

We have a trade-abuse committee, which deals directly with all cases of unfair business methods, such as unjustifiable cancellation of orders, deduction of excessive discounts, salesmen defaults, and other commercial evils.

We have at present in course of preparation a plan for the cooperative purchasing of general supplies, which will eventually lead to a considerable reduction in cost to members of the association.

Many manufacturers belong to both the National Cotton Garment Manufacturers' Association and the Cotton Garment Manufacturers of New York (Inc.)

No efforts have been made to form a trade combination or trust in this industry. Probably it would be impossible to form a trust, for the reason that the business of manufacturing muslin underwear can be conducted on very little capital. The small manufacturer may dispense with a cutting machine; he can purchase sewing machines on monthly installments; he can buy cloth and trimmings in small quantities, and by imitating the styles of other manufacturers he incurs no expense for designing. If he makes underwear to sell on contract to jobbers, his selling expenses are small. There is probably no other manufacturing line in which anyone can do more business on so little capital. Many factories starting with very small capital have developed into large enterprises. The above-mentioned brief of the National Cotton Garment Manufacturers' Association says:

It does not take any capital worth considering for anyone to set himself up in business as a manufacturer of this kind of underwear. He need have but a few sewing machines, some muslin, and some embroidery. With the help of a few seamstresses, he can at once set to work and enter the competitive field. As a matter of fact, the competition in our trade is intensely keen, this being primarily due to the fact that such a large percentage of the cost of production consists purely of labor. There is not the slightest possibility of any combination or trust in this line.¹

No statistics are available to show the amount of muslin underwear imported into the United States, because, in the statistics of imports, wearing apparel is not separately classified as to outer apparel and underwear. The muslin underwear imported annually is, however, estimated by customhouse appraisers in New York City at about \$300,000 in value, and nearly all of it is hand embroidered, while practically none thus embellished is made in factories in the United States. Much of the imported lingerie is made by hand, while none is made by hand in factories in the United States. There is, therefore, almost no foreign competition in the United States with the establishments considered in this report.

WOMEN'S CLOTHING INDUSTRY.

The Bureau of the Census has published no separate statistics in regard to the muslin underwear industry, but it has published statistics for the women's clothing industry, which classification includes a great variety of clothing for women, girls, and children, such as suits, dresses, skirts, shirt waists, jackets, cloaks, capes, wrappers, kimonos, dressing sacques, underwear, belts, dress shields, infants' clothing, and similar articles.

The manufacture of women's clothing is one of the important industries of the country. In 1909 it ranked fifteenth in value of product and eleventh in number of wage earners.²

¹ Tariff schedules: Hearings before the Committee on Ways and Means, 1913, p. 3940.

² Thirteenth Census, Manufactures, Vol. VIII, p. 45.