teacher’s Certificate) due to the cost of art school fees, when the pressure of her brother’s Oxford education costs became too high. She continued for a year part-time, taking ‘the afternoon and evening classes only, which were on far cheaper terms.’\footnote{Baines, G., op. cit., p63. Mr Gilroy, the Illustrations Master at Croydon School of Art, helped her find work illustrating children’s books, designing Showcards, Illuminated Cards for special occasions and Christmas cards.} Some progressed on to the RCA for the highest level of art training. The School of Design and Crafts had courses on cotton-printing, embroidery, wood-carving, decorating and illuminating, among others, with a total of 469 design students in 1930-7 (compared to 240 painting, 41 sculpture, 43 engraving students and 3 architecture students).\footnote{Pevsner, N. op. cit., p153.} Professor Rothenstein had a policy of encouraging a closer relationship between fine art and design, stated in a letter to Herbert Fisher, the President of the Board of Education in 1919, prior to his appointment in 1920 as Principal.\footnote{‘The separation between craftsmen and artists is already too wide. Each has lessons of value to learn from the other.’ Letter (18/6/19) quoted in Frayling, C. & Catterall, C. (eds.) op. cit., p90.} His tenure made a sharp transition in the focus of the RCA from a teacher training college to ‘a new identity of its own - Fine Art in a context of Design’.\footnote{Ibid., p90.} However, design was considered an inferior occupation: if applicants failed a life study test, they were
relegated to the Design School. His view is evident in a BBC talk of January 1932, in which he stated: 'There is a danger in the limited objective. If a man is to design cotton prints, he has a right to a complete education in the arts first.'¹⁷⁰ He continued to be resistant to the pressure from the Board of Education for less fine art and a more industrial emphasis during his period as Principal, but retired in 1934, to be replaced by Percy Jowett. The training in the Design School began with plant drawing, then antique plaster casts and finally life classes.¹⁷¹ Paul Nash was employed as a part-time tutor in the Design department from 1922-5 and 1938-40, and encouraged students to take up the classes in wood and steel engraving and lithography, taught by Sir Frank Short.¹⁷² Reco Capey (designer of fabrics, ceramics, glass, metalwork, lacquer-work and art director of Yardley 1936-8) was the Chief Instructor in Design from 1924-35 and established the Textiles Department in 1924. Changes to the College, introduced following the Hambledon Report in 1936 (see Section 3.7.1), included the establishment of new departments of dress design and weaving, a new course on 'how to present their work to employers, with reference to the special needs of the particular industry' and the institution of industrial/ commercial placements.¹⁷³ The Royal College of Art bestowed the initials ARCA on graduates (Associate of the Royal College of Art) including a number of textile designers.¹⁷⁴

There is limited information on the proportion of printed textile designers with an art school education. Of the British printed textile designers listed in the Designers Database (567), there are details on the education available for 96, most of which are artists or craft studio printers. There were 80 designers who attended art school full-time (but for 15 no details are given); 4 who had an architectural training; 2 a part-time art school education and an industrial apprenticeship; 7 trained in a commercial design studio (1 attended full-time art school first); 2 a less formal apprenticeship and 2 that had no training. An indication of the effectiveness of the RCA Design School is given by a questionnaire of RCA graduates from 1900-1950.¹⁷⁵

¹⁶⁹ Ibid., p92.
¹⁷⁰ Quoted on p107, Ibid.
¹⁷¹ Ibid., p102.
¹⁷⁴ Reco Capey, Janet Dean, Phyllis Donaldson, Jane Edgar, Irene Fawkes, Miss C.A. Dunbar Kilburn, Vera Moller, Charles Paine, Grace Peat, Mrs Lucy Elizabeth Revel, John S. Tunnard and Constance Wibnott.
¹⁷⁵ Questionnaire sent out in 1987-8, resulting in 180 completed questionnaires. Data and analysis given in Cunliffe-Charlesworth, H. 'Women and Art Education: the Royal College of Art', in Seddon, J. and Worden, S.
showed that 32/143 students who gave their area of study became designers, and of these 32, 25 had a training in the Design School, while 7 had a Fine Art training. However, the proportion of designers working in textile design is not given.

3.6.2.2 Change in Approach and Syllabus of Art Colleges

A clear change in approach by art schools during the 1920s was perceived by the Board of Education, with art schools becoming heavily industry-focused and encouraging a 'spirit of adventure and repeated experiment', rather than the paper-based design approach pre-war. A new policy of the Board of Education in the appointment of inspectors, principals and teachers, within a hierarchy of art instruction leading up to a regional art college, was instigated by the issuing of Circulars 1431-2 to all art schools in 1932. The new, more experimental approach was developed in art schools by short courses, arranged as in-service training for art school teachers by Board of Education inspectors and emphasising imaginative, Modernist approaches to design. This change in approach towards experimenting with techniques and materials was signified by developments in the Board of Education examinations: in 1935 the production of craft pieces based on the student's designs was made available as an option, becoming compulsory in 1936. Indications of the ideological approach of art schools are given by the membership of and activity within the DIA. The initial dynamism of W.R. Lethaby (Professor of Design at the RCA and previously Head of the Central School of Arts and Crafts), Benjamin J. Fletcher (Headmaster of Leicester School of Art) and Morley Fletcher (Director of Edinburgh College of Art) in establishing the organisation was supported by the membership of 10 art schools, before publication of the November 1915 prospectus. By 1927, 22 art schools or their head teachers were members. By October 1930, additional members included three further Principals of

(eds.) Women Designing: Redefining Design in Britain between the Wars, University of Brighton, 1994, pp11-15.


Macdonald, S. The History and Philosophy of Art Education, University of London Press, 1970, p303. The 'new men' resulting from this circular are considered hopeful by Pevsner, in fulfilling the need he perceived for 'men who at the same time are of a high cultural status, have full experience in industry and possess good and modern standards of taste.' Pevsner, N. An Enquiry into Industrial Art in England, Cambridge University Press, 1937, p152.

Dean, B. & Pavitt, P. Rebecca Crompton and Elizabeth Grace Thomson: Pioneers of Stitchery in the 1930s, Beryl Dean, 1996.


In Britain: Batley, Swansea Schools of Art and the RCA; also head teachers of Belfast, Birmingham Municipal, Blackburn Municipal, Bradford, Brassey Institute (Hastings), Doncaster, Dover, Eastbourne,
Schools of Art. In 1929/30, there were 225 art schools in England: i.e. 11% of the total number of English art schools officially supported the DIA approach.

A description of the syllabus of the Design School at Manchester in 1924 is given by Stuart Macdonald. Emphasis was placed on drawing from casts or natural forms (animals, birds, drapery, etc.); principles, materials and processes of industrial design, heraldry and historic examples of lettering; and study of history and styles, with optional flower painting, anatomy and the practice of specialised branches of design or handicrafts in the lower school. The upper school subjects included drawing and modelling from casts and life, architectural drawing and historic ornament. The general syllabus was clearly similar in 1929, though showing influence from recent art developments: a class for the study of natural forms, flower painting and 'painting in "gouache" after the French manner', which textile designers could attend, was noted in the Design and the Cotton Industry report. The curriculum at Croydon School of Arts in 1924 (in preparation for the Intermediate School Certificate) is described by Geraldine Baines. There were four standard subjects taken by all students: 'Light and Shade', from casts and from life; 'Object Drawing', from memory and from life; 'Figure Drawing', from casts and in life classes; 'Anatomy and Composition'. There was also a choice of options for three further subjects: she chose 'Pen and Ink Drawing', 'Design' and 'Animal Drawing' (taught by Rebecca Crompton, a prominent Modernist embroidery teacher). The exam included drawing from memory dray horses pulling a cart and constructing a perspective drawing of a view up at a spiral staircase.

An indication of the approach to training textile designers in 1930 is given by Aldred Barker. He demonstrates how to conventionalise natural forms 'from within the limits of its

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Hammersmith, Huddersfield, Keighley, Leicester, Llanellly, Macclesfield, Manchester Municipal, Maidstone, Oldham, Plymouth and Wakefield Schools of Art and the RCA; lecturer in textile design at Manchester College of Technology, 1 other lecturer in textiles, 1 in embroidery, Head of Women's Department at Shoreditch Technical Institute and 22 art teachers and lecturers; Bradford, Derby and Keighley Education Committees, an Education Officer at Manchester and Directors of Art Education at Falkirk and Oldham.

Principals of Salisbury, Scarborough and Southend Schools of Art.


She by-passed the Elementary Exam, due to the quality of her work and having entered in the second term after the Junior Cambridge Matriculation Exams (equivalent to GCSEs) at school. Baines, G., op. cit., p52.

Barker, A. Ornamentation and Textile Design, Methuen & Co. Ltd., 1930. Aldred Barker was Professor of Textile Industries at the University of Leeds, Vice-President of the Textile Institute, member of the Worshipful Company of Weavers of the City of London and had previously been Professor of Textile Industries in the Bradford Technical College.
inherent truth' and arrange such forms in pattern.\footnote{Ibid., p13.} He emphasises the need to avoid ‘deadness’ due to mechanical repetition, quoting approvingly W.G. Raffé that the finest art will normally arise out of the harmonic balance ‘in which vital geometrical stability will use the lowest material [or arithmetical] mode after its own manner’. His ideal examples of the clever conventionalising of natural forms are six ‘Cubist’ designs, French futurist and modernistic treatments of flowers, a Deco type liner and skyscraper design, American abstraction of building outlines, a fern design and one composed of floating peasants. He also gives examples of Chinoiserie design, a woven water-plant design, grotesque creatures in rug designs and a llama pattern. His assessment of the contemporary feeling in design is that it is ‘electrically dynamic’, but he considers that a period in which ‘feeling for restfulness and stability in intrinsic beauty will dominate’ is near.\footnote{Ibid., p31.} A more abstract style was supported by John Chirnside, lecturer in textile design at Manchester College of Technology, at the Textile Institute conference on the training of textile designers in 1938. He commented on the success of certain Continental schools and indicated that ‘microscopic photos of bacteria and ooze, sea shells and natural rock forms are all fertile sources in suggesting patterns to take the place of the dying floral chintz.’\footnote{Chirnside, J. ‘Training of Textile Designers’, Journal of the Textile Institute, Proceedings, Vol. 29, 1938, p186.}

3.6.3 Artists in Industry

There was a strong emphasis by Government on the encouragement of artists to work in industry. For example, the Crowe Committee recommended investigations into the artistic standard of individual industries, supported by an Artists Advisory Committee, which would consider key points such as the ‘desirability or possibility of industries employing practising artists of distinction as art advisors or principal designers.’\footnote{PRO ED 24/ 608: Second Interim Report of the Inter-departmental Committee on Industrial Design and Art Education.} The 1934 Industry and Art Education on the Continent report suggested that industry should ‘secure the part-time services of artist-craftsmen and selected architects, painters and sculptors.’\footnote{PRO ED 24/ 608: Second Interim Report of the Inter-departmental Committee on Industrial Design and Art Education.} A number of artists without technical training became involved in pattern design in the 1930s,
following the severe decline in the art market during 1930-1 and total inactivity in 1932-3.\textsuperscript{193} The speculative boom of the later 1920s in Modernist British art dwindled to a market of a few 'cognoscenti' and sympathisers. This put an acute economic pressure on Modernist artists, forcing them to look for work in related areas of commercial art (Paul Nash recorded in January 1932 that he hadn't painted in months).\textsuperscript{194} Allan Walton Textiles\textsuperscript{195} and Edinburgh Weavers,\textsuperscript{196} where the director was an artist, used artists frequently, but the practice was taken up to a small extent by other textile companies\textsuperscript{197} and had been employed by a number of firms in the 1920s.\textsuperscript{198} It was far easier for artists to transfer their skills to printed pattern design than woven, since little technical knowledge was needed. When screen-printing technology became available, very free, painterly designs could be applied to the screen without alteration. The total number of British printed textile designers listed in the Designers Database who practised as artists or had had a training as a painter or sculptor was 67/570 (12%).

3.6.4 In-Service Further Education

Refresher courses for 'designers in the service of industry' were introduced at the RCA in April 1922.\textsuperscript{199} Further evening classes could be taken by managers, salesmen and designers during their working career.\textsuperscript{200} For example, Alastair Morton took drawing classes at a London art school and a hand weaving and spinning course at Ethel Mairet's Gospels workshop in 1940.\textsuperscript{201} Public lectures were also given at museums and Universities. In February 1928, the University of Manchester invited members of the CPA staff to a public lecture given by Mr Roger Fry - 'one of the greatest experts of the day on Art' - on 'How to Look at Pictures.' This and a further lecture at the Whitworth Art Gallery by Miss Margaret Bulley (Mrs G.W. Armitage FRSA) on 'The Post Impressionist Movement' was brought to the attention of

\begin{footnotes}
\item[192] Quoted in Design and the Designer in Industry report, Council for Art and Industry, 20/1/37.  
\item[194] Ibid., p41: letter from Paul Nash to Hilda Felce (24/1/32) quoted.  
\item[195] Bernard Adeney, Vanessa Bell, Frank Dobson, Duncan Grant, Kenneth Martin, Paul Nash, Helen Sampson, Sheila Walsh.  
\item[196] Ashley Havinden, Barbara Hepworth, Eileen Holder, Ben Nicholson, John Tandy.  
\item[197] Warner & Son Ltd. (Sheila Walsh); Old Bleach Linen Co. Ltd. (Paul Nash).  
\item[198] Examples are: Tootal, Broadhurst & Lee Ltd. (John Tunnard, Mr A.R. Thomson, Elsie McNaught, Lucy and John Revel), W. Foxton Ltd. (Claud Lovat Frazer, Constance Irving) and Seftons (George Sheringham).  
\item[200] A total of approximately 1,300 'mill managers, designers, clerks, salesmen, overlookers, weavers and other mill workers enrolled in Textile Design classes at art schools in the last completed session.' Design and the Cotton Industry report, op. cit., p17.  
\item[201] Morton, J. op. cit., p413.
\end{footnotes}
employees and the Board of Directors by the Employment Department. Courses of art lectures with slides were available in the afternoons at the Victoria & Albert Museum: a course of 12 lectures cost £2 in 1930. The Victoria & Albert Museum studio was also available for aspiring designers. Geraldine Baines worked there when she had free time, while teaching at Glendower School in South Kensington and working as a freelance graphic designer: 'It provided everything for you, easels, water, warmth and would fetch for you the original work of any artist that you wanted to study or copy. The DIA gave lectures and discussions on textile design (Section 6.2). Lectures for the information of designers and other staff were sometimes made available by companies. For example, a series of lectures for managers and salesmen was set up in June 1920 by the CPA, for which lecturers' fees of £280 were charged. Local textile societies had educational programmes of lectures, with both the Bradford (in 1925) and Burnley (in 1928) Textile Societies requesting the CPA (unsuccessfully) to send a representative to lecture.

Occasionally, a promising young designer could get assistance from a production company, on the technical requirements for freelance designs. Geraldine Baines was given a brief course by post, by the agent of a textile printing firm, following her success in the textile section of the RSA competition and exhibition in 1932. When Lillyanne Wilson sent designs to the CPA, after recommendation from the Royal College of Art, she was advised by the company to draw up future designs 'to a suitable scale, which would have the effect of making them much more attractive at first sight.' They added that 'one of the Caterers to whom the sketches were shown saw possibilities in your work and he kindly offered to give you a 'tip' or two if ever you are in Manchester.' Another avenue was Dunbar Hay Ltd., established in 1936 as a retail outlet for RCA students' work to facilitate the transferral of highly educated but inexperienced designers into industry. They tended to start their own small businesses, joined in printing

202 M75/1921-28/ 32.1, 24 and 28/2/28.
204 Ibid.
205 M75/ Directors' Minute Book No. 6, 15/6/20.
207 'I had decided to go in for the Textile Section, but did not expect to get my work hung as I had hardly studied the art of textiles except by myself in the Victoria & Albert Museum . But I got three out of the five in the group hung; and this meant that the textile firms got in touch with me for doing work for them should I be interested. It was a rather exciting new venture.' Baines, G., op. cit., p33. She worked as a freelance designer, having been trained at Croydon School of Art. Postal tuition detail added in oral history interview, 1993: could not remember name of the company, though it was in Lancashire.
workshops (such as 'Footprints', 'Handprints' in Chiswick or Barron and Larcher's workshop), or were asked to work for artist-led firms such as Edinburgh Weavers or Allan Walton Textiles.

3.6.5 Conclusion: Training of Designers

The great majority of textile designers were trained as industrial apprentices from age 16, with most taking part-time evening art classes. Junior Art School Departments were developed to improve the training of these students, taking students at 14, from elementary school, until they left for their apprenticeships. There was a sharp division in training between industrially trained draughtsmen/colourists and the designers and art directors, who had a full-time art school training. There appears to have been a significant increase in female designers trained in the period, with a greater number in full-time art school education and in art school education of any type than male by 1927/8. There was also an involvement of artists in design, though this was primarily economically related, with a redirection of artists into such areas in the depression (particularly Modernist artists). Opportunities for the amateur painter, or those without a specific training in textile design, to enter the profession existed, with postal tuition offered by sources such as design studios and manufacturers' agents. Art school curricula remained based on developing high quality drawing skills, but with an emphasis on simplifying and conventionalising form. Modernist developments included an experimental approach to materials, encouragement of practical work, rather than purely paper-based designs, and an interest in more abstract subject matter.

3.7 Government Influence on Education

3.7.1 Design Education

Consideration of industrial art by the Government in the 1920s included a report by the Department of Overseas Trade after the 1925 Paris International Exhibition, a section in the 1927 Balfour Committee Report and a report on Design and the Cotton Industry by HM

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204 M75/1922-28/93 Letter, 6/7/28.
205 Referred to in PRO ED 24/608: First Interim Report, Inter-departmental Committee on Industrial Design and Art Education, 27/1/31; BT 60/7/2: Advisory Council memoranda on 1925 Paris Exhibition.

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Inspectors in 1929. The Design and the Cotton Industry report is discussed in Sections 3.2.3, 3.4.2, 3.5.2-3 and 3.6.1. There were also publications by the British Institute of Industrial Art, such as The Art Training of the Middlemen in 1927. A range of new initiatives was established to investigate design education and promote the employment and professionalisation of designers in the 1930s. The Board of Education produced a Report on State-Aided Art Schools in England in June 1930, giving a summary of the structure of art and design education and reviewing the change in number and approach of art schools since before the war. This was followed by an Inter-departmental Committee on Industrial Design and Art Education (chaired by Sir Edward Crowe), which produced a report reiterating many of the key points made by the FBI Memorandum, such as extending the Junior Art Departments, improving the transfer rates from Junior to Senior Art Departments, formation of specialised central art schools for particular industries (with local authority grants for student maintenance) and industry representatives on art school advisory committees. In the final report of the committee, it advised the formation of a new committee to investigate the art school system in more detail. A committee of the Board of Trade’s Council of Art and Industry - possibly one initiated by the Crowe Committee report - also examined design education, recommending that textile students should be referred from local art schools to a regional college of art in Manchester which should be of a status equivalent to a university. Of these students, a small proportion would pass on to a central college in London for a finishing course in creative design. Discussions on the reorganisation of the RCA and Central School of Art and Design, with some comparison with the education of designers and facilities available on the Continent, continued in 1933-4 with the FBI, DIA and the Board of Education (Section 3.2.2). This was followed by the establishment of the Hambledon Committee, to consider ‘advanced art education in London’, which reported in 1936. It recommended the abandonment of teacher training at the RCA, the establishment of courses in Weaving, Furniture Design, Commercial Art and Dress Design and a general switch in emphasis from the fine arts to designing for mass-production. The Board of Education staff Inspector of Art

210 Listed as a source document in the Design and the Cotton Industry report.
212 PRO ED 24/ 608: Second Interim Report of the Inter-departmental Committee on Industrial Design and Art Education.
E.M. O’R. Dickey enthusiastically suggested that Dr Gropius (who had acted as a witness to the Hambledon Committee and had had a series of meetings with Board of Education officials) would be:

‘of the greatest possible assistance in an advisory capacity in connection with any new schemes which may be planned for a ‘Bauhaus’ which might rise up in place of the present RCA.’

The Modernist tenor of the Board of Education is further indicated by the discussions on a suitable replacement for Prof. Rothenstein, when he left the RCA in 1934. There was consideration of the possibility of appointing Herbert Read or E.M. O’R. Dickey, although he was finally to be replaced by Percy Jowett of the Central School (a painter). The new approach to art and design education promoted by the Board of Education was shown in the intensive short courses it organised and funded, to retrain and develop the approach of Art School teachers.

The comparison with other forms of design education in Europe was published in the 1934 Board of Education report *Industry and Art Education on the Continent*, which concluded that there had been a recent improvement in the standards of Continental design. It stated that there was ‘no comparison between the spacious and lavishly equipped schools on the Continent, notably in Czechoslovakia, Germany, Zurich and Milan, and our schools at home.’

Recommendations were: that more fully trained designers should be employed, with better pay and prospects; part time employment of artist-craftsmen, architects, painters and sculptors; better art education for designers and all ranks to heads of firms; modification of art school training for industrial purposes and close co-operation between all, so that the art school

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216 Quoted on p117, ibid.
217 Ibid., p119.
218 Dean, B. op. cit., p16 and p36. Dress design and embroidery courses were taken by Rebecca Crompton and Elizabeth Thomson, who made intense demands on the imagination of students, inspiring with ‘gorgeous materials’, very bright colours and visits (including the Modernist BBC studios). The courses emphasised good technique and the ‘appreciation of line, tone, texture and balance’ considered so important by Rebecca Crompton. A great interest was taken in these courses by the Chief Inspector and F. W. Burrows, the Senior Inspector: it was felt to be a privilege to be selected.
would be an organic part of industry, working enthusiastically for industry.²²⁰ An inquiry into ‘Design in Industry’ was established by the Council for Art and Industry (CAI) in February 1935. This concluded in general terms that there should be a partnership between artists and manufacturers, that every effort should be taken to improve the artistic quality of British goods and the standard of staff employed in British studios and design departments and more specifically that:

"We would like to see it the accepted practice that, in all industries where artistic design plays a really important part, a highly trained industrial artist should be given a position of primary importance in the formulation of the manufacturing and common policy of the firm. . in such industries, prospective managers should be put through the design room as part of their training."²²¹

There was further investigation of the issue in the late 1930s in Northern Ireland, with an Advisory Art Council established by the Ministry of Education and a Committee of Enquiry on Industrial Art appointed by the Ministries of Education and Commerce of Northern Ireland.²²² A National Register of Industrial (Art) Designers was established by the CAI in 1936, which awarded the initials of NRD to designers accepted on to the register. The register was intended to:

'act as a centre of information on matters pertaining to industrial art and design; to establish conditions and standards of qualification for admission to register and to examine and accept or reject candidates for registration; and to bring registered designers seeking employment or a market for their designs into touch with manufacturers and other users seeking to obtain the services of designers or purchase designs."²²³

3.7.2 Primary and Secondary Education in Art and Design

Importance was also attached by Government to improvement of elementary and secondary school art education, with reports of a distinctly Modernist tone published, such as *The Teaching of Drawing in a Secondary School: Being the development of intelligence through form and colour* in 1924.²²⁴ The Hadow Report in 1926 (which established Modern Schools with a leaving age of 15) recommended that ‘Practical Instruction’ should become:

²²¹ Ibid.
²²² Webb, N F. op. cit.
²²³ PRO, BT 64/3464.
²²⁴ *Design and the Cotton Industry*, op. cit., p59.
'the training of boys and girls to delight in pursuits and rejoice in accomplishments -
work in music and art; work in wood and metals. In all such courses the emphasis
should be laid on the artistic aspects of the work, which should be closely linked up
with the courses in drawing and applied art.'

Practical work for girls should move away from useful needlework to the artistic crafts,
including pottery, weaving, enamelling, leatherwork and bookbinding. Direct intervention
in the established school curriculum on a national scale by the Board of Education became
possible with the control over School Certificate examinations, taken on in the Fisher Act of
1918. One result of this concern with the quality of art and design in schools was the Board
of Education ‘Design in Education’ exhibition in 1937, at County Hall, Westminster, which
was the initiative of Sir Frank Pick (President of the Council for Art and Design). The
exhibition demonstrated the educational value accorded by Inspectors to giving children ‘the
opportunity to work with colours and textures’, showing ‘how, by choice of the right
materials, the work of elementary schools might show beauty and quality as an introduction to
understanding good design.'

226 Ibid., p309.
227 Graves, J. Policy and Progress in Secondary Education, 1902-1942, 1943, pp104-7, 151-2: given in Mowat,
C.L. op. cit., p206.
228 Dean, B. op. cit., p36.
229 Ibid.
3.7.3 Conclusion: Government Influence on Education

A highly proactive approach was taken by Government ministers and Board of Education officials to reform art and design education in the interwar period. This reform was actively Modernist in the stress on abstract form, personal expression and relevance to industry (to the extent of using Dr Gropius as a central advisor in redesigning the RCA), breaking with conventional narrow skills training in school and further education. Analysis of design education structure, curriculum and Board of Education examinations is given in Section 3.6.
3.8 Conclusion: Conditions of Employment and Education Context of Designers Chapter

In this chapter, the conditions of employment and education of printed textile designers and the structure of design supply were investigated. This analysis was intended to clarify the mechanisms of style development and influence within the design production structure of the printed textile industry. A key finding was that there were different sources of freelance designs for dress and furnishing fabrics and for export and home markets, implying the operation of separate systems for the construction of taste within the various sectors. The geographical distribution of (freelance) designers shows a concentration of dress fabric designers working within a small area of central Manchester, in the district where the offices of textile merchants and production companies were based. This negates the proximity advantage of Paris studios stated in the Design and the Cotton Industry report, and is a probable explanation for the dependence of the dress fabric printers on a small number of Manchester studios. Designers supplying the printed furnishing sector were mainly based in London, or the home counties. Most freelancers supplied the home market, though some specialised in particular export markets. However, there was a cross-over in designers supplying the printed furnishing textile and wallpaper industries, with some individual freelancers covering a range of other decorative design industries. Manufacturing and print companies in the furnishing sector appear to have had a small number of studio designers, often divided into a works and a London studio, with a considerable dependence on freelance designers. More substantial studios appear to have been maintained by dress print manufacturers, supported by use of a limited range of freelance studios. The number of freelance individual designers working full-time was moderate (40-100), but there was a large number of freelancers that occasionally supplied designs to the industry. However, it was common practice for companies to use a small number of freelance companies or individuals regularly, who they were confident could produce work of a professional standard, suitable for the needs of their company. The average salary for designers from the case study evidence appears to be the relatively low level of £230-300 (see Appendix 2), but the salary and status of head designers/ studio managers appears to have risen during the 1930s. An increase in the number of female printed textile designers over the interwar period is indicated by the

[230] Morton Sundour Fabrics Ltd. maintained a London studio and a small Edinburgh studio, but employed freelancers. A similar situation existed at Warner Bros., with a London studio and a small Works studio, although a large proportion of designs were produced by freelancers. Turnbull & Stockdale Ltd. also had a small studio, with designs predominantly purchased from freelance designers.
education statistics for designers and chronological analysis of the Design Database. There
does not appear to be any evidence from the case study companies of a lower general rate of
pay for female designers, either in studio or freelance payments – an unusual circumstance in
the interwar period, when lower wages for women were normal. There is insufficient evidence
to posit any difference between dress and furnishing sections in salary and gender balance for
studio staff. The proportion of art school trained designers appears to have risen during the
1930s, with additional groupings of artist-designers working as craft printers in small
workshops.

The general contemporary assumption, stated in the Balfour report, Design in the Cotton
Industry report and CAI report, of a domination of fashion in dress fabric design by French
designers seems overstated. Combined with the subscription patterns, the apparent national
proportion of designers named in the CPA and Ferguson Bros. records does indicate a higher
use of French freelance sources in dress fabric prints than furnishing prints, but when studio
design is taken into consideration, it was not the dominant source of designs. Analysis of the
source of designs in the printed textile industry found that there was a significant number of
artists practising as freelance textile designers (12% of the total). However, the number of
designs produced by this group was very limited, and most were restricted to a small number
of textile companies where there was a policy of using their work (usually for screen prints).
The question of whether the freelance artists had any determining influence on design in the
case study companies or design trends in the industry in general (as stated by John Chirnside)
becomes more difficult to resolve, since they were not active in these companies. The
significance of architects as freelance designers (posited by Fiona MacCarthy) appears
negligible overall in the printed textiles industry. The relative significance of freelance
designers, artists and the French studios in terms of the innovation and influence of their
design will be assessed in Section 6.5.4.

A concerted attempt was made by industry organisations and Government to promote the
professionalism and economic importance of designers, with a very active role being taken by
textile industry representatives. One aspect of this campaign was the pressure on companies to
credit the designers with their designs. Another was the proliferation of various honorific
indications of professional or artistic status in the use of initials after the name to denote membership of organisations, to increase respect for the individual designer and raise the broader social status of designers. However, there does not seem to have been a notable increase in designs registered by manufacturers and merchants, or the other print companies, following the professionalisation through Register of Industrial Art Designers in 1937, or earlier non-governmental registers, such as the Designers Register and Employment Bureau opened by the FBI in 1924 (see Figure 2.2). The data on salary or wages of studio designers from case studies is not sufficient to indicate clear trends over the period, but the CAI and National Register of Designers reports suggest that the pay level of studio managers and head designers rose significantly during the period. This could be a result of the campaign to raise the status of designers and the increasing economic significance of design as a competitive weapon in the industry. Comparison with Scandinavian and German approaches to designer employment and training by H.G. Dowling indicated that the number and status of designers in similar companies in Britain was far lower.\footnote{Dowling, H.G. A Survey of British Industrial Arts, F. Lewis (Publishers) Ltd., 1935, pp18-20.} However, the Board of Education investigations into the training and employment conditions of textile designers in France concluded that the employment conditions were very similar and that there seemed to be little use of art school training and no apparent influence of the professional artist in the ateliers.\footnote{Design and the Cotton Industry, op. cit., p10.}

There was a campaign of reform directed at the structure and approach of art education by textile industry representatives, design organisations and the Board of Education, to encourage a more creative approach to design and improve the relevance of art school education to industry. A consensus on the necessary changes to improve the education of textile designers seems to have formed among the Lancashire educational authorities and textile industry. Some of these recommendations were instituted (the restructuring of the RCA to bring a more industrially focused education), but others, such as the establishment of a regional textile university in Manchester, were checked by the intervention of the Second World War. In my view, the elitist assumptions within the RCA (evident in the Rothenstein memorandum) and acceptance by the FCP of a ‘class division’ in the status quo (in the sharp division in training between studio draughtsmen and designers/ art directors, and in the proportions of such industry-trained draughtsmen compared to designers) are indicators of fundamental obstacles
within industry and the art school structure to the campaign to improve the quality of design and raise the status of designers. The Government approach to design has a distinctly Modernist construction in the representatives appointed to committees of enquiry, witnesses consulted and recommendations made. The Modernist outlook of the Board of Education was especially marked, with Modernist in-service training courses funded, exhibitions arranged and the involvement of Dr Gropius in the redesign of the RCA.
4. Economics

4.1 Introduction

This chapter will give an analysis of the economic development of the British calico print industry in the interwar period. Sectional divisions in market orientation, dress or furnishing textiles, fabric type or business model (commission-processing or entrepreneurial) will be related to economic results, as far as the evidence allows, to form a broad model of economic change and its implications within the industry. The style response of each sector to macroeconomic change can then be compared (in Chapter 6) and critical theories on such responses tested. Comparison of sectional divisions will establish the economic conditions of production and of consumer demand. The degree of functional separation between the sectors as taste systems can then be ascertained. Any significant structural difference in the economic conditions between taste systems will impact on the formation of style.

The effect of economic conditions on design can be considered more specifically in relation to changes in market demand in individual export markets and the home market. These national market changes are clarified, and the market orientation of the case-study companies analysed, to permit sectional market analysis and indicate the relation of company sales in particular markets to the national statistics. Competition in exports of printed cotton from Japan and from other European countries is considered, with the concurrent reduction of demand in key markets (such as India, China and Egypt), due to increasing self-sufficiency of production. Modifications of established taste systems may occur due to the development of new competitive threats, requiring the establishment of new competitive strategies. Adaptation by diversification into rayon, silk or mixed fibre fabrics is considered as a factor in price competition in home and export markets, with particular reference to the data from Ferguson Bros. Ltd. on the fluctuation in demand of various fabric types (see also product diversification and research analysis in Sections 5.4.1-2).

Analysis of the changes in a range of costs will also be examined, with consideration of the impact on design. For example, any fluctuations in prices of particular dyes, in the cost of
copper or wages of copper engravers would have a direct effect on design. The examination of costs is followed by an analysis of the overall changes in printing charges and retail prices. Alterations in price can have a fundamental impact on the social demographics of the consumers of the product and therefore, due to the tastes of a new group of consumers, on design. A comparison of the strategic policy of different companies is given in Chapter 5, with an examination of broader industry and Government approaches, to consider their management response to the economic conditions analysed. Design policy - or response in style terms to economic pressure - by individual companies and sectors of the industry is considered in Chapter 6.
4.2 Production in the British Textile Industry

4.2.1 Production of Cotton Piece Goods

The UK cotton weaving industry collapsed during the First World War and interwar period, from a high point of maximum production in 1913. The dependence on exports (in 1912 more than 85% of cotton piece goods produced were exported) indicates the relevance of data on the total cotton piece goods export to demonstrate the severity of the fall, as annual figures are available. Figure 4.14 shows the rise and fall of exports of the British cotton industry, from 1800-1944, to clarify the broader historical context of the interwar period. If analysed in square yards, rather than lbs., cotton piece goods exported fell from 7,075 million square yards in 1913 to 3,524 in 1919: a clear statement of the devastation of the cotton industry during the war. The severe fall in the depression is evident in Figure 4.15: grey, undyed cloth exports fell from 1,033.80 million square yards in 1929 to 301.9 in 1931, recovering to a peak of 375.6 in 1933 before a further decline to 235.4 in 1938. The extent of this fall was partly due to the export dependence on primary producing countries, which suffered more severely from the depression, since the fall in the price of food and other commodities was much greater than that of industrial goods. Production of cotton piece goods shows a slight recovery from 1930 (3,320m square yards) to 1933 (3,504m), followed by a fall in 1934 (3,457m) and 1935 (3,386m). A significant drop occurred in 1938, indicated by the total production drop of cotton piece goods from 3,600m square yards in 1937 to 2,700m in 1938.

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3 JCCTO, Cotton Trade Statistics, 1939, Table 97.
5 Ibid.

139
Table 4.1

<table>
<thead>
<tr>
<th>Year</th>
<th>Production (in million sq. yds)</th>
<th>Export (in m. sq. yds)</th>
<th>Export (in m. linear yds)</th>
<th>Export Value (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1912</td>
<td>8,050 (m. lin. yds.)</td>
<td></td>
<td></td>
<td>1910-13: 6,665</td>
</tr>
<tr>
<td>1913</td>
<td>7,075</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1919</td>
<td>3,524</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1924</td>
<td>6,026</td>
<td>4,467</td>
<td>4,508</td>
<td></td>
</tr>
<tr>
<td>1925</td>
<td></td>
<td></td>
<td>4,637</td>
<td></td>
</tr>
<tr>
<td>1926</td>
<td></td>
<td>3,923</td>
<td>116.1</td>
<td></td>
</tr>
<tr>
<td>1927</td>
<td></td>
<td>4,189</td>
<td>110</td>
<td></td>
</tr>
<tr>
<td>1928</td>
<td></td>
<td>3,968</td>
<td>107.3</td>
<td></td>
</tr>
<tr>
<td>1929</td>
<td></td>
<td>3,672</td>
<td>99.3</td>
<td></td>
</tr>
<tr>
<td>1930</td>
<td>3,320 (3,100 m. lin. yds.)</td>
<td></td>
<td></td>
<td>61.3</td>
</tr>
<tr>
<td>1931</td>
<td></td>
<td>1,716</td>
<td></td>
<td>37.3</td>
</tr>
<tr>
<td>1932</td>
<td></td>
<td></td>
<td></td>
<td>43.6</td>
</tr>
<tr>
<td>1933</td>
<td>3,504 (3,504 m. lin. yds.)</td>
<td>2,031</td>
<td>40.2</td>
<td></td>
</tr>
<tr>
<td>1934</td>
<td>3,457 (3,457 m. lin. yds.)</td>
<td></td>
<td>39.8</td>
<td></td>
</tr>
<tr>
<td>1935</td>
<td>3,386 (3,386 m. lin. yds.)</td>
<td>1,949</td>
<td>39.5</td>
<td></td>
</tr>
<tr>
<td>1936</td>
<td></td>
<td>1,917</td>
<td>40.3</td>
<td></td>
</tr>
<tr>
<td>1937</td>
<td>3,600</td>
<td>1,922</td>
<td>44.8</td>
<td></td>
</tr>
<tr>
<td>1938</td>
<td>2,700</td>
<td>1,387</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Greycloth export was worse affected than that of bleached, dyed or printed cotton piece goods (Figure 4.15). Cotton exports suffered partly due to greater home production in foreign markets, but especially from the emergence of Japan as a cotton spinning and weaving rival in significant overseas markets. The scale of the reversal is shown by the difference in position between 1924, when Japan exported 960 million square yards of cotton piece goods and Britain 4,444 million square yards, to 1937, when Japan exported 2,644 and Britain 1,922 million square yards. The specific market changes in exports of cotton piece goods can be seen in Figures 4.21-2.

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8 Ibid.
4.2.2 Woven Furnishing Fabrics

Consideration of woven furnishing fabrics (such as cotton and woollen damasks, brocades, tapestries, etc.) is relevant to the economic performance of manufacturing companies such as Morton Sundour Fabrics Ltd. Woven furnishing fabrics were not listed separately in the Board of Trade classifications. The Furnishing Textile Manufacturers Association (which covered the manufacture of all classes of furnishing tapestries, damasks, brocades, moquettes, mohair and worsted velvets, cotton velours, table covers, pile mats and hearthrugs) stated in 1926 that total sales of ten of their largest member firms had fallen from £1,667,490 in 1919 to £1,225,157 in 1925.10 Home trade suffered from strong foreign import competition. Sales to 15 home trade wholesale houses by 12 representative member firms shows a fall from £331,836 in 1919 to £130,476 in 1925.11 However, a recovery in the home market occurred in 1932-3, with the imposition of the import tariff (see Section 4.4.3). Manufacturers of damasks increased their output of cheaper styles considerably, due to the exclusion of cheap Belgian lines.12 Export of woollen and worsted fabric is given as 183,756,000 yards between 1920 and 1929 by Mathias, dropping to 101,246,000 yards in 1930-9.13 Pollard states the annual average production of wool and worsted tissues as 550 m. sq. yards in 1912, 476 in 1924 and 344 in 1930, while a reduction in exports (from 172 million averaged over 1911-13 to 94 million over 1930-32) is explained as due to narrowing of European markets in the 1920s and Far East markets in the 1930s.14 Export sales of woven fabrics, apart from linen, cotton or jute piece goods, were stated by Entwisle, Lewis and Mellor (Figure 4.18), showing a higher level of sales in the 1920s than pre-war, but a considerable fall in the 1930s.15

10 BT 55/94/175, p8.
11 Ibid.
4.2.3 Rayon

The exponential growth of the rayon industry is shown in Figure 4.1, by the international production of rayon filament yarn in 1920-41.16 Production of rayon piece goods, in sharp contrast with cotton piece goods, increased throughout the interwar period, though not to the extent of the increase in filament yarn production. The industry was established when Courtaulds bought the British rights to the viscose process in 1904 and started mass-production of rayon. International production of rayon was dominated by Courtaulds, with almost 100% capital control of La Soie de Calais, 100% control of its Canadian company, 85% of the American Viscose Co., joint controlling interest in Snia Viscosa (the largest Continental rayon firm) and the German combine Glanzstoff, 10-12% of AKU, over 10% of Viscose Suisse and connections with rayon companies in India, Denmark, Spain, Sweden, Poland, Russia and Japan.17 The proportion of Courtaulds' filament yarn used for woven fabric increased in the later 1920s, with the availability of delustred yarn, from 26.6% in 1923 to 43.8% in 1928, rising more slowly to 53.7% in 1939.18 A number of smaller rayon producing companies were also formed, rising to about 30 in 1929 and falling to 11 in 1939.19 In 1920 British Celanese Ltd. began to produce cellulose acetate yarns, forming 'celenese' fabric. Overall, in the inter-war period world rayon production increased from 32m lb in 1920 to 2,817m lb in 1940, with viscose staple fibre added to filament yarn as a bulk production method in the 1930s, while the quantities of cuprammonium yarn and nitro-cellulose yarn were reduced.20 Cellulose acetate filament yarn production also increased significantly in the 1930s, from its initial commercial production in 1921 as 'celenese'. UK production of rayon and rayon mix piece goods is given in Table 4.221:

16 Graph given in Coleman, D.C. Courtaulds: An Economic and Social History, Vol. II: Rayon, Oxford University Press, 1969, Fig. 10. Source of data: Textile Organon, January 1962.
18 Ibid., p200.
20 Coleman, D.C. op. cit., p172.
Table 4.2

<table>
<thead>
<tr>
<th></th>
<th>1912</th>
<th>1924</th>
<th>1930</th>
<th>1933</th>
<th>1934</th>
<th>1935</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volume printed (m. sq. yds.)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>78</td>
</tr>
<tr>
<td>Volume of total finished goods (m. sq. yds.)</td>
<td>-</td>
<td>49.1</td>
<td>181.1</td>
<td>284.9</td>
<td>341.8</td>
<td>359.9</td>
</tr>
<tr>
<td>Value of total finished goods (£000)</td>
<td>45</td>
<td>971</td>
<td>2387</td>
<td>3189</td>
<td>3853</td>
<td>3924</td>
</tr>
</tbody>
</table>

There was a decline in exports of rayon and cotton mixture piece goods from UK during the depression (Figure 4.19), though the rayon/cotton equal mixture group of exports followed a different pattern, recovering much of the 1929 loss in 1930.22 This temporary setback led to the closure of factories.23 Investment in research in developing artificial fibre fabrics and cotton/rayon mix fabrics by the case study companies is discussed in Section 5.4.2.2.

4.2.4 Conclusion: Production in the Cotton and Rayon Industries

The interwar period was disastrous for the cotton weaving industry, due to very severe reduction of the export market, particularly during the First World War, in the 1930-1 depression and in 1938. Plain woven fabric (greycloth) exports were most severely affected by the emergence of low-priced competition from Japan and home production within export markets, followed by bleached fabric, while the competitive depredations on dyed and printed piece goods exports were comparatively moderate. Woven furnishing fabric (brocades, tapestries, etc.) sales to the home market fell in the 1920s, due to import competition, though the tariff protection of 1932 is likely to have promoted recovery in the 1930s. Exports of these furnishing fabrics fell sharply in the 1930s. Production of rayon piece goods increased during the period, though exports of rayon/cotton mixture fabrics fell sharply in 1929-31.

22 Ibid., Table 181, p137.
23 Ibid., p196-8.
4.3 Production of Printed Calico

4.3.1 Analysis of the Production Data for the Printed Calico Industry

A broad view of the economic trends of the calico printing industry in the inter-war period requires data on the fluctuations of production in volume terms (in this case in yards printed) and a comparable statement of the variation in the value of this production. The data available is limited, since national totals were principally collected in irregular Censuses of Production. However, the concern evinced by the textile industry and Government led to the establishment of industrial organisations for the compilation of statistical data on the industry, including the Joint Committee of Cotton Trade Organisations (JCCTO) and Cotton Trade Statistics Bureau. Their data can be used to supplement the official statistics: ²⁴

Table 4.3

<table>
<thead>
<tr>
<th>Year</th>
<th>No. of million linear yards printed</th>
<th>Value in £ million</th>
<th>No. of million square yards printed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1912</td>
<td>1305</td>
<td>5.1</td>
<td></td>
</tr>
<tr>
<td>1924</td>
<td>800</td>
<td>9.5</td>
<td>834</td>
</tr>
<tr>
<td>1930</td>
<td>611</td>
<td>6.437</td>
<td>603</td>
</tr>
<tr>
<td>1933</td>
<td>623</td>
<td>5.354</td>
<td>639</td>
</tr>
<tr>
<td></td>
<td>(at 1930 average values: 6.864)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1934</td>
<td>608</td>
<td>5.164</td>
<td>629</td>
</tr>
<tr>
<td></td>
<td>(at 1930 average values: 6.757)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1935</td>
<td></td>
<td></td>
<td>659</td>
</tr>
</tbody>
</table>

²⁴Linear yards and value figures from Board of Trade archive, PRO BT 64/14/1872/36; square yards figures and 1930-34 value figures and 1930 equivalents from Joint Committee of Cotton Trades Organisations, Cotton Trade
No differentiation is given in these total figures between furnishing and dress fabrics. The severe drop in production during the First World War is demonstrated, with a further fall in production after the 1929 crash and world recession. The overall fall in production since the pre-war level of 1913 to 1929 was 51.8% (24,522,565 pieces of 30 yards in 1913; 11,809,993 in 1929), but the indigo trade fell more severely, by 73.4% (1,200,000 average over 1910-12; 319,000 in 1929). This overall trend can be compared with the more detailed export figures (Figure 4.14), in which the pattern is still more marked and overall contraction of the market is severe. The more stable home market (Section 4.4.2) acted as a cushion to the extreme fluctuations of exports. A rise in average prices during the period from 1907-24, followed by a fall in 1924-34, is also indicated: more detailed analysis of prices is given in Section 4.6. The difference between linear and square yards figures implies that the average width of piece goods narrows between 1924 and 1930, rising again in the 1930s. An explanation of this could be that the reduction of the Indian export market in the depression meant that there was a lower quantity of 'sarees' and Eastern market goods in the total produced, so that the proportion of narrower widths in the total rose. No discussion of the reasons for this change has been found in the contemporary or subsequent historiography.

4.3.2 Analysis of Production in the Case Study Companies

Broad developments can be seen from the archives of individual printing companies, although there are variations between companies due to markets supplied, product difference and company strategy. Ferguson Bros. Ltd. was a dress print company, the CPA also dress prints (mainly), while Morton Sundour Fabrics was furnishing fabrics, Turnbull & Stockdale Ltd. was predominantly furnishing prints and the United Turkey Red Co. Ltd. was mixed.

Statistics, 1939, p69, Table 98D.
25 BT 55/18, Evidence to the Economic Advisory Council Committee on the Cotton Industry by the FCP, 12/2/30, C.21.
4.3.2.1 The CPA Ltd.

There are no detailed order books or similar production records for the CPA available, but weekly data on production (orders and volume printed) from 1920 to 1935 is stated in the minute books. The resultant annual trends are given in Figure 4.2. Some weekly figures are also given in 1919: production was very low during early 1919, with the CPA weekly print figures falling from 237,000 pieces on the 21st January to 85,000 on the 29th April. The Management Committee had expected post-war demand to be similar to the pre-war level: in February 1920, it was announced that ‘we should be in a position to produce 21 million pieces a year’ (average print production for 1907 and 1910-14 was 22,113,865). The difference was expected to be due to the hours worked, which had dropped from 56 to 48 per week in 1920 (Section 4.5.7). The post-war crash and coal strike is evident in the sharp fall in 1920-1: from 360 thousand pieces printed, in the week to 12th October 1920, to 57 thousand noted on 15th March 1921. Recovery occurs, though not to the immediately post-war level, with a sharp effect on production in 1926 and an overall decline in production beginning in 1928 for the CPA. There is a levelling out in 1929, before further decline in the depression, but no very sharp fall in 1930. A new low level of production is established from 1932-4, with a slight reduction in 1935.

4.3.2.2 Ferguson Bros. Ltd.

Ferguson Bros. Ltd. production data for the Print Department is only available to 1929, but shows steeply rising production during the 1920s (Figure 4.2). A fluctuating pattern of over-production and reaction appears to occur. Sales income in the Print Department also shows a steep increase during the 1920s (Figure 4.4). A more varied pattern is shown in the 1930s, with an income drop in 1930-1 and a sharper fall in 1935-6. Each fall was recovered swiftly, but the peak of print sales income in 1929 was not surpassed. The total sales income, mainly consisting of Silesia process sales (Figure 4.3), shows the 1920 post-war inflation peak and the establishment of a fairly stable income level in 1924-9. Income dropped sharply in 1930-1, followed by the establishment of a new level to 1935, with a rise in 1937 and 1939-40.

26 M75/ Directors' Minute Book No. 6, 17/2/20.
4.3.2.3 United Turkey Red Co. Ltd.

United Turkey Red Co. Ltd. suffered a severe fall in production during the depression, but increased overall production between 1926 and 1937 (the period for which data exists). These figures include dye and other processes as well as printing. The orders and production of the UTR rose sharply in 1934, a trend not echoed at the other case studies, and production was increased in 1937, although orders were down. More fabric was produced than ordered during the 1930s, implying a greater proportion was produced for direct sale. Consignment sales overseas fall to a very low level in 1933, disappearing in 1936.

4.3.2.4 Turnbull & Stockdale Ltd.

Turnbull & Stockdale Ltd. print production records are available for the majority of the interwar period, showing a very volatile rate of production (Figure 4.3). Sharp falls in production occur in 1921 and in 1926, implying that the coal strikes in these years had a distinct effect, but that there was better preparation for the 1926 strike. A fall in production also occurred in 1930-1, but not as severe as the 1921 or 1926 falls. A recovery occurs in 1932, with rising production levels to a peak in 1937. The higher level of goods delivered than printed is likely to be due to production of bleached and dyed goods, for which the demand was greatly reduced by 1940, while the reduction in differential between orders and deliveries may indicate a policy of reducing the total volume of fabric produced speculatively. Income levels, given in Figure 4.4, show the same sharp falls in 1921, 1926 and 1930-1, but a reduction occurs over the period, indicating a decline in
price (particularly in 1934-6). Sales income is considerably lower than invoice level, implying that more than half the company income came from commission printing, bleaching and dyeing. Sales fell in 1930-2, but then rose steadily to a peak in 1937. The greater volatility in delivery invoices compared to sales could be due to the commissioning of their dyed, bleached and printed dress fabric orders, which as a passive mechanism is likely to be more susceptible to price fluctuation in market demand.

4.3.2.4 Morton Sundour Fabrics Ltd.

No volume production figures are available for MSF Ltd. The print department at Morton Sundour Fabrics (Figure 4.5) shows a very steep rise in sales income from 1915/16 to 1919/20. There was a post-war drop in 1921/2, with fairly level income during the rest of the decade, except for a fall in 1925/6. In contrast, the Standfast Dyers & Printers Ltd. (MSF print subsidiary) records show that their income from MSF sales, both in print and piece goods as a whole, increased from 1924/5 to 1925/6 (Figure 4.6). There was a general rise in Standfast’s MSF print sales income in 1928-30 but a decrease in piece goods (includes dyed and finished fabric) from 1925/6-1930/1. At the same time, their commission piece goods sales expanded quickly, particularly in 1925/6-1926/7 and 1929/30-31, an impressive achievement during the depression. Print commissions improved from nil in 1924/5 to £28,285 in 1927/8. The expansion of commission sales may be due to the fast dyes developed by Sundour, which were available to other companies: the development of commission-processing was ‘largely to stimulate a greater use of the dyestuffs which we were then making in large quantities’.

A sharp drop in MSF print sales in 1929/30 is shown, but the continuing impact of the depression on sales is not known specifically, since no annual sales figures are available for the 1930s. On 25th February 1936, the minutes noted a serious fall in K and F (Print) Department sales. At the following meeting, it was decided to expand the bulk wholesale trade of printed goods ‘at keen prices’ to the advantage of Standfast, but to disassociate the trade from Sundour. The 1937 rise and 1938 fall shown in the production and income at Turnbull and Stockdale Ltd. is echoed by

__27__ GD 326/ 224 Address by Chairman at Shareholders' Meeting, 29/3/35.
the 'satisfactory increase in volume of trade at the British Industries Fair' noted in the MSF minutes in February 1937\textsuperscript{28} and remarks in the 1938 Morton Sundour Fabrics Ltd. Directors' Report:

'Last September, trade during the previous year had been distinctly progressive and there had seemed nothing to indicate other than a continuation of the same favourable conditions. But the late months of the year and beginning of 1938 saw a kind of collapse in the textile industry such as had rarely been experienced by the oldest in the trade, indeed some reports from Lancashire state that the trade had reached its lowest ebb in over 150 years.'\textsuperscript{29}

4.3.3 Conclusion: Production of Printed Calico

Analysis of the response of the case study companies to macroeconomic change shows some variation. A very severe reaction to the 1921 crash was shown by the CPA, with a subsequent increase in production to 1925, but a general decline from 1928. Income from print commissions at Standfast Dyers and Printers Ltd. increases in 1924-6 and 1928-31, with no effect from the depression registered. Ferguson Bros. had no high production level established pre-war and shows a general rise through the 1920s, although the 1921 crash had a temporary effect. There was a dip in 1925-6, rather than the sharp drop in 1926 of the CPA, though the fall in 1928 relates to the CPA pattern. These differences could be due to the effectiveness of their respective response to the 1921 and 1926 coal strikes (Section 4.5.6), but market differences are likely to be a very significant factor (Section 4.4.4). A 1929 fall at the UTR was not echoed by Turnbull & Stockdale Ltd. or at Ferguson Bros. The United Turkey Red Company had a dramatic fall in total cloth production in 1930-1, while the CPA showed a more gradual decline from 1927-31. This is likely to be due to the dependence of the UTR on the Indian market, and the resultant effect of the Indian boycott of British textiles in 1930. The volume reduction at Turnbull & Stockdale Ltd. in 1930-1 was less severe than falls in 1921 or 1926. The emphatic rise in orders between 1931 and 1932 (from 33,055 pieces to 50,111) at Turnbull & Stockdale Ltd. illustrates the scale of the recovery, which is likely to be due to the restriction of foreign competition in the home market. UTR production also recovered quickly in 1932, followed by a small decline. The CPA recovered in 1932, although not to previous levels, and established a new, lower level of production for the 1930s.

\textsuperscript{28} GD 326/ 228 Directors' Minutes, 19/2/37.
\textsuperscript{29} GD 326/ 226 Morton Sundour Fabrics Ltd. Directors' Report, 1938.
Stockdale Ltd. increased its print production during the interwar period, with temporary falls in 1921, 1926 and 1930-1. A greater similarity of Ferguson Bros. production data with Turnbull & Stockdale Ltd. in the 1920s indicates that market rather than section differences between dress and furnishing fabric was the most important factor. However, the general picture of falling, or level, income at MSF print department during the 1920s contrasts with Ferguson Bros. and Turnbull & Stockdale Ltd., though all three have broadly the same home/colonial market. A significant difference between the Ferguson Bros. pattern and the other case study companies in the 1920s may be the extensive use of artificial fibre textiles by Ferguson Bros.: the relative cheapness of these is likely to have increased market demand. Turnbull & Stockdale Ltd. shows an increase in orders and production in 1932-7. In contrast, the CPA and UTR had lower level of sales and production during the 1930s, due to the loss of export markets. Turnbull & Stockdale Ltd. and Ferguson Bros. both show reduced income during the 1930s, particularly in 1934-6 (Turnbull & Stockdale Ltd.) and 1935-6 (Ferguson Bros. Ltd.), probably due to price reduction (see Section 4.6).
4.4 Market Sales

4.4.1 Finishing Industries Export

A comparison of printed cotton piece goods export with exports of the other finishing industries can be seen in Figure 4.15 and Figures 4.16-17. Bleached cotton was a far higher volume of exports than piece dyed or printed until the depression, when it dropped to a similar level. From 1912 to 1922, dyed and printed exports had been of very similar volumes (and previous to 1912, dyed had been lower than printed). However, the relative position of printed cotton worsened, with a lower recovery after the post-war crash and a decline from 1927. The scale of export collapse over the depression was worst for grey cloth, then bleached, then piece dyed, then printed. Yarn dyed was low throughout, but stayed fairly steady (Figure 4.15). The value of exports (Figure 4.17) demonstrates the scale of the increase in prices in the 1920 boom, but also indicates the lower level of prices in exported printed piece goods during the 1920s compared to price changes in dyed and bleached piece goods (see also Figure 4.61).

An example of a dyeing company - J. Chadwick and Co. Ltd. - demonstrates that income rose from 1926 to 1929, followed by a steady decrease to 1934 (Figure 4.12). However, production remained fairly steady throughout 1932-7, with a rise in 1938-9 higher than the previous 1929 peak (Figure 4.11). A similar pattern is shown by Scottish Dyers and Printers Ltd. (Figure 4.13), the dyeing subsidiary of Morton Sundour Fabrics, which shows strongly rising sales in 1928/9-29/30, but the fall back to the level of the 1920s in 1932/3.

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31 Data from Oldham Record Office: 60/2/10, balance sheets.
4.4.1.1 Printed Calico Export

Dramatic changes in the cotton weaving industry were compounded by severe difficulties in the printed calico export trade. The total printed goods exports fell from 1,230.8 million square yards in 1913 to 413 million in 1937. There was a gradual decline from 1927, while bleached and piece dyed exports showed a sharp drop in 1929.\(^{32}\) Value of exports fell in 1926 and 1929. However, there was an earlier recovery from depression for the printed cotton industry than the broader national economy, which did not recover its 1929 level of industrial production until 1935. Recovery shows in the lift in total quantity of calico produced nationally from 1930-3. No differentiation is given in these national figures for dress and furnishing fabrics, though the bulk of printed cotton exports is likely to be dress fabrics, since the majority of exports were to destinations such as India and Africa which took high volume, low price dress fabrics ('Manchester goods'). Analysis of the case study companies sales destinations (Section 4.4.4) give a more detailed picture, although only indicating the characteristics of part of the industry.

A general indication of the decline of export markets from 1913 to 1930 is given in Figure 4.20.\(^{33}\) Expansion in domestic production in foreign markets reduced demand and India began exporting its own textile goods on a larger scale, making inroads on British East Africa, Malaya, Ceylon and the Persian Gulf. These difficulties were accentuated by an influx of cheap calico from Japan, which drastically undercut British calico prices in Egypt, Java, India and Africa. Figure 4.23 demonstrates the steep increases in 1932 and 1934 of Japanese production of printed cotton, although printed satin, flannel and jean remain more stable in export volume.\(^{34}\) Distributors found they could not sell British calico, and the significant bad debts, which resulted, led to the refusal of many shippers to carry their goods. The Calico Printers' Association suffered from this structural problem, especially in India.\(^{35}\) However, the competition from Indian textiles reduced, with a decline in Indian printed and dyed cotton exports by sea from 175.9 million yards in 1926 to 50.8 m. yards in 1934, shown in Figure 4.24.\(^{36}\) American printed and dyed cotton exports (Figure 4.25), a serious competitor in the Philippines and West Indies, dropped steeply during the

\(^{32}\) PRO, BT 70/ 28/ s1322/ 30: Fiscal Blue Book.

\(^{33}\) Ibid.

\(^{34}\) Data from Joint Committee of Cotton Trades Organisations, Cotton Trade Statistics, 1939, Table 186: Manchester Library 338.476772 104.

depression, to about a third of its 1929 level (297.1 million square yards) by 1936 (100.6 m. sq. yds.).

European competition over the same 1927-37 period is given in Figure 4.26. German and Russian export figures for printed cotton were not given in the JCCTO tables. Mr Hewit commented in 1930 that there was serious Russian competition, with prices quoted at 40% of the British costs of production. Competition from Italy and Czechoslovakia was also discussed:

'We felt very severe competition from Italy until Italy had to begin to stabilise, and the competition there has fallen much. ... Czechoslovakia has been a very severe competitor, but we know that the industry there is almost in bankruptcy. They have been selling there at less than cost.'

The severe decline in Czechoslovakian production from 1929-31 supports this contention. Belgian exports fell sharply in 1932, as did Czechoslovakian, indicating the effectiveness of the import tariff (discussed in Section 5.2.3). Crisis in the French industry during the depression, due to the fall in exports combined with the effect on the home market of 'the reduction in purchasing power which the economic depression has brought', is indicated by the continued low level of exports after the 1933 recovery. Measurement of the depression in France, using levels of partial employment translated into equivalent total unemployment, shows the periods of heaviest depression (when the total figure was above 10%) were November 1931-October 1932 and June 1934-February 1936. In 1940, MSF found many of their export markets easier:

'Owing to the cessation of Continental competition, which has been substantially subsidised, ... markets are to be targeted in Australia and New Zealand, South Africa and South America.'

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36 Cotton Trade Statistics, op. cit., Table 187.
37 Ibid., Table 190.
38 Ibid., Tables 191, 192, 194, 195, 198.
39 BT 55/18 Evidence by the FCP to the Economic Advisory Council Committee on the Cotton Industry, C.17.
41 Ibid.: chart of equivalent total unemployment given on p360.
42 GD 326/320.
4.4.1.2 Analysis of Fluctuations in Export Markets

4.4.1.2.1 India

India had traditionally been the largest single export market for British printed cotton, but it became an increasingly difficult market to compete in. There was a rise in domestic calico production in India, protected by tariff barriers, with increasingly intense price competition from Japan. Briefly, the scale of the reduction in this market is shown by the fall in exports of printed cotton to India from 470 million yards in 1913 to 162.5 million in 1924 and 84.1 million in 1930.\textsuperscript{43} Overall, cotton piece goods export to India dropped to 41.5% of its 1913 level by 1929.\textsuperscript{44}

The serious fall in British imports from 1927 to 1931 and increase in Japanese textiles imported is shown in Figure 4.27.\textsuperscript{45} A collapse of the market is noted on 3rd September 1929 by the CPA: 'There was a sudden and definite falling off in the Association's main Indian line (Bradshaw Hammond & Co. accounting for about 50,000 pieces). This was probably due to the Japanese price being 1d per yard below the Association's and also to the trouble in Afghanistan.'\textsuperscript{46}

The Swadeshi movement, led by the FICCI group of Indian businessmen, was initiated following the imposition of an additional preferential duty of 5% on the import of non-British cotton goods in March 1930. Their boycott of British piece goods was linked to Gandhi’s Civil Disobedience Campaign, and led to violence and intimidation against those dealing in British cotton. The CPA stated on 29th April 1930 that 'business with India had practically ceased.'\textsuperscript{47} At UTR, the comment was made:

'No definite information could be obtained as to when improved conditions in India are likely to occur ... The opinion expressed is that Bombay will never buy again to the same extent, but that business will come through Karachi and ports like Bedi-Bundar to a great extent.'\textsuperscript{48}

An enforced agreement of all merchant houses not to import further British cotton goods, apparently not known by the Government when informed by the FCP in early 1931, was

\textsuperscript{43} BT 70 28/s1322/30: Fiscal Blue Book.
\textsuperscript{44} BT 55/18, Final Report, p10.
\textsuperscript{45} Data from JCCTO, Cotton Trade Statistics, 1939.
\textsuperscript{46} M75/ Directors Minute Book No. 12, 3/9/29.
\textsuperscript{47} Ibid.
\textsuperscript{48} UGD 13/5/7, UTR Minute Book 1930-36, 11/2/31.
catastrophic for the cotton industry.\footnote{UGD 13/5/15, Bengal Chamber of Commerce analysis, 2/5/31.} The campaign, and the boycott, was taken up vigorously in Bombay. In January 1931, the UTR reported that Karachi was the only Indian market doing significant business, though by April Calcutta had recovered, with 'individual dealers risking bookings' against the boycott. In Calcutta the drop in British cotton piece goods imported between the first quarters of 1930 and 1931 was 86% (from 65,890 to 8,922 pkgs) while the Japanese imports only fell by 51% (62,484 to 30,890 pkgs); a similar scale reduction occurred in Bombay, with 74% and 52% falls respectively between the quarters.\footnote{Ibid.} Failure to pay accounts due to British companies at this time was partly due to exchange rate difficulties. Import duty was raised from 11% to 15% in 1930 and then to 20% in 1931 (see Section 5.2.3). The political boycott of British textiles was reduced in 1931 but re-launched in 1932. Restrictions eased later in the 1930s, but trade remained poor, with uneconomic prices being demanded. On the market recovery in 1932-3, much of the increased sales went to the Japanese: printed cotton imports from Japan rose from 33 to 115 million yards, overtaking the British imports for the first time.\footnote{Cotton Trade Statistics, op. cit.} A small recovery in 1934-5 for British prints proved temporary: imports rose from 50 million yards in 1933-4 to 85 in 1934-5, before falling again to 45 in 1936-7.

4.4.1.2.2 Asia and the East Indies

Persia was a strong market from November 1921 to May 1925 for the UTR, but in April 1926 the Persian market was reported to be bad, due to the conditions of the country and the floods, and in August 'the depression in Persia said to be the worst for 40 years'.\footnote{UGD 13/5/6, UTR Minute Book 1920-30, 18/8/26.} Russian imports were blamed by Mr Shamash (a specialist merchant in Manchester) in October for upsetting the British trade, noting that 'all the weaker traders had gone to the wall'.\footnote{Ibid., 13/10/26.} In November 1928, the UTR had a report that the Soviet had launched a textile company in Persia and that they were forcing Russian manufacturers to export textiles and sell at prices in many cases below cost to secure monies from foreign countries in place of the usual monies received from their grain exports, which had failed this year.\footnote{Ibid., 14/11/28.} A severe decline is shown from 1927-9 in British imports of printed cotton, while Russian imports rose steeply (Figure 4.29). In April 1930, the value of silver was

\begin{itemize}
\item \textit{UGD 13/5/15, Bengal Chamber of Commerce analysis, 2/5/31.}
\item \textit{Ibid.}
\item \textit{Cotton Trade Statistics, op. cit.}
\item \textit{UGD 13/5/6, UTR Minute Book 1920-30, 18/8/26.}
\item \textit{Ibid., 13/10/26.}
\item \textit{Ibid., 14/11/28.}
\end{itemize}
said to have had a disastrous effect on the Persian market, while in July it was noted that the
Persian Government would only allow a certain amount of money to leave the country,
hampering business.\textsuperscript{55} Small orders continued to be noted at the UTR, as indicated in March
1931: 'Persian business very quiet, speculative orders only.' Price competition from Russia and
Japan reduced British imports to less than a thousand quintals in 1934-5.

Exports to Iraq expanded suddenly in 1924 and 1925.\textsuperscript{56} Figure 4.30 gives imports into Iraq from
1928-36. British imports fell in 1929 from 10.85 million yards in 1928 to 6.38 m. yards, but
thereafter remained stable until severe competition from the Japanese in 1933/4. By 1936, British
imports had been entirely displaced by the Japanese, with an import of only 0.44 million square
yards. Figure 4.28 gives a comparison of British imports to Iraq, Burma, Ceylon, Malaya, Java,
the Philippines and Dutch East Indies from 1927-38. The Dutch East Indies was a significant
printed cotton export destination in 1915 (108 million yards), which fell sharply to 38.6 million
in 1924 (see Figure 4.20). It increased in 1925 but fell to 17.4 million in 1930. Notes from
company minutes books give an impression of trade movement in the region before 1927. The
CPA decided to invest in a Singapore showroom in February 1920, at an estimated cost of £4-
5,000 per year.\textsuperscript{57} These markets appear infrequently in the UTR minutes, indicating a small and
fluctuating market for the firm. They noted that Java was doing a fair business in November
1921, that Java was doing well and was prosperous in December 1924 but in January 1925 the
Java and Singapore markets were quiet again.\textsuperscript{58} In February 1925, the Straites Settlement ordered
700 lumps of Garts [Garments] and it was reported that the chintz business was being worked
up.\textsuperscript{59} In October 1928, the UTR noted that 'in the Singapore and Java markets, the boycott of
Japanese goods is at present helping this country'.\textsuperscript{60} A temporary revival was indicated in
December 1930 with 'Java at last taking a little interest in Para Chintzes, enquiries and orders
received' and January 1931, 'A' Department orders showed 750 lumps for Java, 230 for Persia and
150 for Rangoon [Bunna].\textsuperscript{61} Japanese imports to Java and the Dutch East Indies increased

\textsuperscript{55} UGD 13/5/7, op. cit., 9/4/30 and 9/7/30.
\textsuperscript{56} Fiscal Blue Book, op. cit.
\textsuperscript{57} M75/ Directors' Minute Book No. 6, 24/2/20.
\textsuperscript{58} UGD 13/5/6, op. cit., 9/11/21 and 12/24 and report on 'A' Department visit to Manchester by Mr Urquhart,
4/1/25.
\textsuperscript{59} Ibid., 11/2/25.
\textsuperscript{60} Ibid., 10/10/28.
\textsuperscript{61} UGD 13/5/7, op. cit., 10/12/30 and 14/1/31.
steeply in 1931-2, expanding the total market consumption (exports to Java increased from 29 m.
yds in 1930 to 84 in 1932, Dutch E. Indies from 9 m. in 1931 to 21 in 1932). The Javanese
market and Dutch East Indies market virtually disappeared in 1932-6 for British printed textiles,
but British Malaya, Burma and Ceylon were more buoyant. The Philippine Islands were a United
States protectorate, with most cotton goods imported initially from the US and later from Japan.
A boom in the East Indies countries of Malaya, Java and the Dutch East Indies occurs in 1937.

4.4.1.2.3 China

The cotton piece goods trade with China was Britain's second largest market before the war.62
Encouraging sales and investment in the market in the immediate post-war period by the CPA63
was followed by the 1921 economic crash: the UTR noted in June 1921 'China market very bad',
and by May 1922 'China market dead.'64 Total British print exports to China dropped from 24.1
million linear yards in 1913 to 16.7 in 1924 and 4.8 in 1927 and rose again to 7.7 million in 1929
before falling to 3 million yards in 1930 with the depression (see Figure 4.20). In 1930, the FCP
stated that: 'the Japanese have taken everything. They are putting 2 million pieces a year in
there.'65 Japanese printed cotton dominated the market by 1928 (79.4% of the market, British
5%), with an overall reduction of all imports from 4,262 million yards in 1928 to 31 million
yards in 1937.66 The UTR noted in November 1934 that 'the Exchange was fluctuating violently
due to the wide movement in the price of silver and this was affecting prices.'67 Currency and
political troubles interrupted the Shanghai auctions in December 1935 - only one UTR case was
sold.68 It was agreed to sell the unpacked stocks for Shanghai still at the Works in Britain rather
than sending them on. A similar catastrophic fall is shown in the total cotton piece goods export
figures for China and the Far East: by 1934-6, British exports had fallen to about 4% of the 1909-
13 average (see Figure 4.22).

63 UGD 13/5/6, op. cit. 'Consignments to China (Brubros Department): total sales from commencement to date
204,903 pieces' 18/3/19. 'Bradley & Co. proposed handkerchief agency in China with Messrs James Shaw on Brubro
lines. £10,000 worth of handkerchiefs to China.' 8/4/19. £800 for 15,000 copies of Chinese Calendar to be issued
11/5/20. The CPA registered as a foreign limited company in Hong Kong in 13/7/20.
64 Ibid., 8/6/21 and 10/5/20.
65 BT 55/18 Evidence to the Economic Advisory Council Committee on the Cotton Industry by the FCP, 12/2/30,
C.20.
66 Cotton Trade Statistics, op. cit.
67 UGD 13/5/7, op. cit., 14/11/34.
68 Ibid., December 1935.

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4.4.1.2.4 Africa

For total cotton piece goods, North Africa was the largest export destination in the 1920s, followed by West Africa and then South and East Africa counted together (see Figure 4.21).\textsuperscript{69} All three followed the same pattern of an increase from 1924-5, significant fall in 1926 and recovery in 1927. Thereupon, North, South and East Africa fell in 1928 and rose again in 1929. West Africa rose to more than its 1913 level in 1928 but fell in 1929. North Africa had fallen to 73% of its 1913 level by 1929, while South and East Africa had almost regained their 1913 level.

Development activities by the CPA to improve the post-war trade in North Africa included a subscription to the British Merchants Morocco Association. In Egypt, there was an expansion of domestic calico production, protected by tariff barriers. Very strong Japanese competition developed in the 1930s, with a domination of the market in 1933-6 (Figure 4.32). The CPA minutes note in August 1933 that the bankruptcy of the merchants Btesh Bros. & Co. (their largest Egyptian customer) and David Ades, due to Japanese competition, 'might necessitate closing down Hayfield' works.\textsuperscript{70}

In the Union of South Africa, printed exports fell from 18.5 million yards in 1913 to 11.9 in 1925 before recovering to 16.6 by 1929 (Figure 4.20). The Indigo Printers' Association noted in January 1926 that they were meeting serious competition in South Africa and had been cut out.\textsuperscript{71} The South African cotton goods market expanded in the 1930s to a position greater than it had been at any time previously. The 1926 drop in British imports common to all parts of Africa was due to Japanese undercutting on price: The Manchester Chamber of Commerce's East Africa Committee found that between 1925, when Japanese competition had aroused 'no serious fears', and 1926 it had taken 50% of the market.\textsuperscript{72} Almost all the trade in East Africa was replaced by Japanese imports by 1938, due to the Congo Basin Treaties dating from 1885, which prevented any discriminatory customs duties being applied (Figure 4.33).\textsuperscript{73} The main East African markets were Kenya, Uganda, Tanganyika and Zanzibar.

\textsuperscript{69} BT 55/ 18, Final Report, p10.
\textsuperscript{70} M75/ Directors' Minute Book No. 15, 12/9/33.
\textsuperscript{71} B14/ 16/ 6, FCP Indigo Printers' Association, 29/1/26.
West Africa was a distinct market, with specialist processes and styles. It included the Belgian Congo, Gold Coast, Nigeria and French West Africa and French Equatorial Africa. However, exports to French West Africa (vastly larger geographically than British West Africa) were very low (see Figure 4.21). Barriers to the market by the French were evidently a problem: in 1919, Mr Horridge (of Horridge & Cornall Ltd., specialist African Indigo printers) ‘pointed out that as we had fought for the French it was only right they allow us entry into their colonies’. The Indigo Printers Association then agreed a Resolution that: ‘everything possible should be done to safeguard for British cotton goods the same terms of entry into the markets of our Allies as we allow theirs in respect to our own’, in support of which representations would be given in proper quarters. This market fluctuated between 11.2 and 15.1 million yards between 1924 and 1930 (Figure 4.21), with 13.9 in 1913, so no significant structural alteration in access seems to have occurred. Development activities by the CPA to improve post-war trade in West Africa included a Congo visit in December 1919 to establish showrooms and a representative. Post-war recovery in the West African markets began for the UTR in August 1921, with 'business for the West Coast of Africa looking better' in September. National printed calico exports to British West Africa dropped from 1913 to 1924, rose to 1925, fell and rose again in 1927 before dropping (Figure 4.20). A healthy African trade in batiks was shown by United Turkey Red Ltd. during the 1920s, which was expanded from 1927 with considerable ‘Sarries’ and ‘Garments’ orders, although the dip in exports to the Gold Coast in 1929 is confirmed by a note on the unsettled conditions due to a cocoa slump. In May 1930 the ‘steady progress in job printing of African styles’ was commented on in the minutes. Ferguson Bros. Ltd. was encouraged by this buoyant market to appoint an agent for West Africa (Gambia and the southern border of Angola) in July 1930. A native boycott in West Africa in January and February 1931 prevented the movement of stocks from the coast and caused a drastic price-cutting when stocks were at last able to move: they 'were being slaughtered at up to 50% of the original cost'. It was also 'felt that want of confidence in internal trade is responsible' for the poor business and lack of credit in

74 JCCTO, Cotton Industry Facts and Figures, 1939, p42 and p44.
75 This included the countries now known as Camaroun, Central African Republic, Gabon, Chad, Congo, Sudan, Niger, Mali, Upper Volta, Ivory Coast, Togo, Benin, Senegal, Mauritania and Guinea. Given in Freeman-Grenville, G.S.P. Atlas of British History, Rex Collings, 1979.
76 B14/16/6 FCP Indigo Printers' Association 20/5/19
77 M75/ Directors' Minute Book No. 5, 9/12/19.
78 UGD 13/ 5/ 6, op. cit., 10/1/29.
79 UGD 13/ 5/ 7, op. cit., 15/5/30.
80 Ibid., 11/2/31.
the market. New competition was also faced from Czechoslovakia in West African shawls from February 1931. By May, new orders and general indications pointed to an improved tendency in the West African markets. The volatility of this market can be seen in the Gold Coast and Nigeria imports, shown in Figure 4.31. In 1934, calamitous produce prices threatened disaster to anyone in the West African trade, but the trade expanded in 1936-7 due to a boom in cocoa. Mr Frank Crompton (of Benjamin F. Crompton Ltd., specialist African Indigo printers) stated that they had had a busy 1935-6, and had increased their capacity from 3 to 8 printing machines between 1934 and 1936. British West Africa was the most significant export market for cotton goods after India, between 1935-7 (Figure 4.22). However, in the summer of 1937, an agreement among the chief buyers of cocoa and a serious slump in prices led to a buying strike by cocoa producers. The consequence of this was that import of cotton goods diminished to a very low level. A gradual resumption of cotton imports occurred with the ending of the strike in spring 1938. The UTR comments in its 1939 Chairman’s AGM Statement that the difficulty of late has centred round cocoa and other raw materials. The situation appears to be easing out and business in West Africa in the last two or three months has shown consequent signs of revival.

However, the increases in demand in 1935-7 in the Belgian Congo were taken up by Japanese imports (Figure 4.34): in the Gold Coast minimal Japanese prints were imported (maximum 0.31 m sq. yards) and none in Nigeria. British exports to the Gold Coast increased from 16.26 million square yards in 1927 to 28.68 in 1937 (Figure 4.31). This may be a consequence of a difference in process specialism, with indigo being more important for Nigeria and Gold Coast, but would also be due to the imposition of quotas for Japanese textile imports for British colonies in 1934 (Section 5.2.3).

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80 Ibid., 14/1/31.
81 Ibid., 11/2/31.
82 Ibid., 13/5/31.
84 Cotton Industry Facts and Figures, op. cit., p42.
85 M75/1929-1939/58.1.
86 Cotton Industry Facts and Figures, op. cit., pp42-3
88 Cotton Trade Statistics, op. cit.
4.4.1.2.5 Europe

Europe was the only market in which British printed cotton exports expanded after the First World War, from 60.4 million yards in 1913 to 75.5 in 1924 (Figure 4.20). The CPA noted 'Dutch and Scandinavian markets licences coming freely' in March 1919. However, France suffered a similar post-war depression to Britain. The CPA noted in December 1920: 'Trade position in France very unsatisfactory'.90 CPA (France) Ltd. dropped into loss between 1920 and 1922.91 A decline in printed cotton exports from 1924, with a sudden fall in 1926 and small revival in 1927, followed. More specific data on imports of printed cotton for European countries is shown in Figure 4.35. Total cotton piece goods export rose from 1913 to 1925 (383.9 to 554.1 million linear yards) fell in 1926, recovered partly in 1927 and fell to 340.5 million yards by 1929 (Figure 4.21).92 Overall, exports to Europe rose in the 1930s, but there were distinct differences in trend between countries. The volume of cotton piece goods exports to France, Germany and Austria declined, while Bulgaria almost disappeared during the depression. Belgium and Yugoslavia increased, but fell back in 1937-8. Holland rose sharply in 1932, thereafter falling back to the 1929 level during 1937. The sharp rise in printed cotton imports to Denmark in 1933-6, shown in Figure 4.35, is not indicated in the minutes of any of the case study companies. The increase does not seem to have applied to the furnishing fabrics of MSF, since in February 1936, the minutes note that 'Denmark has been difficult for the last 3-4 years. A special allowance of £50 to be given to Mr Rasmus [agent] for losses sustained.'93 Belgium ordered quantities of handkerchiefs from UTR (particularly in 1921-2, 1925, 1927 and 1931): their E Department was mainly involved in this trade. It may be that much of this was re-exported to the Belgian Congo, and thus that a significant proportion related to economic patterns in West Africa.

4.4.1.2.6 Russia

Limited data is available for exports to Russia: the lack of a distinct category in the Fiscal Blue Book or JCCTO sources indicates that it was a relatively insignificant market. However, the CPA commented in January 1919 on the 'very good business offering in Siberia'.94 CPA membership
of the Russo-British Chamber of Commerce was reinstated in October 1925, before resigning in 1927. Political reasons caused the curtailment of trade with Russia: the Chair of the Chamber of Commerce wrote in September 1927 emphasising 'the delicate position in which the Chamber was placed owing to strained and abnormal relations between the two countries.' 95 In August 1928, the Chamber Report was written 'under circumstances of exceptional difficulty' with the Journal discontinued and all salaried staff let go. 96

4.4.1.2.7 Australia and New Zealand

Exports of printed cotton to Australia fell from the pre-war level of 31.2 million yards in 1913 to 21 in 1924, before rising to 28 in 1927 and dipping to 23.2 in 1930 (Figure 4.20). The UTR commented in April 1922 'outlook much brighter in Australia' and in January 1926 that the 'Australian market seems to be reviving.' 97 New Zealand regained most of its pre-war level by 1925, before declining to 1928, recovering partly in 1929. The Balfour Report stated in 1929 that:

"In the Australia and New Zealand markets, the demand is predominantly for the better qualities of goods. The imperial connection and preferential tariff rates doubtless play a part, and British exports . . . have experienced no serious competition from other countries." 98

The effect of the depression on CPA exports to the Australian market is shown by a 15% drop in turnover for the first 8 months of 1930, compared to the corresponding period the previous year. 99 Ferguson Bros. director Mr J.S. Chance and Miss Josephine Chance made a sales visit to New Zealand in January 1932 (as the market recovered from the depression). 100 The JCCTO figures for Australian imports indicate a decline in demand during the 1930s, from 121.82 million yards imported in 1932/3 to 96.66 in 1935/6 (Australian imports were given as combined printed and dyed cotton piece goods). 101 British printed cotton exports almost halved, from 101.52 million yards in 1932-3 to 58.03 million in 1935-6, while Japanese imports were increasing from 17.39 to 36.11 million yards.

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95 M75/ 1922-8/ 19.2, letter of 13/9/27.
96 Ibid., letter of 10/8/28.
98 Committee on Industry and Trade, Survey of Textile Industries, 1928, p75.
99 M75/ Directors’ Minute Book No. 13, 2/9/30.
100 DB 110/ 229, Directors’ Minute Book 1928-37, 18/5/32.
101 JCCTO, Cotton Trade Statistics, op. cit.
4.4.1.2.7 The Americas and the West Indies

South America was the second largest market for British print exports in 1913 (122.3 million yards). Total exports fell to 47.1 million yards in 1926 before rising to 63.6 million in 1929 (Figure 4.20). Developments related to this market in the case study company minutes include: the reference to an agent in South America by the UTR in May 1922; Uruguay and the Argentine Republic registered the trademark 'Ferguson', in July 1926; and the CPA turned down membership of the British and Latin American Chamber of Commerce in March 1927.

The Balfour Report stated in 1928:

"In Brazil, the high tariff also practically restricts imports to goods of superior quality, and it is significant that in the imports of that country British trade has fully maintained its relative position, although there has been some falling off in the absolute volume."

However, in the JCCTO report, all imports into Brazil from the UK, France and the US cease in 1931, with a very small Japanese import (0.09-0.18 thousand quintals) continuing. A wave of agency bankruptcies in South America was reported in 1931. The market in Argentina was far healthier for British printed cotton, with Japanese competition only becoming a danger from 1935 (Figure 4.36).

Exports of British cotton piece goods to Central America, Mexico and the West Indies fell from 1913 to 1927, recovering to 51.3% of the 1913 level by 1929. The UTR recorded in November 1934 that regular small orders for the South American Department of Horrocks Crewdson Ltd. were received. A Ferguson director visited the West Indies in 1936.

The United States of America and Canada show a rise in the cotton piece goods export from Britain between 1913 and 1924 followed by a decline to 1929, which was 33.8% of the 1924 level. The main fall was from 1924 to 1926. The Balfour Report notes that in the export of cotton

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102 UGD 13/5/6, op. cit., 10/5/22.
103 DB 110/228, Directors' Minute Book 1919-28, 23/7/26.
105 Survey of Textile Industries, op. cit., p.75.
106 Report on South American trade, M75/1929-1939/32.2.
107 UGD 13/5/7, op. cit., 14/11/34.
piece goods to the United States:

'British trade has not merely held its relative place but has expanded absolutely – notwithstanding exceedingly high rates of duty levied upon imports in the last few years. The explanation is that the goods exported to the US are of very high quality, such as are not produced there to any great extent, and that the abounding prosperity of America since the war has resulted in a demand which the tariff has failed to check.'\(^\text{109}\)

The USA is not shown at all in the Fiscal Blue Book table of printed cotton export destinations, but Canada dropped from 25.1 million yards in 1913 to 6 million yards in 1930 (Figure 4.20). The UTR commented 'Canadian market lively' in April 1923, with orders of 23,000 yards shirtings.\(^\text{110}\) In January 1926 they noted that 'there are a few small orders for Canada but so far we have not been able to get into this market with Chintzes, as the local article which is much inferior to ours is selling at a lesser price and seems to satisfy the market.'\(^\text{111}\), while in March the E department was showing good sales of handkerchiefs. In November 1928 it was reported that the Canadian market, which had left for cheaper Canadian chintz, had come back to them.\(^\text{112}\) The 1929 crash had a serious effect on the economy of the USA, and recovery was slower than in other countries (see Appendix 2.1.2, Figure A2.3). The MSF September 1934 Directors Report to Shareholders summarises the position: 'the trade has had to weather the very adverse conditions there [USA and Canada] of the past few years. Recent months show considerable improvement.'\(^\text{113}\) In June 1936 the Directors Report is confident: 'Our Subsidiary Company in America is again showing good profits . . . which are likely to continue and increase, while the business of the Canadian Company has also proved profitable.'\(^\text{114}\) However, in 1938 this trend alters: 'In America there has been during the past financial year a very sudden and alarming drop in all business activities.'\(^\text{115}\)

\(^{109}\) Ibid.  
\(^{110}\) UGD 13/5/6, op. cit., 4/23.  
\(^{111}\) Ibid., 13/1/26.  
\(^{112}\) Ibid., 14/11/28.  
\(^{113}\) GD 326/224.  
\(^{114}\) GD 326/226.  
\(^{115}\) Ibid.
4.4.2 Home Market

No official figures are available for home trade consumption, although the Report on the Cotton Industry of the Economic Advisory Council notes that an increased proportion of production was taken by the home market (from 22% to 25%) from 1912 to 1924, due to a smaller fall in home consumption than export.\textsuperscript{116} Annual data from 1933-8 is given by Geoffrey Turnbull, based on FCP reports, with a rough impression of the 1927-32 period noted.\textsuperscript{117}

Table 4.4

<table>
<thead>
<tr>
<th></th>
<th>Home Trade Print Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1927-32</td>
<td>Varied between 210 and 225 million yards; 1928 was a 'print' year.</td>
</tr>
<tr>
<td>1933</td>
<td>281 million yards</td>
</tr>
<tr>
<td>1934</td>
<td>266 million yards</td>
</tr>
<tr>
<td>1935</td>
<td>226 million yards</td>
</tr>
<tr>
<td>1936</td>
<td>220 million yards</td>
</tr>
<tr>
<td>1937</td>
<td>242 million yards; 'print' year</td>
</tr>
<tr>
<td>1938</td>
<td>228 million yards</td>
</tr>
</tbody>
</table>

Company minutes indicate that the post-war recovery occurred in 1920, but that demand dropped with the 1921 crash: the CPA noted in January 1919 'In February and March our Home Trade outstandings would be very large - extend facilities for payment, accept bills rather than dating.'\textsuperscript{118} The UTR minutes show that D Department (Cretonnes, Printed Shirtings, Block, etc.) was fully booked for some months ahead in October 1920 and for practically twelve months ahead in 'Block Prints' in September.\textsuperscript{119} However, 'Home Trade enquiry had absolutely died away' for E Department (Handkerchiefs, Coloured Shirtings) by August 1921 and in November,

\textsuperscript{116} BT 55/18.
\textsuperscript{117} Turnbull, G. op. cit., p370.
\textsuperscript{118} M75/ Directors' Minute Book No. 5, 28/1/19.
\textsuperscript{119} UGD 13/ 5/ 6, op. cit., 13/10/20 and 8/9/20.
that 'the Wholesale Houses are not buying at present.' Home trade continued to be very low in 1922. By 1925, sales were better in twills and chintz and there was a good demand for shadowettes. At Ferguson Bros., the destinations of pieces sold indicate that the home market fell sharply from 1918 to 1921 and expanded quickly in 1924 and 1926 (Figure 4.42). This does not follow expectations of a reduction during the General Strike in 1926 or an increase in the 1928 'print' year.

World recession was far milder in its effects in Britain than in most other industrial competitors except Japan, with a faster recovery in industrial production and exports (see Appendix 2, Figure A2.3). This showed in the introductory notes on the Ferguson Bros. balance sheets, which state in 1931: 'It is impossible at present to record any marked sign of recovery in our Export Trade, but the prospects in the Home Trade appear more encouraging. This was confirmed by a letter from MSF in August 1932: 'We are confident of a final rise in turnover - all in Home Trade.' UTR reported a 'fair trade' in the home market in November 1932 and by April 1933, 'Home Trade much better.' The cut in competition in November 1931, with the imposition of import tariffs, opened a wider market in low priced goods, mainly controlled by the wholesalers. The sudden rise of the broad home market in 1933 shows in the home sales of Turnbull & Stockdale Ltd., with a slower increase in 1934-5 and more rapid expansion in 1936-7. The high market demand for 1933 and 1934 was due to greater competition and falling prices from the merchants and producers who usually sold to the export trade. In 1934 the Ferguson Bros. balance sheets notes state that: 'The Directors regret that the results obtained have been disappointing and although Home Trade has been fairly satisfactory, Export Trade still remains very dull.' The rise in consumption of low priced textiles in 1933-4 may be partly due to the general increase in disposable income of the working and lower middle class in employment, which allowed greater expenditure on furnishings (see Appendix 2.2.5). In 1935 the continuing export situation further 'concentrated trade in the home market, for which there has been serious overproduction', and prices dropped further. Consumption dropped back to a lower level in 1935-6, possibly due to the

121 GD 326/ 224: letter to A.B. (no other name given).
123 DB/ 110/ 78.
rising food prices and to the additional furnishing textile demand due to low prices being satisfied in 1933-4. A greater fashionability of weave rather than print in these years was also noted by Geoffrey Turnbull and Alastair Morton. An expansion in production and consumption of printed textiles occurred in 1937 (UTR and Turnbull & Stockdale Ltd., both home trade dominated by late 1930s, show sudden rises in production in 1937). This is likely to be due to increasing prosperity, with the improvement of the economy in 1936-7 and the lowest rates of unemployment in the 1930s in 1937 (see Appendix 2), combined with the demand for furnishing fabrics caused by the very high level of house-building in 1936 and fairly high level for the previous two years. Ted Ould (London manager of Gordon Russell Ltd.) commented in September 1937 on the 'really high fabric sales ... quite astonishing when you consider that about 95% of our fabrics are 12s 6d per yard or less.' In the Chairman’s speech at the AGM of the UTR on 29th March 1939, it was stated that the home market production during 1938 declined by about 22% from the previous year, due partly to the overproduction and consequent unsold stock of 1937.

Variations in prosperity of area and trade could make a significant difference to the home market demand for textiles. For example, the prosperity on the Clyde during the laying of the keels of the Queen Mary and Queen Elizabeth was indicated in a sudden demand by the Scottish Co-operative Wholesale Society for quilting in 1929: ‘Now that the Clyde is becoming busier, the CWS have been taking larger quantities than they have for the last three years and altogether prospects are brighter.’ The continuing disruption in the coal mining industry after the 1926 strike also affected the United Turkey Red Company’s home trade: ‘Once the miners are back at work again the trade in Chintzes should revive.’

125 Turnbull, G. op. cit., p370; GD 325/164/10 Morton, A. Character of Present Day Design, referring to ‘the first stage’ in the emergence of ‘the contemporary style of design’.
129 UGD 13/5/6, op. cit., 13/3/29.
130 Ibid., 13/3/29. Fluctuations in the coal industry are indicated by minute notes: 12/9/28 ‘Some pits reopening’; 13/2/29 ‘Increased demand for coal (severe weather and influenza epidemic), decreased production, closing down many pits.’; 13/3/29 ‘Pits re-opening’.
4.4.3 Imports

Britain also faced import problems with the cheaper end of the printed textiles market (Figure 4.37). However, the implementation of tariffs in November 1931 sharply reduced the volume of imported printed cotton piece goods from 11.53 million square yards in 1931 to 1.2 million square yards in 1932 (and total cotton piece goods by from 81.5 to 13.79 million square yards).\(^{131}\) The level of printed textile imports remained low until 1937. The rise in 1937 was noted by Mr E.W. Goodale, President of the Federation of British Furnishing Textile Manufacturers: 'many millions of square yards are being imported annually, principally from Belgium, nearly always of inferior design, and sold in cheaper shops on price.'\(^{132}\) He appears to have been principally concerned with woven furnishing fabric, however, since in a similar article in 1938 he quotes the import figures of damasks, brocades and tapestry: from approximately 3.5 m. sq. yds in 1935 (2.5 million from Belgium), to over 7 million in 1937 (6 million from Belgium).\(^{133}\)

Comparative examples of data for imports of piece dyed cotton goods showed increasing levels of imports from 1935 to 1938, of which most was from Belgium, the Netherlands and Germany.\(^{134}\) Coloured cotton import was mainly from Belgium, while unbleached cotton piece goods and shirts were mainly from Japan. Imports of damasks, pile fabrics, brocades and tapestries came from Germany, France, Belgium and Italy. Coloured cotton rose particularly quickly, from a value of £427,000 in 1935 to £658,000 in 1937: over the same period, piece dyed cotton increased from £422,000 to £559,000.

\(^{131}\) Cotton Trade Statistics, op. cit., Table 212A.
\(^{132}\) Rena, M. 'How Textiles are Made', The Studio, February 1937, pp88-98.
\(^{134}\) BT 70/ 62/ s1111/ 38.
4.4.4 Market Orientation of the Case-Study Companies

4.4.4.1 Dress Fabric

Printed dress fabric sales generally had a broad global range of markets. The Calico Printers' Association had a wide international spread of the cheaper markets, including India, Persia, the East Indies, Egypt and the Levant, West and East Africa, South and Central America, China and Japan. Proportions of market destinations by volume production in January-June 1920 can be seen in Figure 4.40: 7.2% was sold in the home market.\textsuperscript{135} The largest markets were 'Egypt and the Levant' (19.1%) and 'India and Ceylon' (16.6%), markets that were severely affected by home production and Japanese competition (see CPA minute notes in Section 4.4.1.3.1). Pitt comments that no effort was made to break into the USA market, during the interwar period: a conclusion was reached in 1923 that 'it was useless for us to hope at any time for any considerable import trade either into the USA or Canada', apparently due to distribution barriers and competition with the American production model of long print runs.\textsuperscript{136} A reduction in their proportion of UK exports, from 53% in 1927 to 41% in 1938 is noted by Pitt, from invoicing CPA volume produced against aggregate national volumes.\textsuperscript{137} The reduction in piece goods produced noted in September 1929 'was entirely in commission printing, the Merchant Departments having improved by 55,000 pieces over the comparative 11-week period the previous year', with the annual reduction stated as 'entirely in the Overseas markets' in November.\textsuperscript{138} A drastic reduction of income from their wholesale trade in the home market from £380,000 in 1930 to £180,000 in 1935, with further reductions in 1936, is noted in the minutes.\textsuperscript{139} The other section of their home market trade was making-up (clothing) companies, of which there were 8-900 accounts totalling £600,000 in 1937.\textsuperscript{140} In July-October 1934, bookings were down for the home trade by 120,000 pieces against the corresponding period for 1933.\textsuperscript{141} The policy of direct sale to retailers in the home market, adopted in 1939 (Section 5.4.5.1), resulted in sales of £60,000, 'roughly equivalent to all of Grafton's wholesale business.'\textsuperscript{142} There are no annual figures of total home market production available, but a comparison of the number of

\textsuperscript{135} Data given in Pitt, S., op. cit., p101. Source: M75/ 1915-1921, Box 1178.
\textsuperscript{136} Ibid., p113. Source: M75/ 1921-8/ Box 1196, fol. 54.
\textsuperscript{137} Ibid., p132.
\textsuperscript{138} M75/ Directors' Minute Book No. 12, 5/11/29 and 17/9/29.
\textsuperscript{139} M75/ Directors' Minute Book No. 18, 17/8/36.
\textsuperscript{140} Pitt, S. op. cit., p143.
\textsuperscript{141} M75/ Directors' Minute Book No. 17, 23/10/34.
\textsuperscript{142} Pitt, S., op. cit., p139: from minutes, 9/5/39.
pieces exported against the total printed\textsuperscript{143} (comparable data is only available 1928-36) implies that the proportion of their production sold in the home market increased significantly from a very small volume in the 1920s (1\% of production in 1929) to approximately 20\% in the 1930s (Figure 4.41).

The United Turkey Red Co. Ltd. was also orientated towards export in dress fabrics, particularly in India. The ‘A’ and ‘B’ departments specialised in the dress textiles required by this market, with a significant export to West Africa and smaller quantities to Persia and Java. They also had regular consignments to China. F. UTR dress production was traditionally for the cheaper end of the market:

'Turkey Red dyed cloth and Turkey Red prints, formerly largely used in working-class districts throughout the United Kingdom and the Colonies, and very largely used in the East.'\textsuperscript{144}

No annual figures for home and export production or sales are given, but monthly weights of cloth purchased for home and shipping markets are given for a period in 1930, indicating that 28\% of the total was intended for the home market over the seven months from March to September (210,714 lbs. home, 291,881 lbs. shipping).\textsuperscript{145} The Factor book of fabric produced recorded the total monthly values of listed styles, with values of home and total trade given for some months of 1938-9. This indicates that by 1938 the UTR had become dominated by home market production overall: for the 5 months from September 1938 to January 1939, 65\% of the total value of fabric production was home trade (£11,714 home, £6,310 shipping).\textsuperscript{146}

Ferguson Bros. Ltd. had a market profile nearer to the furnishing fabric manufacturers, in being dominated by the home market, supplemented by the Dominions and the USA, with a small proportion exported to Europe. In 1919-28, 48\% of production was sold to the home market, 16\% to Australia, 7\% to Canada, 5\% to the USA, 9\% to Continental Europe and only 15\% for all other countries (Figure 3.42).\textsuperscript{147} These proportions are based on total production, rather than the print

\textsuperscript{143} Total exported given in Pitt, S. op. cit., p106; annual print volume production totalled from minutes.
\textsuperscript{144} 1930 Yearbook, UGD 13/ 5/ 15.
\textsuperscript{145} UGD 13/ 5/ 7, op. cit., 12/3/30-10/9/30.
\textsuperscript{146} UGD 13/ 5/ 10 Factor Book No. 16, 1938-50.
\textsuperscript{147} Percentages of total market destinations calculated from sales data for 1870-1928, DB 110/ 63.
department. The most significant change during the 1915-28 period is the severe fall in production for the home market 1919-21, which is not recovered until 1926. The CPA also had a severe fall in production in 1921, with the economic crash and coal strike, which was never recovered, indicating over-confidence in their export potential, in the changed conditions compared to pre-war global trading situation.

4.4.4.2 Furnishing Fabric

The case study companies producing furnishing fabrics show a similarity in market range, dominated by home market production. The increasingly high proportion of Turnbull & Stockdale Ltd. home market sales from 1928-40 can be seen in Figure 3.38, indicating a rising sales income from 1933-7 due to an increasing home market. In the October to March half-years of 1926/7-1932/3 (Figure 3.39), 66.7% of their sales were sold to the home market. The ‘D’ department of the UTR, which produced cretonnes, casements and other furnishing fabrics, sold principally to the home market, while ‘C’ department (mainly chintz and twills) sold to the home and export trade. Morton Sundour Fabrics attempted to increase their wholesale trade to the home market during the 1930s, to compensate for the lack of exports: A letter from James Morton to George Walton (designer) on 2nd March 1931 stated that ‘some of our best export markets have collapsed altogether.’ This was followed by a clear statement of policy to shareholders, in their confrontation of the depressed conditions:

'It was realised that there was likely to be a more or less permanent reduction in our Shipping Trade and in order to make up this loss, it was desirable that we should make every effort to get more of the Home Trade. For this purpose it was suggested that we should take steps to cultivate some of the Wholesale Houses and lay ourselves out to prepare cloths specially to suit the wholesale market and which we hoped might replace goods now being imported from Continental countries.'

The success of this policy is indicated by a minute of the Board of Directors in May 1936, which stated that they had orders at keen prices for bulk wholesale trade for printed goods from some large retail distribution organisations.

148 Sales data from DDX 924/ 4/ 7.
150 Memorandum of a Directors’ meeting on 24/4/31, GD 326/ 224.
151 GD 326/ 228 Directors’ Minutes, 5/5/36.
Export of furnishing fabrics was principally to colonial, ex-colonial and European countries. The UTR 'D' department had regular West African print orders and occasional export orders from Europe and South Africa while the 'C' department exported to Australia, New Zealand, South Africa and South America, with European markets in Belgium and Spain and a regular order to Java. Turnbull and Stockdale Ltd. exported principally to the USA (14.8% of sales in 1926/7-1932/3 half-years) and European countries (10.8%), with smaller quantities to Australia (3.8%) and Canada (1.8%). South Africa, China, Japan, India, the West Indies, South America, the East Indies and North America were markets of less than 1%. Exports to Japan occurred from 1927/8-31/2. Morton Sundour Fabrics had sub-companies established in the United States and Canada as principal export markets, but also exported significant quantities to Australia, South America and Europe. MSF representatives in India, the Far East, South America, Ireland and Norway are mentioned in the company minutes. In 1940, a new marketing campaign was developed for the high quality Sundour ranges (which included printed cretonne, chintz, linen and satin), directed at the markets of Australia and New Zealand, South Africa and South America (mainly Argentina).

4.4.4.3 Fabric Type

Ferguson Bros. Ltd. archive has data on the fabric types sold for home and export markets from 1915-28 (Figures 4.43 and 4.44). The home market increase in 1926 seems to have been principally due to the introduction of new fabrics (poplins, marocaines and plains), a rise in art silks and voiles and a smaller increase in satteens. Overall, the home market seems to have been far more enthusiastic about the artificial silks than the export markets. Marocaines and percalines also seem to have been more popular in the home market: however, it is not clear if these categories of fabrics are also rayon or rayon mix fabrics. Twills, voiles, shirtings and pocketings were more popular in the export markets. A fall in 1925 occurs only in the home market, mainly for sateens. The minutes indicate concern at this development, noting the importance of increased sales of tailor’s linings in June 1926 and giving instructions for a reduction in prices after a review (linings are not given as a separate category in the sales figures, but the sateen sample

152 Data from DDX 924/ 4/ 7.
153 Report by Osbourne-Peacock Co. Ltd. on marketing strategy for overseas markets, GD 326/ 320.
154 DB 110/ 63.
The sample books for the interwar period with a particular fabric stated are of artificial silk (2), voile (3), ‘Fergotex’ (1), cotton (1) and sateens and lawns (1). There was also a very broad range of new fabrics and finishes developed by Ferguson Bros. in the 1930s, including artificial silk and artificial silk mixes (see Section 5.4.2.2). The variety of cheap artificial silk and lightweight fabrics, combined with the choice of finishes, may have been a significant factor in the recovery of sales income in 1933-4 and 1937-9 (implying considerable increase in volume sold, due to price reductions). None of the other case study companies have archival data on their fabric type sales in different markets.

4.4.5 Conclusion: Market Sales

The market division between furnishing and dress fabrics, stated in the Balfour Report, appears to be broadly correct. The furnishing prints of the case study companies were ‘chiefly sold in the home and European markets and in the Dominions and Colonies.’ Dress fabric sales had a broad international coverage, but concentrated particularly on India, with significant markets in Africa, the Near and Middle East, South America, the Dominions and Europe. The UTR and CPA were primarily dependant on exports to India, the Near and Middle East and Africa and suffered severe reduction of their Indian and Eastern market sales, due to Japanese price competition, cotton textile production within the export markets and the Indian political boycott of British textiles in 1930-2. Ferguson Bros. Ltd., however, had a market balance similar to the furnishing print companies. An additional factor is the price of fabrics used: the increasing sales of cheaper rayon and mixed rayon/cotton fabrics by Ferguson Bros. Ltd. may be significant in their buoyant recovery of income levels. The CPA, for example, had a reduction in its proportion of the home market, with significant falls in their income levels.

West African and some Near Eastern colonial markets (British Malaya, Burma and Ceylon) were given import protection in the 1930s (see Section 5.2.3). The protected Eastern markets survived, while the others virtually collapsed due to Japanese competition, although showing a revival in

156 Survey of Textile Industries, op. cit, p352
157 The CPA had an additional South and Central American market, while the UTR had some European markets, particularly Belgium (for handkerchiefs).
1937. A similar situation occurred in African markets, with a severe reduction of British proportion of East and North African markets, but a revival in the West African market in 1935-7. However, the key factor in the variation of demand in the West African market was the success of its cocoa harvest and trade. Protection of the home market in 1932 was also highly effective in arresting the import of low-priced foreign prints, initiating an expansion of the market during the 1930s. Particularly high demand in the home market occurred in 1933-4 and 1937 (Section 4.4.2). However, competitive price-cutting in the home market reduced sales incomes in the 1930s, particularly in 1932-5 (see Section 4.6).
4.5 Costs

4.5.1 Total Cost Trends

Variations in costs are a primary cause of profit decline, when no change in sales or company policy occurs. A total figure for the increase in cost of production between 1914 and 1929 is given in the Cotton Industry Report by the Committee of Civil Research.\(^{158}\) Comparative increases for Dyeing, Bleaching and Spinning are also given:

<table>
<thead>
<tr>
<th>Section of Cotton Trade</th>
<th>% increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spinning</td>
<td>168-176(^{159})</td>
</tr>
<tr>
<td>Calico Printing</td>
<td>160</td>
</tr>
<tr>
<td>Dyeing</td>
<td>131</td>
</tr>
<tr>
<td>Bleaching</td>
<td>141</td>
</tr>
</tbody>
</table>

Figures for constituent parts of the cost total are given in relevant subsections. The higher cost for calico printing is mainly due to a greater rise in wages costs. A breakdown of the costs for sample bleached, printed and dhootie cotton fabrics was given to the Cotton Industry Sub-Committee by the Cotton Yarn Association, based on 1927 figures, with cotton futures at 11d/lb. The printed example is given in full in Table 4.5a and b:

<table>
<thead>
<tr>
<th>Table 4.5a</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raw cotton and cleaning</td>
</tr>
<tr>
<td>Brokerage on raw cotton</td>
</tr>
<tr>
<td>Total spinning cost</td>
</tr>
<tr>
<td>Yarn agent (1% on cost)</td>
</tr>
<tr>
<td>Total weaving cost</td>
</tr>
<tr>
<td>Cloth agent (1.5% on cost)</td>
</tr>
<tr>
<td>Finishing</td>
</tr>
<tr>
<td>Packing and f.o.b.</td>
</tr>
<tr>
<td>Shippers charges, c.a.d. (est.)</td>
</tr>
</tbody>
</table>

\(^{151}\) BT 55/5/CR (CI) 5: 1929 Joint Committee Report on Cost of Production to the Sub-Committee on the Cotton Industry, Committee of Civil Research, Board of Trade.

\(^{159}\) Based on the hours worked in May 1929: if based on full time working, cost of production increase is 138-146%.
The finishing cost was further broken down into:

Table 4.5b

<table>
<thead>
<tr>
<th>Process</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shrinking and Calendering</td>
<td>1.84%</td>
</tr>
<tr>
<td>Printing (2.25d/yd)</td>
<td>30.34%</td>
</tr>
<tr>
<td>Finishing (0.5d/yd) and making-up</td>
<td>7.08%</td>
</tr>
</tbody>
</table>

The large proportion accounted for by the printing costs is further emphasised by the total finishing costs for the dhootie (2.48%) and the bleached cloth (13.54%). This particular print example clearly does not include any separate bleaching or dyeing cost.

Analysis of production costs throughout the period can be seen in the Print Department costs and cost per piece data for Ferguson Bros. Ltd. (Figures 4.45-6). Cost per piece analysis is also available from 1935-9 for the CPA (Figure 4.47), with comparative cost per piece analysis from J. Chadwick & Co. Ltd. for 1929-36 (Figure 4.48) and works costs and overhead costs from 1929 (Figure 4.49). Total cost data (‘Expenses’) is available for the Print Department of Morton Sundour Fabrics to 1929/30 (Figure 4.69). Overall, the Ferguson Print Department costs increased quickly in 1919 and 1924, in line with the rises in income (Figure 4.75). A temporary fall in 1931 was followed by a decline from 1932-6, which was recovered in 1937. The cost per piece figures, available from 1918-30, indicate that, in proportion to production, all costs rose temporarily in 1921, with the sudden drop in production of the coal strike and economic crash (Figure 4.46). Costs then increased moderately in 1923 and more steeply in 1925, mainly due to store prices, particularly dyes. Morton Sundour Fabrics Print Department expenses were very volatile in the early 1920s (Figure 4.69). The sharp rise and fall in 1920/1 and 1921/2 follows the inflation pattern, while the increase in 1922/3-1924/5 (and in 1922/3 in the Print Department: Figure 4.70) indicates the establishment of Standfast Dyers’ & Printers’ Ltd. and other investments. At Chadwick, costs rose from 1923-29, but production income expanded more steeply, particularly in 1926 and 1928 (Figure 4.18). The Works cost fell from 1930 to 1933, rose quickly to 1935 and remained fairly level to 1938 before jumping in 1938. This includes wages, material costs, coal, power, water, etc. A closer analysis can be seen in the cost per piece figures, given only from 1929-36 (Figure 4.48). The dip in costs does not appear with the depression, but shows in 1932-3, with a new higher level established from 1935. The drop in Works cost of 1931
is compensated for by higher capital expenditure, salaries and other overheads.

4.5.2 Overhead Costs

Overhead cost increases were the most severe of any section: the 1929 Joint Committee Report on Costs for the Civil Research Cotton Industry Sub-Committee states that Interest and Depreciation costs increased from 210-272% since 1914. Depreciation cost can be closely related to capital investment, which varied from company to company. Ferguson Bros. Ltd. can be given as an example: Figure 4.50 shows the depreciation costs, which can be compared with capital investment (Figure 4.51; detailed list given in Appendix 4.1) and repair costs (Figure 4.50). Ferguson Bros. began a programme of investment in equipment and buildings from April 1920 (following an increase in capitalisation with the creation of new shares in November 1919 and February 1920 and sale of reserve fund investments in November 1920, and supplemented in 1928 by further capitalisation). The total 1920s investment was £77,246, with the largest expenditure in 1922 on a new printworks and dyehouse (£24,000), though investment continued throughout the 1920s. The depression is shown by the gap in investment from September 1929 to November 1933, and is followed by a much lower rate of investment in the later 1930s (total investment of the 1930s is £5,714). The depreciation cost at Ferguson Print Works increased dramatically in 1923, after the investment in the Print Works in 1922. Smaller rises in depreciation show in 1925 and 1928, following the purchase of seven colour printing machines in 1924 (£2,300) and extensions to the Roller Room in 1927 (£2,400). The repairs undertaken in 1930 increased depreciation costs in 1931. The fall in 1932 indicates that the major Print Works investment of 1922 has now been covered. Repairs cost for the period (Figure 4.50) show that an increase occurs during the period of maximum investment, in 1920-23, but also shows a higher level of spending on repairs through the depression when investment was at its lowest, actually showing an increase from 1929 to 1930-1. In general, investment priorities shown in the minutes at Ferguson Bros. in the 1930s were on sales trips to foreign markets by directors, salaries for new sales staff and advertising.

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160 BT 55/5/CR (CI) 5, op. cit.
Profits in the post-war inflation boom of 1920 encouraged expansion in the printed cotton sector. For example, Seedhill Finishing Co. expanded into calico printing at the Arkleston Works in 1921, Arthur Sanderson & Sons Ltd. started a fabric print side to the wallpaper business (Eton Rural Cretonnes) in 1921 and MSF established their commission dyeing and printing subsidiaries in 1919 and 1921 respectively. The CPA purchased Love Clough Works in April 1920 and Furness Vale works in January 1921. Investment in research (discussed in Section 5.4.2) also required capital investment. For example, James Morton initiated a broad range of research programmes at MSF Ltd., which required heavy investment. Particular costs were equipment such as autoclaves, development of a research laboratory at Carlisle and the purchase of phthalic anhydride rights in 1920. The establishment of a new chemical works for the Scottish Dyes Ltd. at Grangemouth in 1919 required capital of £150,000 from MSF and the same from other sources, including the National Metal and Chemical Bank. Further investment was required for the establishment of Edinburgh Weavers as an experimental Modernist weaving subsidiary, with the purchase of St. Edmundsbury Weavers in 1928.

Other overheads include rates and taxes, which the Final Report of the Sub-Committee on the Cotton Industry stated had increased by 370-426% from 1914-1929. The local rates were stated to be a heavy burden on industry in 1926, with 12/2 in the pound levied in Manchester, 12/7 in Carlisle, 13/8 in Heckmondwike, 13/10 in Bradford and 14/6 in Halifax. However, this overhead was reduced by the 1928 Rating and Valuation (Apportionment) Act, which granted rate relief of 75% to properties registered solely as factories or workshops. Excess Profits Duty was charged from 1915-21, Corporation Profits Tax throughout the period. The highest level of Excess Profits Duty and Corporation Profits Tax charged to Ferguson Bros. Ltd. occurred in 1926-7, followed by 1922 (Figure 4.52). There is some variation in the correlation with the points of maximum profits and dividends: a similar level of peak profits in 1922 and 1927 (Figure 4.74)

163 M75/ Directors' Minute Book No. 6, 9/4/20 and 12/1/21.
165 Ibid., p 226.
166 BT 55/5, Final Report of the Sub-Committee on the Cotton Industry, Committee of Civil Research, Board of Trade, p9.
167 BT 55/94/175 Application of the Furnishing Textiles Manufacturers' Association for inclusion under the Safeguarding of Industries Act.
and the highest level of dividends issued in 1924 and 1927-8 (Figure 4.65). These taxes were not purely percentages of profits and income, since the tax charged in 1930 to Ferguson Bros. Ltd. was more than double the profits for that year (Figure 4.44).

An additional overhead cost was insurance. A specific increase in insurance to cover War Risk occurred in early 1935. The CPA stated that they considered it a liability on the customer, and asked what the policy of the UTR was: their position was that the UTR had got the majority of their customers to agree to the extra charge.\(^\text{169}\) The need to extend credit to customers could also be a heavy liability: the CPA had outstanding debts of £900,000 in 1920.\(^\text{170}\) An outstanding debt of £145,000 for various accounts in Roumania, Bulgaria and Serbia was noted in August 1922, although payments were not seriously behind.\(^\text{171}\) The Association was sufficiently confident to offer to finance new business in Roumania to a maximum of £50,000.

Comparative valuation of currency was another variable export cost, which could have a formidable effect on export sales. For example, the Tootal Broadhurst & Lee Finance Committee minutes state in 1921 that Finnish exchange values had fallen by 50% since the previous June.\(^\text{172}\) In 1923 the consequence of exchange rate changes on UTR trade was indicated: 'Colonial markets dull due to poor rate of exchange'\(^\text{173}\) but also 'due to favourable exchange, clear USA stocks'.\(^\text{174}\) The 1925 return to the Gold Standard at the previous parity of £3 17s 10.5d per ounce (at the insistence of the City) had overvalued the pound, requiring a high interest rate and disadvantaging export industries.\(^\text{175}\) The difficulties caused by conflicting gold and silver standards of valuation of currencies were noted in evidence to the Economic Advisory Council Committee:

'As predominantly an exporting industry, the trade has been exceptionally hampered by world-wide financial instability and insolvency. More especially, the Lancashire cotton industry has been harmed by depreciation of Silver values in terms of Gold. First, it has reduced the purchasing capacity of its customers in those markets where currency is

\(^\text{169}\) UGD 13/5/7, op. cit., 13/3/35.
\(^\text{170}\) M75/ Directors’ Minute Book No. 6, 21/12/20.
\(^\text{171}\) M75/ Directors’ Minute Book No. 7, 29/8/22.
\(^\text{172}\) M461/ Box No. 33 Tootal Broadhurst & Lee Ltd. Finance Committee Minute Book, 1921-23, 14/3/21.
\(^\text{173}\) UGD 13/5/6, op. cit., 10/23, C Dept.
\(^\text{174}\) Ibid., 11/23, E Dept.
\(^\text{175}\) Ibid.
based upon silver. Secondly, it has doubly advantaged the cotton manufacturing industries abroad whose costs are also based upon Silver.'

Exports to India, China and other Eastern markets were severely affected, as demonstrated in the UTR minutes: ‘The Exchange and value of silver disastrous effect on Persian market.’ and ‘Pongees orders ceased due to market upset owing to the Exchange being raised’. Mr Hewit stated to the Economic Advisory Council Committee that the principal advantage competitors had over British producers was that they had not deflated: ‘We have had much less competition from Italy since they have had to stabilise their currency. The most effective competitor at the present time in that way is France.’

The collapse of the Austrian Kredit-Anstalt and German and Central European financial institutions in 1931 triggered a sudden export of gold and international short-term funds, requiring the suspension in September of the Gold Standard, to prevent the free sale and exports of gold. The value of the pound fell 30% by the end of the year, increasing exports. The effect on the textile industry was noted in the trade press:

‘Six weeks after the suspension of the gold standard, Lancashire is feeling the stimulation it has given to trade... The depreciation of currency has turned the tables in favour of textile manufacturers in Britain, so that for the first time in some years their prices are competitive with foreign, and Britain is recapturing some lost markets.’

The UTR also commented that exports to the Continent were better, due to the lower pound. In 1932 the Exchange Equalisation Account was created to keep the ‘managed’ (rather than gold standard) economy stable and supported in 1936 by a Tripartite Agreement with the United States and France in 1936. This system ended in 1939 with the pegging of the pound at $4.03 to the pound.

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176 BT 55/18 Evidence given by the Federation of Master Cotton Spinners' Associations, p20.
180 UGD 13/5/7, op. cit., 16/12/31.
4.5.3 Printing Cloth Costs

Valuation of raw cotton, as a commodity on the stock exchange, indicates the violent price changes that caused such havoc to the textile industry in the 1920s (Figure 4.54). The steep drop in raw cotton price during 1921, recovery in the early 1920s and depression after 1929 follows the overall economic and cotton industry developments. Detailed monthly cloth prices of C55 (basic printing cotton) between 1920 and 1935 are quoted in the UTR Minute Book (Figure 4.55), with the extreme inflation of the post-war boom evident in the price of February 1920. The anomalous height of prices had collapsed by January 1921 (the next available figure in the UTR minutes, with further cloth price reduction to October 1921. This was followed by a general increase in cotton and cloth prices to height in January 1924. Overall, greycloth prices increased by about two and a half times from 1912 to 1924 (from 2.73 pence per linear yard to 6.86). The consequence of the rise in price during 1922 was noted by Mr Drew, of Alex. Drew & Sons Ltd., at the Federation of Calico Printers: 'although business had looked like coming along, the big increase in cloth prices checked it.' A fall in prices from 1925 is demonstrated by the change in market price of C55 Cotton from 59s in March 1925 to 45/6 in November. A further fall occurred from 44s in September 1926 to 36/3 in January 1927, due to the large American harvest. Immediate effects of this were evident in the UTR minutes in A Department ('the big drop in the cotton market closed up any business'), but it allowed C Dept. to meet the Canadian competition prices for chintz, opening up a significant market. This fall in cotton prices was felt to be sufficiently serious that President Coolidge stated officially that four million bales of cotton were to be held up and a reduction of the area to be planted next year to be agreed on. A rise in cotton cloth prices from April-June 1927 resulted from this policy. The 1929 crash and resulting world recession is indicated by the drop in price of C55 Cotton from £2 2s 4d in March 1929 to £1 4s in August 1931. Difficulties in supply of cloth also occurred during this period. A four-week weavers strike resulted in very low orders in August 1929. The CPA noted in July 1929: 'the Strike had already affected the Order book and orders might go abroad. So far commission print orders were chiefly affected, but the sale of clearing lines had been stopped, meantime prices for

182 Data from The British Economy: Key Statistics, 1900-66.
183 Turnbull, G. op. cit., p470; data from Census of Production and Import Duties Act Enquiries.
184 M75/1922-8/7.2 Memorandum of the FCP Minimum Price Committee, 22/6/22.
185 UGD 13/5/6, op. cit., 15/10/26.
186 UGD 13/5/6 Minute Book, 8/12/1926.
cloth and printing were unaltered. A more serious Lancashire cotton mill strike occurred in 1931: 'Of the deliveries contracted for February, only 35% would be delivered on time on account of the strike, as in the case of all the others the Mills are closed.' By May, the problem was being managed effectively: 'deliveries from Stock goods during month fairly well maintained in spite of strike.' Orders do not seem to have been seriously affected by this strike, but it did occur at a period of severe crisis, with a dearth of orders due to the Indian Boycott. An overall decline in grey cloth prices from 1924 (6.86 pence per linear yard) to 1934 (3.82 pence) was recorded by the Census of Production before a rise again to 1937 (4.12 pence). The Chadwick material costs exclusive of dye chemicals (Figure 4.48), are likely to be mainly cloth costs. These costs remained fairly steady during 1930-2, dropped in 1933 and then rose to 1936 (last year given). However, a fairly steady median cloth price level is shown by the UTR from June 1931 to their last stated figure in May 1935.

4.5.4 Dye and Chemical Costs

Vat dyes were invented in Germany during the war, and became the most important dyes used during the inter-war period. This substitution of the dyestuffs and mordants used was significant in raising the cost of dyes during the period. The development of a British dyestuffs industry, supported by a ban on the import of foreign dyes that could be produced here (Section 5.2.4), also raised the price of dyes very significantly. Complaints were made that the cost of the new dyestuffs industry was borne by the dyeing and finishing industry (Section 5.3.2): the CPA stated that the Dyestuffs (Import Regulation) Act licence modification proposals of 1922 would cost the Association £98,000 more than its foreign competitors. High prices continued in 1923, with a drop recorded in March 1925, as a new factor of 250% of pre-war prices was agreed by the Board of Trade Licensing Committee. By 1929, the factor had fallen to 1.75. However, there were still competitive difficulties: in 1930, the FCP stated that for vat colours they 'have been underquoted consistently in France. There is a suspicion that the French printing combine, who is keeping up the prices in France for the French provinces, is subsidising the Alsace printers, who are undertaking the export trade at less than cost. 

187 M75/ Directors' Minute Book No. 12, 30/7/29.  
188 Turnbull, G., op. cit., p470.  
189 M75/ Directors' Minute Book No. 7, 2/5/22.  
190 BT 55/18, Evidence to the Economic Advisory Council Committee on the Cotton Industry by the FCP, 12/2/30.
Minutes of the Indigo Printers' Association note an increase in prices in April 1920, due partly to an increased price for indigo. In January 1921, the Chair remarked that indigo was now five times the pre-war price. The significance of this was underlined by a comment of Mr Mycock in April 1922: that for indigo printing, the cost of indigo is not less than 25% of the dyeing costs, rather than 3-4% as some in the FCP thought. Discussion minuted in April 1925 indicated concern at the high price of British indigo — 1s 4d per lb, compared to 8d for the Continental product and 7d in America. This was being undercut further by the Italian government selling reparation indigo under cost, at 2.5-3.5d. Although the price of indigo then fell considerably, by 1930, British printers were still not able to get it at the lowest world price, and much of the market had been lost. The consequence of these rises in indigo costs was a disproportionate decline in the indigo printing sector: The FCP indigo trade had fallen from 1,205,000 pieces of 30 yards in 1920 to 319,000 pieces in 1929, a fall of 73.5% against the 59.5% drop in FCP trade overall, although the I.G. (indigo manufacturers) stated that the world consumption of indigo was greater than at any previous time.

Total costs of dyes, drugs and similar stores at Ferguson Bros. Ltd. show the steep rise in price in the early 1920s (Figure 4.56). A sudden rise occurs in 1924-5 and again in 1931. In 1934 a separate category of ‘drugs and dyes’ is given in addition to the previous one of ‘stores’, clarifying the dyestuff cost changes. A steep reduction in drug and dye costs is shown from 1933-6. There is no significant change in sales income, or difference in other costs, to indicate any change in total production between 1932 and 1936. Detailed analysis of the costs of J. Chadwick and Co. Ltd. (a dyeing company), between 1929 and 1935, shows that dye chemicals rose at a disproportionate rate (Figure 4.48). The cost per piece increased from 3.84 in 1929 to 12.16 pence in 1935, with a steep increase from 1933-5. This indicates the serious situation that Ferguson seems to have faced effectively in their works. However, a very sharp increase in costs occurs in the Ferguson dye costs in 1937, with a smaller increase in 1938. A corroboration of the

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193 Ibid.
194 BT 55/18, Evidence to the Economic Advisory Council Committee on the Cotton Industry by the FCP, 12/2/30, C.22.
195 Ibid., C.21.
increase in general dye costs in the late 1930s is given by Wm. Fulton & Sons Ltd., who stated that the cost of dyestuffs rose by 10% from January to September 1938. The rise in dye costs was due to the expansion in use of synthetic vat dyes (Figure 4.57), Government protection of the British industry (see Section 5.2.3) and a wider range of colours used (Section 2.6).

4.5.5 Printing Costs

The FCP stated that, in general, the printing cost is ‘about 40% added for printing onto raw materials’, but that for more expensive things, when it takes half a day to fit up the machines, the cost of materials would be doubled. Printing costs had increased seriously since before the war: "Whereas the cost pre-war of designs and engraving averaged less than 6d/ lump of 120 yards, it now [1930] averages more than 2/6d for the same unit of output." Costs of engraving and design rose steeply in 1936 at Ferguson, and also at the UTR: 'The Chairman stated that the cost of engraving was £1,000 per month, which means 4.8d per piece of 30 yards and stressed the necessity or advisability of getting repeat orders." Engraving costs in the case study companies are given in Section 5.4.3, since increases may be due to a greater investment in new designs, and thus a change in design strategy rather than average costs.

The various printing processes had varying overheads and investment costs for new designs. Block print was an expensive and lengthy process, due to the labour costs of the skilled printers and their tierer assistants needed to hand print the fabric. Printing with engraved rollers was a far cheaper process, since it was mechanised, but the skilled engravers required for the production of new rollers meant that initial costs for new designs were high. The costs of establishing a new design, both in engraving and in the time to set up the machines, were considerable. An example was given to the Economic Advisory Committee Sub-Committee of a typical order of 50 lumps of a 5 colour print in several different colourways, which would require half a day to fit up the machines and three-quarters of a day to print: the overhead of time spent in preparation would be

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196 Statement by Deputy Chairman at AGM, quoted in 'Paisley Dyers' Year', Glasgow Herald, 8/9/38: M75/ 1929-39/ 61.2.
197 Data from Board of Trade, given in Colour Users Association 1934 Annual Report: M75/ 1929-39/ 61.2.
198 BT 55/ 18, op. cit., C.6.
199 Ibid., C.9.
200 UGD 13/ 5/ 7, op. cit., 15/1/1936.
201 Turnbull, G. op. cit., p364.
far more economic on larger orders. A comparison was made with the Japanese and American practice of printing vast quantities of one design and flooding the market with it at low prices to force a sale. However, the United States was finding that they were unable to follow British variety in production in South America since it was too costly. Printers attempted to spread these costs by encouraging greater print runs to a design, but in periods of economic uncertainty or strong competition, there was a tendency to commission far shorter runs. This is seen during the drop in market demand in 1938: in the UTR Chairman's Statement, it states that the consequence was 'that competition for a share was much keener. Where this did not result in lower prices, it tended towards smaller yardage to a shade or pattern, with a definite effect on cost of production."

4.5.6 Energy Costs

Supply of coal was strongly affected by political issues of state control and wage disputes, resulting in threats of a strike in January 1919, brief strikes in July 1919 and October 1920, a lengthy strike from April to July 1921 and a second serious strike in 1926 (see Appendix 2.2.2.2 for details of negotiations and political developments). The effect of these coal strikes is shown by the United Turkey Red Ltd minutes. For example, 'in view of uncertainty of a coal strike' the UTR did not buy grey cloth in bulk on 8th September 1920. No volume production figures are available for the UTR at this date, but their works closed from April to July 1921 due to the coal strike, resulting in late deliveries of orders and no new work taken on. The suddenness of the effect can be seen in the minutes, indicating that very low stocks were kept:

'Last week a general demand had started, but owing to the Coal Strike, all business had come to a stop . . . when writing the foreign mail, firms should be advised of the Coal Strike and the fact that the Works had been forced to close down this week on account of same.'

By the 13th July, some collieries were offering coal at the March prices, and it was anticipated that in the next few weeks all the collieries would be open again. The 1926 coal strike seems to have had a less severe effect on the UTR than that of 1921: although no price is quoted in the monthly statements from May to October, 'cloth is entered into process'

202 BT 55/18, CR (C1) 38: Evidence to the Economic Advisory Council Committee on the Cotton Industry by the FCP, 12/2/30, C.12.
203 M75/1929-39/4, March 1939 AGM.
throughout the period, with a drop from the high level in April of 39,271 pieces to 10,852 in October. On 19th May, the minutes state that the Works were to be closed the following day, but no further mention is made of it. Grey cloth was bought with a Strike Clause, and 'A' Department (India and the Eastern markets) noted that May had been very quiet due to the Strike, but that there was indication of a fair demand if the Strike would finish. Coal was bought from Germany from 45-6s/ton (900d).

The effects of the strikes on the CPA were similar, with the 1926 strike having a less severe effect. The CPA minutes record that in May 1921 five works had under a week's supply of coal and by July 1921, seven works and four mills had to be closed. In June 1926, it was noted that bookings are 40% of normal and that the increase in coal prices represents an increase of 10% in the cost of production. The first strike also appears to have had a more serious effect at Ferguson Bros. and Tumbull and Stockdale Ltd, indicated by the fall in volume production in 1921 (although this could be simply due to the post-war crash). Coal and electricity costs at Ferguson Bros. do not indicate any notable effects of the 1921 strike in policy changes (Figure 4.59). However, by 1926, the company was clearly prepared to buy expensive foreign coal and in 1927 they invested in electrification of machinery, requiring a rising expenditure on electricity rather than coal to 1933. The sudden replacement of coal by electricity in 1935 shows a change in policy. It implies that coal powered generators were installed, requiring a much lower level of electricity from external sources, except in the year when the new system was implemented (see Section 5.4.2.1).

Prices of coal rose in the immediate post-war period, with the temporary elimination of Continental competition, but dropped seriously following the end of Government control in April 1921 (see Appendix. 2.2.2.2). This is shown in the fall in the cost of coal at Ferguson Bros. in 1921-2, following a rise in 1920 (Figure 4.59). A temporary rise is shown in 1924, with serious price inflation in 1926, during the coal strike. The price of coal in the Lanarkshire area was quoted in the UTR monthly statements, from 1926 to 1938 (Figure 4.58). Exaggerated prices continued for a brief period after the six-month strike stoppage.

205 M75/ Directors' Minute Book No. 7, 24/5/21 and 5/7/21.
206 Mowat, C.L. Britain Between the Wars, 1918-1940, Methuen & Co. Ltd, 1955.
207 DB 110/70.
208 UGD 13/5/9.
(71s 6d per ton in November 1926), but a fairly steady level of about 18s 6d per ton was established by March 1927. A rise in coal prices is shown in late 1935-January 1936, leading to a higher general level. This was due to the expansion of demand, and to the rise in wages given in October 1935, under threat of another General Strike.\(^{209}\) The Lanarkshire coalowners met every week to consider prices at this time, forming a central selling system with fixed district prices, which became active in July 1936.\(^{210}\) By April 1936, it was decided that UTR would have to give six month contracts in order to guarantee supply, since the withdrawal of coal for their gas plants by Dixons and Bairds and by the steel works meant demand was fully equal to production.\(^{211}\) A graph of coal costs per piece in 1937-8 in the Chadwick archive shows a rise from 9d/ piece on 2nd June 1937 to 16d on 18th August, falling to 12.5d on 20th October and rising to 20.4d in 22nd December, remaining high (though volatile) to 23rd February 1938 (18d) before dropping to 10.3 in 20th April.\(^{212}\) The CPA coal and electricity costs per piece (Figure 4.47) register a sudden rise during the half year to June 1938, which is then established as a new plateau. A smaller corresponding rise shows in the UTR figures for 1938, though not in the coal costs for Ferguson Bros. Wm. Fulton & Sons Ltd. stated that their coal cost was 11.5% higher in the financial year to September 1938 than the previous year.\(^{213}\)

4.5.7 Wages

Rates of pay for wages in the finishing trades rose significantly during the inter-war period. Overall, the increase in wages and salaries in the printed textile industry was 266 in 1928 against an index figure of 100 in 1914, although wages went up more than salaries.\(^{214}\) The rates of pay were agreed between employers and unions, and were adjusted as changes in the Cost of Living Index occurred (see Appendix 2.2.2.1). This was stated by the Secretary of the CPA in a letter of engagement to a shorthand typist: 'All our weekly wage staff are subject to the Board of Trade Cost of Living Figure, their wages being increased or decreased for each

\(^{209}\) UGD 13/ 5/ 7, op. cit., 24/10/35.

\(^{210}\) Ibid., 19/2/36, 18/3/36 and 15/4/36.

\(^{211}\) Ibid., 15/4/36.

\(^{212}\) Oldham Local Studies Library, J. Chadwick & Son Ltd., 1929-40 graphs.

\(^{213}\) Statement by Deputy Chairman at AGM, quoted in 'Paisley Dyers' Year', Glasgow Herald, 8/9/38: M75/1929-39/61.2.

\(^{214}\) BT 55/18, Evidence to the Economic Advisory Council Committee on the Cotton Industry by the FCP, 12/2/30.
5 points rise or fall therein.\textsuperscript{215} The Federation of Calico Printers (formed 1922) replaced the Society of Master Calico Printers as the body responsible for resolving labour issues. However, decisions by the Sectional Federations were subject to the approval of Allied Trades Association.

Reduction in standard working hours was agreed with individual employers early in the period. Ferguson Bros. reduced hours from 55.5 to 49 in 1918 and to 48 hours in 1919 (in 1946 down to 45). The CPA reduced the weekly hours worked from 56 to 48 in 1920. They also attempted to reorganise their business and invest in order to reduce the need for overtime.\textsuperscript{216} In 1937, a convention was passed in Geneva by the International Labour Conference to apply a 40-hour week to the textile industry. The convention was not ratified in this country, however, due to the increasing hours being worked in Germany and Italy, which were not represented at Geneva (in Germany, extensions beyond 10 hours per day were allowed for skilled workers, and up to 72 hours in exceptional cases).\textsuperscript{217} The national wage levels in the textile finishing industry were generally significantly higher, and working hours shorter, than their competitors: comparison with Belgian wages for dyeing were given by the Piece Dyers' Association (56% of the British, or 41% if external exchange rates included), in 1930.\textsuperscript{218} In Japan, the hours of work were far longer (60 hours/week for similar wages as paid for 48 hours in Britain), so reducing the total wage costs.\textsuperscript{219}

Wages rose sharply during the post-war boom, with a 20-25% increase in the minimum scale for general workers offered by the Warehouse Employers Federation in January 1920\textsuperscript{220} (the CPA and the Warehouse Workers agreed a rate of 62/6 per week); a further rise to 72/6 agreed in June 1920; and a sharp wage inflation of 110-115% offered in August 1920 (to 125s or 127/6), following a sudden increase in the Cost of Living Index from 132% to 150%.

\textsuperscript{215} M75/ 1922-28/ 3.1, 20/6/28.
\textsuperscript{216} 'The Management Committee suggest we should be in a position to produce 21 million pieces a year under 48 hour conditions and that overtime should be abolished as far as possible. In order to do this, it would be necessary to increase our bleaching and finishing capacity . . . each manager is asked to put forward requisitions for expenditure necessary to enable him to produce that capacity.' M75/ Board Minute Book No. 6, 17/2/20 (it stated that there was 'an average production of 22.1 million pieces of printed fabric in 1910 and 1910-14, under 56 hour conditions and with more or less overtime').
\textsuperscript{217} M75/ 1929-39/ 4, p30.
\textsuperscript{218} BT 55/ 5 CR (C1) 10: Memorandum by the Board of Trade, p3.
\textsuperscript{219} BT 55/ 18, Evidence to the Economic Advisory Council Committee on the Cotton Industry by the FCP, 12/2/30.
\textsuperscript{220} M75/ Directors' Minute Book No. 6., 6/1/20.
However, by February 1921 the position was sufficiently altered by the crash that the Warehouse Workers were given a choice of working short-time, reduction in wages or dismissal of staff by the Employers Federation (the Union representatives voted in favour of short-time working). A wage increase of 2 shillings on the basic wage was awarded (by arbitration) in 1924. This was abolished in November 1927, but a new agreement of 2-3 shillings per week for lower paid workers agreed in July 1928. A small wage reduction occurred in April 1931: with a cut in the cost of living wage system (whereby, wages would be reduced by 1% for each 1% drop in the index, rather than 0.8426%) and a 1% cut in pieceworkers’ earnings. An application for the restoration of the 1931 cuts was put forward by the National Union of Bleachers, Dyers and Textile Workers in October 1937 (amalgamated from previous finishing unions in July 1936) and finally refused in January 1938, due to the continuing depression in the industry.

Instead of losing workers in periods of economic stress, it was common to reduce the hours worked. Evidence from the Amalgamated Society of Dyers, Bleachers, Finishers and Kindred Trades in the 1929-30 Cotton Enquiry showed that 'during the last three or four years, time worked is not more than half a normal working week.' They stated that, by mutual arrangement with the employers, 'in times of severe depression . . an excess of labour over and above the number ordinarily employed is carried and work shared, the operatives playing off in turns.' Short-time working was noted in the Report of the Cotton Committee as one of the causes of rising costs and prices in the Finishing Industry, combined with the small orders and variety of finishes required by merchants.

Comparison of individual company records show that wages at Ferguson Bros. Ltd. rose steeply from the end of the war to the 1930 depression (Figure 4.60). There was a small drop in 1921 after the extravagant inflation of 1920, with a sharp increase occurring in 1925. This rise during the 1920s was partly due to company expansion: a new weaving shed in 1926, new roller print room in 1928 and new capital equipment throughout the period indicates the

221 Ibid., 24/8/20.
222 Turnbull, G. op. cit., p238.
225 BT 55/ 18.
scale of development. In November 1932, the Board of Ferguson Brothers instituted a general cut in wages, half of which was restored in February 1934:

'With reference to the reduction in wages which, in consequence of the depression, was made in November 1932, the Board of Directors are pleased to report that the results of the year's trading for 1933 show an improvement and though it is still too early to feel confident that the period of depression is ended, the Board have decided to restore half the cut.'\(^{226}\)

The remainder of the cut was restored in August 1937.\(^{227}\) This appears to be independent action taken by Ferguson Bros., without reference to national union negotiations. A wage and salary cut during the depression was also made by Morton Sundour Fabrics Ltd, after consultation with worker representatives.\(^{228}\) By contrast, there was little expansion of salaries at Ferguson Bros. Ltd after the 1918-22 post-war increase. They were dropped in 1926 (wages were unaffected) and also in 1930-33 in line with wages, but suddenly expanded for a period in 1934-7. This may be due to a policy change in the company - such as employing more salesmen or opening a showroom - but no indication is given in the minutes.

Turnbull & Stockdale Ltd. increased their wages level less steeply than Ferguson Bros. in the 1920s, being a well-established company not attempting major development (Figure 4.61). A sharp fall occurs from 1929-31, as shown by Ferguson. Information on any specific company wage cut is unavailable, due to the lack of minutes for Turnbull & Stockdale Ltd. The number of employees shown in their accounts book varies each week: this may be common practice, but greater use of casual employees could be a reason for generally lower wage levels, since there would be less short-time working and other measures to support the workers in periods of less work. A notable increase occurs in 1937, a year also showing some degree of increase in the other case studies, but after a dip in 1936. The CPA costs show a rise in weekly wages from June 1937-June 1938 and in fixed wages and salaries from June 1937-December 1938 (Figure 4.47). The Cost of Living Index (Figure A2.6) shows a strong upward trend in 1936-7.

\(^{226}\) DB 110/229, letter to their directors and staff on 1/2/34.
Wages and salaries at Chadwick rose steeply from 1925 to 1929, with a more gradual increase from 1923 (see Figure 4.62). The increase from 1923 to 1929 was almost two and a half times. A reduction in cost of wages and salaries per piece occurs between 1929 and 1932 (Figure 4.48). There was a levelling out in 1933-5 and dips in 1936 and 1938 for the years of high competitive pressure in the home market.

4.5.8 Delivery and Transport

The Balfour Committee quotes figures from the CPA which state that, in 1926, for a piece of cotton cloth with a selling price of 266.63d, the cost of carriage of raw cotton from Liverpool to Oldham was 0.6075d (0.227% of the price of the piece of cloth and 12.32% of the total transport cost). Railway carriage of yarn from Oldham to Burnley and of greycloth from Burnley to the Manchester merchant was 1.045d (21.20%). If the cloth were then being finished at Glasgow, the cost of transport there and back would be 2.835d (57.50%). The finished piece was then hauled to Birkenhead for shipment, costing 0.442d (8.98%). Total transport cost was therefore 4.93d, or 1.85% of the total price of the cloth. This compared well with the 2.83% of 1914. The actual increase of railway charges from 1914 to January 1925 for cotton piece goods shows a sharp increase from 18s 5d per ton to 28s 2d. In the 1929 Report of the Committee of Civil Research Sub-Committee of the Cotton Industry, it was stated that 'with a view to encouraging development of trade, reductions have been made in the last year or so in railway rates for raw cotton, ... and in freight rates on cotton goods.' However, the principal transport cost to the industry was the railway haulage of coal, since the movement of greycloth and finished piece goods was the responsibility of the commissioning merchant or manufacturer. The assumption that the customer paid for transport of their goods is implied by the acceptance of a proposal in July 1923 that the Association would pay the carriage of goods for Home Trade Customers, totalling £12,000 p.a. - a considerable competitive advantage. Railway charges for land sale coal (rather than shipment coal) increased from 3s per ton in 1914 to 4s 8d in 1925. The problem of high

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230 Ibid.
231 BT 55/ S.
232 M75/ Directors' Minute Book No. 7, 31/7/23.
haulage costs to Glasgow is demonstrated further by the anxiety shown by directors of the CPA in June 1922, when they agreed to send a resolution to each of the Scottish railway companies:

'The Directors view with grave concern the high percentage of carriage charges involved in the production costs of the Association's Scotch Works, which are being seriously prejudiced owing to the refusal of the Scotch Railway Companies to make any reductions in their rates, which for industrial coal, still remain at their highest level.'

Negotiation with the English railway companies took place through the Federation of British Industries, and was more constructive, resulting in a general reduction of rates in August which allowed a £10,000 p.a. saving. An additional meeting between the Glasgow Chamber of Commerce and the Scottish railway companies in August resulted in a reduction of the flat rate for all classes of coal from 6d/ton to 3d on the Scottish railways, although the general percentage increase was only reduced from 100% to 75%. Other negotiations are not reported, although in January 1925 there is a recommendation to the Federation of British Industry that the demands of the railwaymen be refused, since they would cost £30 million, with an additional charge to the Association of £20,000. A further cost, though lesser in total, was transport of dyes and other chemicals. Railway charges for dyes and dye extracts rose from an average of 33s 6d per ton in 1914 to 50s 7d in 1925, while dyewoods and dyewood extracts rose from 18s 4d to 28s 1d per ton.

Shipping costs were also considered by the Committee of Civil Research Sub-Committee. It found that the Japanese Government subsidised the shipping lines transporting freights of raw cotton from East Africa to Japan and return freights of piece goods, and probably also to and from India. Following previous disagreements on shipping charges to the Continent, the President of the Board of Trade had recommended in 1928 that such commercial disputes be resolved in the Empire Shipping Committee. Shipping rates were now felt to be as low as possible in the circumstances, and a subsidy or freight rebate by the British Government was

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234 M75/ Directors' Minute Book No. 7, 20/6/22.
235 Ibid., 15/8/22.
236 Ibid., 29/8/22.
237 M75/ Directors' Minute Book No. 8, 13/1/25.
238 Survey of Textile Industries, op. cit., p495.
239 BT 55/ 5, Minute prepared by the Board of Trade on 9/10/29.
the only possibility of improvement, although a warning was given on the likelihood of other industries also demanding freight subsidy.

4.5.9 Sales Costs

Sales costs varied between companies depending on their distribution strategy: direct sales companies such as MSF, Turnbull & Stockdale Ltd or Ferguson Bros. Ltd had high costs, while those that relied on wholesalers as intermediaries (CPA and UTR) were far lower. An indication of the level of sales costs, inherent in any decision to take a less passive role in distribution, is given by the direct sales campaign established by the CPA in 1938 (Section 5.4.5.1). Sales for the first year of the scheme were £60,000 (the starting turnover aimed at), but the selling organisation required cost £120,000 p.a.\(^\text{240}\) Salesmen were usually paid salaries (counted under the general salary figures) and in commissions, so much of the cost is hidden within other categories. A merchanting charge occurs from 1926-9 in the Ferguson Bros. Ltd. costs (Figure 4.46), while 'Other costs' also increase sharply in 1926-33 (Figures 4.45-6), implying a change in their distribution policy. Advertising costs also varied greatly between companies, depending on their corporate policy (see Section 5.4.5.3). It fluctuated dramatically in some companies (such as Morton Sundour Fabrics Ltd.), with low general levels of expenditure and periodic campaigns.

4.5.10 Conclusion: Costs

A heavy increase in costs took place during the period, particularly in dye, local rates of taxation and printing costs (due to engravers' wages and small orders). Rail haulage (especially for Scottish works) and coal (in 1936-8) prices were also serious charges on the industry. Wages rose during the period, in line with cost of living, to a significantly higher level than national competitors. Overall, the industry did not react to the economic pressure by making any significant reduction in wages (though a temporary cut was made in wages, salaries and directors fees in some firms), but primarily by short-time working.

\(^\text{240}\) Pitt, S. op. cit., p139.
4.6: Price

4.6.1 Printing Prices

Average printing charges are given in Table 4.6:

<table>
<thead>
<tr>
<th></th>
<th>1912</th>
<th>1924</th>
<th>1930</th>
<th>1933</th>
<th>1934</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average printing charge per 1,000 yards</td>
<td>£3.9</td>
<td>£11.8</td>
<td>£10.5</td>
<td>£8.6</td>
<td>£8.5</td>
</tr>
</tbody>
</table>

A more complete set of data can be found by using the export volume and value figures to produce an overall annual export price for printed, dyed and bleached cotton (Figure 4.63). The very sharp post-war rise and crash in printing prices and the falls in the 1926 and 1931 are shown clearly.

A comparison of the printing charges for different fabrics was given in the 1935 Census of Production, shown in Table 4.7:

<table>
<thead>
<tr>
<th></th>
<th>1930</th>
<th>1933</th>
<th>1934</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average charges for work done on printed, whether dyed or not, cotton piece goods (£/1,000 sq. yds.)</td>
<td>10.74</td>
<td>8.38 (78% of 1930)</td>
<td>8.20 (97.9% of 1933)</td>
</tr>
<tr>
<td>Average charges for work done on dyed and printed linen and mixed linen piece goods (£/1,000 sq. yds.)</td>
<td>73.51</td>
<td>22.19 (30.2% of 1930)</td>
<td></td>
</tr>
<tr>
<td>Average charges for work done on all silk and mixed silk piece goods (£/1,000 sq. yds.)</td>
<td>24.51</td>
<td>25.57 (104.3% of 1930)</td>
<td>28.75 (112.4% of 1933)</td>
</tr>
<tr>
<td>Average charges for work done on all art silk and mixed art silk piece goods (£/1,000 sq. yds.)</td>
<td>11.30</td>
<td>10.76 (95.2% of 1930)</td>
<td>10.49 (97.5% of 1933)</td>
</tr>
</tbody>
</table>

241 Figures from Board of Trade archive, PRO BT 64/14/1872/36.
Comparative figures for printing, dyeing and bleaching, of the average charge in pence per yard, was given in the Census of Production and Import Duties Act Enquiries,\textsuperscript{244} stated in Table 4.8:

<table>
<thead>
<tr>
<th>Year</th>
<th>Printing</th>
<th>Dyeing</th>
<th>Bleaching</th>
</tr>
</thead>
<tbody>
<tr>
<td>1912</td>
<td>0.94</td>
<td>0.84</td>
<td>0.31</td>
</tr>
<tr>
<td>1924</td>
<td>2.84</td>
<td>2.20</td>
<td>0.87</td>
</tr>
<tr>
<td>1930</td>
<td>2.52</td>
<td>1.76</td>
<td>0.84</td>
</tr>
<tr>
<td>1934</td>
<td>2.04</td>
<td>1.34</td>
<td>0.74</td>
</tr>
<tr>
<td>1937</td>
<td>2.09</td>
<td>1.32</td>
<td>0.77</td>
</tr>
</tbody>
</table>

A minimum price for bulk styles was agreed by the FCP, and noted by the CPA in December 1918.\textsuperscript{245} In January 1919 the minimum price was raised, and the 'basis' quoted by the FCP was defined as the first cost of printing an article for merchant business.\textsuperscript{246} In June 1922, members involved in the Eastern Trade suggested that the minimum price be reduced by 1/4d on light printings, heavy printings and semi-Blotches and by 1/4d on Blotches, Light and Heavy Covers and Blotch Covers (carried unanimously).\textsuperscript{247} Mr Walker noted that he did not find much trouble in getting the price in the heavier work: it was the lighter styles where he was most pressed.\textsuperscript{248} Competition between companies could be tight, even when they were members of the FCP. New regulations were brought in on 11th October 1926 for printing prices of new engravings and for reductions allowed per run.\textsuperscript{249} A new FCP price list was agreed in 1931, but the agreement collapsed in January 1932, allowing severe competitive price-cutting. The 'delisting of FCP prices' occurred on 4th February.\textsuperscript{250} The drop in average charges for calico printing between 1930 and 1933 brought a fall in production income, although the quantity produced rose. Overproduction for the home market, due to competition

\textsuperscript{244} Turnbull, G. op. cit., p470.
\textsuperscript{245} M75/ Directors' Minute Book No. 5., 3/12/18.
\textsuperscript{246} Ibid., 14/1/19.
\textsuperscript{247} M75/ 1922-8/ 19.6 Memorandum of the FCP Minimum Price Committee, 22/6/22.
\textsuperscript{248} Ibid.
\textsuperscript{249} M75/ 1922-8/ 19.6 FCP Regulations as to Engraving Minima, 11/10/26.
\textsuperscript{250} UGD 13/ 5/ 7, op. cit., 10/2/32.
from export companies, led to further price cuts in 1934-5. This price change is described by MSF in September 1934:

'The collapse of the Export trade has forced the large plants in this country to compete for work in the limited Home Market, with consequent price-cutting to such a degree that these trades have become for the time being quite unprofitable.'

The UTR refused to drop prices for home trade prints in particular colours to the level quoted by J. F. & E. Caulfield Ltd. and Bollington Printing Co. Ltd. in March 1935. They referred to the low prices being obtained for printing in May and noted in October 1935 that home trade styles were unprofitable, but that in order to keep the machines running it was necessary to be competitive. Turnbull & Stockdale Ltd. commission orders (from 1935-9) vary from 1 1/16d to 2 1/2d for most orders, with cheaper orders generally those for higher runs or fewer colours. Prices of 3d or above were usually for vat dyes (e.g. three 40 lump orders of 4 colour floral home trade styles from Sugden's at 3 1/4d in 1935, using vat reds), indigo or more unusual fabrics (such as the 50 lump Mickey Mouse print order on a soft looped pile for H. Tong in 1935, at 5d, Figure 6.3). The highest price was for a 110 lump United Africa Co. medallion design in red and yellow on a twill at 5 5/8d in 1936, probably due to the red dye needed (Figure 6.224).

A comparison with export prices of printed cotton piece goods indicates the overall changes in price of the fabric, as a context for the printing charges (Figure 4.63). Export prices of printed cotton rose from approximately 3d/yd in 1915 to a height of 17d/yd in 1920 in the post-war boom - the 'Textilia' journal of 1919-20 was established with the aim of 'revealing the facts behind these abnormal prices'. After the steep descent in 1921, the high point for the period was 8d in 1924. Printing prices fell from there to a level of about 6.8d in 1927-9, before falling again to a new plateau in the depression of c5d. Prices never fell as low as they had been before the First World War, and rose steeply during the Second World War.

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251 GD 326/224 Letter to Shareholders, September 1934.
252 UGD 13/5/7, op. cit., 13/3/35.
253 Ibid., 8/5/35 and 9/10/35.
4.6.2 Retail Prices

Retail prices indicate the changing fabric prices in the home market and the differential between various types of fabrics. Examples of dress fabric prices at Affleck & Brown, in Manchester, in 1925 are: Cotton Crepe 11d, Dress Casement Cloth 11.5d, Printed Coat Lining 1s 6d (up to 2s 6d), Printed French Foulard 2s 3d; and in 1929: Check Crepe 1s, Kimono Crepe 10.5d; Satin Hygrade 2s 2d, Artificial Silk 1s 8d and Satinette 1s 3d.255 The CPA noted in October 1925, that a comparatively large trade was being done in London in high class dress fabrics of 30-70s per yard, mainly by about six French firms and decided to go into this trade, concentrating on the mid-level of 20-40s per yard.256 This is very expensive in comparison to the two-coloured silk sold at 17s 6d a yard at Modern Textiles in 1926:257 it seems likely that it must be referring to high quality silk, hand printed using many colours. The fall in home trade prices from 1928-38 of dyed, printed and bleached goods (in pence per yard) was noted by Ewing,258 using the data given in Table 4.9:

<table>
<thead>
<tr>
<th></th>
<th>1928</th>
<th>1930</th>
<th>1936</th>
<th>1938</th>
<th>% decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brocades</td>
<td>2 3/8</td>
<td></td>
<td>1 3/8</td>
<td></td>
<td>42</td>
</tr>
<tr>
<td>Sateens</td>
<td>2 5/8</td>
<td></td>
<td>1 1/4</td>
<td></td>
<td>52</td>
</tr>
<tr>
<td>Mock Voiles</td>
<td>1 1/2</td>
<td></td>
<td>7/8</td>
<td></td>
<td>42</td>
</tr>
<tr>
<td>Limbrics</td>
<td>1 3/4</td>
<td></td>
<td>7/8</td>
<td></td>
<td>50</td>
</tr>
<tr>
<td>Poplins</td>
<td>1 5/8</td>
<td></td>
<td>7/8</td>
<td></td>
<td>46</td>
</tr>
<tr>
<td>Vat Shirtings (2 colour)</td>
<td>1 7/8</td>
<td>1 1/8</td>
<td></td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Dress Goods (3 colour)</td>
<td>2 9/32</td>
<td>1 5/8</td>
<td></td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Rayon Crepe (3 colour)</td>
<td>4 5/8</td>
<td>3</td>
<td></td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>Aniline Blacks schreinered (for export)</td>
<td>3 1/8</td>
<td>1 1/8</td>
<td></td>
<td>64</td>
<td></td>
</tr>
</tbody>
</table>

255 The British Economy: Key Statistics, 1900-66, op. cit.
256 M75/ Directors' Minute Book No. 9, 6/10/25.
These figures indicate that price reductions in textiles during the 1930s were very considerable, dropping to almost half the previous price. Dress goods dropped in price by less than other categories of textiles, while the fabrics purely for export fell most severely. A comparative figure for printed rayon in 1935 is the 'Crepe Santos' of D. Marshall & Co. Ltd., which sold for 3/11d per yard.\textsuperscript{259} Prices of Ferguson dress fabrics for the upper market range (sold in Harrods) were given in an advertisement placed in Vogue in c.1939: coloured stripe piqué, 1/6 per yard; printed piqué voile, 2/3 per yd; crepe Jessamy, 2/11 and crepe Carlido 3/11 (both chosen by Chanel for her new collection).\textsuperscript{260}

Printed furnishing fabric was generally more expensive, though the major difference in price was between roller printed and hand printed fabrics. Basil Ionides gave a range of furnishing textile prices in 1926: a good hand-block chintz will cost 6s a yard 24 in. wide and 13s a yard 36 in. wide, while machine printed chintzes start at about 3s of good quality.\textsuperscript{261} Two examples of 50 in. wide block prints were given: 'Dutch Bouquet' by Turnbull & Stockdale Ltd. on velvet, at 27s 6s a yard and a Warner & Sons Ltd. hand-block print at 25s a yard. At 'Modern Textiles', hand printed linen was priced from 10s a yard in 1926.\textsuperscript{262} Nikolaus Pevsner stated in 1937 that printed cretonnes and linens with period floral patterns of exemplary design, produced by Turnbull & Stockdale, Warners and others, sold at about 3-4s per yard.\textsuperscript{263} Printed cotton and linen furnishing textiles illustrated in Woman's Journal in 1930 vary from 1s 9d to 10s 6d per yard, though the most common price is 2s 6d. Weaves were shown less frequently, and were priced between 9s 9d and 17s 6d per yard for cotton, while silk weaves were priced at 18s 9d and 21s 9d per yard. An example of furnishing textile prices is the statement in September 1937 that at Gordon Russell Ltd. 'about 95% of our fabrics are 12s 6d per yard or less'.\textsuperscript{264} A fairly moderate price is also inferred by the comment of James MacGibbon in 1939 on the cheapness of furnishing fabric, such as a pair of curtains at 30s, encouraging experiment.\textsuperscript{265}

\textsuperscript{260} DB 110/224. Scrapbook of advertisement cuttings, 1917-42.
\textsuperscript{262} Clark, H. op. cit.
4.6.3 Conclusion: Price

A substantial rise in the level of printing charges occurred in the interwar period, compared to that before the war. However, there was a decrease in charges for printing cotton and artificial silk (rayon) from 1930. A very sharp cut in the printing charges for linen from 1930-3 is stated by the 1935 Census of Production, with a small increase in charges for printing silk. Finishing prices were most reduced for purely export fabrics. Overall, price differentiation was based on fabric type (the cheapest retail prices for dress fabrics were rayons, followed by cottons, linens and silks) and print process, with some variation for width of fabric. The hand block prints were the most expensive fabrics.
4.7 Profits

4.7.1 The Calico Finishing Industry

Loss of exports during the war meant that production continued at a low level in the immediate post-war years. However, in spite of the loss of exports, the price rises meant that 1920 was the peak year for cotton industry profits. The rise in consumption and price in the post-war boom of 1919/20 was followed by a sudden crash in late 1920/early 1921. The crash had a drastic effect on Belfield Ltd (a CPA subsidiary), which went into loss in 1920, reaching its worst point of £59,248 loss in 1921. Daniel Lee & Co. Ltd., another subsidiary, dropped into a loss of £35,320 in the second half of 1920, although this was corrected in 1921. In 1922 and 1923 it remained just in loss, and was wound up in March 1925. The effect of this on the industry can be seen in the fall in dividends given by the three major sectional combinations during the inter-war period (Figure 4.64). The dyers' dividend fall occurs in 1921 rather than 1920, with the printers and bleachers associations. It also shows a more drastic fall in 1926, while the CPA and BA suffer in 1925, due to export reduction. The CPA pattern can be compared with Ferguson Bros. Ltd. dividends (Figure 4.65): a rise in dividend occurred in 1921-2 at Ferguson Bros., but the rises in 1924 and 1927-8 at Ferguson Bros. do not occur at the CPA. The complete cessation of Ordinary Share Dividends of all three finishing combines in the 1930s shows the extreme nature of the economic crisis for all sections of the cotton finishing industry.

4.7.2 The Commission-Processing Sector

The entire commission dyeing industry became unprofitable during the depression. The Bradford Dyers' Association went into loss in 1930. It dropped from a profit of £500,000 in 1929 to a loss of over £100,000 in 1931. Hawley & Johnson Ltd., a Leicester dyeing company, had a steady fall in profits from the height of £68,403 reached in 1922 to £15,151 in 1929. No profit figures are given in the minutes from then until 1936, when a profit of £3,930 is shown (balances are simply passed). In the interim, details are noted of increasing overdrafts and the deeds of properties handed to the bank against liabilities and the closing of one of their two works. Scottish Dyers' and Printers Ltd. - the MSF dyeing subsidiary - was

266 M75/1922-28/2.4. It was agreed in September 1925 that Belfield Ltd. should be closed.
269 Leicestershire Record Office, DE 2139/3.
created in 1919, when the Midlothian dyeworks at Slateford was bought: it was profitable from 1922-31 depression, went into loss in 1932 and remained in loss throughout the 1930s (Figure 4.66). J. Chadwick and Co. Ltd. went into loss in 1934 (Figure 4.67): the profitability difficulties of the company were due to the fall in prices from 1931-34 and rising costs of production. In 1934, the Bradford Dyers' Association commented that dyeing prices were 25% lower than in 1930. The overall situation of the dyeing industry was given in February 1937, when the BDA Chairman's Annual Address stated that the cost of production of dyeing and finishing had increased by 53% since before the war, but the price of dyeing had only gone up by 3%. These price cuts were standard rates, which applied to the home market as well, preventing any recouping of losses. The combination of commission bleaching and dyeing with printing in many companies had a serious deleterious effect on print companies, exacerbating the impact of the depression.

No purely commission processing dress fabric print companies have been analysed, due to lack of available archives. The United Turkey Red Co. Ltd., Turnbull & Stockdale Ltd. and the CPA all had a proportion of their business based on dress fabric commissions, but separate profit data is available. Wm. Hollins & Co. Ltd. purchased Seedhill Finishing Co. Ltd. in 1928, ensuring that Hollins' dyeing, printing and finishing was 10% cheaper than previously, but due to rising costs and a reduction in orders, the Seedhill profits fell from an average of £23,277 in 1927-30 to £9,291 in 1933. A fall in commission printing is indicated in September 1929 at the CPA: they noted that there was a decline of 50,000 pieces ordered, against a comparative period of 11 weeks in 1928, but 'the drop was entirely in commission printing, the Merchant Departments having improved by 55,000 pieces.' Stead McAlpin, a commission-processor for furnishing fabrics, has no archives of economic data. There is profit data for Standfast Dyers and Printers Ltd. (Figure 4.72), a commission-processing print subsidiary of MSF, but much of its commissions came from the parent company. Standfast Dyers' and Printers was purchased in 1925, had eliminated its cumulative losses by 1928, sank back into heavy loss in 1931 and climbed steadily back from 1934, regaining profitability in 1936-7. Morton Sundour Fabrics commented in 1934 on the state of the dyeing and printing commission-processing industry:

270 Ewing, A.F. op. cit.
272 M75/ Directors' Minute Book No. 12, 17/9/29.
'Shareholders may be aware from the published results of large public Companies concerned in these branches of the textile trade how profitless they have been for the past four years, and how heavy the drain made on their resources.'273

The situation had not seriously improved by 1938, as the comment in the Morton Sundour Fabrics Shareholders Report of that year shows:

'The chief obstacle to the more satisfactory results of the Company as a whole has been its two subsidiaries engaged in commission dyeing and printing. Drastic price-cutting competition in these trades still continues and the increased cost of raw materials such as coal and dyestuffs has added to the difficulties.'274

Jocelyn Morton later summarised the position of the industry:

'parts of the textile trade, including the field of manufacturing and selling furnishing fabrics, rallied somewhat by the end of the decade, but important sections of it, including especially the commission dyeing and printing trades, only went from bad to worse.'275

Overall, the problems of the cotton industry were partly a reduction of export market demand, but also the drastic level of price cuts necessary, while the cost of production was rising. A report from the JCCTO to the Board of Trade in December 1936 stated that:

'Increased costs and heavy capital charges have made the industry unprofitable. They now recognised that the slump in the cotton industry which had begun in 1920 was different in character from all previous depressions, and that there is no prospect of recovering what had been lost as a result of changed world conditions.'276

4.7.3 Profits of the Case Study Companies

Analysis of the differences in company profitability is given below. The print section of those companies involved in a range of different processes is examined separately. Calico print companies often combined their production with other related processes. It was common to combine dyeing, bleaching and other finishing processes within the same company, but some fabric manufacturers also had print departments, and sometimes manufacturing or finishing companies had 'making-up' (clothing manufacture) or embroidery departments. For example, Tootals was mainly weave, CPA had a vibrant print design department among a varied range

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273 GD 326/ 224, Letter to Shareholders, September 1934.
274 GD 326/ 226.
276 PRO BT 64/ 14/ 1872/ 36.
of weave and clothing departments, and Turnbull & Stockdale produced plain dyed and bleached goods as well as printed. In some combined manufacturing/finishing firms, printed design may be a small proportion of turnover, with insufficient departmental data provided in the accounts to determine the profitability of that section of the company. Since most individual firms were complex multi-industry concerns, there was cross-subsidy of different processes, as different economic movements affect the separate production lines. This makes it difficult to present a clear picture of the printing industry. Morton Sundour Fabrics' profits in the 1920s were a combination of weave, print and dye departments (sales income of departments shown in Figure 4.68). The different product trends interact and moderate each other, to provide a greater stability for the company.

4.7.3.1 Morton Sundour Fabrics Ltd. Print Profits

However, print sales show a declining trend, in contrast to the other sections. Profits of the Print Department can be inferred from the sales and expense data. A sudden collapse in general MSF sales occurred in 1920/1, falling to a deficit of £78,482. This was graphically described in an Address to Shareholders by James Morton, in which he recalls receiving a letter in March 1921 from the Secretary while on a trip to India:

'Business seemed to have toppled down in a night, our stock value had fallen by some £180,000, we had large purchases made at high prices, while our own customers were cancelling their contracts placed with us.'

A recovery occurred in 1921/2, with a further dip into deficit in 1922/3 and a low level of profits from 1925/6 to 1929/30. The knife-edge of viability on which Standfast was also balanced (Figure 4.56) is demonstrated by the climb back into profits during the periods of rising sales income in 1924/5-27/8 and 1932/3-33/4 (Figure 4.9). The MSF parent company shows a steep fall in profits in 1929-32, following a sudden increase in 1926-7 (Figure 4.55). A memorandum of the MSF directors meeting on 24th April 1931 acknowledges that while profits 'were very much reduced from ordinary years, they were considered satisfactory as compared with what one knows of the Textile Trade generally.' The increased turnover in home trade and severe cost-cutting in 1932 resulted in the recovery of 1933 (Figure 4.54). By September 1934, the MSF Report to Shareholders stated that 'As concerns the parent Sundour

277 GD 326/224 Chairman's Address at meeting of shareholders, 29/3/35.
278 Ibid., Memorandum of meeting of Directors, 24/4/31.
Company this improvement has been realised, and it has made progressive and substantial profits. The decline in 1935-7 is likely to be due to the increased pressure of competition and price-cutting in the home market. The final Directors' Report of Morton Sundour Fabrics Ltd. for the inter-war period reads:

'The rapid changeover in both industry and social life from peace to war makes a statement exceedingly difficult. The Parent Company and its Subsidiaries are equipped for the manufacture and distribution of all kinds of fabrics for the furnishing of beautiful homes, and at no period of our existence have we been better equipped for that purpose. But it takes two sides to make any kind of trading, and the plain fact facing us during the whole of the past year has been that the furnishing of homes has been about the last thought in the minds of the public, for ever since last September the whole public from the top downwards has had one constant thought, how to be sheltered from Bombs. The inevitable result is that, in spite of our special sales effort, the volume of trade for the past year dropped to a level that was no longer profitable.'

4.7.3.2 Turnbull & Stockdale Ltd.

Total cost or profit data is not available. The reduction in total invoices during 1926, 1930-1 and lower level in 1934-6 compared to the general 1920s level (Figure 4.7) would have resulted in declining profits over the period, although sales income from their own productions sold in the home market rose during the 1930s. The steady rise in sales income of Turnbull & Stockdale Ltd. from 1932 to 1937 implies that the price-cutting of 1934-6 affected the dress fabrics of the commission processing orders to a far more serious degree than their own furnishing fabrics. The fall in textile prices in the depression, with the general increases in dye and coal costs in 1935-6 is likely to have resulted in marginal profits levels, particularly in the mid 1930s.

4.7.3.3 The Calico Printers' Association

The CPA suffered a severe fall in profits in the immediate post-war period, with a sudden recovery in 1923 (Figure 4.73). The fall in profits in 1919 is likely to be due to rising costs. In January 1919 it was commented that 'in view of the position disclosed, it was necessary to exercise the strictest possible economy in keeping down expenses of every kind.' The CPA declined in profits overall from 1923 to 1939, with falls in gross trading profits in 1926 and 31 in line with national recessions, and a rise in 1928 and 1937. This pattern is notably

279 OD 326/226, Directors Report to Shareholders, 30/9/39.
280 M75/ Directors' Minute Book No. 5, 28/1/19.
different from the record of orders and production (Figure 4.2), which shows a brief dip in 1921 and recovery, with a small rise in 1925 rather than any sharp increase in 1923. There is no general trend to explain this 1923 rise: it is likely to be the result of cost-cutting measures taken by the company, though no such measures on the scale of the profit rise are indicated in the minutes. The closure of Springfield works and other subsidiary companies with works is a possible factor (see Section 5.4.4). The 1926 and 1931 falls correlate to falls in orders. However, the fall in profits during 1935-6 follows a drop in home market demand rather than in orders or a cost rise.

4.7.3.4 Ferguson Bros. Ltd.

Ferguson Bros. Ltd. was economically dominated by their Silesia Process Department, shown by the departmental income and profits in Figure 4.4 and Figure 4.7.281-281 It brought in 84% of their sales income in 1919-1940 (the Print Department was only 8%, while Yarn was 5% and Weave 3%). This process required the engraving of shells and design costs, as well as printing and finishing at their own works or at external firms. No details of this process are given, but it may be the manufacture of artificial fibres. Analysis of the production of fabric types is given in Section 6.5.2. Silesias were tailor's linings: the Irish Dyers and Finishers Association stated that silesias and jeanettes were 'goods confined entirely to the linings trade'.282

The production income for the Ferguson Bros. Print Department more than doubled from 1919 until 1929 (from £40-93,000), although this increase is not reflected in the profits, due to increasing costs (Figure 4.75). Costs broadly increased with production income, leaving variations on the trend of expansion as the profit. The market destination analysis (Figure 4.42) indicates possible changes in market demand to explain the sudden small falls in income in 1923 and other data points, but covers the entire production rather than conditions specific to the Print Department. Higher profits show in 1920 and 1922, 1926-9, 1932-4 and 1939. The descent into deficit in 1930 and 1932 was primarily due to falls in Silesia profits. The recovery of print dept income in 1932 is likely to be due to the import tariff introduced. Economic recovery of the industry was apparent by 1933, as a comment on the balance sheet indicated: "They are pleased to report a distinct improvement in the results as compared with

281 DB 110/ 70, Ledger of Balances, 1921-42.
the three previous years.\(^{283}\) The significant fall in production income during 1935-6 - greater than that in the 1930 crash - indicates the severe effect of low prices, although recovery to previous levels had been achieved by 1939, before a fall in income to 1941 due to the war. The low prices and rising costs resulted in deficit or very marginal profitability from 1935-8. The severe effect on Ordinary Share Dividends in the 1930s of the 1930-1 depression and the low levels of profitability in 1935-8 can be seen in the lack of dividend on dividend in the first half of the year in 1930, 1936 and 1938 (Figure 4.65).

4.7.3.5 United Turkey Red Co. Ltd.

The UTR had a yarn dyeing, hosiery, weave, and garment manufacturing department, cloth processing and chemical sales departments. Garment manufacturing showed a sudden rise in 1928-9, although otherwise relatively steady, while yarn orders rose in volume until 1926 and then fell to a level in 1930 that remained for the rest of the decade. Cloth processing was not separated into categories such as printing or different dye or finishing processes, so it is difficult to give any proportionate idea of the importance of printing within the company. There is no income or profits data for the UTR in the Glasgow Business Records Centre, but profits from 1931-8 are given in the CPA archive (Figure 4.76). This shows a recovery after the recession in 1932 to almost £60,000, a fall to loss in 1933-4, a small recovery in 1935 followed by a dive into severe loss by 1938 (of £109,769). The vertically combined nature of the company meant that it suffered from the competitive problems of other British fabric production companies. Particular difficulty in getting printing business at economic prices is recorded in 1935, when many of their standard lines became untenable: 'could not continue to accept business at the ruling prices for 1 Colour Sarries. . the same goes for Khanga styles. . Home trade styles were no better.\(^{284}\) The severity of the fall by 1939 was explained by the Chairman as due to the low sales in India, difficulties in West Africa due to their cocoa and other raw material industries (their main export markets) and high costs.\(^{285}\) However, the war entirely altered the economics and production of the company: by March 1942, 80% of their production was for Government departments, including anti-gas cape material for the Forces.

\(^{283}\) DB 110/ 70, op. cit.
\(^{284}\) UGD 13/ 5/ 7, op. cit., 9/10/35.
dyeing and proofing of haversack materials, canvas for wagon covers and hangars, rot-proofing of sandbags and camouflage printing of netting.

4.7.3.6 Other Printed Textile Company Profits

Profits for F. Steiner & Co. Ltd., Simpson & Godlee Ltd. and Alexander Drew & Sons Ltd. for the early 1930s are given in the CPA archive (Figure 4.77). This shows that Steiner and Drews have a similar pattern of recovery from loss in 1932, followed by a fall into less severe loss in 1933. Simpson & Godlee profits are only given for 1932-3, but also show a drop in 1933.

4.7.4 Conclusion: Profits

The combination of cost rises and price cuts had a very severe effect on the profitability of the industry, forcing the commission-processing sector into a position of marginality or deficit for most of the 1930s. Companies showing increasing production orders and sales, such as Ferguson Bros. Ltd. and Turnbull & Stockdale Ltd., also became more marginal. Great volatility in profits and deficits was demonstrated by the dress fabric companies in the 1930s. Analysis of sectional divisions shows similar trends in dress fabric companies, with a common fall in the depression in 1930-1, revival in 1932 and a small dip in reaction in 1933. F. Steiner & Co. Ltd. and the UTR had a more notable 1933 reduction. Price-cutting and cost rises resulted in severe falls in profits in the later 1930s: the UTR fell in 1936-8, Ferguson Bros. Ltd. had poor results in 1936-8, while the CPA had reductions in 1935-6 and 1938-9. A general pattern of decline is evident in the CPA profits, but there were no deficit years. The very low level of profits in 1918-22 and sharp recovery in 1923 is anomalous: Ferguson shows greater variation, with a 1920 rise, 1921 fall, 1922 recovery, fall in 1923 and a strong rise in 1924.

Data on furnishing print companies is limited, with MSF Print Department sales and expense data to 1929/30 (profits can thus be inferred) but no profits or total cost data for Turnbull & Stockdale Ltd. A smooth decline in sales from 1920-30 was shown by the MSF Print Department (no volatility in 1920-3), though profits were far less consistent, with a dramatic fall into deficit in 1921 and further profit swings in the following years. Standfast Dyers' &

286 UGD13/ 5/ 22, Notes on Production Processes, 10/3/42.
Printers' Ltd. was mainly a commission-processor, and may have printed dress and furnishing fabrics. Turnbull & Stockdale Ltd. orders recovered suddenly in 1932, though sales improved more gradually in 1933-7, indicating the fall in prices. Their total invoices in 1934-6 were also reduced by price-cutting.
4.8 Conclusion: Economics Chapter

The volume of printed calico produced fell sharply during the First World War and during the inter-war period, due to a serious loss of export markets. This was a result of severe price-cutting from international competitors with lower costs, such as Japan, Russia and India, combined with protection for home production within prominent export markets. Export markets for British printed textiles that prospered (subject to macroeconomic pressures) were principally those that were protected by colonial tariffs, with a lesser effect from inter-governmental treaties.

The most serious factor for the industry was rising costs, which prevented those companies with healthy sales from benefiting in overall profits. Some costs, such as rail freight charges, affected particular case study companies to a greater extent, while coal strikes in 1921 and 1926 caused drops in production across the industry. The most onerous increases were in dye costs (due to the use of vat dyes and Government policy in protecting the dyestuff industry), local authority taxes and coal (particularly in 1936). Wage levels were considerably higher in the interwar period than they had been pre-war, and significantly higher than in competitor nations. Increases during the period were tied to the Board of Trade Cost of Living figures, subject to negotiation with unions and the Allied Trades Association. Wage cost increases within individual companies were related to production rises and changes in policy, such as diversification or research investment. Some companies found strategies to deal with cost changes - for example, Ferguson Bros. Ltd. reduced its dye costs in 1933-6 - while industry bodies negotiated for reductions in costs such as freight haulage rates. Cost reduction tactics by the case study companies that relate to design, such as the quantity of engraving, the print process used and dye use, are considered in Section 5.4.4. The textile production speciality in artificial silk mixtures developed by Ferguson Bros. Ltd. avoided the wider problems of the cotton industry, while the furnishing fabric specialist weave sector (brocades, damasks, tapestry, moquettes) recovered from depression and (due to markets) was less severely affected. Reduction in profitability of some dye processes, such as indigo and turkey red, impinged heavily on some companies, due to product specialism. Analysis of results will be developed further in the discussion of company policy in the Section 5.4.
Individual differences between the case-study companies are too great to lead to strongly based conclusions on the division between furnishing and dress fabric sectors, due to the variation in market between companies in each sector. Another problem is the involvement in both sectors by individual companies (the CPA, the United Turkey Red Co. and Turnbull & Stockdale Ltd.), but without separate sales or profit totals for product specialisations given in their accounts. However, the market division between dress and furnishing fabric did result in structural differences in economic conditions. Dress print production was predominantly an export business, of cheap goods sold, via a complex distribution system of independent merchants, shippers and agents, to India, Near, Middle and Far East and African markets. It was therefore highly susceptible to international competition on price. Printed furnishing fabrics were primarily sold in the home, American, Dominion and European markets, by a combination of direct sale and wholesalers. Sectional divisions in market orientation and business model (commission-processing or entrepreneurial) were the key determinants of the economic conditions of a company. Variation in the economic health of different markets required constant awareness and a changing marketing and production strategy. This was impossible for much of the industry, which was dependent on orders from merchants, and therefore suffered much more severely in the depression. Commission-processing companies had the worst results, since the competitive price-cutting, small orders and increasing level of costs made the business uneconomic, and as a passive sector, changes in product (whether design or development of brand name fabrics or finishes), distribution or marketing could not be utilised to improve their economic conditions. Even specialist dye techniques and innovative 'sunfast' dyes (seen in Scottish Dyers' and Printers' Ltd. results) were not sufficient to overcome price and cost problems. Vertically combined companies also had much more severe difficulties, due to the severity of competition in commission-dyeing, bleaching, weaving and spinning. Those companies that were orientated around fairly cheap production of fairly standardised export style types were also very vulnerable to price competition from international competitors (the United Turkey Red Co., and to a lesser extent the CPA). Companies specialising in the home market (often including Europe, the USA and Dominions) kept their production levels steadier, while some of those specialising in particular export markets, such as the West African, were able to expand in the later 1930s. Fabric type specialism was also relevant to economic conditions: for example, silk printing charges rose in the 1930s, while linen printing charges plummeted. However, the price of the fabric was more significant than relative changes in printing charges: the expanding fabric
sector of the industry appears to have been artificial fibre fabrics, due to the low price of rayon and rayon mix fabrics. Turnbull & Stockdale Ltd. increased their sales in the home market significantly during the 1930s, but since cloth codes were used in the design photo books, it is not possible to ascertain what the fabrics were.