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THE PRODUCTION AND DISTRIBUTION OF WOMEN
KNIT OUTERWEAR AND LINGERIE BY FIRMS IN
THE READING-BERKS COUNTY, PENNSYLVANIA
MARKET AREA

By Andrea Ruth Desjardins

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THESIS

ABSTRACT

THE PRODUCTION AND DISTRIBUTION OF WOMEN'S KNIT OUTERWEAR AND LINGERIE BY FIRMS IN THE READING-BERKS COUNTY, PENNSYLVANIA MARKET AREA

By Andrea Ruth Desjardins

Prompted by the emphasis placed upon knit fashions today, this study was undertaken to describe the women's knit outerwear and lingerie industry in the Reading-Berks County, Pennsylvania market area. Heads of ten selected knitwear firms were interviewed regarding the structure and organization, method of production, sources of materials, distribution, and type of garments produced by representative firms. Designers from three of the knitwear firms were also interviewed to obtain information regarding their part in the production of knitwear.

The findings of this study indicate a recent increase in the number of knitwear firms. The majority of the firms realize a yearly sales volume between three and four million dollars, and draw an average of between two and three hundred employees from the local supply of highly skilled laborers. The firms are primarily manufacturing operations, with a few performing as contractors; all firms utilize the progressive bundling system for their production of knitwear.

Raw materials are obtained from Eastern states. All of the firms distribute their merchandise nationally and six of the firms distribute internationally. Most of the firms exhibit their knitwear in all of the major trade centers throughout the United States. The

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Andrea Ruth Desjardins

majority of the firms distribute directly to department stores, chain stores, and mail order houses.

Although most of the knitwear firms specialize in the manufacture of one specific type of knitwear, together they produce a variety of knit styles in a wide range of sizes and prices. Unique problems are frequently encountered in the production of knitwear, however, of most concern were problems related to characteristics of the knit fabrics.

The knitwear designers selected for interviews had received professional training and have been designing for their firms for approximately 10 years. The most significant inspirational sources for original designs mentioned by the designers were European magazines, customers, and ready-to-wear; while previous designs, present fashion trends, and competitors were their main sources of adaptation. Methods of creation ranged from sketching and draping to pattern making. The designers felt that designing for knit fabrics presented a challenge with unique problems, unlike any encountered with woven fabrics.

During the past 15 years expansion has occurred in the Reading-Berks County knitwear industry in the form of plant facilities, employment, and diversification of products. Improvement of machinery, fibers, and fabrics were also mentioned as extending factors. Although plans for future growth are being made by most of the firms, there was general agreement that a decrease in the available labor supply will be the major drawback to future growth of the industry.

Andrea Ruth Desjardins

The Reading-Berks County knitwear firms and designers view their major contribution to the apparel industry of the United States as superior quality knitwear, well cut and designed in youthful, fashionable styles.

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AND LINGERIE BY FIRMS IN THE READING-BERKS COUNTY,
PENNSYLVANIA MARKET AREA

By

Andrea Ruth Desjardins

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CHAPTER I

INTRODUCTION

Statement of the Problem

Knitwear has become the focus of fashion emphasis today. Aside from the fashionable aspect, knit fashions are comfortable, easy to care for, and versatile. Technological advances in machinery as well as developments and improvements in fibers and fabrics have greatly contributed to this current expansion in knitwear. The knitwear industry has recently witnessed spectacular increases in sales production and future potential for the industry appears to be limitless.

At the present time there are many knitwear industries throughout the United States manufacturing apparel for all ages, sizes and prices, from underwear to outerwear. A number of these prosperous knitwear industries are located in the Southeastern portion of Pennsylvania, specifically--Reading-Berks County. Although Reading-Berks County is a minor market area, over 100 of its various industrial establishments manufacture fabrics or apparel; approximately 35 firms produce knit fabrics and/or knitwear.¹

A few studies have been made concerning the apparel industry in regional market areas; however, there has been no research specifically concerned with the knitwear industry of a regional market area.

¹The Chamber of Commerce of Reading and Berks County, Pa., Industrial Guide to Reading and Berks County, Pa., (1966), p. 54.

Therefore, the purpose of this study is to investigate the contributions of the Berks County, Pennsylvania market area as a minor market in the production and distribution of women's knit outerwear and lingerie.

This study supports Golly in her research of the Dallas Women's Apparel Market, in which she suggested that "Further studies of other regional markets of importance would lead to an appraisal of not only those regional markets, but an evaluation of their part in the national apparel industry."¹

Review of the Literature

Much emphasis has been placed upon knitwear and lingerie today by leading fashion magazines and newspapers. Neither knitwear nor lingerie are new to the field of women's apparel, however, through recent developments in fabric and machinery and as a result of a comfort-seeking, leisure-oriented and mobile society, knits have become an important segment of the apparel industry. Although there has been an upsurge in knitwear and lingerie, there is relatively little documented information written concerning these specific industries.

An extensive technical study of selected knitwear industries throughout the United States was undertaken by the Anglo-American Council on Productivity.² The Council analyzed factory administration,

¹Jeanne Marie Golly, "A Study of the Present Status of the Dallas Women's Apparel Market" (Unpublished Master's thesis, Department of Textiles, Clothing and Related Arts, Michigan State University, 1966), p. III.

²Productivity Team Report, Hosiery and Knitwear (New York: Anglo-American Council on Productivity, 1951).

organization, layout, methods and operating conditions of hosiery and knitwear industries in order to compare knitwear industries in the United States to those in the United Kingdom for the purpose of improving upon the latter.

Regional markets producing women's apparel have undergone some exploration in the past. Griffin investigated a number of regional markets producing women's and misses apparel in the late 1940's. However, each market was treated in a general manner due to the comprehensiveness of the study.¹

Individual regional markets have also been studied. Drake and Glasser surveyed trends in the New York City garment industry to determine whether it was growing or declining.² A later study by Hall, recognized a decentralization of the New York apparel industry and endeavored to examine all responsible factors leading to the decline of activities in the New York City market center.³

¹Tira W. Griffin, "A Survey of Selected Regional Markets Producing Women's and Misses' Apparel' (Unpublished Master's thesis, Department of Textiles, Clothing and Related Arts, Michigan State University, 1949).

²Leonard A. Drake and Carrie Glasser, Trends in the New York Clothing Industry (New York: Institute of Public Administration, 1942).

³Max Hall (ed.), Made in New York (Cambridge, Mass.: Harvard University Press, 1959).

The development and status of the Dallas women's apparel market have been researched by Gano,¹ Johnson,² and Golly.³ Goodman summarized apparel manufacturing and marketing facilities in California.⁴ The growth and status of the apparel industry in Florida was examined by Hersker.⁵ Bourne analyzed the development of the apparel industry in Alabama.⁶

There are a few good books offering background information of the apparel industry. Jarnow's text is a compilation of interesting readings concerning the production, distribution, design, etc. of the apparel industry.⁷ An early review of the history of the apparel industry is presented by Nystrom.⁸ Arnold and White's book also

¹Lowell R. Gano, "The Women's and Misses' Apparel Industry in Dallas, Texas" (Unpublished Master's thesis, Southern Methodist University, 1949).

²Elton Davis Johnson, "Women's Outerwear Industry in Texas" (Unpublished Doctoral dissertation, The University of Texas, 1954).

³Jeanne Marie Golly, "A Study of the Present Status of the Dallas Women's Apparel Market" (Unpublished Master's thesis, Department of Textiles, Clothing and Related Arts, Michigan State University, 1966).

⁴Charles S. Goodman, "The Location of Fashion Industries With Special Reference to the California Apparel Market," Michigan Business Studies, Vol. X, No. 2 (Ann Arbor, Michigan: University Press, 1959).

⁵Barry Jay Hersker, "The Women's Apparel Manufacturing Industry in Florida" (Unpublished Doctoral dissertation, The University of Florida, 1962).

⁶Judith Mayton Bourne, "An Analysis of the Development of the Fashion Industry in Alabama, 1949-1962" (Unpublished Master's thesis, Auburn University, 1962).

⁷Jeanette Jarnow and Beatrice Judelle, Inside the Fashion Business (New York: John Wiley and Sons, Inc., 1965).

⁸Paul Nystrom, Economics of Fashion (New York: The Ronald Press Co., 1928).

describes the apparel industry and briefly touches on the knitwear industry.¹

Periodicals frequently devote sections or articles to trends in knit fashions and knitting industries. Textile Industries² and Textile Research Journal³ are technical magazines and are particularly informative to the people in the trade. While others such as American Fabrics⁴ and Apparel Markets,⁵ are also informative, interesting and enjoyable to the consumer.

Women's Wear Daily newspaper is still another source of information covering the impact of knit fashion trends to both industry and consumer.⁶ Forecasts of the future for knit outerwear and lingerie fashions are predicted and illustrated.

¹Pauline Arnold and Percival White, Clothes on Cloth (New York: Holiday House, 1961).

²Textile Industries, Vol. 131, No. 4 (April, 1967).

³Textile Research Journal, Vol. 37, No. 5 (May, 1967).

⁴American Fabrics, No. 75 (Spring, 1967).

⁵"Other Apparel Markets," Apparel Markets (1948), p. 220.

⁶refer to:

"Fall Lingerie and Loungewear," Women's Wear Daily, Vol. 114, No. 92 (May 11, 1967), Section 2.

"Technology in Knit Fashions," Women's Wear Daily, Vol. 114, No. 89 (May 8, 1967), Section 2.

Few historical accounts of industry in Berks County have been published. Books by Albright¹ and Graeff² discuss the history of the knitting and knitwear industries in Berks County. The Chamber of Commerce of Berks County continually publishes pamphlets providing summaries and statistics of Berks County industries.³

Definition of Terms

Various terms are used in discussing knitwear and the knitwear firms in the Reading-Berks County Market area. These terms need to be defined to promote a better understanding of their usage in this study.

Knitwear refers to clothing which is constructed by means of the knitting process. Outerwear refers to clothing such as dresses, coats, suits, sweaters, cardigans, and slacks. Lingerie refers to women's underclothing, specifically, slips, petticoats, pettipants,

¹Raymond W. Albright, Two Centuries of Reading, Pennsylvania (Reading, Pa.: The Reading Eagle Press, 1948).

²Arthur D. Graeff (ed.), Industrial Berks County (Reading, Pa.: Textile Machine Works, Berkshire Knitting Mills, Narrow Fabric Co., 1948).

³refer to:

Reading-Berks County, Pa. Chamber of Commerce, Facts About Reading and Berks County, 1967.

Reading-Berks County, Pa. Chamber of Commerce, Berks County Is A Community At Work, 1967.

Reading-Berks County, Pa. Chamber of Commerce, Where Progress Is Tradition, 1967.

panties, and sleepwear. Underwear refers to underclothing for men and boys usually made of cotton knit. Knitwear manufacturing firms or knitwear firms are those firms which produce knit outerwear and lingerie.

In this study, fashion refers to "The prevailing or accepted style or group of styles in dress or personal decoration established or adopted during a particular time or season."¹ Style refers to the specific characteristics which distinguish one product from another.² Design refers to individual variations in materials and details of line and decoration which distinguish specific garments.³ The designer is the person who designs a line of knitwear by means of sketches, creates in fabric, or both.⁴

A market consists of the manufacturers in each specific classification of apparel; while a regional market refers to the geographic location of the market.⁵ Reading-Berks County Market Area identifies a minor market area, manufacturing knitwear, located in Southeastern Pennsylvania. This market area will be referred to as either Reading or Berks County.

¹Jarnow, op. cit., p. 2.

²Ibid.

³Ibid.

⁴Mary Brooks Picken, The Fashion Dictionary (New York: Funk and Wagnall Company, 1957), p. 96.

⁵Ibid., p. 220.

There are different types of manufacturing plants within the industry. The manufacturer produces the garment from beginning to end; the jobber takes care of everything but the actual sewing, which is done by outside shops referred to as contractors.¹

Importance of the Study

Research in the field of knitwear industries in regional market areas has been very limited. With the increasing emphasis placed upon knits today, a study focusing on the knitwear industries would prove to be invaluable to education, business, and industry. In a recent issue of American Fabrics, Robert E. Provost, President of Burlington Nexus Fabrics stated:

The time has come to evaluate the present position and future prospects of the knitting industry, to take note of radical changes in its size and structure, and to record the major role it now plays in the fashion market. During the past five years the production and use of knitted fabrics has expanded beyond the most optimistic forecasts of any producer in the field. In terms of fiber consumption, it is now operating at the rate of more than 1,300,000,000 pounds a year and its overall volume of business has more than tripled since 1960... Our evaluation of the knitting scene leads us to conclude that this is no temporary phenomenon responding to the whims of fashion, but a logical historical development with long-range implication for the textile industry as a whole.²

¹Jarnow, op. cit., p. 59.

²"The Knitting Industry Comes of Age," American Fabrics, No. 75 (Spring, 1967), p. 83.

The purpose of this study is therefore, to investigate the design and production of women's knit outerwear and lingerie industries as well as the importance of knits to fashion. Also to obtain information regarding the contributions of Reading-Berks County as a minor market area for knitwear. This research will hopefully supplement information on other regional market studies and also provide a basis for future studies of knitwear industries.

CHAPTER II

METHODOLOGY

Selection of the Method

For obtaining information about the knitwear industry, methods of data collection previously used for similar studies were reviewed. The direct interview technique was then selected to secure information for this descriptive study. According to Sellitz, interviews have an advantage over questionnaires because of the certainty of response. The use of the interview assures a much better representation for a selected group.¹ The direct interview technique provides a better opportunity for complete control over the material of the interview and thus enables the interviewer to redirect the responses of the interviewees by keeping within pre-determined limits.² Therefore, for the purposes of this research, the direct interview technique seemed to be the most appropriate and satisfactory.

Development of the Instrument

The interview schedule used for this study was developed to include both fixed-alternative questions and open-ended questions, the

¹Claire Sellitz, Marie Jahoda, Morton Deutsch, and Stuart W. Cook, Research Methods in Social Relations (New York: Holt, Rinehart and Winston, 1963), p. 242.

²Ibid., p. 241.

majority being fixed-alternative. This type of question was more frequently used as it limited the interviewee to stated alternatives and therefore, was less time-consuming to administer. Open-ended questions were also used since they did allow for free response which was necessary in order to obtain various opinions and ideas. Such responses were very helpful in establishing the contributions which the knitwear firms make to the apparel industry.

The interview schedule was divided into two parts. Part I was to be administered to the heads (manager, president, or owner) of the knitwear firms and provided questions pertaining to structure and organization of the firms, method of production, distribution, and type of garment produced. The second part was to be administered to the designer for each firm to determine his part in the production of knitwear.

All interviews were thus conducted with a fixed set of questions presented to the selected interviewee. Similar circumstances for each interview were maintained as much as possible to increase reliability. Validity of the instrument was checked through a pre-test. The first part of the interview schedule was tested with a co-owner of a men's sweater firm and also with a manager of a men's knit underwear firm. Part II of the interview schedule was tested with a designer of women's apparel. Through the pre-test and discussion with the respondents, a few minor revisions were made to improve the continuity and clarity of the interview schedule. The pre-test also provided experience for the interviewer and helped to establish a more standardized procedure to be used when administering the instrument.

Selection and Description of Knitwear Firms

A list including all of the knitwear manufacturing industries located in Berks County was obtained from the Reading-Berks County Chamber of Commerce. This listing was supplemented with additional firms found in the Pennsylvania Bell Telephone Directory.

Introductory letters briefly explaining the research and the need for an interview were sent to all of the firms on the list. The letters were followed by telephone calls to schedule convenient appointments for interviews. Eighteen letters were mailed to knitwear firms within the county, three of which would not respond and five could not be used since they manufactured men's knitwear. The remaining ten used for the sample consisted of four women's knit outerwear firms, and six lingerie firms. Two of the lingerie firms and one of the women's knit outerwear firms employed a full-time designer located with the firm in the Berks County area.

Method of Presentation

The information collected from the interview schedule was compiled and tabulated in order to achieve a form of presentation. This information about the firms, their structure and organization, their methods of production, distribution, and type of garments produced formed a basis for this descriptive study. Tables were used to present information in visual form for quick review. Expressions of opinions and ideas gained through responses to open-ended questions were analyzed to determine the contributions of the firms to knitwear and to the total apparel industry.

CHAPTER III

WOMEN'S KNIT OUTERWEAR AND LINGERIE FIRMS IN THE READING-BERKS COUNTY MARKET AREA

Reading-Berks County is an important manufacturing center which will be considered as a minor market area. The knitwear firms located within this prosperous industrial area have played a prominent part in its development. In order to determine the contributions of the knitwear firms, specifically the women's knit outerwear and lingerie firms, an investigation was conducted to examine the structure and organization, method of production, sources of materials, types of garments, and systems of distribution. The designer within the firm was also asked to contribute information regarding his position in the firm, background, and method of work. The following chapters present and discuss the findings of this descriptive study.

Structure and Organization

The structure and organization of each of the firms was examined in regard to the following factors: establishment, function, ownership, location, and size of the firms.

Establishment, Function, and Ownership of the Firms

Background information about the knitwear firms was obtained through questions concerning the date of establishment and the function

of the firms when established. This information along with information about the present function of the firms, has been compiled in Table I to show the periods of greatest development as well as the transformation of products.

TABLE I.--Periods of establishment, original function and product, and present function and product

Period of Establishment	Firms N	Original		Present	
		Function	Product	Function	Product
1896-1905	1	Contract.	Underwear	Contract.	Lingerie & Underwear
	1	Manufact.	Skirts	Manufact.	Outerwear ^a
1906-1915	1	Manufact.	Underwear	Contract.	Sweaters & Underwear
1916-1925	1	Manufact.	Underwear	Manufact.	Lingerie & Underwear & Contract.
1926-1935	0	----	----	----	----
1936-1945	1	Contract.	Cut & Sewn Hosiery & Lingerie	Manufact.	Lingerie
	1	Manufact.	Parachutes	Manufact.	Lingerie & Swimwear
	1	Manufact.	Full-Fash. Hosiery	Manufact.	Outerwear
1946-1955	0	----	----	----	----
1956-1965	1	Manufact.	Hosiery	Manufact.	Lingerie
	1	Manufact.	Lingerie	Manufact.	Lingerie
	1	Contract.	Outerwear	Contract.	Outerwear

Total 10

^a25% of the outerwear produced by this firm is knitwear

It can be seen readily from Table I, that two of the oldest firms were established between 1896 and 1905. The periods 1936-1945 and 1956-1965 show the greatest increase in the number of knitwear firms established in the Reading-Berks County market area.

All of the firms, with the exception of three, were established as manufacturing operations. The three exceptions were established as contracting operations, two of these eventually converted to manufacturing operations. Two other firms reversed the procedure and one is presently doing contract work while the other operates as both a manufacturing and contracting firm. Two of the newest knitwear firms are presently manufacturing the same type of product as when originally established. All of the other firms have either diversified their products or completely changed over to the production of knitwear.

Half of the selected group of knitwear firms interviewed produce knit outerwear or lingerie specifically for women, while the remaining five produce knitwear for both men and women. When the knitting industry first got under way in Berks County, cotton knit underwear for men accounted for the major portion of the knitwear produced. Although there are still firms in the area producing cotton knit underwear for men and boys, many of the firms have expanded their production to include women's underclothing which for the purposes of this study has been classified as lingerie to differentiate from men's and boy's underwear.

One firm was included in this study, even though 75 percent of its total apparel production is not classified as knitwear, because it is a large operation making a significant contribution to the knitwear industry.

Inquiry was also made as to the present type of ownership of the firms. The largest knitwear firm in terms of number of employees, operates as an open-corporation. The remaining nine firms are organized as closed-corporations.

Location of Firms

The number of production plants run by each of the firms and their location may be considered important factors in the evaluation of Reading-Berks County as a market area. Questions 5 and 6 of the interview schedule (Appendix A) were asked to obtain this information.

Two of the firms interviewed are divisions of larger corporations located in New York City, while the remaining eight firms are the parent companies and operate one or more production plants. Four of these firms operate a single production unit.

Of the remaining four firms which operate multiple units, one firm has two plants in Berks County, two plants in out-lying counties as well as one plant in Maryland and one in Connecticut. Another firm which operates two plants in Berks County has an additional plant in Oklahoma. One firm consisting of four plants in Berks County has an operation in a neighboring county in Pennsylvania. The remaining firm operates three plants located in the Reading-Berks County market area itself.

Various reasons were given by the interviewees for the location of the knitwear firms in the Berks County area. These reasons which were mentioned have been summarized as follows:

Reasons for location:

	<u>Number of Mentions</u>
Suitable labor supply	6
Materials easily accessible	3
Close to the Eastern market	3
Owner native of area	3
Plant facilities available	2
Transportation facilities	2
Financing available	2

Six of the interviewees mentioned more than one reason for the location of their firms. A suitable labor supply was the most frequently mentioned as well as the most important reason for many of the firms. Several of the interviewees remarked that the Berks County area has a reliable type of labor supply, with a high degree of finger dexterity, which is conducive to superior quality production.

Size of Firm

For this study, the size of the firms was determined by the yearly sales volume and the number of the employees for each firm. The information concerning the yearly sales volume obtained from question 24 of the interview schedule (Appendix A) is presented in Table 2, page 18.

As can be seen from Table 2, more of the firms fall into the \$3,000,000 - 3,999,999 range than any other range. The largest firm in terms of yearly dollar volume realizes a volume of over \$5,000,000, but produces only 25% knitwear. The other ranges are each represented by one firm.

TABLE 2.--Yearly dollar volume of Reading-Berks County knitwear firms
by number of firms

Yearly Dollar Volume	Firms N
Under \$1,000,000	1
1,000,000 - 1,999,999	1
2,000,000 - 2,999,999	1
3,000,000 - 3,999,999	3
4,000,000 - 4,999,999	1
Over 5,000,000	1 ^b
Total	8 ^a

^aTwo firms preferred not to give this information.

^bTotal volume for firm mfg. 25% knitwear.

A second measure of size used in this study is the total number of employees for each firm. According to Solinger, the number of employees is a more valid measure of size than dollar volume because dollar volume is relative to time.¹ Table 3, page 19, shows that the largest firm employs between 500 and 599 production workers. Four of the firms employ between 200 and 299 employees and almost as many firms employ 100 to 199 employees.

¹Jacob Solinger, Apparel Manufacturing Analysis (New York: Textile Book Publishers, Inc., 1961), p. 12.

TABLE 3.--Number of full time employees by number of firms

Full Time Employees N	Firms N
100 - 199	3
200 - 299	4
300 - 399	1
400 - 499	1 ^a
500 - 599	1
Total	10

^aFirm mfg. 25% knitwear.

Four out of the ten firms interviewed hire additional production employees during peak seasons. Two of the firms hire between 10 and 20 production employees. Another firm hires between 20 and 40 workers and the largest firm hires approximately 50 additional production employees during peak seasons. None of the firms employ part time employees.

Approximately 85 percent of the total number of production employees for all of the firms are women. All of the production employees for each of the firms live in local areas within a radius of ten miles.

Two of the interviewed firms were union affiliated with the International Ladies' Garment Workers' Union. One of the older firms became unionized in 1933, while a newer firm joined the union in 1960.

Inquiry was also made concerning the method of wage payment utilized by the firms. The majority of the production employees,

specifically the sewing machine operators, are paid by the piece by all of the firms. A few of the employees, such as the cutters and packagers, are paid on an hourly basis; the office personnel receive a salary.

Method of Production

Production, for all of the firms interviewed, is organized on a progressive bundling system. Much like an assembly line system, the operations to be performed on a garment are broken down into small balanced segments, each segment being carried out by one individual. These segments are then combined into a work unit. The cutter bundles and numbers the garment pieces by dozen lots to be distributed by the unit supervisor to the first operative in each unit. The bundles are then passed by hand from process to process until the garment is completed.¹

Although there are always problems involved in any type of apparel manufacture, the interviewees were asked if there were any unique problems encountered in the production of knitwear. Eight of the ten firms interviewed felt that the production of knitwear did present unique problems. These problems have been summarized as follows:

Problems:

	<u>Number of Mentions</u>
Characteristics of knit fabrics	5
Construction techniques	3
Cutting	2
Styling	2

¹Productivity Team Report, op. cit., p. 19.

Several problems were mentioned, however, characteristics of knit fabrics appeared to be the major problem and also accounted for most of the other difficulties. Fabrics, particularly synthetic fabrics, present a different problem. The variations in the knit construction along with the weight of the fabric and the amount of desired stretch increases the difficulty in handling the fabrics. Cutting, sewing, pressing, and sizing techniques are different for knit garments than for garments made of woven fabrics. Construction techniques become more difficult due to the stretch factor inherent in knits. Styling also was mentioned as a problem because of the limitations presented by the characteristics of knitted fabrics and the special equipment used in the production of knitwear.

Sources of Material

Raw materials, primarily fibers and fabrics used for the manufacture of knitwear by firms in Berks County, are secured from sources outside of Pennsylvania. All of the firms indicated between 90 and 100 per cent of their raw materials are obtained from New York City, New England, and the Southern States. The firms rarely import materials from abroad since they can obtain superior quality and less expensive raw materials from near-by areas within the United States.

Presentation and Distribution

Information regarding the presentation and distribution of the knitwear by firms in the Reading-Berks County market area was

obtained from questions 16 through 20 of the interview schedule (Appendix A). The interviewees were first asked to name the apparel trade centers throughout the United States in which they exhibit their merchandise.

Responses from this question showed that eight firms exhibit their knitwear in New York City, and five of these firms also exhibit in Los Angeles and Dallas. Four of the firms exhibit in Miami, and two exhibit their knitwear in St. Louis. Other minor apparel trade centers, such as San Francisco, Boston, Pittsburg, Baltimore, Philadelphia, and Washington, D. C., were mentioned by one of the firms. Two firms did not sponsor exhibits of their merchandise themselves.

Table 4, page 23, shows the approximate percentages of each sales method used by the firms responding to questioning. Six firms used road salesmen in percentages varying from 10 to 100. Four of these also utilized market showings. One firm depends primarily on trade showings held in outlying cities for smaller firms within a limited radius. Four of the firms did not respond to questioning, since the methods they use vary greatly or they sell directly to jobbers.

Further inquiry was directed to the distribution of the knitwear produced. All of the selected knitwear firms interviewed distribute their products to the major apparel centers within the United States. Six of the firms distribute internationally to centers in Europe, South America, Puerto Rico, Canada, and the Phillipines.

TABLE 4.--Percentages of sales methods used by the knitwear firms

Firms ^a	Sales Methods		
	Road Salesmen %	Market Showings %	Trade Showings %
A	10		90
B	50	50	
C	50	50	
D	75	25	
E	90	10	
F	100		

^aFour firms did not respond.

The knitwear manufacturers were also questioned regarding their methods of distribution. Seven of the firms transport finished products directly to the retail outlets and two of the firms deal directly with wholesalers. The types of retail outlets used by the firms directly or through wholesale distribution are presented in Table 5, page 24.

Table 5 shows that most knitwear firms distribute their merchandise directly to department stores, chain stores, and mail-order houses. Most of the merchandise which is distributed through a wholesale agent is retailed in department stores.

TABLE 5.--Number of knitwear firms using direct and wholesale agents for distribution to retail outlets

Type of Retail Outlet	Number of Firms	
	Direct	Wholesale
Department Stores	6	3
Chain Stores	6	1
Mail-Order Houses	6	1
Specialty Shops	5	1
Discount Houses	4	
Variety Stores	3	

Summary

The selected group of knitwear firms interviewed for this study consisted of manufacturers of knit outerwear, lingerie, underwear, and swimwear. Background information concerning the knitwear firms indicates the periods of greatest growth to be between 1936 - 1945, and between 1956 - 1965. Six of the firms interviewed are presently manufacturing operations, three are contracting operations, and one does both. All but one of the firms are closed-corporations.

The most important reason for the location of the firms in the Reading-Berks County area is the availability of a suitable labor supply. The majority of the firms realize a yearly sales volume between three and four million dollars, and average between two and three hundred employees.

Unique problems in the manufacture of knitwear are frequently encountered, the greatest problem being in the variance of fabrics. Raw materials are primarily obtained from sources on the Eastern seaboard.

Most of the firms exhibit their knitwear in all of the major trade centers throughout the United States and use road salesmen as their major method of selling. The majority of the firms distribute their merchandise directly to department stores, chain stores, and mail order houses.

CHAPTER IV

WOMEN'S KNIT OUTERWEAR AND LINGERIE PRODUCED IN THE READING-BERKS COUNTY MARKET AREA

The Reading-Berks County market area, noted for its excellent supply of highly skilled laborers, produces a variety of superior quality knitwear. Although half of the firms interviewed manufacture both men's and women's apparel, the primary concern of this study is women's knit outerwear and lingerie. In this chapter the characteristics of women's knit wear will be described in terms of type, size range, price range, and seasonal lines.

Type of Knitwear

The type of knitwear produced by the selected group of knitwear firms for this study was divided into two major categories: knit outerwear and lingerie. Three of the four knit outerwear firms interviewed manufacture sweaters, two of which produce full-fashioned sweaters, while the other produces cut and sewn sweaters. Three firms manufacture dresses and two manufacture two piece and three piece suits. Two of the knit outerwear firms manufacture sweater and skirt co-ordinates with a wide range of style and color choices.

A great deal of specialization occurs in the field of lingerie. Four of the interviewed firms, specializing in the production of panties, manufacture simple basic styles and more elaborate fancy styles.

The very fashionable "Mod" styles such as fish-net stretch panties were also included in their production. The firms are frequently developing new ideas for panties. One firm in particular, was experimenting with fabrics of various fiber content in order to obtain a light weight, durable, machine washable, and inexpensive stretch pantie. The firm was also testing a pantie with a seamless full-fashioned crotch.

Specialization also occurs in the production of sleepwear. Two firms reported that their sleep gowns were fashionable and luxurious enough to be worn as evening or party clothes. The three firms manufacturing sleepwear produce primarily long and short gowns, some with matching robes, sleep shifts, robes, and relatively few pajama ensembles.

The specific knit items manufactured by each of the firms, along with the size and price ranges, have been tabulated and presented in Table 6, page 28.

Size Range

The size ranges for the women's knit outerwear varied little among the four firms. Two firms produce a smaller range of dress, suit, and co-ordinate sizes than the other firm and two firms produce larger sweater sizes than the third firm.

Lingerie sizes varied according to the method of sizing used by the firms. Two firms manufacturing panties used the terms small, medium, and large for size identification, one of the firms used a

TABLE 6.--Types of knitwear produced, size range, and wholesale price range by each firm

Firm	Types of Knitwear	Size Range	Wholesale Price Range	
			Garment	Dozen
<u>Knit Outerwear</u>				
1	Full-Fash. Sweaters	36 - 42		\$32.50-48.50
2	Full-Fash. Sweaters	34 - 42	\$ 4.25-10.75	
	Co-ordinates			
	(Skirts & Sweaters)	8 - 18	\$ 6.75- 7.50	
	Dresses	8 - 18	\$ 8.75-10.75	
3	Sweaters (Cut & Sewn)	34 - 42		\$ 6.00- 9.00
	Dresses	8 - 18		-----
	Suits	8 - 18		-----
4	Dresses	6 - 20	\$10.00-39.00	
	Suits	6 - 20	\$16.00-50.00	
	Co-ordinates	6 - 20	\$ 3.75-20.00	
<u>Lingerie</u>				
5	Sleepwear	Petite, S, M, L		\$55.00-285.00
	Panties	S, M, L		\$ 7.50- 12.50
6	Panties	5 - 7		\$ 3.50- 4.50
7	Panties	36 - 50		\$ 5.00
8	Panties	S, M, L		\$ 8.00- 10.00
		4 - 8 stretch		
9	Panties	5 - 8	}	\$ 7.00-140.00
	Slips, Petticoats,	30 - 46		
	Pettipants	30 - 46		
	Sleepwear			
10	Panties	5 - 7	}	\$ 3.50-120.00
	Slips, Petticoats	32 - 48		
	Sleepwear	32 - 48		

four to eight size range for its stretch panties. Other firms manufacturing panties used a five to seven or five to eight range, while another firm used a 36 - 50 size range. Petticoats and sleepwear for two of the firms are made according to bust size. The size range for the other firm producing sleepwear goes from petite, through small and medium to large.

Price Range

The wholesale price range for the knitwear varied from inexpensive panties at \$3.50 per dozen to suits at \$50 per suit. The products from two of the knit outerwear firms are sold wholesale per garment. All of the other firms wholesale their knits per dozen lots. The quoted price ranges for the last two lingerie firms listed in Table 6, page 28, include all of their knit products.

Further information was obtained concerning the specific knit item manufactured, which was most important in terms of sales for each firm. Three of the firms reported that their line of men's underwear accounted for their highest sales. One lingerie firm felt that not one item in particular was more important, as all of the items contributed equally to the total sales volume.

Sleep shifts were mentioned as an important item for one lingerie firm because of the lower price range and also because simpler styles are preferred to more elaborate ensembles. As a result of present fashion trends, two of the knit outerwear firms concentrate on their production of sweaters, especially their sweater and skirt

co-ordinates which have become their largest sales items. Another knit outerwear firm felt that their line of dresses was most important in terms of sales. The two remaining firms specializing in the production of panties reported that the simpler more basic styles were their most popular sales items.

Seasonal Lines

The interviewees were asked in question 23 of the interview schedule (Appendix A), if their products were seasonal. Responses from this question indicated that seven of the firms felt that their products were seasonal. Four of these firms mentioned that the Holiday season was their most important season in terms of sales, as knitwear, especially lingerie, makes an excellent gift item. The Fall was also noted as an important season for five of the firms. Students returning to school, new colors and fabrics, and cooler weather were reasons mentioned for higher sales in the Fall. Two firms indicated Spring and Summer as important seasons because the use of less expensive fabric permits a lower price range which caters to a larger number of people. Three firms did not feel that their products were seasonal; their sales remain relatively constant throughout the year.

Summary

Knit outerwear and lingerie firms in the Reading-Berks County market area produce a variety of knit fashions in a wide range of sizes and prices. Most of the firms interviewed specialize in a

particular type of knitwear and, therefore produce superior quality merchandise. The majority of the firms felt that their knitwear is seasonal, and most of these firms indicated the Fall and Holiday seasons to be most important in terms of sales.

CHAPTER V

THE DESIGNER WITHIN THE KNITWEAR INDUSTRY

Determining the role of the knitwear designer within the knitwear industry was a major objective of this study. Upon obtaining information concerning the designer within each firm, it was found that designers for two of the firms are employed with their main offices in New York City. One firm employed the services of a free-lance designer on a part-time basis. Four other firms did not have designers; new designs are created by the heads of the firms, but not as designers. The remaining three firms employ full time designers. Therefore, this chapter will be based on findings concerning the position, background, and method of work of the designers employed by one knit outerwear firm and two lingerie firms.

Experience, Employment, and Education

Inquiry was made concerning the professional background of the three designers interviewed. All three of the designers have been designing for their firms for approximately 10 years. One of the designers had worked as a professional designer for five years prior to his present position.

Two of the designers have an additional interest in the firm other than designing. The first designer interviewed is also a partner

in the ownership of the firm. The second designer is the wife of one of the owners of the firm where she is employed.

The design department is a separate department within one of the firms and is directed by the designer interviewed. One of the other designers shares a large office with his partner (co-owner) and does his designing there along with his other business responsibilities. This particular firm also employs a sample maker. The third designer designs either in her home or in the business offices of the plant. Two free-lance designers, one at a time, are occasionally employed by this firm.

Questioning concerning educational background and training of the designers interviewed revealed that they all had completed high school and attained degrees from design school. One designer had also completed one year of college before going on to design school. Two of the designers had attended design schools in New York City. One of the designers had graduated from the Fashion Institute of Technology and another designer had studied at the Traphagen School of Fashion Design.

Sources of Design Inspiration and Ideas

The success of a knitwear firm depends a great deal upon the ability of the designer to create fashions which will receive popular consumer acceptance. It is therefore, the designer who must continually find new ideas for knit fashions. Various sources of inspiration are used by designers for creating new designs. The following is a list

of sources mentioned by the designers in this study:

Sources of Inspiration:

	<u>Number of Mentions</u>
French and other European magazines	2
Customers	2
Ready-to-Wear	2
Fabric	1
Art	1
Museums	1
Travel	1

French and other European fashion magazines and customers were each mentioned twice. Both designers of lingerie mentioned that their designs are frequently inspired by ready-to-wear outerwear. One designer further explained this source of inspiration as the silhouette of outerwear frequently determines styles of underclothing, such as the creation of the mini-slip for mini-skirts.

All three of the knitwear designers said that they adapt or copy designs from other sources. Designs from previous creations were mentioned by the three designers as a principal source of adaptation. Five sources mentioned by the designers were:

Sources of Adaptation:

	<u>Number of Mentions</u>
Previous designs	3
Present fashion trends	2
Competitors	2
Fashion leaders	1
Trade papers and magazines	1

Method of Design

Methods of design creation varied for the three designers interviewed. One designer used the flat pattern method and another used sketching and draping in both fabric and muslin. The third designer preferred not to indicate his method of design creation, claiming that all of his designs were presented for approval as finished products.

When new designs are accepted for production by all three firms, a basic standardized pattern is made of leather and sent to the cutter for those garments which will be cut and sewn. Design instructions and other specifications are given to the knitters for full-fashioned garments.

The designers were further questioned concerning the number of collections which they prepare. The designer of knit outerwear prepares three collections per year. Each of his collections consist of approximately 40 numbers, of which 60 percent represent new styles and 40 percent can be considered adaptations of previous styles. One of the lingerie designers prepares two collections, one in the Fall and one in the Spring, and supplements the collections throughout the year. Both collections consist of about 60 numbers, half representing new styles and the other half representing adaptations of previous styles. The other lingerie designer interviewed said that he does not prepare a collection as such. However, he designs one line for production which remains constant throughout the year.

Two of the three designers indicated unique problems were encountered when designing knitwear. One designer felt that he was handicapped by the capabilities of the machinery, especially when creating new designs for full-fashioned garments. The greatest problem encountered by the other knitwear designer is achieving the proper size with the proper amount of stretch and holding power in a garment.

Responses to questions concerning previous designing experience showed that two of the designers had also designed for woven fabrics and found designing for knits to be more challenging. One of the designers felt the challenge in designing for knits was because of the limitations of machinery. The second designer pointed out that there are more possibilities with designing knitwear because there is a wider variety of new synthetics and knit fabrics. He also felt that new improvements in machinery geared to knitwear presented no draw backs.

All of the designers design under the name of their firm. Two of the designers, however, mentioned that they receive recognition as a designer for their designs.

Summary

This part of the study is based on information obtained from interviews with three full-time designers employed by three of the knitwear firms interviewed. Responses from various questions showed that all of the designers had attained degrees from a design school and had been designing for their firms for the past ten years. Two

designers have additional interests in their firms other than designing, and only one firm maintains the design department as a separate department.

French and other European magazines, customers, and ready-to-wear were the most frequently mentioned sources of inspiration for the designers. Sources of adaptation frequently mentioned were: previous designs, present fashion trends and competitors.

One designer uses the flat pattern method of designing, while another uses sketching and draping in muslin and fabric. One designer prepares three collections per year, while another prepares two collections each year plus supplementary designs.

Unique problems are encountered by two of the designers when creating knitwear designs. Two designers find originating knit fashions to be more challenging than other types. All of the designers design under the name of their houses.

CHAPTER VI

THE IMPORTANCE OF THE KNITWEAR INDUSTRY

The United States fashion industry has recently witnessed vast increases in the production of knit fabrics and knitwear. It has become evident that minor market areas, such as the Reading-Berks County market area, have significant roles in the production of fashionable knit garments. Both the designers and the heads of the knitwear firms interviewed for this study responded to a series of questions concerning their opinions regarding the status of the Berks County market area. The importance of the knitwear industry in the Reading-Berks County market area, its growth and future potential, and the contributions it makes to the United States fashion industry are discussed in the following chapter.

Growth and Future

In an attempt to determine the status of the knitwear industry in the Reading-Berks County market area, the selected firms were first questioned about their growth over the past 15 years. Responses indicated that a great deal of expansion occurred during that period. Five firms mentioned their plant facilities had expanded. Most firms had become three or four times larger and one firm was 20 times greater than it had been in 1950. Employment doubled and tripled for four of the firms. Diversification of products, fibers, and fabrics accounted

for major increases in production for eight of the firms. Two firms reported that they had opened new plants or expanded to include other plants outside of Pennsylvania. One firm could not respond to questioning as it had recently been established and no major developments could be noted at this time. Another firm indicated there has been a regression in their production of lingerie.

Both the designers and the heads of the firms were asked if their firms had expansion plans for the next five years. Three of the firms mentioned that they planned to expand their line of knitwear and possibly diversify their products as much as possible within the line of women's knitwear. Two firms explained they operate a controlled type of expansion; they plan to expand their production by a certain percentage each year. Two other firms said they planned to expand their production to increase sales and to keep up with current demands. Another firm has expansion plans for areas outside of Pennsylvania, in the West and South. Three firms stated that they had no immediate development plans, one of which indicated that they planned to concentrate on solidifying their operation.

Interesting responses were obtained from the interviewees when they were asked for their opinions concerning the future growth potential of the Reading-Berks County market area in regard to women's knitwear. Three of the interviewees expressed the feeling that although there is an excellent type of labor supply in Berks County, there has been a tremendous decrease in the availability of this supply. One firm indicated that this was due to the strong competition in the labor

market by electronic and heavy industry which have traditionally had higher wage levels. Another interviewee also felt that increases in heavy industry will result in decreases in the textile industry. Two other firms merely mentioned the potential to be low or non-existent.

The opinion of the other four interviewees implied that there was much potential for future growth in the knitwear industry. Two of these firms felt that increases in population and retail outlets, especially chain stores, will necessitate increases and growth in the knitwear industry. One interviewee claimed that employment and the labor supply were unusually good and that there is great potential for future development in this area. The other firm also reported good potential and expects their knitwear production to double within the next few years.

Contributions of the Knitwear Industry

A major objective of this study was to determine the contributions of the knitwear industry in the Reading-Berks County market area to the United States fashion industry. The interviewees were asked to express their opinions concerning the knitwear industry. Six of the interviewed firms felt that they do make a valuable contribution to the United States fashion industry. Several of these firms reported that the area is noted for its number of apparel manufacturers, many of which manufacture nationally known brands. One interviewee explained that they contribute superior quality knitwear because of their highly skilled laborers. The machinery used in the production

of knitwear is also manufactured in this area, which is as important a contribution as the knitwear itself.

The remaining four firms indicated that the Berks County market area does not make a unique contribution to the United States fashion industry, as the area is not a style center; they might help to influence style trends, but they do not set them. These four firms did feel, however, that the contributions of the area are primarily that of the craftsmanship of the labor force. They consider themselves to be an important manufacturing center, producing quality apparel, but not a fashion center.

Contributions of the Designers

The three designers interviewed were asked what they as designers felt they contribute to the Berks County market area and to the United States fashion industry as a whole. Two of the designers felt that their contributions are extremely important, the third designer did not respond to questioning.

One of the designers stated that his creations catered to the younger women, the "misses of America". His ideal is to have women well dressed in good taste, wearing staple, well cut and designed knit clothes. The other designer indicated she is designing what she termed "high style lingerie" and "youthful styles of up-to-date lingerie". She further explained that as a designer she considers herself to be an innovator of fashionable lingerie.

Summary

In the past 15 years a considerable amount of expansion has taken place within the knitwear industry in the Reading-Berks County market area. Noticeable expansion which has occurred in the way of plant facilities, employment, diversification of products, improvement of machinery, fibers, and fabrics, accounts for noteworthy increases in knitwear production. Plans for future expansion have been made by seven of the ten firms interviewed.

Over half of the interviewees expressed the feeling that potential for future growth of the knitwear industry in Berks County is not very great. This feeling was mainly attributed to the competition for labor from heavy industry.

The majority of the interviewees feel that the Reading-Berks County knitwear industry definitely makes a valuable contribution to the United States apparel industry. Their contribution is, however, in the form of a prominent manufacturing center, but not as a fashion center. The designers, although few in number, also make noteworthy contributions.

CHAPTER VII

SUMMARY AND RECOMMENDATIONS

Summary

Prompted by the emphasis placed upon knit fashions today, this study was undertaken to describe the women's knit outerwear and lingerie industry in the Reading-Berks County, Pennsylvania market area. This study also involved examination of the contributions the Berks County knitwear industry makes to the apparel industry of the United States.

Information was obtained through direct interviews with designers and heads of the selected knitwear firms. A structured interview schedule, consisting of two parts, was administered to persons connected with ten firms. Part I secured information from the heads of the firms, concerning structure and organization, method of production, sources of materials, distribution, and type of garment produced. The second part was administered to designers from three of the firms to obtain information regarding their part in the production of knitwear. Both parts included questions pertaining to growth and future development of the firms, future potential of the knitwear industry, and the contributions of the firms and designers to the United States fashion industry.

The periods 1936 - 1945 and 1956 - 1965 show the greatest increase in the number of knitwear firms established. Six of the firms

are presently manufacturing operations, three are contracting operations, and one does both. A suitable labor supply of highly skilled laborers was the primary reason mentioned for the location of the firms in the Reading-Berks County area. The majority of the firms realize a yearly sales volume between three and four million dollars, and average between two and three hundred employees.

The progressive bundling system is the type of operation used by all of the firms. Unique problems in the manufacture of knitwear are frequently encountered, the greatest problem being attributed to the characteristics of knit fabrics. Most of the raw materials in the production of knitwear by the Reading-Berks County firms are obtained from New York City, New England, and the Southern States.

All of the firms distribute their merchandise nationally and six of the firms distribute internationally. Most of the firms exhibit their knitwear in all of the major trade centers throughout the United States. Road salesmen were used by the firms as their major sales method. The majority of the firms distribute directly to department stores, chain stores, and mail order houses.

Although most of the knitwear firms specialize in the manufacture of one specific type of knitwear, together they produce a variety of knit fashions in a wide range of sizes and prices. The firms producing knit outerwear manufacture sweaters, dresses, two piece and three piece suits, and sweater and skirt co-ordinates. The lingerie firms manufacture panties, slips, petticoats, pettipants, and sleepwear. The majority of the firms reported their knitwear is seasonal; the Fall and Holiday seasons being most important in terms of sales.

Information regarding the role of the designer was based upon interviews with the full-time designers from three of the knitwear firms. The designers have attained degrees from design school and have been designing for their firms for approximately 10 years. Two of the designers have an additional interest in their firms, through partnership and ownership. One firm maintains a separate design department.

Designers considered their best sources of inspiration to be French and other European magazines, customers, and other ready-to-wear. The designers also cited previous designs, present fashion trends, and competitors as their main sources of adaptation. Their methods of creation ranged from sketching and draping to patternmaking. Only two of the designers prepared seasonal collections each year. The production of designs for knits was considered more challenging than designing for woven fabrics. Designers also encountered unique problems such as those presented by machinery and sizing, when designing for knitwear.

During the past 15 years expansion has occurred in the Reading-Berks County knitwear industry in the form of plant facilities, employment, diversification of products, and improvement of machinery, fibers, and fabrics. Although plans for future growth are being made by most of the firms, there was general agreement that a decrease in the available labor supply will be the major drawback to future growth of the industry as a whole.

The Reading-Berks County knitwear firms and designers view their major contribution to the apparel industry of the United States

as superior quality knitwear, well cut and designed in youthful, fashionable styles.

Recommendations

This study of the knitwear industry in the Reading-Berks County market area investigates a relatively unexplored field. There has been no research specifically concerned with the knitwear industry of a regional market area. Therefore, the following suggestions for further study of the knitwear industry in other regional market areas may be made.

1. A survey of the knitwear industry in other regional markets to determine more completely the role of knitwear production within the national apparel industry.

2. A study of other minor market areas to determine the contributions of individual market areas to the national apparel industry.

3. A more extensive survey utilizing a larger sample might be done to achieve more conclusive results.

4. A comparative study of the quality, design, and price of imported knitwear with American made knitwear.

5. A comparative study of the production of knitwear with the production of different types of apparel.

6. A study of the foreign markets and products for international distribution.

7. A study of men's knitwear.

Although the interview schedule developed for this study secured the desired information, possible revision of the open-ended questions would promote a better understanding between the interviewer and the interviewee.

APPENDIX A

APPENDIX B

March 6, 1967

Dear

Some of the regional market areas of the United States have been selected for study by Michigan State University. Although Reading and Berks County is presently a minor market area, the industries and their progress have already made a contribution to the production of apparel today.

I would like to include your firm in the present analysis of the Reading-Berks County market area which I am doing as a Master's degree candidate in the Department of Textiles, Clothing and Related Arts. Your participation will be of great value to the entire project.

I will be in Reading until March 26, and would like to interview you and a designer for your firm at your convenience. These interviews are completely confidential. Individual responses to various questions will not be identified. My questions should not take longer than 20-30 minutes. I will telephone your office for an appointment.

Thank you for your consideration. I am looking forward to talking with you.

Sincerely yours,

Andrea R. Desjardins
1415 Alsace Road
Reading, Pennsylvania

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