

THE LADIES' GARMENT INDUSTRY IN BOSTON:

A STUDY OF CHARACTERISTICS  
AFFECTING CHOICE OF LOCATION

by

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This attempt to steer a course between an economics thesis on the one hand and a downtown planning thesis on the other seems to suffer from the narrowness of its approach. Although the author presents much data on the way the garment industry now functions, he does not get into its fundamental economics far enough to present a rigorous analysis of its economic requirements. And although he has shown clearly how its present location is favorable to continued operation, he does not demonstrate conclusively that it could not be moved, or that it is an unquestionable asset to the City in its present location.

2/3/58

R. B. Greeley

## ABSTRACT OF THESIS

Title: THE LADIES' GARMENT INDUSTRY IN BOSTON: A STUDY OF CHARACTERISTICS AFFECTING CHOICE OF LOCATION

Author: Albert Tappé

Submitted to the Department of City and Regional Planning on January 20, 1958, in partial fulfillment of the requirements for the degree of Master in City Planning.

The object of the thesis was to investigate the physical characteristics and functioning of the Ladies' Garment Industry in Boston and how such functionings affect or will affect the industry's choice of location.

The hypothesis examined is:

"That the ladies' apparel industry needs a location which offers maximum accessibility to (1) Labor, (2) Business services available in the central business district of the city, and (3) Other apparel manufacturers."

The general economic and physical characteristics of the industry are described and a detailed description of the industry in Boston is presented. The division of the manufacturing operation among jobber, manufacturer, and contractor with the resulting varying location requirements of each is described. Special characteristics of the industry: the importance of style, the method of marketing the product via buyers, and the type of labor, are discussed with reference to their effect upon the industry's choice of location.

The present locations of the industry in the State of Massachusetts and in Boston are described. Alternate locations for the industry in the State and in the City of Boston are discussed and evaluated, with reference to the requirements respectively of the jobber, manufacturer, and contractor.

The study concludes that, while the contracting portion of the industry seeks a location largely to be near labor, the manufacturers and jobbers require a location offering a maximum of access to other apparel manufacturers and to the services available in the central business district of a large city. On the basis of the evaluation of alternate locations, it is recommended that the Kneeland Street area in Boston should continue as the best location for the industry's operation.

Thesis Supervisor:

Roland B. Greeley  
Associate Professor of Regional Planning

January 20, 1958

Professor John T. Howard  
Head  
Department of City and Regional Planning  
School of Architecture and Planning  
Massachusetts Institute of Technology  
Cambridge, Massachusetts

Dear Professor Howard:

I hereby submit my thesis entitled, The Ladies' Garment Industry in Boston: A Study of Characteristics Affecting Choice of Location, in partial fulfillment of the requirements for the degree of Master in City Planning.

Yours sincerely,

/'  
Albert Tappé



## FOREWORD

This thesis is the result of the desire of the author to investigate an area of urban activity that until recently remained largely unknown to him. I am greatly indebted to Professor Roland B. Greeley, my thesis advisor, for his patience, wise counsel and friendly encouragement in this undertaking. I also wish to thank the faculty of the Department of City and Regional Planning for their helpful criticisms. The cooperation of the members of the ILGWU in Boston and New York City as well as that of the manufacturers in Boston is gratefully acknowledged. Finally I wish to thank Sydnor Hodges, Melvin Levine and Joseph Savitzky for their aid and suggestions. I am indebted to Miss Dulcie Jones for assistance in the preparation of the manuscript.

While the author received a great deal of help from all those mentioned above, he takes full responsibility for all interpretations of the facts, assumptions and conclusions presented in this thesis.

Albert Tappe

Cambridge, Massachusetts

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CHAPTER I  
THE PROBLEM

Boston, as are many other American cities, is facing a trying period of growth and change. Decentralization of industry, residences, and some of the traditional retail functions of a city is characteristic of our time. The effects of these movements necessitate the planner's attention to the various activities which make up the fabric of the city.

These changes in Boston and in other cities suggested the importance of a reexamination of Boston's oldest and largest industry, the garment industry. While some studies of the garment industry in general exist, no organized body of data dealing with the industry in Boston has been published. Its location and operation in Boston, although known in general terms, need further definition and accurate description.

Important questions in examining the apparel industry in Boston are:

- (1) Are any of the current forces of decentralization at work in the industry, and, if so, to what extent?
- (2) Is it in good economic health?

Scope of Study

The purpose of this thesis is to investigate these questions about trends within the Boston garment industry.

However, a detailed investigation of the entire garment industry in Boston is beyond the scope of this thesis. While a general background description of the whole industry is offered, the detailed study of the location of the industry and the analysis of trends in location are confined to one section only, the largest: the women's apparel industry.

There are of course many subdivisions within the garment industry. The United States Census Bureau defines the "cutting up and needle trades" (as the industry is sometimes known) as

"those establishments producing clothing and fabricated textile products by cutting and sewing purchased woven or knit textile fabrics and related materials such as leather, rubberized fabrics, plastics, and furs."<sup>1</sup>

The Bureau of the Census, in defining this category of manufacturers, excludes knitting mills, and manufacturers who produce straw and felt hats, leather footwear, and rubber footwear.

Included in the Census's category of "apparel and related produces" are:

- 23 Apparel and related products
- 231 Men's and boys' suits and coats
- 232 Men's and boys' furnishings

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<sup>1</sup>U.S. Dept. of Commerce, Bureau of the Census, Census of Manufactures, 1954, p.

233	Women's and misses' outerwear
234	Women's undergarments
236	Children's outerwear
238	Miscellaneous apparel
239	Fabricated textiles

In Boston, categories 233, 234, and 236, all describing the manufacture of clothing for women, comprise the major segment of the apparel industry. Grouped under these three categories are 281 of the 411 manufacturing establishments in the City of Boston, and 9,944 of the 13,469 workers.<sup>1</sup> In addition, these three categories are those commonly referred to as the "women's apparel industry," and they represent a fairly homogeneous section of the industry in production methods, type of products, and location trends.

For the above reasons, these three Census categories were selected for detailed study. The full description of the products of the selected women's and children's clothing categories used as defined in the U.S. Census of Manufactures is given in Appendix B.

The physical functioning of the industry and of how such functionings affect or will affect the choice of location is studied in this thesis. Briefly, the major areas covered are:

a description of the general economic and physical characteristics of the industry in general;

a detailed description of the industry in Boston and its process of manufacture;

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<sup>1</sup>See Tables I, VII in Appendix A.

a survey of the present location in the state and in the city, with a comparison of the actual and possible alternate locations based on locational determinants; and

conclusions and recommendations as to probable and desirable location of the Boston women's garment industry.

### Hypothesis

Specifically, we shall examine the following proposition:

"The women's apparel industry seeks a location which offers maximum accessibility to: (1) labor, (2) business services available in the central business district of the city, and (3) other apparel manufacturers."

### Importance of the Study

Planners have an increasingly important role in determining the form of the city. In order to make decisions as to the proper place within the general plan for a particular activity, a planner needs many types of information, among which are data on trends in location, size and needs of the specific industry or activity. Changes in location of a large segment of the economy, such as a major industry, can have a significant effect on the physical form of the city, and must be considered in planning its renovation as well as designing for future growth.

The specific implications of this study to planners are discussed in the final chapter.



Personally, I was concerned with the following:

- (1) I hoped to become acquainted with a phase of city activity about which I knew little.
- (2) The techniques of study of a particular industry, the collection of data, and preparation of a report promised valuable experience.
- (3) Hopefully, some small measure of new information about the Boston women's garment industry and its activities might emerge as a result of this investigation.

Let me stress that this industry is observed only from the viewpoint of a planner, not from that of an economist.

## CHAPTER II

GENERAL CHARACTERISTICS OF THE GARMENT INDUSTRY

To provide background reference for a detailed discussion of the women's apparel industry in Boston, it is necessary, first, to review the major characteristics of the industry as a whole.

An Urban Industry

The manufacture of the majority of women's clothing in the United States has become concentrated in the central areas of the larger cities, permitting access to consumers, agents, and buyers, other business services, and a large labor pool. The apparel industry generally is composed of an agglomeration of small single-plant manufacturers who have a high value for low bulk of product. Because of the volatile demand for its products (seasonal fluctuations and rapid style change), there is a low limit on the size of plants beyond which size increases do not further reduce the cost of unit-production.

As an urban industry, the clothing industry pays the high rents of central location which contribute to a high degree of specialization of product.<sup>1</sup> Specialization in the

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<sup>1</sup>As Edgar M. Hoover, Jr., puts it (Location Theory and the Shoe and Leather Industries, p. 107): "The higher the rents, the more incentive there is for a detailed separation of processes, those requiring much space and not imperatively requiring an urban location being relegated to the outer regions."

needle trades often takes the form not only of production by a manufacturer of a particular type of garment but sometimes of garments only of particular sizes or prices.<sup>1</sup> Thus, among the highest rent-payers (i.e., most centrally located) in the industry, we find the firms with the highest degree of specialization. Thus also we find that the rent resulting from a manufacturer's choice of location affects his method of manufacturing, his plant size, and what he produces.

Competition in the clothing industry is cut-throat. Manufacturers, subject always to the threat of style stealing, have to compete to maintain retail outlet accounts. Contractors traditionally under-bid each other in their competition for contracts to stitch for the jobbers. Because of this competitive situation, and because of the added difficulties of a fickle market, the rate of business failures and new formations is high.

The extent of this competition and its effect on business stability was well described by the National Credit Office in its 1952 report describing one important part of the U.S. garment industry:

"Today's dress industry is composed of 3,910 firms, 152 fewer than two years ago.... Each year a large part of the trade goes out of business. Since the start of 1950 over 25%

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<sup>1</sup>Interviews with garment manufacturers.

of the dress trade's cutters then active have left the manufacturing field. The vast majority were voluntary liquidations; relatively few were outright financial failures. On the other hand, for every ten firms that left the field, 9.5 came on to take their place during those years. This rapid turnover keeps the trade a young one ... over 45% of today's concerns have been in business less than seven years."<sup>1</sup>

The clothing industry is one of the larger industries in the country. It numbers 1,197,000 employees who work in 30,960 plants across the nation. Table III in Appendix A indicates the degree to which these employees and plants are concentrated in 11 metropolitan areas. These areas have approximately 60 per cent of the employees and 80 percent of the plants.

Compared to all industries reported by the Census of Manufactures, the clothing industry represents 7.6 percent of the labor force in 1947 and 5.9 percent of the value added by manufacture, and, in 1954, 7.9 percent of the labor force and 9.5 percent of the value added.<sup>2</sup>

In Table III the rate of growth of the apparel industry by region between 1947 and 1954 is shown. As a whole, the industry increased in value added by manufacture by 13.3 percent, from \$4,443,300 in 1947 to \$5,033,000 in 1954. The

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<sup>1</sup>Market Planning Service, a division of National Credit Office, Inc., The Apparel Manufacturing Industry, p. 19

<sup>2</sup>U.S. Dept. of Commerce, Bureau of the Census, Statistical Abstract of the U.S., 1957, pp. 786-7

value added of the eleven reported metropolitan areas increased by 2.8 percent during this period (representing approximately two-thirds of the total manufacturing value in the nation of this industry) while the rest of the United States increased in value added by nearly 37 percent (by 1954 representing slightly over one-third of the total value added). Thus, although the majority of manufacturers are still in a central, urban location, preferences for alternate locations for some of the industry, reflected by the increased rate of growth of the rest of the country, are beginning to appear.

Of all the metropolitan areas, New York is the dominant force in the industry as a whole. In 1954 New York produced 40 percent of the national total value added by the apparel industry. New York's domination of the ladies' clothing industry is even more striking: in 1954 it had 66.2 percent of the national women's apparel market dollar volume in terms of gross production costs (see Table IV of Appendix A). Table IV also points up the gradual decline of New York (from 68.4 percent of the national dollar volume of women's wearing apparel in 1948) and the recent growth of certain regional centers.

It is interesting to note that Boston has made the largest absolute percentage gain in share of the women's apparel market in the last span reported -- up from 2.7 percent in

1952 to 3.1 percent in 1954, or up one-third since 1948. Los Angeles, Philadelphia, and Miami are the other metropolitan areas where relative expansion is occurring.

#### Plant Size and Space Needs

Table VI of Appendix A shows the number of employees in shops in Boston producing women's outer and undergarments since 1953. In outerwear (by far the larger segment of the industry), 23 percent of the employees worked in shops of between 8 and 19 workers and 37 percent worked in shops of between 20 and 49 workers. Only 22 percent worked in larger shops, 18 percent in smaller shops. This small size of shop is traditional across the nation and is also typical of Boston's needle trades (see Table VII, Appendix A).

Garment manufacturers have traditionally operated in loft buildings in the center of large cities. Characteristically, buildings have high-ceilinged loft space with access to a freight elevator, and street-loading facilities.

Crowded quarters are typical of clothing production in the United States. There is, however, a gradual trend towards larger quarters for manufacturing, as illustrated by a comparison of the New York Regional Plan estimates of 1927 with a survey made in New York in 1950 by Consolidated Edison.

The Regional Plan surveyors found that in 1927 the space per worker in manufacturing varied from 55 square feet in a

high grade dress plant giving a large proportion of its space to showroom, to 140 square feet in an underwear factory located outside the congested district. They estimated at that time that "about 100 square feet would seem to be a fair average, taking into account space required for stock, shipping, and an adequate showroom in addition to that needed for strictly factory purposes."<sup>1</sup>

The 1950 survey shows manufacturers operating with 170 square feet per production worker in Manhattan, as opposed to 250 square feet for the rest of New York City.<sup>2</sup>

Today, forward-looking engineers are advocating 200 square feet per worker for future plants. Interviews with the engineering department of the ILGWU (International Ladies' Garment Workers' Union) in New York City indicated that it considers 200 square feet per worker to be now ample and this is the approximate figure that they recommend.<sup>3</sup>

### Three Types of Producers

In the apparel industry, there are three usually distinct types of establishments for producing for the market:

(1) Manufacturers. The manufacturers perform the entire

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<sup>1</sup>New York City, Regional Plan of New York and Its Environs, p. 61

<sup>2</sup>New York City, Mayor's Committee for World Fashion Center, A Stitch in Time, p. 38

<sup>3</sup>Interviews by the author, November 1957

clothing manufacturing operation. They purchase their own material, select styles, employ workers in their own plants to cut and sew the material into garments, and market the finished garment. In return for the problems of both labor and marketing, the manufacturer hopes to retain the profits that might be shared under more diversified manufacturing arrangements.

(2) Jobbers. Apparel jobbers are manufacturers who do not stitch but who let out this part of the operation under contract. Jobbers perform primarily the entrepreneurial function of the business. Generally, they purchase the material, design and prepare samples, cut the material, arrange for stitching from their materials by other firms, and then market the finished product. Along with the manufacturers, they are commonly known as "cutters" in the trade.

The actual process of stitching the garment for the jobber is performed by the "apparel contractors," although occasionally the contractors perform an even larger part of the manufacturing process.

The often stated advantage of the jobber-contractor arrangement for the jobbers is that they thus by-pass most of the problems of maintaining a constant large labor force, and avoid negotiations with labor -- which can be most troublesome in this industry where the price of each piece of cloth to be stitched is negotiated with the workers. Through this



arrangement, a jobber can keep a small permanent staff but transact a large or small volume of business through contractors.

(3) Contractors. The apparel contractors, or contract shops, perform specialized operations for the jobbers and occasionally for manufacturers. Their operations consist primarily of stitching and special operations such as pleating. They are small shops, often employing only 10 to 15 workers. The capital required to enter the apparel contracting business is small as the machines can be rented.

The competition between contractors is fierce, as the high turnover of firms indicates. Often the contract shops are family affairs and come and go during a single season. The practice of underbidding for work from the jobbers, mentioned earlier, results in instability both for the contractor and for his labor force. Many of the traditional abuses of labor within the garment industry occur in the contract shops which are consequently frequently described as "the bane of the union". They are so small and often so dispersed (as opposed to the jobbers and manufacturers which tend to be concentrated in urban areas) that they are difficult for the union to organize and to police for legal standards in hours and wages.

The advantage of the specialization of operation by the operator of a contract shop is that he is relieved of all

responsibility for the purchase of material and for the style to be made, and of marketing the finished garment.

The system described above was evolved to spread the risk and responsibility in an industry noted for change and seasonality. Although the use of contractors is rising and industrial conditions appear to encourage their increased use, the three major categories of apparel producers are often not so clear-cut as the description of their functions above would suggest. Many establishments employ more than one method of operating, acting both as manufacturer and as jobber for different processes, or as manufacturer-contractor in certain other areas. Often a manufacturer uses a variety of contractors while he is busy, even though he has production facilities for the complete garment.

Although information is not available for Boston, as to the percentage of total establishments in each of the three producing categories, manufacture, jobber, contractor, some idea of the character of the industry can be gained from an examination of the 1954 Census of Manufactures in New England. For those areas of production which were comparable, of some 629 establishments reported, 59 percent were contractors employing some 60 percent of the workers (see Table XI in Appendix A). Twenty-eight percent of the total number of establishments were manufacturers and the remaining 13 percent were jobbers.

The locational requirements of the three types of apparel manufacturing establishments differ. The manufacturer has a dual orientation -- both to the market and to a labor supply. His choice of location must therefore try to fill both needs. The jobber is primarily market-oriented. He needs contact with the clothing market for style information and with the services of the city (banks, freight and parcel post, material suppliers, etc.) to conduct his business. Maximum access to labor, on the other hand, is the almost sole location criterion of the contractor whose operations do not require daily access to the market.

Obviously, the different location requirement arising from the division of work in the apparel industry is that, unlike the manufacturer and jobber who are relatively bound to urban location in a central city, the apparel contractor is free to locate near any available source of labor -- and the cheaper the labor the better. The location of highways permitting rapid trucking of materials and finished garments to and from the jobber, such as the Fall River Expressway, facilitates prompt delivery of a contractor's goods to a jobber in Boston. As an example of the predominance of low-cost labor availability as a locational determinant for contractors, one may note the recent spread of contractors in Massachusetts to the depressed mill towns where large num-

bers of women factory workers are available for work of this type.

### The Process of Manufacture

The manufacture of women's garments is still in many ways a handicraft industry. The reason for this lies primarily in the nature of the demand for women's clothing. With production often limited to a few hundred dresses of a variety of patterns and sizes, and with changes in materials and cut and style used every season, and the sales of any garment to a single purchaser limited to small lots of each style and size, assembly line production is out of the question, as individual attention is required. There are obvious opportunities for mass production of Army fatigue clothes, for instance, but not for milady's spring frock. Even further technological advances in cutting, pleating, various types of sewing, and pressing, do not seem likely to change the basic nature of an artisan industry, according to management as well as labor spokesmen from the needle trades.

To assist in evaluating locational factors, a review of the detailed operation of a typical dress manufacturer will be presented:

A "typical manufacturer," as described by the Market Planning Service of the National Credit Office, Inc., would have begun business sometime in the last decade (the National

Credit Office 1952 survey reported then that 53 percent of the entire industry had begun in the 1940s, that about 1 out of 5 firms started business in the 1930s, and only 13 percent had opened prior to that date).<sup>1</sup>

Although this hypothetical cutter would carry a full line of sizes, his emphasis would be on ladies' and misses' sizes.

Our typical manufacturer's location would significantly influence his production methods. In New York he would be apt to use outside contractors for much of the actual labor, but if located outside New York City he would be almost certain to do most of his work in his own shop.

The most likely outlets for this typical manufacturer's garments would be the department stores and specialty shops. Chain stores rank next in importance as purchasers of his finished garments. Jobbers (acting as middlemen to sell in turn to retail outlets), mail-order houses, and direct sales account for only a limited portion of his volume.<sup>2</sup>

"If such a typical cutter could be found, his annual volume would run around \$576,000 per year in 1952; for despite the fact that 62% of the firms in the entire trade have annual sales of under \$500,000 a year, the importance of the larger firms brings that average up."<sup>3</sup>

In Boston, the average dress manufacturer would have loft

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<sup>1</sup>Market Planning Service, a division of National Credit Office, Inc., The Apparel Manufacturing Industry

<sup>2</sup>Ibid., p. 37

<sup>3</sup>Ibid., p. 22. See also Table VIII of Appendix A

space in one of the several bays of a building in the Kneeland Street area. He would probably have 32 employees working for him, the majority of whom would be women coming to work via transit. He would occupy perhaps 32 by 150 feet, or an average of 4800 square feet in the hypothetical loft building.

The costs of production for the typical dress manufacturer would be distributed something like those shown in Table V of Appendix A. After subtracting the portion (37 percent) of the consumer's dollar reported in that table to go for retail mark-up, we find that our producer spends 47 cents of each dollar on material, 25 cents on wages, leaving 28 cents for manufacturer's overhead and profit.

The manufacturer would begin his process with selection of the style of dress to make, on the basis either of a request for a specific style or his own initiative, perhaps copying a "fast-selling number". The material is then purchased at a nearby drygoods wholesaler and several trial dresses might quickly be made the same day. The rapid production of trial dresses makes possible both a test of salability in showrooms and by salesmen, and an estimate of cost per unit. Proximity of the market facilitates speed in this process.

As orders come in, the dresses are put into production. Sometimes the interval between the production of one trial

dress and its order in quantity by a store may be only a few days. Immediately final patterns are made in the manufacturer's specialty sizes, and the pieces are cut from the cloth, bundled and placed with the girls at the sewing machines in the plant or sent to contractors. Button holes, buttons, and other special items as required are added after the stitching. The finished dresses are lined if necessary, inspected, pressed, and packed for shipment to retailers via truck or parcel post.

\* \* \*

With this background of the urban, intensely competitive, and highly specialized apparel industry in the United States, we may now examine in detail the characteristics of the industry and its location in Boston.

## CHAPTER III

THE GARMENT INDUSTRY IN BOSTONGrowth of the Garment Industry in Boston

In Boston the apparel industry probably began as a service to the bachelors, merchants, and sailors of the town. To meet the demand of this group, the small shops of the tailors increased in size and number, and the practice of farming out the sewing of the cloth to the wives of the town became prevalent. Soon these women became the dominant source of labor for the industry.

With the introduction of the power loom and the resultant growth of New England's textile production, the apparel industry thrived. Emphasis at first was on the making of men's ready-made suits, which in the 1840's were among the many products exported from Boston's flourishing port.

The invention of the sewing machine in 1846 and the heavy Civil War demand for uniforms soon led to the development of standard sizes in clothing.

In the 1870's the large city department store made its appearance, and shopping for men's ready-made clothing began to be accepted by many. The garment manufacturers in Boston tended to locate near the downtown department store of that time, since this was their major retail outlet.

Not until the turn of the century did women begin to



purchase their clothes ready-made. This was followed by a rapidly growing demand for women's ready-made wear. What had once been predominantly a business devoted to the manufacture of men's clothing soon changed its emphasis to meet the demand of this new market. Today, fashion, style-change, and conspicuous consumption have helped make the women's wear industry far larger than the men's in both volume of units produced and total sales.

#### Role of the International Ladies' Garment Workers' Union

Long hours in sweat-shops, sub-standard wage practices, and poor working conditions typify the picture of the apparel industry in the United States before the twentieth century. The insecurity of jobs in the many marginal firms and an abundance of immigrant workers to fill the low-paid jobs made union organization exceedingly difficult. Since its formation in 1900, however, the ILGWU has risen to a membership of about 450,000 and is known as one of the wealthiest and most progressive unions in the country.

In the industry today, which is still far from organized, the union serves a certain unifying function. It offers engineering assistance to the manufacturers (who very often only recently were employees) in setting up shops. It assists them in recruitment of labor, which the splintered employers' organizations are not equipped to do. The ILGWU maintains a

research department in New York City which is well informed on conditions and trends within the industry. It can claim credit for elimination of the appalling conditions that existed in the shops in the last century.

### Largest Industry in Boston

Today, according to U.S. Census tabulation, the garment industry is the largest manufacturing industry in the City of Boston. The combined men's and women's clothing industry represents nearly 20 percent of the total industrial establishments of the city, employing approximately 20 percent of the labor force and contributing 16 percent of the value of product. In 1955 the clothing industry had 411 establishments, 13,469 workers, and a value of products of \$207,735,335, its nearest competitor being the printing and publishing industry, which employed only 8,805 workers, had 230 establishments, and a value of product of \$138,927,532.<sup>1</sup> The size of plant in the industry in Boston is small, the average employing 32 people.

### Low Wage Scale

It is interesting to note that though 20 percent of the city's total industrial employees are in the garment industry, and though they contribute 16 percent of the total value of

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<sup>1</sup>Table I, Appendix A

product, only 12 percent of the total wages paid to industrial workers was received by them.

A comparison of the relative wages paid by the two leading industries in the city shows that the garment industry paid its 13,469 workers \$38,409,465 in 1955 (an average of approximately \$2,850 per worker), which is much lower than the average wage in most other urban industries. The average wage of the worker in the printing and publishing industry, for example, was approximately \$4,620. However, since some 70 percent of the garment industry's employees are women, this seemingly low average wage is more acceptable, particularly since most of the same women would probably have even lower incomes if employed elsewhere.<sup>1</sup>

#### A Stable Total Employment and Volume of Production

The garment industry, although rapidly turning over, has maintained a fairly even level of total number of plants and employees. In Boston, during the ten-year period 1945 to 1955, the industry has declined slightly in the number of plants (457 to 427), gained slightly in the number of workers (13,833 to 14,101), and nearly doubled its value of product (from \$128,000,000 to \$216,000,000).<sup>2</sup>

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<sup>1</sup>Table I, Appendix A

<sup>2</sup>Table II, Appendix A

### Share of National Market Increasing

This increase in value of product over a ten-year period has placed Boston in a favorable position nationally as one of the few major clothing centers that has increased its share of the national market. The majority of the other major centers -- New York, in particular -- have been declining. Tables III and IV in Appendix A point out that Boston had 2.2 percent of the total apparel market in the country in 1947 and had increased this share to 2.7 in 1954. In the category of women's wear, Boston in 1948 had 2.3 percent of the national market, which increased to 3.1 percent of the national total by 1954. In comparison with other garment centers in the nation, the industry in Boston seems to be in good health and in a favorable position to continue increasing its share of the national market, in spite of its low wage scale and rapid plant turnover.

### Space Use in Boston

The range of space per worker in Boston ladies' garment shops is between 100 and 180 square feet. Generally, Boston manufacturers have more crowded working areas than those in New York, if the survey quoted on page 10 is correct. In Boston it would seem that the present average in the Kneeland Street area, which represents the best accommodations in the

city, is approximately 150 square feet per worker.<sup>1</sup>

The low space requirements per worker in this industry suit it well to its operation in urban areas. One story in a modern loft building is as adequate for production in the garment industry as a much larger one-story factory is for another industry on Route 128.

In planning for the future, it is important to note the gradual trend toward more space per worker as discussed above. While 150 square feet is in use today in Boston, planning for tomorrow's loft manufacturing space will probably be on the basis of 200 square feet per worker.

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<sup>1</sup>In the Boston City Planning Board's survey of building occupancy in the central business district in 1953, three buildings were studied in detail for the garment trade. These were the Hudson Building, the South Cove Building, and the Traders' building, all on Kneeland Street in Boston. These three buildings, which had 73 firms reporting, represented a total space of 536,000 square feet, of which 21,000 square feet were vacant, 146,000 square feet were devoted to wholesaling, and 355,000 to manufacturing. Assuming approximately 32 employees per firm, as mentioned earlier, this gives a total of 2336 employees with an average of 152 square feet per worker. While there was often no distinction made between men's and women's clothing manufacturers, it is fair to assume, based on interviews with men in the industry, that at that time as well as today, these buildings housed predominantly women's clothing manufacturers.

Other clothing manufacturers scattered around the district in older lofts probably have fewer square feet per worker than do the leading firms in these three buildings.

### Freight Movement

Dresses and other apparel are generally shipped in small lots several times a week, via express trucks, often owned by companies transporting nothing but garments. One pick-up truck can usually handle the ordinary manufacturer's shipment. The vehicular congestion that is usually found in the garment district results mostly from a total lack of off-street loading facilities. One ten-foot truck loading bay with 200 square feet of space would probably be ample for approximately twelve manufacturers' shipments per day.

An estimate of the division of the use of "transfer" services in Boston shows that about 60 percent of the manufacturers ship to their ultimate destination by truck, 30 percent by parcel post, and 10 percent by rail. Occasionally shipments are made by air freight.

Conversations with clothing manufacturers indicate that in the future shipping by truck will play an even larger role in the transportation of the industry's goods. The continued use of the contractor by the manufacturer and jobber also makes shipment by truck essential today.

The dispersal of the small stitching contractor into the suburbs is possible because of the labor supply there and the highways that make service accessible. In Boston the Central Artery will strengthen downtown location for the garment

industry for several reasons. It offers the manufacturers and jobbers speedy access to the dispersed contractors and to the airport for quick shipments to other cities. It also offers quick access to the urban manufacturers by out-of-town buyers, assuming, of course, that it is not jammed with commuter traffic. The express highways will exercise a definite locational effect on the industry, tending to support the concentration of the manufacturer and jobber in an urban location and aiding the dispersal of the contractor in his quest for even cheaper and non-unionized labor.

### Rent

In Boston, rents for loft space range from 60¢ a square foot in the old loft buildings to \$1.25 per square foot for space in the Hudson Building, Boston's garment center at 75 Kneeland Street. In these rents, the Boston manufacturer operates at an advantage over his brethren in New York City. There, the range of rents is from \$1.50 per square foot to \$2.25 in the newest of the loft buildings.

No standard basis for comparison of rent costs in proportion to earnings has been used by observers in different studies of the apparel industry. In 1925 a survey of the women's apparel industry in New York City reported rents were approximately 1.45% of total operating costs.<sup>1</sup> The

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<sup>1</sup>New York City, Regional Plan of New York and Its Environs p. 62, computed the percentage of rent in the New York women's clothing industry at 1.45 percent of total operating expenses.

1949 Survey, showing rentals in the total New York apparel industry as about 2 percent of gross revenue (which assumes a reasonable profit) does not indicate a major shift over the 24 years.<sup>1</sup>

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<sup>1</sup>Mr. Alfred Parrott, in his preliminary report to the Regional Plan Association in 1953 (New York City, Regional Plan Working Committee, The Future of the New York Apparel Industry, 1952-1970) said the following about the industry's ability to pay higher rents (p. 68):

"There is no doubt that the apparel industry can well afford to pay the rentals charged in new buildings. Where rent is only about 2 percent of gross revenue, the difference between an annual rental of about \$1.50 per square foot in the old loft buildings south of 14th Street and the approximately \$2.25 per square foot charged in new loft buildings would be only 1 percent of gross. This difference could probably be made up many times in the savings made possible by better lighting, better layout, off-street loading and unloading and quarters more efficient in every way.

"In fact many apparel firms now located in old substandard loft buildings would welcome the opportunity to move into more efficient quarters but the space simply is not available and the manufacturers in this industry are so small that they cannot finance new buildings."

This question of ability to pay higher rents is important since future plans for the industry may depend upon this factor.

The later (1957) New York City Mayor's Committee for World Fashion Center report corroborates Mr. Parrott's observation in a section devoted to the amount the industry can pay for rent (op. cit., p. 38):

"The 1949 U.S. Census of Manufacture lists the available annual production per garment worker as \$20,400. worth of finished goods.

"An average successful firm in the industry may employ 30 workers. Assuming a current \$2.00 per



Of course, Boston is unlike New York. Nevertheless, the extension of this statement is supportable in reference to Boston. The wages in Boston are lower, but so is the gross value of goods produced per worker; and the rents that the industry pays in Boston at the present time are half those paid by the industry in New York. The manufacturer can afford higher rents. He could perhaps pay double what he is paying now, if productivity increased.

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<sup>1</sup>(continued from previous page)

square foot rent for average space in the garment district and using this as a basis of analysis, the following rental picture is derived.

30 workers @ \$20,400 per annum	\$612,000
gross value per annum production	
30 workers @ 170 sq. ft./worker	5,100 sq. ft.
required floor space	
5,100 sq. ft. @ \$2.00/sq. ft.	\$10,200 rent
ratio of rental to gross value of goods produced:	
<u>10,200</u>	1.66 percent
612,000	

"If the rental is doubled to \$4.00 per square foot, the increase in rental would be 1.66 percent. A very small increase in production efficiency would very quickly absorb this difference.

"Production engineers have indicated that modern plants with adequate access facilities for loading and unloading might readily raise production efficiency by 15% to 20%. It would take only a fraction of such gains to pay for the difference in rent."

CHAPTER IV  
CHARACTERISTICS OF THE INDUSTRY  
AS DETERMINANTS OF LOCATION

The garment industry's choice of location is determined in large measure by several characteristics of its operation which we have touched upon only briefly heretofore. Depending on whether he is manufacturer, jobber, or contractor, the garment producer is affected strongly in his choice of location (and in turn in his methods of manufacture) by one or all of the following factors: style, markets and buyers, and labor.

Taken together, these three factors constitute the most important determinants of location in the industry.

Style

Style changes are responsible for the high volume of product, artificial obsolescence of stocks, and frantic competition in the ladies' garment industry. Notice of style change is short and style-pirating is common. In addition, seasonal style changes require periodic shifts of product in an industry where year to year storage of finished garments or materials is not feasible.

Style affects choice of location in the women's garment industry directly. A central location in a regional center

is needed so that a manufacturer may be highly sensitive to style changes, get tips on sales successes, and talk with buyers and convert new information into garments and sales, if possible in a matter of hours. In contrast, slower style changes in the men's clothing industry require less central location for that part of the apparel industry.

Manufacturers of women's clothes prefer the central location so that they can keep abreast of sales in the stores, to watch competitors' successes as well as their own. Some observers have suggested that a strong desire for community relationships reinforces this tendency, particularly among the Jewish manufacturers who predominate in the industry.

Further, the small size of shipments in the women's garment industry and the need for rapid delivery in response to the demands of style require use of the transport facilities found only in large urban centers. Style is a perishable item. Shipment by air freight of higher priced dress lines is not uncommon, when the high value of product and low weight and bulk make it economical to do so, particularly in and out of New York City.

Style also tends to influence the form of production. Because of the need for major transformations in production, there is a tendency to keep plants small. As E.M. Hoover states, "The clothing trades are an instance of drastic

limitations of mass production economies by variation in product."<sup>1</sup> This need for flexibility reinforces the manufacturer-jobber-contractor arrangement, allowing specialization on production by some firms and on sales by others.

Differentiation of product among manufacturers is directly attributable to the influence of style. Through specialization in not only a single article of clothing but a special category of that article or a single price range of that line, a manufacturer can be ultra-sensitive to style changes in that category.

The vagaries of style obviously are responsible for the prosperity of individual manufacturers and jobbers. If styles change -- for example, if in the middle-price bracket, dresses are replaced by skirts and blouses -- those manufacturers formerly engaged in the production of dresses will have to face a major production change or fail. Some will go out of business; others will change the firm name and enter another line of production, which is possible and relatively easy to do because of the low capital requirements of the garment industry.

Style, then, is both a blessing and a curse. It brings both greater consumption (leading to greater production) and greater manufacturer instability because of fierce competition. It is one of the most important locational determinants

<sup>1</sup>E.M. Hoover, op. cit., p. 81

in the women's apparel industry and causes both manufacturers and jobbers to:

- (1) seek a central location;
- (2) operate in small plants;
- (3) assure accessibility of transport facilities;
- and
- (4) require specialization and frequent change of product.

### Markets and Buyers

The method of selling the finished garment affects the choice of location of both jobbers and manufacturers in the apparel industry, and is a direct result of the rapidity of style changes. How are dresses sold once they are manufactured, and how does this selling affect the location of the plant?

### Method of Selling

Dresses are marketed in several ways: they may be sold through the manufacturer's own or others' showrooms, or by his traveling representatives who call on the store buyers in the stores. Because of the cut-throat competition, the manufacturer's efforts to influence buyers is a much more important part of his operation than in many less competitive industries.

Each producer must sell to many buyers since each buyer orders only a small quantity of each dress. Each buyer must contact many producers to get the variety he needs. This is in contrast to other industries where there are many buyers for standardized items from relatively few producers.

In Boston, in order to market his dresses, a manufacturer or jobber may have a small showroom in his own plant where out-of-town buyers may look over stocks. He may, as some do, maintain a small showroom in New York City where buyers from all over the country may see his garments. The Boston manufacturer or jobber usually has several salesmen who call on store buyers in Boston and other towns with sample dresses. Time and style again are important, as both salesmen and buyers are quick to scent style trends and often an order can be made firm by promising quick delivery and a slight modification in style.

The large number of small manufacturers compared with the smaller number of large purchasers makes face-to-face dealing important in this industry.

#### Where Goods are Sold

Opinions differ as to the relative importance of the various avenues of selling. A leading Boston dress house estimates that 60 percent of its sales are made through its New York showroom, 25 to 30 percent through its salesmen on the road,

and the remainder directly from its Boston factory. On the other hand, many of the smaller producers may make as many as 90 percent of their sales in the Boston area, either through their salesmen or to buyers visiting the plant. Some small manufacturers who lack a showroom in the plant, rent space periodically in local hotels for use as show space.

It has been estimated that the majority of women's apparel produced in Boston is ultimately sold outside the city, spreading throughout New England and to some extent across the country. Several observers suggested that only about 30 percent of local production is sold in stores in downtown Boston.

Boston is one of the important regional manufacturing centers for the ladies' garment industry, and as such attracts buyers from all of New England who come to do "comparison shopping," purchase for their stores, and (not least important) "see the town". This desire for a single regional center on the part of outlying buyers only adds to the desirability of a central location for manufacturers and jobbers. Accessibility of entertainment centers (hotels, restaurants, theaters, etc.) is also important to manufacturers seeking to attract and please out-of-town buyers.

The clustering of wholesalers in the ladies' garment industry, in response to these marketing demands, has reached such an extent in Boston that almost all are located in a

single building (Hudson Building, 75 Kneeland Street). This building also contains a large number of the leading manufacturers and jobbers and is considered the first stop in Boston for any buyer.<sup>1</sup>

An increasingly important factor in the accessibility of wholesalers, producers, and jobbers to buyers of finished garments is the availability of parking. Although the Kneeland Street concentration is near one of the principal Boston railroad stations and is served by several transit stops, the majority of buyers as well as producers' salesmen now travel by car. It is estimated that some 100 buyers a week make the rounds of the Boston showrooms. As the Central Artery and Inner Belt are completed increasing highway accessibility to the area, the need for parking spaces for the buyers will become even more acute.

Market requirements of manufacturers and jobbers of women's garments, therefore, are a major factor in influencing them to seek a central location for the sake of:

- (1) access to retail stores;
- (2) close contact with other producers; and
- (3) facilitation of the buyer's purchasing objectives and pleasure on buying trips.

Few buyers would be willing to go to Tewksbury, for instance, to see the wares of an isolated producer there. This

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<sup>1</sup>See Table X in Appendix A.



producer, if he existed, would probably have a showroom in Boston and soon the time lag in information would eventually pull him back to the central city.

### Labor

#### Immigrants Predominate the Garment Workers

Immigrant groups, principally from Central and Eastern Europe, have traditionally manned the sewing machines and presses of the apparel industry in the United States. In 1925 the New York City Regional Plan could say:

"The majority of workers in all branches of the garment industries are drawn from immigrant groups, with Russian and Polish Jews in very considerable preponderance, followed in importance by Italians. These two nationalities probably form together about 90 percent of the labor employed in the industry."<sup>1</sup>

For the unstable and highly competitive manufacturer in the garment industry, immigrants represented cheap and often already-skilled labor with a tradition of employment in the needle trades. For the immigrating men and women, the clothing industry stood for a source of employment with which they were familiar and where language difficulties offered no obstacle to advancement to a position of proprietorship. For foreign-born women skilled in sewing, it was a logical occupation. In addition, the tendency of immigrants to settle in

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<sup>1</sup>New York City, Regional Plan of New York and Its Environs, p. 57

concentrated urban areas facilitated their employment in the clusters of clothing manufactures.

Sons and daughters of immigrant workers in the garment industry are much less inclined to enter the needle trades than were their parents, sharing the apparent prejudice of other American-born workers against employment in what have become known as "immigrant industries," and preferring instead other industries or, even at lower wages, the higher prestige white collar jobs.

This factor, in combination with tightened U.S. immigration policies, has raised the problem of attracting enough workers in the garment industry in recent years and, more particularly, in the future. This is important especially as economic conditions or technological factors show no likelihood of reducing the total requirements for labor in the industry.

Negro women began to enter the dress and waist industries as well as some minor branches of the garment trades during the first World War, when the labor shortage opened a hitherto closed form of employment. Although the 1925 New York Regional Plan predicted otherwise, Negroes have not continued to enter the industry in large numbers and both in Boston and New York their numbers are relatively small. As the labor union keeps no record of color or race of members,

no precise figures are available. It would seem safe to assume, however, that the social pressures which affect the American-born Caucasian also affect the Negro who seeks other labor and white collar (often civil service) employment.<sup>1</sup>

Since World War II, Puerto Ricans have entered the garment industry, particularly in New York City. ILGWU officials interviewed in New York have estimated that approximately 10 to 15 percent of the total union membership in New York City is Puerto Rican. This already outnumbers the Negroes in the industry in New York.

There have always been more women than men in the apparel trades. Their traditional interest in sewing, coupled with their willingness to accept lower wages than men, were contributing factors in their predominance. The 1919 Census of Manufactures reported that 77 percent of the labor force in the dress and waist industry, 89 percent in the underwear trade, and 81 percent in the manufacture of house dresses were women.<sup>2</sup> This general proportion holds true today. In 1950, in the entire apparel and finished textile products industry, women formed 76 percent of the workers, and in 1956 78 percent.<sup>3</sup>

New York manufacturers, at least, will probably have to rely increasingly on the Puerto Ricans for future recruitment

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<sup>1</sup>New York City, Regional Plan Working Committee, *The Future of the New York Apparel Industry*, 1952-1970, p. 60

<sup>2</sup>U.S. Census of Manufactures, 1919, quoted in New York City Regional Plan of New York and Its Environs, p. 57

<sup>3</sup>U.S. Department of Labor, 1956 Handbook on Women Workers, p.16

into the needle trades, unless the social attitude of longer established workers toward the industry can be changed by improving the economic conditions and prestige of the clothing industry.

### Boston's Garment Workers

Until 1850, the Boston garment workers were predominantly Irish and English. Successive immigration waves of German and Polish (largely Jewish) workers began to change the total picture so that at the end of the nineteenth century most of the cutters were still English, while sewers, pressers, and finishers were mostly immigrant Jewish workers. In the early 1900's, the Italians (quickly dubbed "Columbus Tailors") began to enter the stitching part of the trade.

Today, the labor complexion of Boston resembles that of most of the other regional garment centers across the nation, with the exception of New York with its Puerto Rican labor. Jews and Italians form the base of the labor force, with many of the older first generation still active. The problem of filling the increasing labor shortage in Massachusetts is partially met in some areas by use of recently unemployed women in the dying textile areas, but in Boston no adequate substitute supply has yet been found.

Boston was paying well below the top hourly wage in 1955, ranking sixth among major cities with an average straight

time hourly wage in dress manufacturing establishments of \$1.60 compared to \$2.16 in top-ranking New York City.<sup>1</sup> There is a wide range of pay in the Boston clothing industry, however -- from \$.88 per hour to \$3.46, according to U.S. Bureau of Labor Statistics for 1956. For stitchers, the hourly rate is \$1.18.

Such figures indicate only the "base rate of pay" in an industry where piece work (payment for each piece of work completed) is a standard alternate method of pay. Thus, if a woman stitches in one hour 8 pieces of cloth for which she is paid \$.25 each, she is actually paid the higher of the two alternate pay schedules: \$2.00 instead of \$1.18 for her hour's work.

Many full-time stitchers (usually working a 35-hour work-week) may make \$70 to \$100 a week. Good workers, working full-time, make considerably more than they could as clerical employees or as sales clerks. The apparent labor shortage, which nonetheless persists, is caused by the preference of many girls for the prestige of low-paid white collar jobs over the higher pay of the garment industry.

In a previous chapter the seasonality of the apparel industry was discussed. That the insecurity of steady employment does not discourage more employees from remaining in the

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<sup>1</sup>New York City, Mayor's Committee for World Fashion Center, A Stitch in Time, p. 7.

needle trades has been attributed to the availability of unemployment compensation benefits.<sup>1</sup> One observer of the Massachusetts employment security picture recently observed that the garment industry, with its rapid labor turnover, has been the industry to profit the most from the unemployment compensation program. In fact, in 1957, the apparel trades show the highest proportion of collections to contributions in the unemployment compensation funds -- well over 100 percent -- of any industry in the state.

These unemployment benefits, therefore, should in all fairness be added to the average annual wages of workers in the needle trades when making comparisons of wage level with other industries.

#### Labor as a Locational Determinant

We have seen that competitive pressures on the producer of women's clothing -- particularly on the contractor -- have resulted in dependence on inexpensive labor, most frequently on immigrant women workers.

Because wages are lower in outlying cities than in Boston, and because a ready supply of female labor has been made increasingly available by the exodus of the textile industry, New England contractors have been moving into the old industrial

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<sup>1</sup>Massachusetts Division of Employment Security, 1957 Report

textile cities. That manufacturers do not follow them is due to their need of a central location to maintain the entrepreneurial functions of the industry. The recent growth of garment contractors in Fall River and New Bedford are cases in point. Contractors in these cities stitch primarily for the New York market, with only some 15 or 20 percent of their work originating in Boston. It should be recalled that the contractors represent the least stable portion of the unstable industry, which in turn has led to an intensive effort on the part of the ILGWU to organize these dispersed contract shops. To the extent that the union succeeds, a gradual increase in wages and stabilization of employment conditions might lead to a gradual diminishing of the benefits to the contractors of their decentralized location.

The availability of cheap labor is much less important to manufacturers, and almost unimportant to the jobber whose part in the production of finished garments is very small. Insofar as they both do hire employees, this must be obtainable, but market considerations requiring a central location outrank the desirability of low-cost labor as a locational determinant.

In their central city loft buildings, manufacturers and jobbers customarily are located near a public transit system. This is much more important to the garment industry than to

other industries employing large numbers of men, since wages as well as custom contribute to the low proportion of women driving their own cars to work.

In selecting a location for a new plant, therefore, a manufacturer must consider where his potential workers live and how they commute to work.

A survey of the location of the labor supply of the downtown Boston 'ladies' garment industry taken in the Fall of 1957 by the author was based on a representative 20 percent (some 1200 workers) of the membership of the ILGWU in Boston. The location of the workers' residences is plotted on Maps Number 1 and 2. In general, the survey (see Appendix B for full report) brought out the following facts:

- (1) 81 percent of all workers sampled were women, both among those whose homes were in the City of Boston and those living throughout the total area.

This percentage of women employees in the ladies' garment industry is higher than the national average percentage figure for the entire garment industry (78 percent, according to the U.S. Bureau of Labor Statistics for 1956) principally because of the higher proportion of men working in the men's portion of the apparel industry.

- (2) The majority of all workers in the Boston ladies' garment industry live in Boston -- 61 percent of the total sample. More than one-third, or 36 percent, of the Boston residents live in Dorchester and Roxbury alone.



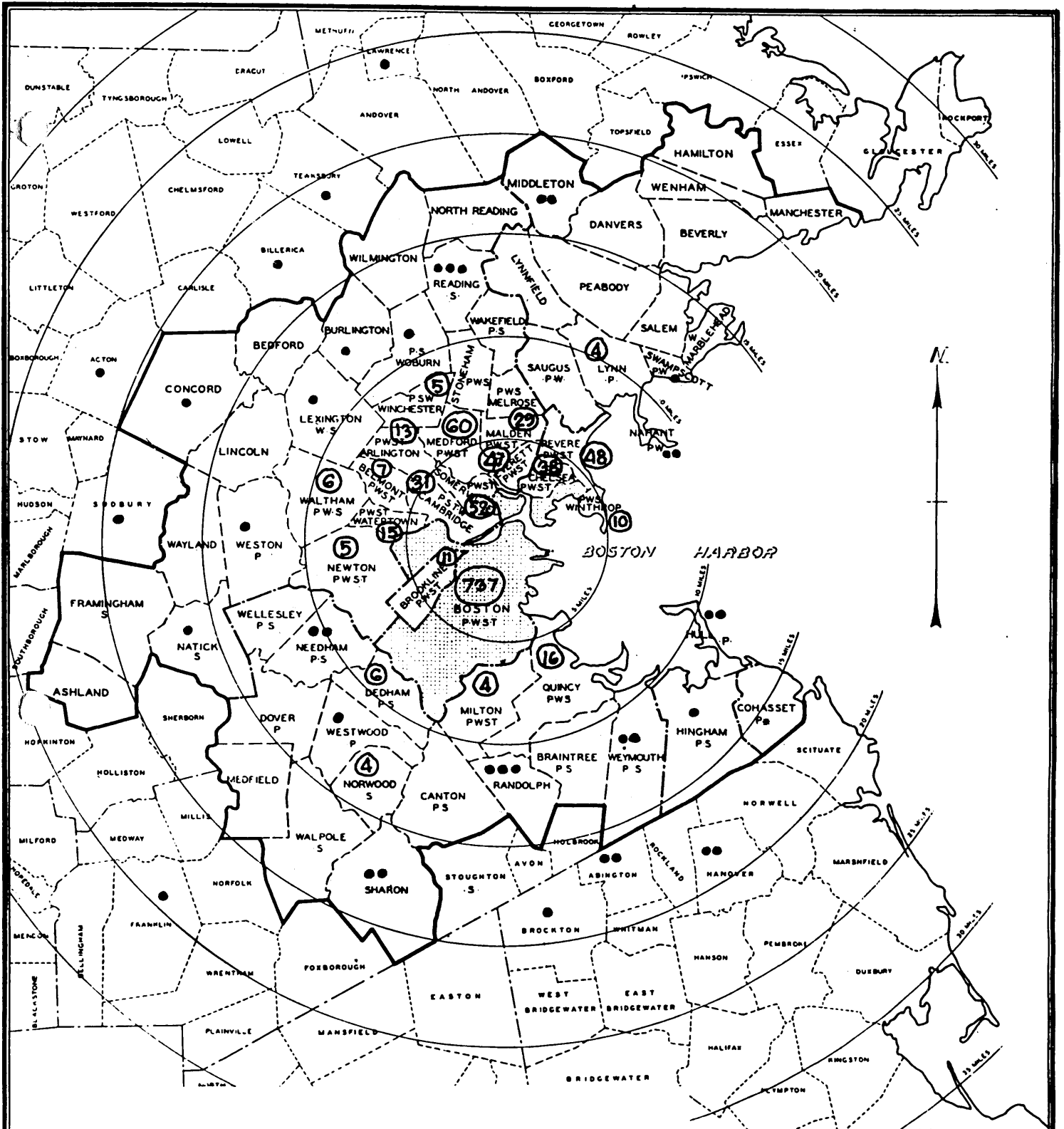
- (3) About 85 percent of workers in the Boston area traveled to work via public transit.
- (4) As indicated on Maps 1 and 2, the majority of places of residence of the ladies' garment workers of Boston are accessible by public transit.

The Kneeland Street location of the majority of ladies' garment industry firms in Boston (see Maps 5 and 6 showing the distribution of plants in Boston) apparently reflects the dominant desire on the part of producers for a central location and proximity with other manufacturers, although this area is also, of course, serviced by subway.

Pockets of available labor in the North End, South Boston, and Roxbury are apparently responsible for the location of a minority of perhaps more strongly labor-oriented firms in those areas.

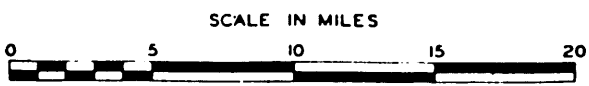
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Thus both the character of labor and its accessibility exercise an effect of the choice of plant location of manufacturer, jobber, and contractor, each according to his needs.



Map No. 1. Location of Workers Residences  
in the Boston Metropolitan Area

● ② Number of workers residences reported in the sample

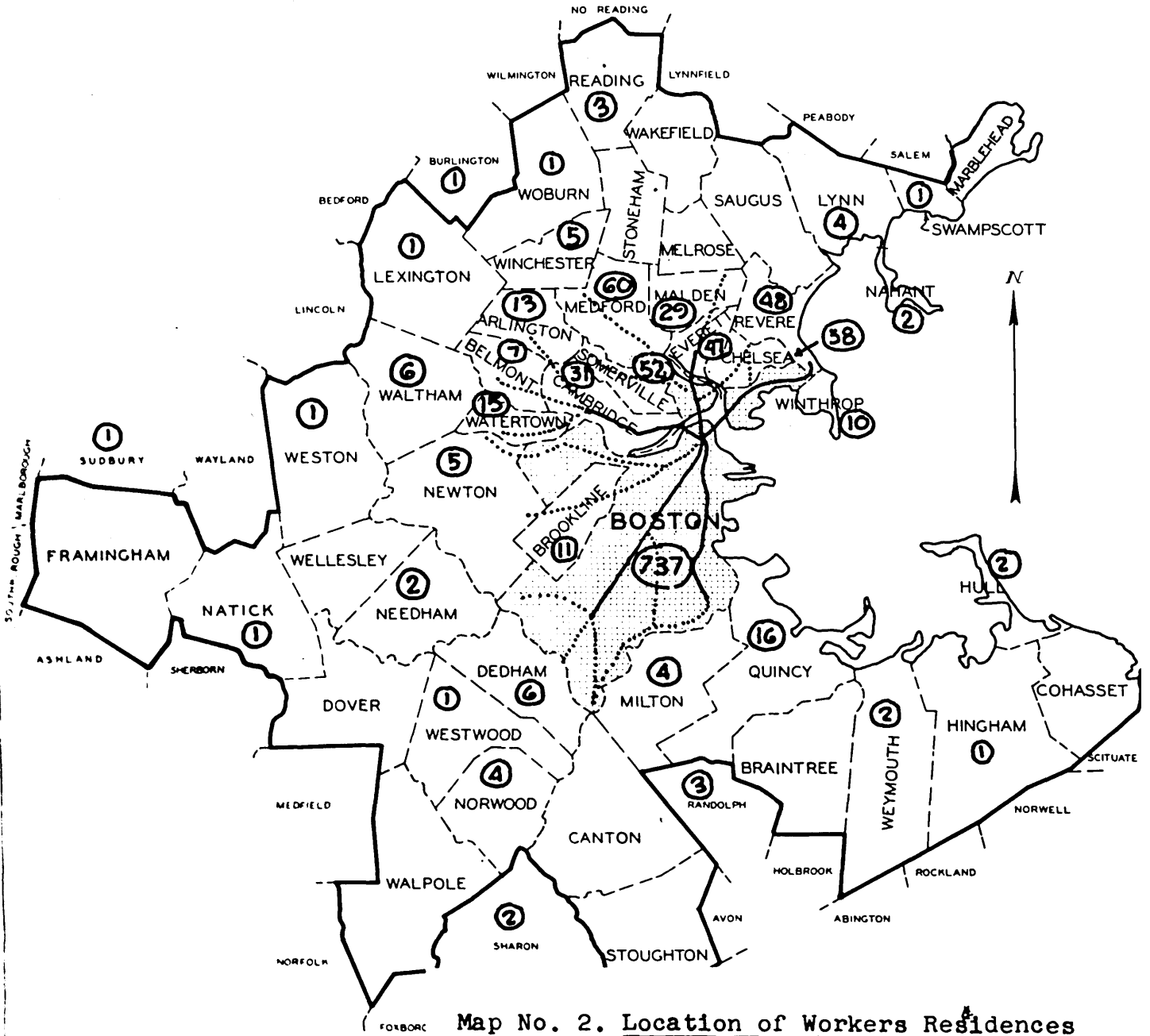


**LEGEND**

P METROPOLITAN PARKS DISTRICT 30 CITIES & TOWNS  
W METROPOLITAN WATER DISTRICT 25 CITIES & TOWNS  
S METROPOLITAN SEWERAGE DISTRICT 35 CITIES & TOWNS  
T BOSTON METROPOLITAN DISTRICT (TRANSIT) 40 CITIES & TOWNS  
● METROPOLITAN PARKS DISTRICT (NANTASKET ONLY)

48 CITIES AND TOWNS ARE INCLUDED IN THE ABOVE DISTRICTS

— BOSTON METROPOLITAN DISTRICT AS DEFINED BY 17 TH UNITED STATES CENSUS (65 CITIES AND TOWNS) (1950)

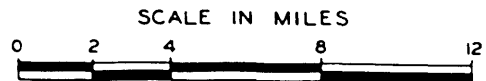


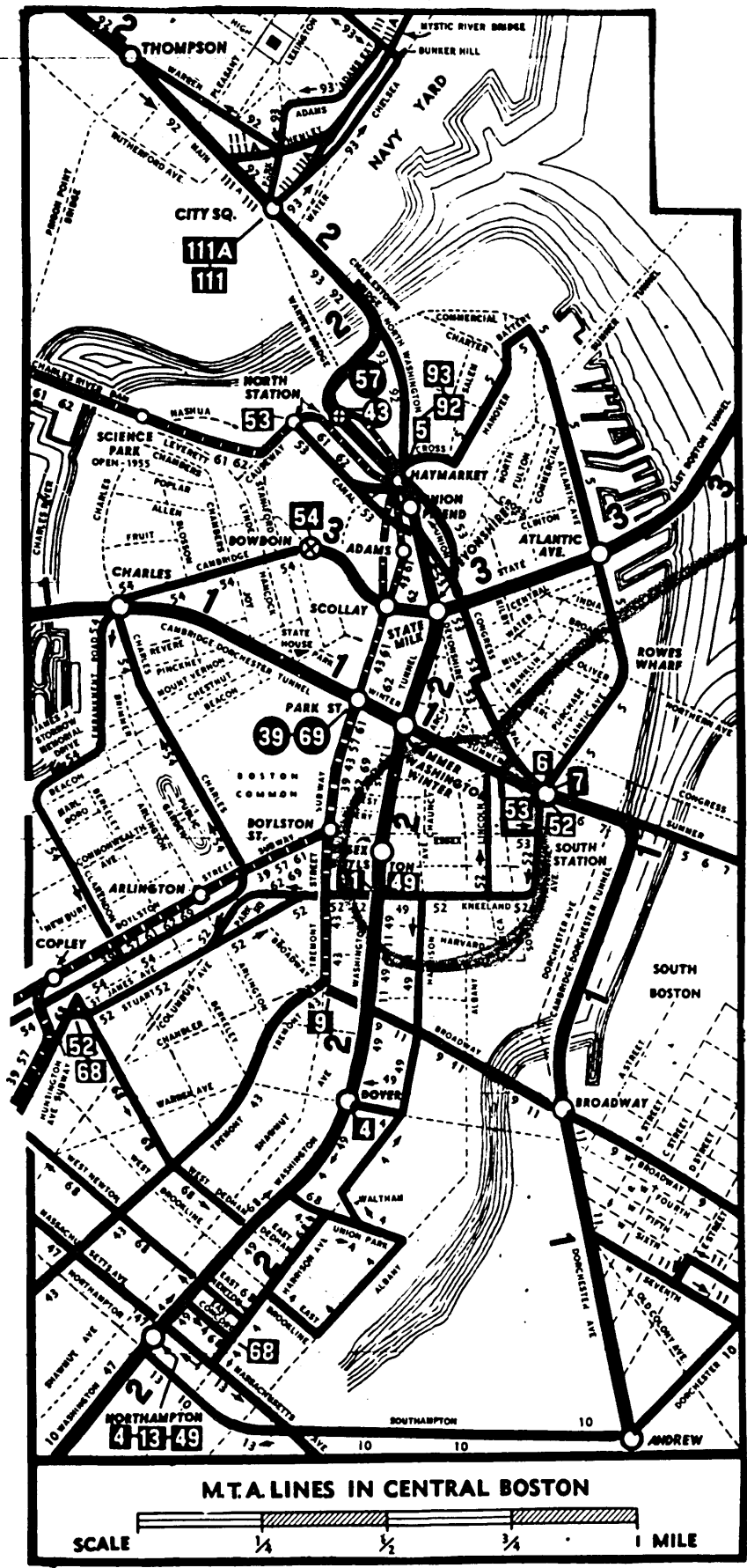
Map No. 2. Location of Workers Residences in the Boston Metropolitan Area

② Number of workers residences reported in sample.

— Rapid Transit Lines

..... Connecting surface lines (general indication only)

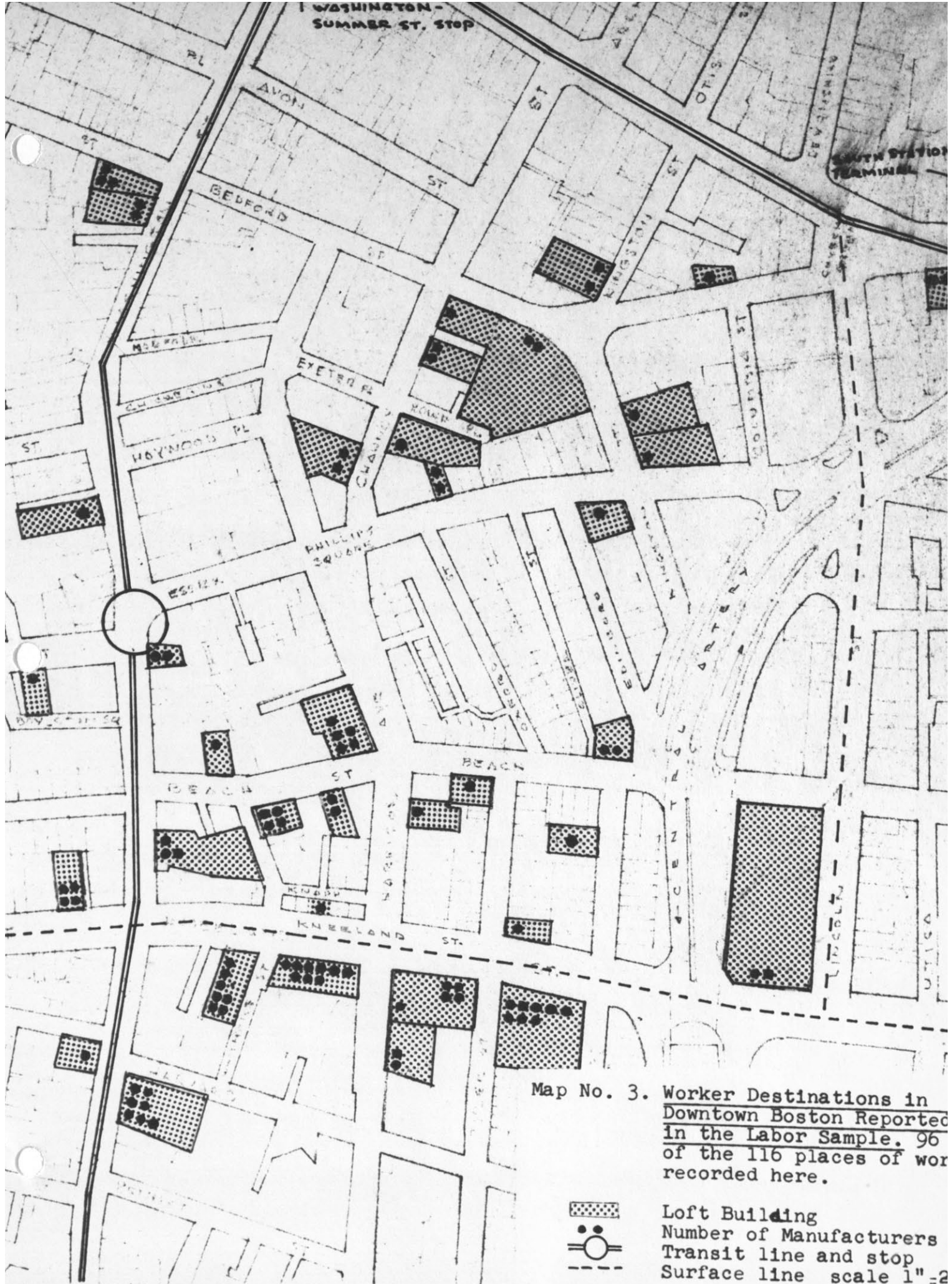








*Study Area*

Map No. 2A Downtown Boston  
 Major Transit Lines  
 Study Area Location

- Major Transit Line
- Surface Line
- Station
- ⊕ Terminal



Map No. 3. Worker Destinations in Downtown Boston Reported in the Labor Sample. 96 of the 116 places of work recorded here.

-  Loft Building
-  Number of Manufacturers
-  Transit line and stop
-  Surface line scale 1"=200

CHAPTER V  
LOCATION OF THE LADIES' GARMENT INDUSTRY  
IN BOSTON

The previous chapter has itemized some of the major locational determinants of manufacturers in the ladies' garment industry: accessibility to retail outlets and other manufacturers for the sake of quick response to style changes, the importance of a central location to facilitate the job of buyers, and the need for a low-cost labor supply accessible by public transit. As long as 30 years ago, many of these same factors were noted by students of the apparel industry,<sup>1</sup> who even then were concluding that it should ideally be located as near as possible to these various services.

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<sup>1</sup>The 1927 New York City Regional Plan which was discussed in the previous chapter is corroborated by Mabel A. Magee, writing in her 1930 book about Chicago (Trends in Location of the Women's Clothing Industry, p. 114) when she concluded:

"Nearness to the market is an all-embracing factor in determining plant location in this industry. In New York migration uptown with the shopping district, the failure of movements outward, and the success of the central location are closely paralleled by the location in the Chicago Loop, the movement back to town after experimenting in the Milwaukee Avenue district, and the ever increasing concentration of the industry into five or six city blocks. Apparently, it is only in the production of the cheaper goods, and then only when the selling function has been intrusted to centrally located agents, that any attempt to utilize outlying areas is successful."

Massachusetts Ladies' Garment Industry Concentrated in Boston

Map #4 below shows the distribution in late 1955 of the women's apparel industry of Massachusetts. The industries shown are those listed under the three major Census categories (233, 234, 236) and tabulated in the 1956 Directory of Manufactures published by the Massachusetts Department of Commerce.

Although data did not permit distinction between manufacturers, jobbers, and contractors, union officials reported that the strong industrial clusters in the depressed textile cities of Fall River and New Bedford are in great majority contractors working primarily for the New York City market (between 15 and 20 percent of their output is for Boston, according to an ILGWU official<sup>1</sup>). This is an excellent example of the greater dispersal of the industry since the New York and Chicago studies of three decades ago, due to increased use of contractors and improved highways between cities.

Contractors located in towns in Maine and New Hampshire have the same relationship to Boston's manufacturers and jobbers as the Fall River-New Bedford basin has to the New York apparel industry. The lower wage scales possible in these former textile communities appear to balance out additional transport costs which may result from the more distant location, although to the extent that present ILGWU efforts to

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<sup>1</sup>Harvey Gold, Boston ILGWU organizer

organize these scattered shops are successful, the wage differential from the central city may be reduced.

The dispersal of contractors throughout the state and New England may be expected to continue with the further improvement of our highway network, but it is probable that jobbers and manufacturers will remain concentrated in a small area in Boston.

#### Location of Women's Apparel Industry Within Boston

The location of the industry in U.S. Census categories 233, 234, and 236 was plotted in detail by street address for the City of Boston on two maps -- Map #5 for Boston as a whole, and Map #6 for the Kneeland Street area only.

The concentration of more than half (169) of the 243 Boston women's garment manufacturers in the immediate vicinity of Kneeland Street was the reason for its selection for detailed examination in this thesis. Within this smaller study area but not plotted on the accompanying maps are also a majority of the men's clothing producers of the city.

The Kneeland Street area is a location with excellent access by transit to all parts of Boston. The major transit lines in the City cross at Washington and Summer Streets. The area is also adjacent to the major metropolitan retail center on Washington Street and the central office districts to the north. The secondary office and retail centers in Back Bay



lie to the west. The location of the Kneeland Street Garment Area represents a location with maximum access to the important central business district functions and with the completion of the Central Artery will have excellent vehicular access as well.

There is a notable subcluster of apparel manufacturers near North Station, reflecting accessibility to public transportation and, more particularly, to a pocket of garment workers in the North End. Another cluster in South Boston and a straggling group of producers between the Kneeland Street area and Roxbury along Washington and Tremont Streets and Columbus and Huntington Avenues are both drawn by available labor supplies.

A walk through the Kneeland Street study area reveals the typical city pattern of manufacturing loft space and mixed uses on the edge of the retail core. The juxtaposition of Boston's Chinatown and the garment district is aesthetically interesting: the apparel lofts wheel in a circle around the Chinese area, their center of gravity resting near the Chinese restaurants on Oxford Street. These brightly colored restaurants add a note of life and activity to an otherwise drab district.

The lofts themselves are old, the most recent being the large Hudson Building at 75 Kneeland Street, built in 1925. Many of the better known manufacturers are located there as well as 22 of the 23 apparel wholesalers in Boston.

Attempts to plot the women's apparel industry to find geographical grouping of industrial sub-categories, such as blouse manufacturers, skirt producers, etc., showed no such concentration of specialized parts of the trade. The lack of employer organizations in many branches of the industry, and the absence of strong employer organizations where they exist at all, is certainly responsible for the failure to achieve any such possibly beneficial locational grouping. The extreme competition of the business is a major factor in the continued dispersal through the garment industry area of the various subgroups of manufacturers.

The only functional clustering noted in the entire study area or throughout the state was the location of most of the wholesalers in the Hudson Building on Kneeland Street (see Table X in Appendix A). Market pressures have obviously overridden pressures leading to non-cooperation as a locational determinant in this instance.

Although subdivisions of the ladies' garment industry may have failed to group in homogeneous units, the observed tendency of the entire industry to cluster in single buildings, as well as one specific area in the city, is evidenced by an examination of the maps of Boston (Map #5). Elements causing such concentration, such as style factors, market requirements, labor needs, availability of acceptable space, and ethnic

clannishness have been discussed in previous chapters.

A check on movement of firms in the past decade was made in order to see whether any trends in locational preference could be ascertained. From a comparison of 1948 and 1956 firms in Boston based on the best possible information, but admitting some serious weaknesses in comparability,<sup>1</sup> slightly less than half of the 1948 firms were still in business. Of the 38 firms employing over 50 persons in 1948, 9 had moved to new addresses while 6 did not move. Three of those moving were firms outside the Kneeland Street study area moving to other locations outside the study area, 2 moved out of the study area to other parts of Boston, 1 moved into the study area, and 3 movements took place entirely within the Kneeland Street area (see Map #7).

Clearance for construction of the Central Artery in 1955 (see Map #8) affected six firms in the Boston ladies' garment industry. Of these, one could not be traced and the other five moved to new locations in the Kneeland Street area.

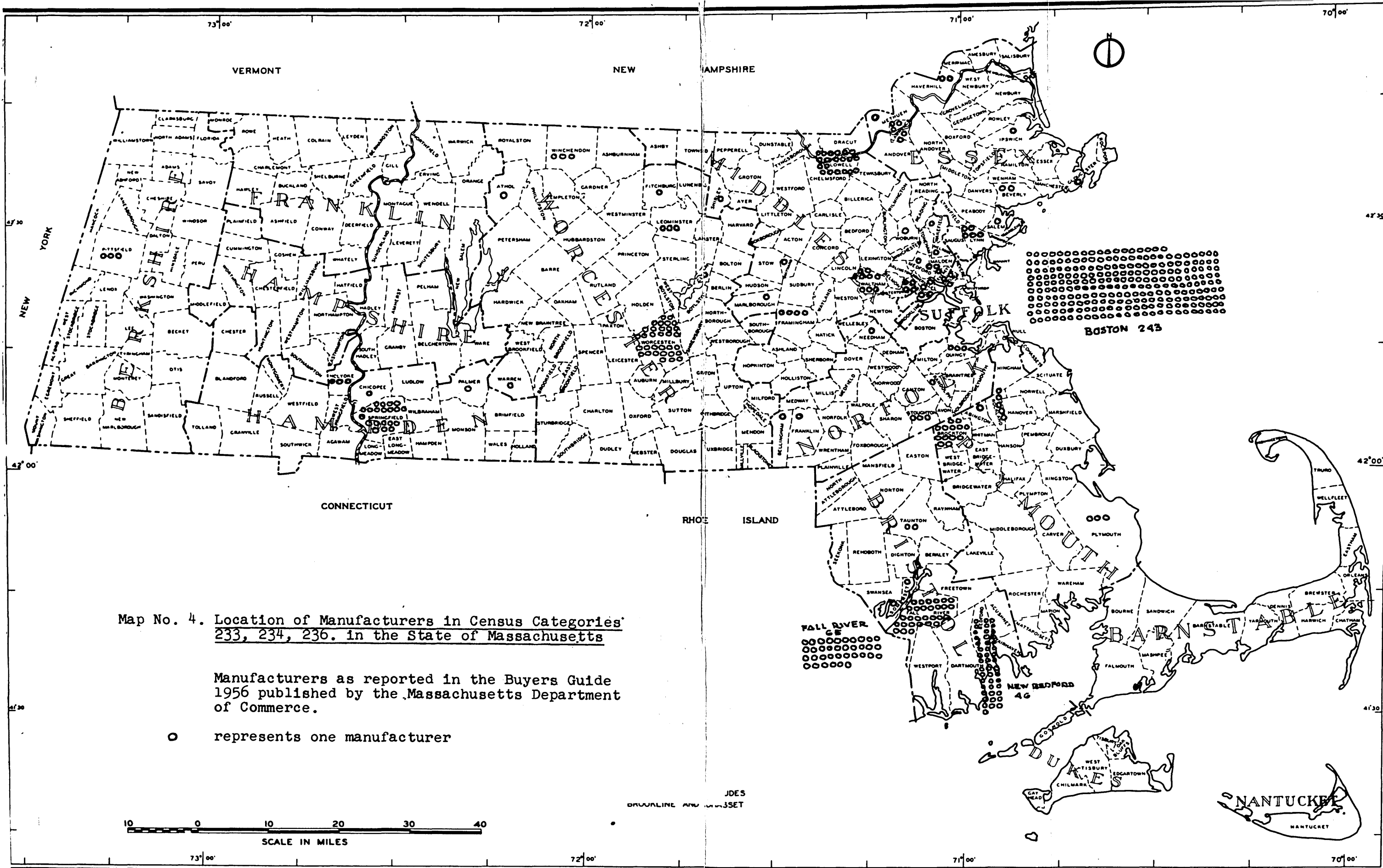
In both of these studies of firm relocations, we note the underlying tendency of manufacturers to seek location near other apparel manufacturers: all but one of the firms locating within the study area selected (or found available) space

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<sup>1</sup>The 1948 Directory of Massachusetts Manufacturers issued by the Massachusetts Department of Labor and Industries reported only firms employing 50 persons or more, while the 1956 Buyers' Guide of Massachusetts Manufacturers published by the Massachusetts Department of Commerce included firms of eight or more employees.

in buildings with other producers.

The location of the women's apparel industry in Massachusetts is a graphic illustration of the industry's tendency to seek a central, urban location.



Map No. 4. Location of Manufacturers in Census Categories 233, 234, 236. in the State of Massachusetts

Manufacturers as reported in the Buyers Guide 1956 published by the Massachusetts Department of Commerce.

○ represents one manufacturer



JDES  
ORIGINALLY AND REVISIT





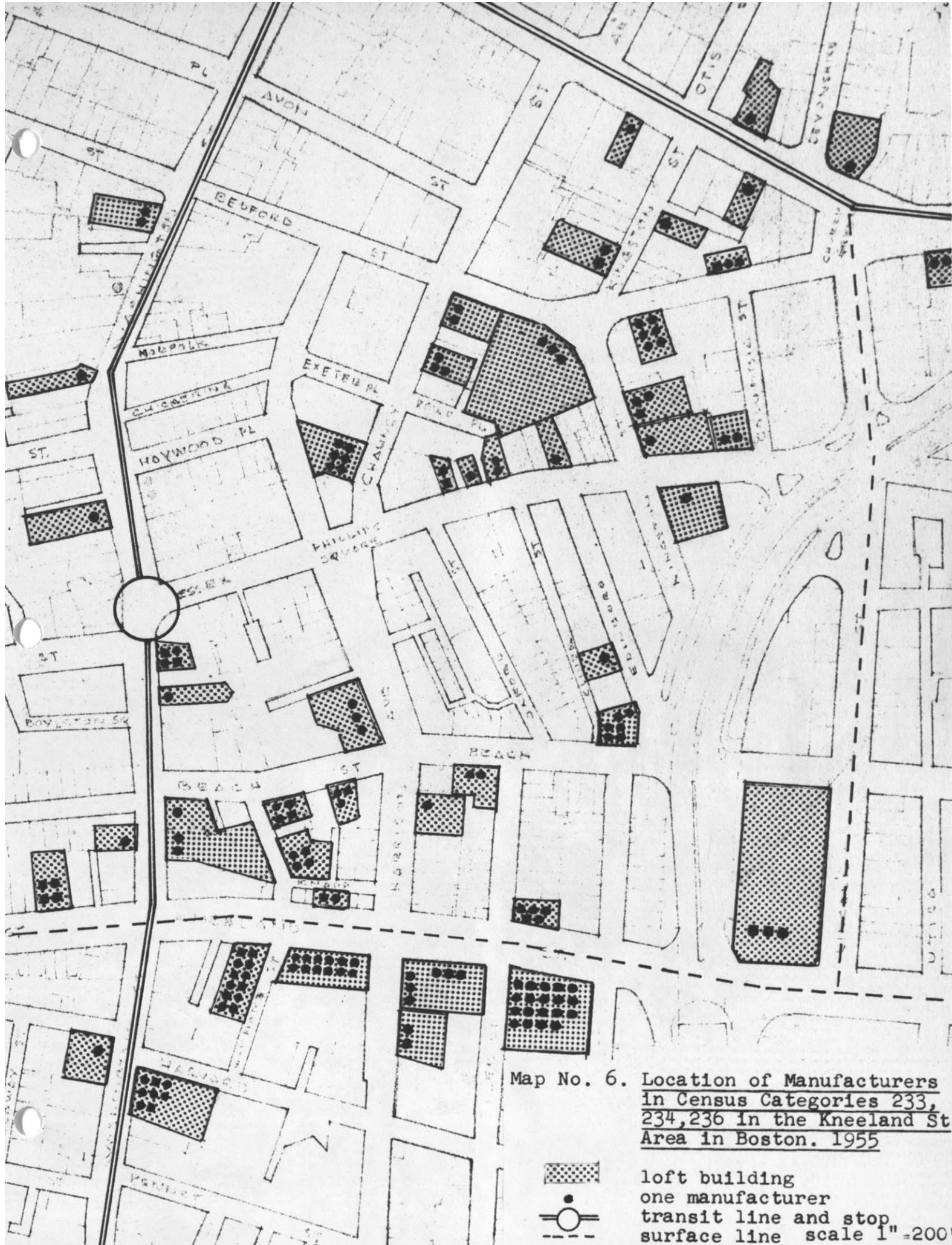
Map No. 5. Location of Manufacturers  
In Census Categories 233,  
234, 236 in the City of  
Boston. 1955

○ represents one manufacturing location

▨ study area

scale 1" = 1 mile

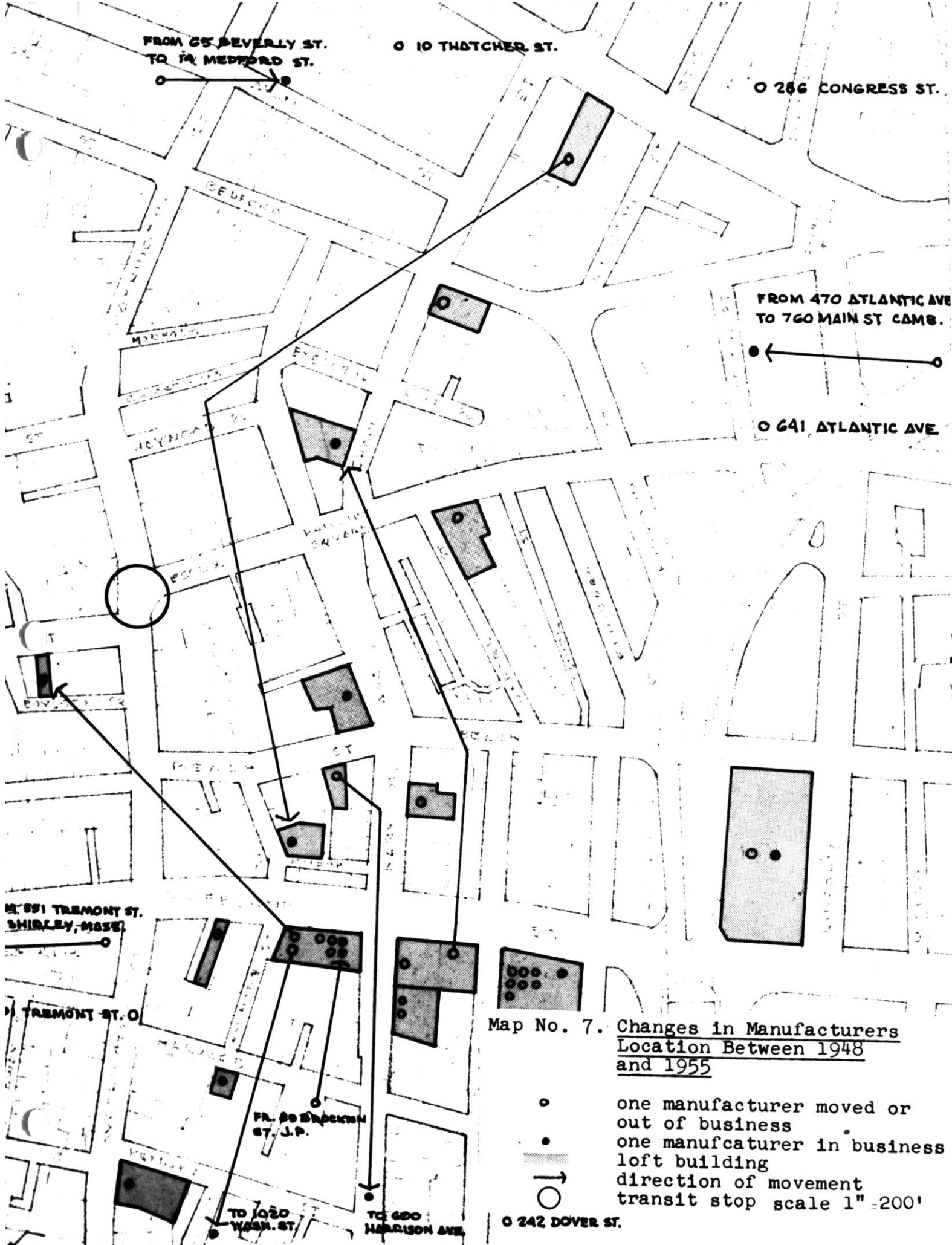




Map No. 6. Location of Manufacturers  
in Census Categories 233,  
234, 236 in the Kneeland St.  
Area in Boston. 1955



loft building  
 one manufacturer  
 transit line and stop  
 surface line scale 1"=200'



FROM 65 BEVERLY ST.  
TO 10 THATCHER ST.

○ 10 THATCHER ST.

○ 286 CONGRESS ST.

FROM 470 ATLANTIC AVE  
TO 760 MAIN ST CAMB.

○ 641 ATLANTIC AVE

○ 591 TREMONT ST.  
SHIRLEY, MASS.

○ TREMONT ST. ○

FR. 38 BRICKTON  
ST. J.P.

TO 1020  
WASH. ST.

TO 600  
HARRISON AVE.

Map No. 7. Changes in Manufacturers  
Location Between 1948  
and 1955

- one manufacturer moved or out of business
- one manufacturer in business
- ▭ loft building
- direction of movement
- transit stop

○ 242 DOVER ST.

scale 1" = 200'



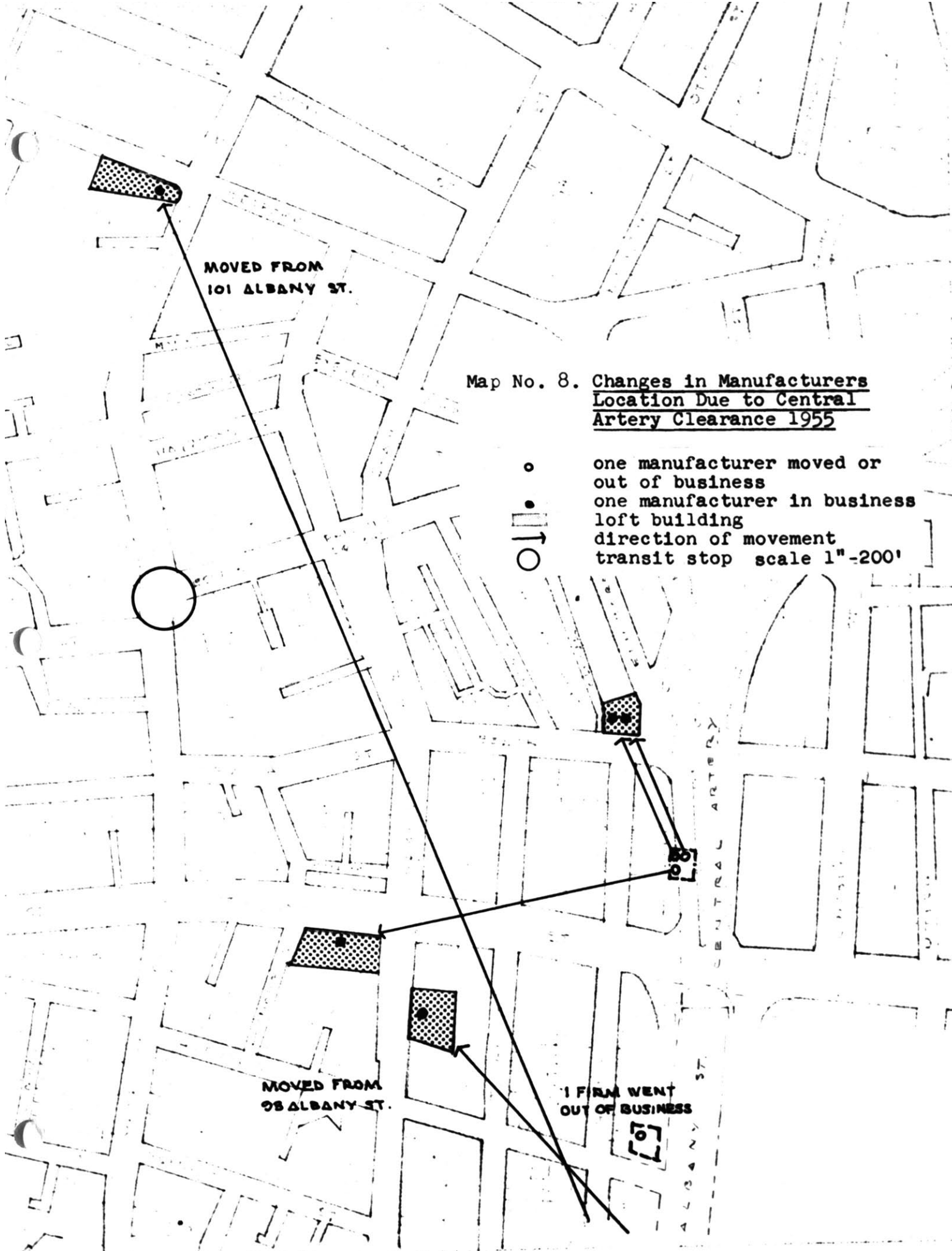
MOVED FROM  
101 ALBANY ST.

Map No. 8. Changes in Manufacturers  
Location Due to Central  
Artery Clearance 1955

- one manufacturer moved or out of business
- one manufacturer in business
- ▭ loft building
- direction of movement
- transit stop scale 1"-200'

MOVED FROM  
98 ALBANY ST.

1 FIRM WENT  
OUT OF BUSINESS



CHAPTER VI  
LOCATIONAL CONCLUSIONS

Boston's ladies' garment industry is concentrated in the Kneeland Street area today. Is this the best location for it in Boston? Must it continue to locate there in the future? If the Kneeland Street area is not ideal as a location for the women's apparel industry of Massachusetts, then what is? An examination of possible alternatives in the light of the locational requirements of the several portions of the needle trades will help to answer these questions.

The various activities to which access is necessary for each of the three principal divisions of the apparel industry may be summarized as follows:

<u>Manufacturer</u>	<u>Jobber</u>	<u>Contractor</u>
Business services	Business services	Labor
Labor	Retail outlets	Manufacturers
Retail outlets	Other manufacturers	Transportation
Other manufacturers	Transportation	

With these requirements in mind, we can review the broad range of choices of location confronting a manufacturer in rural areas, satellite cities, suburbs of a metropolitan area, or central city.

Hypothetical Testing of Alternative Locations

An attempt to rate the importance of locational determinants for the various types of producers in the ladies' garment

industry is given in Appendix D. Four distinct locational possibilities are suggested, and locational determinants are listed under each, assigning differing weights to each factor according to the particular needs of the producer under discussion. The results of this experiment, while admittedly highly subjective, support the general locational preferences developed in this study:

- (1) For the highly labor-oriented contractor, a location in a satellite city (minor urban center) seems indicated.
- (2) When labor, market, and supply-distribution factors are given equal rating, a central business district location is indicated.
- (3) In the rating giving predominance to market and supply-distribution factors over labor, a central business district location results.

#### Alternative Locations in Massachusetts

In general, the contractor can and does operate in a variety of locations, while the individual major dress manufacturer or jobber would probably find a suburban or satellite city location difficult, due to lack of contact with the ever-essential market.

It is conceivable that, if an adequate labor supply and rapid transport facilities could be assured, the entire apparel industry in Boston might be successfully relocated in one community outside the city itself. Its geographic concentration

might permit the drawing-power essential to attract buyers, but decreased accessibility to the business services, hotels and major entertainment areas, retail outlets, and immediate transportation possibilities of the central area would not be replaceable. The desire of the women workers to be near major stores and central business district services for lunch hour shopping would be frustrated. A further major difficulty would be encountered in inducing all the manufacturers to move at once. Just what size the labor supply available to such a relocated industry would have to be, or what proportion of the total industry would have to relocate in order to make such a move feasible in the first place, is beyond the scope of this thesis. Suffice it to say, it is not likely that the following (and other) factors will combine in the foreseeable future to make such a movement to a suburb or outlying city possible:

- sufficient loft space;
- promise of continued lower rents;
- available cheap and adequately trained labor supply;
- creation of really rapid transportation possibilities to the central retail district; and
- unanimity of desire on the part of manufacturers for such a relocation.

It is probable, therefore, that the movement out of the central city will continue to be limited to the contracting function in the women's apparel industry, while manufacturer and jobber will probably profit to the greatest extent by

remaining in their present urban location, from which they have shown no signs of moving.

#### Alternative Locations in Downtown Boston

In selecting a site within the city, a prospective manufacturer would probably choose a location near the leaders in the field. For Boston, this is the Kneeland Street area described above. Is this the best potential site for the garment industry in Boston?

Other potential sites offering labor and market accessibility in varying degrees in Boston and within two miles of the central business district include (1) the North End, (2) the South Boston - Fort Point Channel area, (3) the New York Streets district, and (4) Washington Street in Roxbury. The major potential areas here considered are shown on Map #13 of Boston, which also shows the principal activities areas to which the manufacturer needs access.

(1) Of these potential sites at this time, the North End seems to be one of the better locations in the city. Its great advantage is transit and pedestrian access to labor. Its chief disadvantage is its relative remoteness from the retail center, discouraging "comparison shopping" by potential buyers.

(2) The South Boston - Fort Point Channel area seems to offer better access to the central business district. This

accessibility will be further enhanced by the completion of the pending express highway system for Boston. A principal disadvantage is the inadequacy of the local labor supply and the difficulty of commuting for outside labor. This area might hold some potential for a jobber with his smaller labor needs.

(3) and (4) The New York Streets Project area and Washington Street-Roxbury area have many of the same advantages and disadvantages as the North End location: easy access to labor but relative remoteness from the central business district. The extension into the area of the Massachusetts Toll Road and the Southeast Expressway, while increasing accessibility of the area to outsiders, will not eliminate the difficulties of reaching the central business district.

It is possible that the westward movement of the retail core, with the addition of the Prudential Center development in Back Bay, will continue. If so, and if the shopping area in Back Bay becomes of major significance, then we may find some apparel manufacturers locating on the fringes of that area. Eventually, other possible sites along the proposed Inner Belt highway in Boston and Cambridge may also have to be considered.

We can conclude, therefore, that none of these alternative locations has the access both to the major retail areas

business activity areas of the city, and to a labor supply comparable to the Kneeland Street area. The Kneeland Street area permits 'one stop' visits by the buyers. In addition, it has the great added advantage of having the majority of manufacturers and almost all wholesalers in the ladies' garment industry already there. Even the future Prudential development sparking a larger Back Bay retail shopping area would not be inaccessible to the garment workers and employers in the older portion of the city. The Kneeland Street area, near Back Bay, will also benefit from the immediate proximity of the new expressway system, bringing in buyers from outside the city as well as freight to and from contractors in outlying areas.

#### Review of Hypothesis

The original proposition which this thesis set out to examine was that:

"The ladies' apparel industry seeks a location which offers maximum accessibility to: (1) labor, (2) business services available in the central business district of the city, and (3) other apparel manufacturers."

We have examined the women's garment industry of Boston with this hypothesis in mind. It has become clear that part of the industry -- the contracting portion -- has begun to seek new locations away from the central business district. The other portions, however -- the manufacturer and jobber -- still prefer, and apparently for sound reasons, the central city location.

We can conclude that, normally, a central location is still the best location for the manufacturer and jobber. We are assuming here that, under conditions of a stable population, normal demand for finished garments, need for a constant supply of labor by the women's garment industry, and continued economic stability of Boston, there is little likelihood of technological change affecting either the productivity of labor or the intense competitive situation among producers.

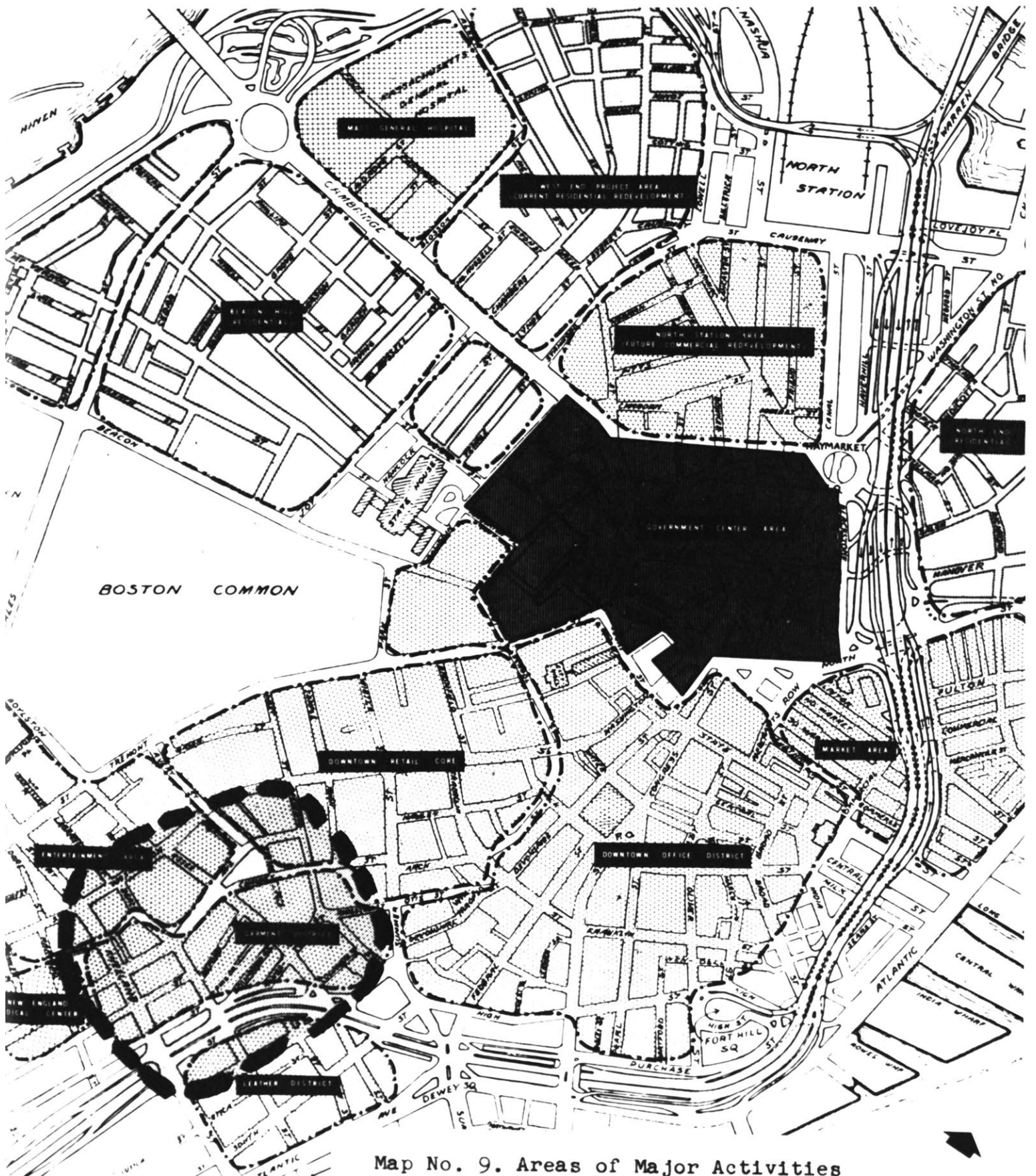
Labor will continue to be a problem in the future for two reasons: (1) as an "immigrant industry" the ladies' garment industry still lacks the prestige to attract new workers; and (2) the relatively low wage scale and poor working conditions contribute to its low prestige. New and improved loft space and/or improved working conditions might make a difference in the attitude of present and potential employees.

\* \* \*

This study has attempted to make some contribution to the general knowledge of the garment industry in Boston. While this thesis has been able to define the location preferences of the ladies' garment industry, and to point out some of the locational trends, many related aspects of the



economy, sociology, and techniques of manufacture, each having identifiable locational implications, warrant further examination before a determination of central city location for the major producing branches of the ladies' garment industry can be finally declared.



Map No. 9. Areas of Major Activities  
in Downtown Boston



study area











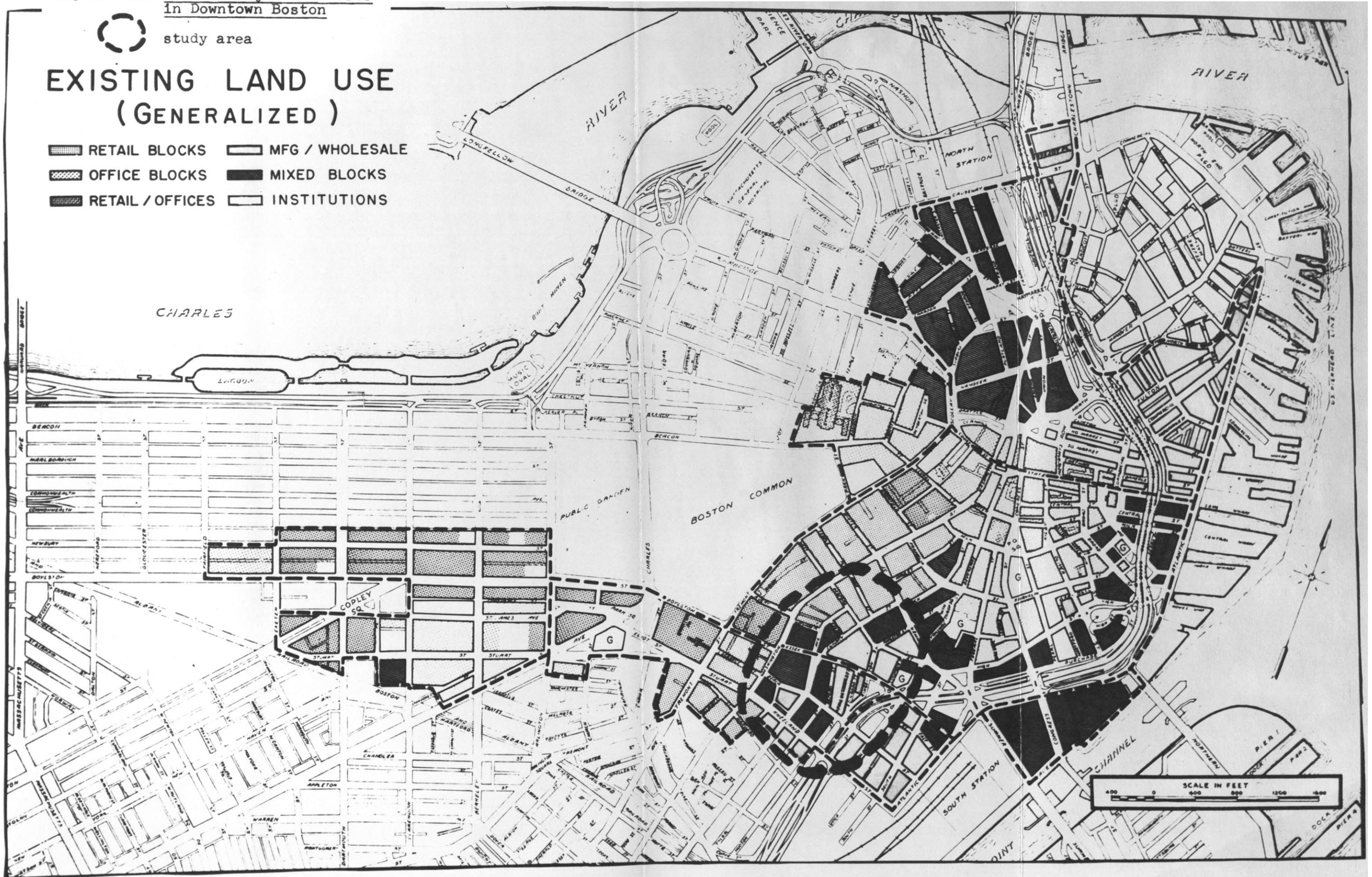
Map No. 10. Present Major Land Uses  
in Downtown Boston

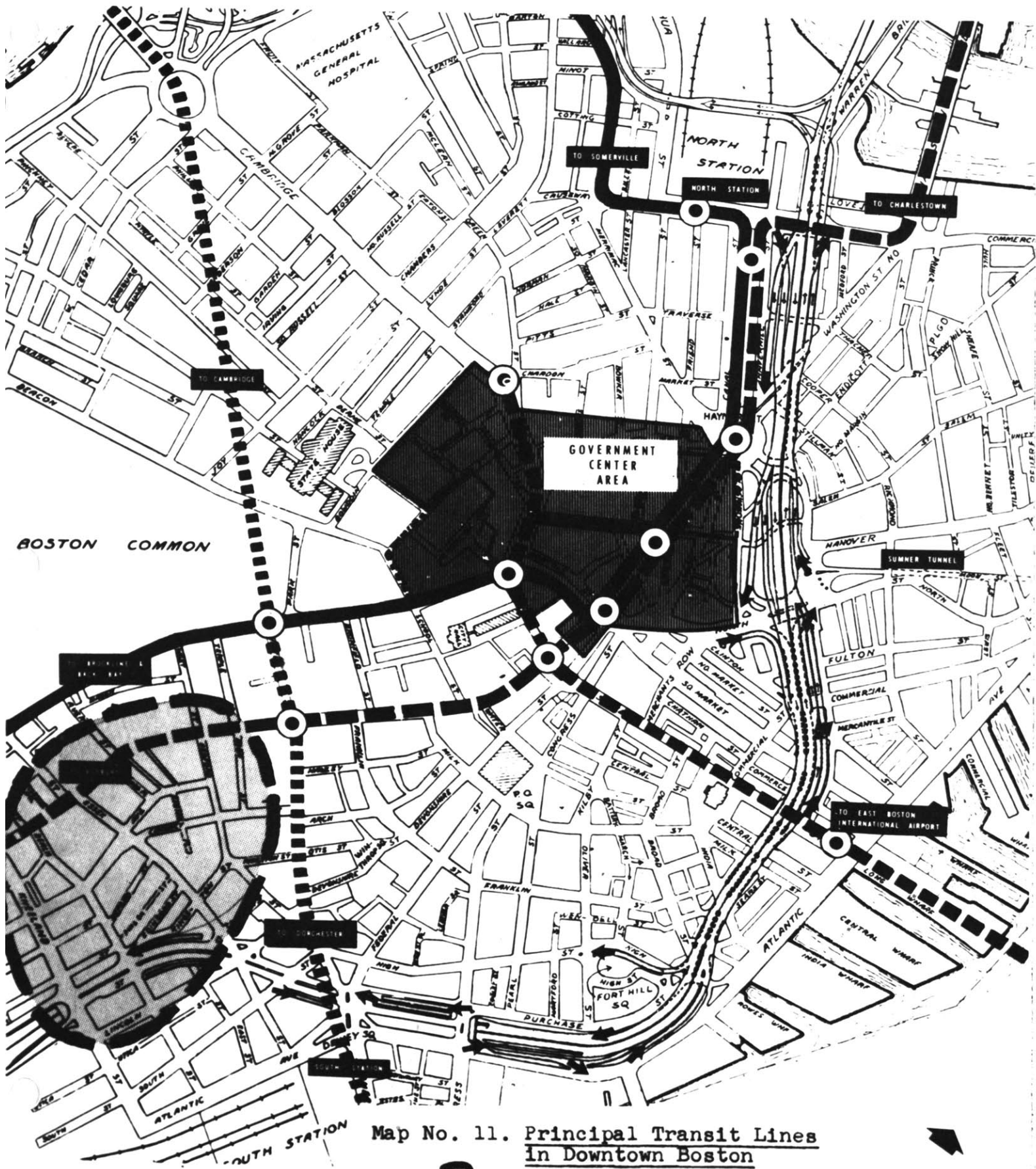


study area

# EXISTING LAND USE (GENERALIZED)

- |  |  |
|--|--|
|  RETAIL BLOCKS    |  MFG / WHOLESALE |
|  OFFICE BLOCKS    |  MIXED BLOCKS    |
|  RETAIL / OFFICES |  INSTITUTIONS    |





BOSTON COMMON

GOVERNMENT CENTER AREA

NORTH STATION

TO EAST BOSTON INTERNATIONAL AIRPORT

SUMNER TUNNEL

TO SOMERVILLE

TO CHARLESTOWN

TO CAMBRIDGE

SOUTH STATION

FORT HILL SQ

PURCHASE

ATLANTIC

ATLANTIC

CENTRAL WHARF

LODGE

COMMERCIAL

MERCANTILE ST

FULTON

NANOVER

WASHINGTON ST NO

TO CHARLESTOWN

TO SOMERVILLE

TO CAMBRIDGE

TO EAST BOSTON INTERNATIONAL AIRPORT

TO CHARLESTOWN

TO SOMERVILLE

TO CAMBRIDGE

TO SOMERVILLE

TO CAMBRIDGE

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TO SOMERVILLE



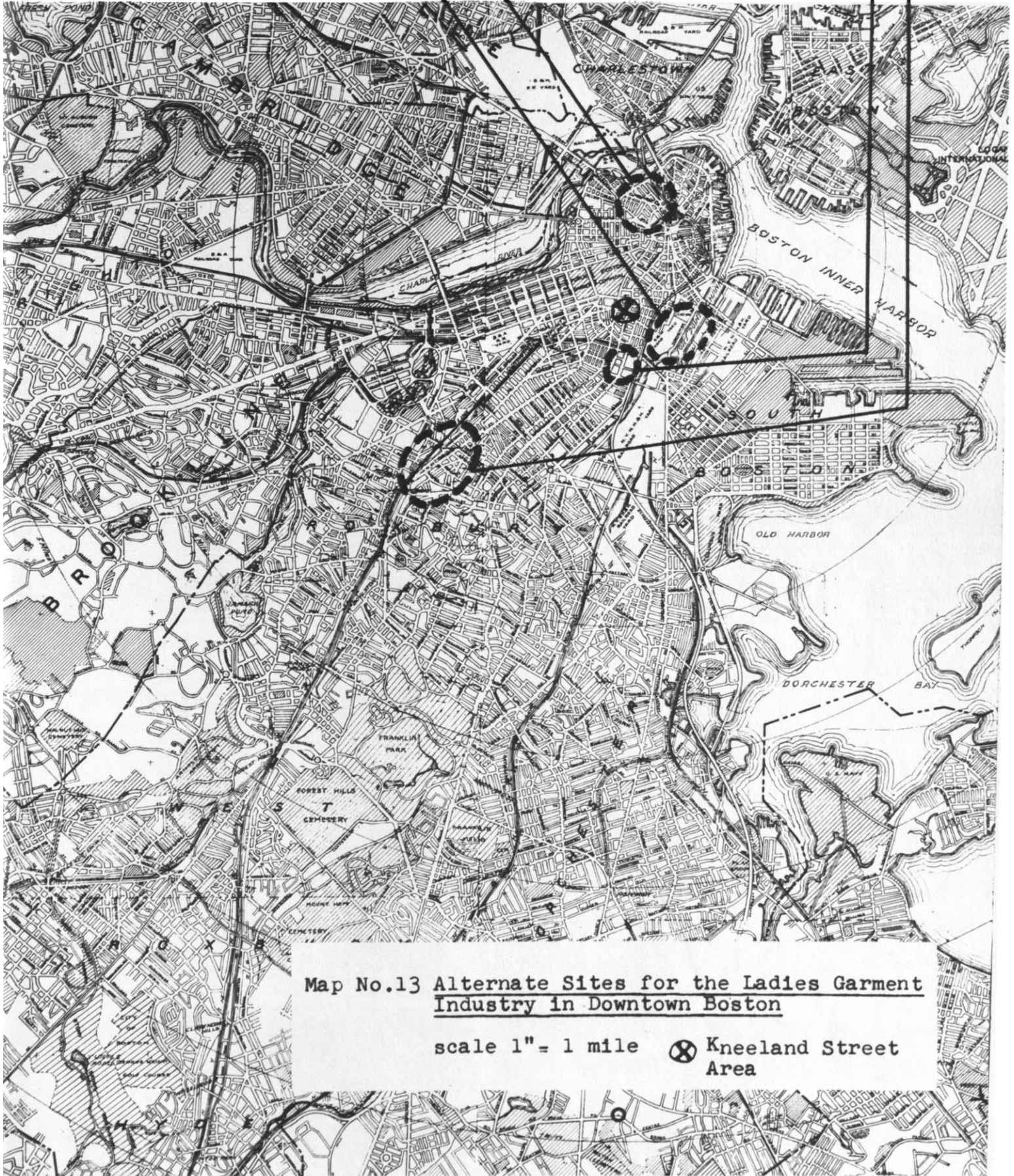


1. North Station Area

3. New York Streets Redevelopment Area

2. South Station Fort Point Channel Area

4. Washington Street-Roxbury Area



Map No.13 Alternate Sites for the Ladies Garment Industry in Downtown Boston

scale 1" = 1 mile

⊗ Kneeland Street Area

LIST OF APPENDICES

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## APPENDIX A

TABLE I. Principal Data Relative to the Leading Manufactures in the City of Boston, Mass., 1955, by Industries

<u>Industries (in order of value of products)</u>	<u>No. of Estabs. (in scope of census)</u>	<u>Av. No. of Production &amp; Related Workers</u>	<u>Total Amt. of Wages Paid During Yr. (Gross before and deductions)</u>	<u>Value of Products (FOB plant)</u>
Men's & Women's Clothing, Other Than Men's Work Clothing	411	13,469	\$38,409,465	\$207,735,335
Printing & Publishing & Related Industries	230	8,805	40,680,162	138,927,532
Fabricated Metal Products (Ferrous) & Related Industries n.e.c. <sup>1</sup> including electroplating	129	4,757	18,154,601	105,213,573
Electrical Machinery, Apparatus & Supplies	52	4,429	15,166,087	67,244,470
Subtotal: These Industries	822	31,460	\$112,410,315	\$519,120,910
Total - All industries	2,090	67,764	\$230,110,062	\$1,286,402,185

<sup>1</sup>Not elsewhere classified

Source: Abstract from Commonwealth of Massachusetts, Department of Labor and Industries, Division of Statistics, Bulletin #3, 1955. Table 1.



## APPENDIX A

TABLE II. Summary Data Relating to Manufactures in the City of Boston, Mass., 1944-1955 -- Clothing, Men's and Women's, including Men's Work Clothes.

<u>Year</u>	<u>No. of Estabs.</u>	<u>Capital Invested</u>	<u>Value of Stock &amp; Materials Used</u>	<u>Total Amt of Wages Paid in Year (gross, before Deductions)</u>	<u>Ave.No.of Production &amp; Related Workers</u>	<u>Value of Products (FOB plant)</u>
1945	457	\$34,658,417	\$69,858,125	\$26,981,118	13,833	\$128,131,549
1950	488	60,230,167	102,699,520	33,784,680	14,539	173,164,304
1955	427	59,930,644	128,972,969	39,842,145	14,101	216,237,492

Source: Abstract from Commonwealth of Massachusetts, Department of Labor and Industries, Division of Statistics, Bulletin #3, 1955. Table II.

## APPENDIX A

TABLE III. The Major Apparel Markets

Metropoli- tan Area	Number of Establishments		Total Employ- ees (000)		Value Added (000,000)		%Change Value	%National Total Va- lue Added	
	1947	1954	1947	1954	1947	1954		1947	1954
New York	18,651	17,477	387.4	394.4	2037.6	2037.8	+ 0.0	45.8	40.5
Philadelphia	1,186	1,143	56.5	56.0	228.0	244.1	+ 7.0	5.1	4.9
Los Angeles	1,276	1,653	33.0	43.5	144.3	211.2	+46.0	3.2	4.2
Chicago	1,204	1,081	48.1	38.6	223.0	195.5	-12.3	5.0	3.9
BOSTON	903	892	24.3	29.6	98.4	136.7	+38.9	2.2	2.7
Baltimore	337	300	16.5	16.7	76.5	84.3	+10.2	1.7	1.7
St. Louis	329	291	19.1	15.1	76.5	75.3	- 1.6	1.7	1.5
Rochester	47	39	11.5	9.2	52.6	50.5	- 4.0	1.2	1.0
Cleveland	191	164	12.4	10.5	56.6	48.1	-15.0	1.3	1.0
Dallas-Ft.Worth	170	204	9.4	10.1	35.2	42.2	+19.9	0.8	0.8
Cincinnati	127	112	10.1	7.9	44.9	33.8	-24.7	1.0	0.7
Total of 11 Met. Areas	24,421	23,326	627.9	631.6	3073.6	3159.5	+ 2.8	69.2	62.8
Rest of USA	6,539	N.A.	453.9	565.4	1369.7	1873.5	+36.8	31.0	37.2
Total of USA	30,960	N.A.	1081.8	1197.0	4443.3	5033.0	+13.3	100.0	100.0

Source: New York City Mayor's Committee for World Fashion Center,  
A Stitch in Time, p. 38

N.A. - Not Available

## APPENDIX A

TABLE IV. Relative Size of the Major Women's Wearing Apparel Markets in Percent of National Dollar Volume of Gross Production Costs

<u>City</u>	<u>1948</u>	<u>1950</u>	<u>1952</u>	<u>1954</u>
New York	68.4%	67.1%	67.3%	66.2%
Los Angeles	5.1	5.3	5.3	5.6 /
Chicago	4.7	4.9	4.4	4.4
Philadelphia	3.0	3.0	3.2	3.2 /
BOSTON	2.3	2.6	2.7	3.1 /
St. Louis	1.6	1.8	1.5	1.5
Kansas City	0.9	1.0	0.9	1.1
Dallas-Ft. Worth	0.8	0.9	1.0	1.0
Baltimore	0.7	0.8	0.8	0.9
Cleveland	1.3	1.1	0.9	0.8
San Francisco	1.0	1.3	0.9	0.8
Miami	0.2	0.3	0.3	0.5 /
Cincinnati	0.4	0.4	0.5	0.4
Milwaukee	0.4	0.4	0.4	0.3
All Other Areas	9.2	9.1	9.9	10.2

Source: International Ladies' Garment Workers' Union, "Trends and Prospects; Women's Garment Industry, 1953-1956," May 1956, p. 19, "based on data collected by the National Credit Office".

## APPENDIX A

TABLE V. Division of Each Dollar Spent for Women's Garments Among Wages of Production Workers, Material Costs, Manufacturers' Overhead, Profit and Retail Mark-up.

	<u>Material</u>	<u>Wages</u>	<u>Manufacturers' Overhead and Profit</u>	<u>Retail Mark-Up</u>
Dresses	\$ .29	\$ .17	\$ .17	\$ .37
Blouses	.28	.17	.17	.38
Coats, Suits, Skirts	.32	.15	.16	.37
Children's Outerwear	.32	.15	.16	.37
Corsets & Bras	.24	.11	.20	.45
Average	.29	.15	.17	.39
Percent of Manufacturer's Dollar	47%	25%	28%	

Source: International Ladies' Garment Workers' Union, Research Department, 1956

## APPENDIX A.

TABLE VI. Size of Shops Producing Women's Garments, March 1953

<u>Size of Shop</u>	<u>Women's Outer Wear U.S.</u>	<u>Under- garments U.S.</u>
Under 3 workers:	9.8%	10.3%
4-7 workers	8.5	8.8
8-19 workers	23.1	20.7
20-49 workers	37.0	26.2
50-99 workers	15.1	17.4
100-249 workers	5.4	12.5
250-499 workers	0.9	2.9
500 workers and over	0.2	1.2
	<u>100.0%</u>	<u>100.0%</u>

Source: International Ladies' Garment Workers' Union,  
Research Department

## APPENDIX A

TABLE VII. Distribution of Workers by Size of Establishment,  
Boston, Mass., September 1955

Census Code	<u>Total</u>		<u>Less Than 8</u>		<u>8 - 24</u>		<u>25 - 99</u>		<u>100 - 249</u>		<u>250 - 500</u>	
	<u>Est.</u>	<u>Wkrs.</u>	<u>Est.</u>	<u>Wkrs.</u>	<u>Est.</u>	<u>Wkrs.</u>	<u>Est.</u>	<u>Wkrs.</u>	<u>Est.</u>	<u>Wkrs.</u>	<u>Est.</u>	<u>Wkrs.</u>
233	254	8,845	39	159	84	1,310	118	5,590	12	1,517	1	269
234	12	605	1	7	3	63	6	265	2	270	--	--
236	15	494	1	4	7	92	6	297	--	--	--	--
	<u>281</u>	<u>9,944</u>	<u>41</u>	<u>170</u>	<u>94</u>	<u>1,465</u>	<u>130</u>	<u>6,152</u>	<u>14</u>	<u>1,787</u>	<u>1</u>	<u>269</u>

Note: Inconsistency of totals due to time span while count was taken

Source: Massachusetts Division of Employment Security.  
Establishments Covered by Massachusetts Employment  
Security Law

## APPENDIX A

TABLE VIII. Distribution of Firms in the Women's Garment Industry in United States by Dollar Volume, 1954 (Both Jobbers and Manufacturers)

<u>Annual Sales</u>	<u>1948</u>	<u>1950</u>	<u>1952</u>	<u>1954</u>
Under \$100,000	15.6%	16.8%	14.4%	14.0%
\$100,000-\$250,000	25.1	23.7	21.8	21.1
\$250,000-\$500,000	27.3	21.6	21.1	20.8
\$500,000-\$1,000,000	16.6	17.0	19.3	19.4
\$1,000,000-\$2,500,000	11.2	11.5	13.8	15.5
\$2,500,000-\$5,000,000	2.6	2.6	3.4	3.8
Over \$5,000,000	1.1	1.3	1.5	1.8
New Firms or volume unknown	<u>5.5</u>	<u>5.5</u>	<u>4.7</u>	<u>3.6</u>
	100.0%	100.0%	100.0%	100.0%

Source: International Ladies' Garment Workers' Union,  
Research Department

## APPENDIX A

TABLE IX. Extract for Boston only from Table Reporting Employment and Wages for 1955, by Municipality and by Industry.

<u>Census Code</u>	<u>233</u>	<u>234</u>	<u>236</u>	<u>Total</u>
Total Number of Establishments	261	13	15	289
Total Compensation (add 000)	\$27,056	\$1,667	\$1,329	\$30,052
<hr/>				
Number of Employees (Av. 12 months):	8,469	566	441	
January	8,550	536	442	
February	8,935	501	484	
March	8,233	562	469	
April	8,332	556	411	
May	8,354	556	390	
June	8,346	570	402	
July	8,109	517	468	
August	8,634	597	460	
September	8,845	605	494	
October	8,548	617	423	
November	8,476	607	438	
December	8,279	577	422	

Source: Massachusetts Department of Employment Security, 881 Commonwealth Avenue, Boston, Massachusetts



## APPENDIX A

TABLE X. Wholesale Trade Area Statistics 1954

MASSACHUSETTS:

<u>Type of Operation and Kind of Business</u>	<u>Estabs.</u>	<u>Sales: 000</u>	<u>Paid Employ- ees' Work Week Ending Nov.15, 1954</u>
Apparel (Incl. Footwear)	54	\$44,246	166
Clothing Furnishings Men and Women	8	6,526	15
Women's, Children's Clothing	23*	16,693	87

BOSTON STANDARD METROPOLITAN AREA:

Apparel Incl. Footwear	50	\$41,275	156
Clothing, Furnishings: Incl. Men's and Women's	7		
Women's, Children's: Clothing and Acces- sories	22*		

\*Note: 23 wholesalers listed for Massachusetts, 22 of these for Boston, and all of these are located at 75 Kneeland Street.

Source: 1954 Census of Manufactures, Massachusetts, Table 101

## APPENDIX A

TABLE XI. Distribution of New England Manufacturer, Jobber, and Contractor by Census Categories, by Numbers of Establishments and Employees

Item Produced	Census Code	Total		Manufacturer		Jobber		Contractor	
		(a)	(b)	(a)	(b)	(a)	(b)	(a)	(b)
*Blouses	2331	60	1,943	13	386	6	84	41	1,473
*Dresses	2332	236	13,851	42	2,114	20	548	174	11,188
Dresses	2334	66	4,249	27	2,069	--	---	---	---
*Women's Skirts	2337	213	8,100	68	2,553	33	883	112	4,563
*Women's & Children's Underwear	2341	78	7,886	39	4,824	7	308	32	2,754
Corsets	2342	42	4,147	31	3,373	not comparable-----			
Children's Dresses	2361	25	1,088	10	588	--	---	15	529
Children's Coats	2363	14	895	6	365	not comparable-----			
*Children's Outerwear n.e.c.**	2369	42	2,526	19	1,413	6	268	17	844
Totals of the Comparable Categories (5 of 8)		629	34,496	181	11,290	72	2,091	376	20,821
Percent of Totals		100%	100%	28%	--%	12%	%	59%	60%

(a) - Establishments; (b) - Employees

\*\* Not elsewhere classified

Source: 1954 Census of Manufacturers

## APPENDIX A

TABLE XII. Location of Massachusetts Ladies' Garment Firms  
in the U.S. Census Categories: 233, 234, 236, 1956

1956 Directory of Manufacturers: shown on map nos. 4, 5, 6							
Abington	1	Ipswich	1	Plymouth	3	Cambridge	6
Athol	1	Lawrence	5	Quincy	3	Waltham	9
Bellingham	1	Leominster	3	Randolph	1		
Beverly	2	Lowell	20	Rockland	5		
Brockton	13	Lynn	5	Salem	1		
Chelsea	2	Malden	2	Shirley	1		
Chicopee	1	Marlboro	1	Somerset	2		
Clinton	1	Maynard	1	Somerville	2		
Everett	2	Medford	1	Springfield	20		
Fall River	65	Melrose	1	Stoughton	3		
Fitchburg	1	Methuen	1	Taunton	2		
Framingham	4	Natick	-	Wakefield	1		
Franklin	1	Needham	1	Warren	1		
Gloucester	1	New Bedford	46	Winchendon	3		
Haverhill	2	Palmer	1	Woburn	1		
Holyoke	3	Pittsfield	3	Worcester	32		
Total these cities:							289
Boston except study area:							74
Boston study area:							169
Total for Mass.							<u>532</u>

Source: Massachusetts Department of Commerce, 1956  
Directory of Manufacturers

APPENDIX B. DESCRIPTION OF CENSUS CATEGORIES OF THE WOMEN'S APPAREL INDUSTRY SELECTED FOR DETAILED ANALYSIS

The study of the women's apparel industry in this report is confined to those industries that produce apparel under one or more of the following Census categories, as listed in the 1954 Census of Manufactures:

- 23.31--Blouses -- including women's and junior blouses, waists, and shirts. Also, women's, misses', and junior knit outer wear and sport shirts.
- 23.33--Unit price -- Women's and misses' dresses including ensemble dresses. These garments are usually sold by the piece.
- 23.34--Dresses, dozen price -- Women's and misses' household apparel, chiefly of washable fabric. These garments are usually sold by the dozen. Also included are individual aprons, smocks and house dresses.
- 23.39--Women's outerwear -- Bathing suits, beachwear, slacks, riding habits, ski suits, swim wear, sweaters, and outerwear, and sport shirts.
- 23.41--Women's and children's underwear -- Women's and misses', children's and infants' underwear and nightwear.
- 23.42--Corsets and allied garments -- Corsets, corset accessories, brassieres, girdles, and foundation garments.
- 23.61--Children's dresses -- Children's and infants' dresses, children's blouses, blousesettes, waists, and skirts.
- 23.63--Children's coats, children's and infants' coats -- Coats and legging sets, snow suits. Also garments in girls' teenage size.
- 23.69--Children's outwear -- Children's and infants' outerwear, such as housecoats, middies, slacks, beachwear -- teenage sizes, too.

## APPENDIX C. TABULATION OF BOSTON LABOR SURVEY

A characteristic of the Boston garment industry is that there is a chronic shortage of stitchers. Approximately half of the stitching done on garments manufactured in Boston is contracted out to small stitching shops all over New England. The following is a rough estimate of the stitchers outside of the Boston area contracting to work on Boston garments. The major centers only are listed as there are numerous small shops that appear and disappear with regularity. In addition there are a number of home workers in the industry: figures from the Massachusetts Department of Labor and Industries show that there were approximately 3,300 licensed home workers in 1946 while today there are nearly 3,500.

A list of the major stitching contractors appears below by location:

<u>Massachusetts</u>	<u>% of work for Boston</u>
Brockton	90
Fall River	15-20 (remainder for NYC)
Lawrence	80
Lowell	80
New Bedford	15-20 (remainder for NYC)
Springfield	80
Waltham	100
Worcester	60

<u>New Hampshire</u>	<u>% of work for Boston</u>
Concord	90
Manchester	90
Nashua	90
<u>Maine</u>	
Auburn	90
Lewiston	90
Portland	90
Sanford	90

It is estimated from various union sources that there are approximately 11,000 stitchers available to Boston manufacturers including Rhode Island. The contractors on the northern fringe service Boston, while in the New Bedford and Fall River areas, as well as Rhode Island, receive the main part of their work from New York City.

The chart below tabulates the survey of the Massachusetts workers in the industries covered by this study. It represents an approximate 20 percent sampling of the union membership file. The sex and home address of every fifth worker were simply recorded.

Without a questionnaire answered by workers as to the means of transportation used in their daily journey to work, we can only rely on the repeated assurances of manufacturers and union officials that at least 85 percent of all their

workers used the MTA system. The distribution of workers' residences plotted from the survey confirms this observation, showing the majority living near transit.

On Maps Nos 1, 2, and 3, are plotted the results of the survey. Map No. 1 gives the location of the workers' residences in the entire Boston Metropolitan area. Map No. 2 shows the location of the workers in the sample in the Boston Metropolitan area, and the major transit lines. Map No. 3 shows their major work destinations in downtown Boston.

Union Local City or Town	80			554			73			12			33			39			46			56				Totals				
	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T
Franklin													1	-	1												1	-	1	
Hanover	1	-	1													1	-	1									2	-	2	
Haverhill	-	1	1																1	-	1					1	1	2		
Hingham																			1	-	1					1	-	1		
Holbrook							-	1	1																	-	1	1		
Hull							-	2	2																	-	2	2		
Lexington	1	-	1																							1	-	1		
Lawrence	1	-	1																							1	-	1		
Lynn	1	-	1																							4	-	4		
Malden	10	-	10				-	2	2	-	3	3	2	-	2	1	1	2			3	-	3			23	6	29		
Medford	41	-	44	-	1	1	-	2	2	-	2	2	8	-	8						3	-	3			52	8	60		
Middleton													1	-	1						1	-	1			2	-	2		
Milton	1	-	1												1	-	1				2	-	2			4	-	4		
Newton							-	2	2												3	-	3			3	2	5		
Natick																					1	-	1			1	-	1		
Nahant	2	-	2																		-	-	-			2	-	2		
Norwood	3	-	3																		1	-	1			4	-	4		
Needham	1	-	1																		1	-	1			2	-	2		
Quincy	10	-	12	-	1	1	-	2	2												1	-	1			11	5	16		
Revere	29	-	31				-	2	2	-	6	6	5	-	5						3	-	3	-	1	1	37	11	48	
Randolph	1	-	1				-	1	1					1	-	1										2	1	3		
Reading	1	-	1											1	-	1					1	-	1			3	-	3		
Sharon							-	1	1					1	-	1										1	1	2		
Stoneham	2	-	2																		1	-	1			3	-	3		
Swampscott	1	-	1																							1	-	1		
Tewksbury																1	-	1								1	-	1		
Somerville	32	-	35	-	1	1	-	1	1	-	3	3	5	-	5	1	-	1	6	-	6					44	8	52		
Sudbury	1	-	1																							1	-	1		
Westwood	1	-	1																							1	-	1		
Weston																					1	-	1			1	-	1		
Weymouth				-	1	1				-	1	1														-	2	2		
Watertown	8	-	8							-	1	1	3	-	3						3	-	3			14	1	15		
WAKEfield	2	-	2																							2	-	2		
Waltham	3	-	3				-	2	2												1	-	1			4	2	6		
Winchester	3	-	3											2	-	2										5	-	5		
WINTHrop	3	1	4	-	1	1				-	1	1	2	-	2						1	-	1	-	1	1	6	4	10	
Woburn	1	-	1																							1	-	1		
GRAND TOTAL	498	-	285	26	4	30	34	1	64	65	14	58	72	24	7	11	25	8	10	21	22	03	12	04	3	22	259	80	216	1196



**TABULATION OF WORKERS' RESIDENCES, MASSACHUSETTS LADIES' GARMENT INDUSTRY 1957**

UNION LOCAL	80			554			73			12			33			39			46			56			Totals		
	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T	F	M	T
<b>CITY OR TOWN OF RESIDENCE</b>																											
Boston Proper	84	4	88	1	6	7	-	1	1	6	5	11	61	-	61	-	-	-	38	-	38	1	1	2	191	17	208
Allston	2	2	4	-	-	-	-	1	1	-	-	-	2	-	2	-	-	-	3	-	3	-	-	-	7	3	10
Brighton	3	-	3	-	2	2	-	3	3	-	-	-	3	2	5	1	-	1	5	-	5	-	1	1	12	18	20
Charlestown	1	-	1	-	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	1	2
Dorchester	25	1	26	1	5	6	11	3	14	1	16	17	33	3	36	1	1	2	32	1	33	1	10	11	95	50	145
Hyde Park	15	-	15	-	1	1	-	1	1	-	-	-	3	-	3	-	-	-	-	-	-	-	-	-	18	2	20
Jamaica Plain	6	-	6	-	-	-	-	-	-	-	1	-	4	-	4	-	-	-	2	-	2	-	-	-	12	1	13
Mattapan	2	-	2	-	1	1	-	7	7	1	4	5	7	-	7	-	-	-	9	-	9	-	3	3	19	15	34
Roslindale	10	1	11	-	-	-	-	2	2	-	1	1	5	-	5	-	-	-	6	-	6	-	-	-	21	4	25
Roxbury	10	-	10	1	3	4	-	6	6	5	7	12	51	5	56	1	-	1	35	-	35	1	4	5	104	25	129
East Boston	96	3	99	-	-	-	-	1	1	-	2	2	7	-	7	2	-	2	4	-	4	-	-	-	109	6	115
South Boston	7	-	7	1	2	3	-	-	-	-	-	-	4	-	4	-	-	-	2	-	2	-	-	-	14	2	16
<b>Boston Total</b>	<b>261</b>	<b>11</b>	<b>272</b>	<b>4</b>	<b>21</b>	<b>25</b>	<b>135</b>	<b>36</b>	<b>13</b>	<b>36</b>	<b>49</b>	<b>180</b>	<b>101</b>	<b>90</b>	<b>5</b>	<b>1</b>	<b>6</b>	<b>136</b>	<b>1</b>	<b>137</b>	<b>3</b>	<b>19</b>	<b>22</b>	<b>603</b>	<b>134</b>	<b>737</b>	
Ayer																			1	-	1				1	-	1
Acton							-	1	1																-	1	1
Abington										-	1	1													1	1	2
Arlington	8	1	9							-	1	1	1	-	1				2	-	2				11	2	13
Auburndale										-	1	1													-	1	1
Belmont	6	-	6				-	1	1																6	1	7
Brookline				-	1	1	-	2	2	-	1	1	1	-	1				6	-	6				7	4	11
Billerica	1	-	1																						1	-	1
Brockton																			1	-	1				1	-	1
Burlington	1	-	1																						1	-	1
Cambridge	11	-	11	-	1	1	-	2	2	1	-	1	10	-	10				6	-	6				28	3	31
Chelsea	12	1	13	-	2	2	-	3	3	-	1	1	10	-	10	1	-	1	8	-	8				31	7	38
Concord	1	-	1																						1	-	1
Dedham	4	-	4	-	-	-	-	1	1										1	-	1				5	1	6
Everett	32	3	35				-	1	1				5	±	6				4	-	4				41	6	47

## APPENDIX D. HYPOTHETICAL COMPARISON OF LOCATIONS

Let us examine a number of possible choices of alternate locations for the "average" manufacturer who desires to locate in order to maximize his profits. Ignoring factors such as the personal preferences of the owner, the choices that present themselves may be generalized as follows:

1. Locate in the hinterland (rural areas)
2. Locate in the satellite city (In Mass. a city in a depressed condition with a large female labor supply)
3. Locate on the outskirts of a major metropolitan area (Route 128, such as Waltham)
4. Locate in the center of a major urban area (Central Business District -- Kneeland Street, Boston)

All the locations listed above have various advantages and disadvantages for our hypothetical employer. What are some of the locational considerations for each manufacturer, jobber or contractor at each location? They may be summarized as follows:

1. <u>Facilities</u>	2. <u>Labor</u>	3. <u>Buyers and Market</u>	4. <u>Supply-Distribution</u>
Low rent	Size of Labor pool	Central location	Other manufacturers
Available space	Low wage scale	Retail stores	Transport. facilities, terminals and freight
Services-Utilities	Sex	Transportation	Material supply
		Hotels	

In explanation of some of the less obvious designations of the various categories:

- (1) Service-Utilities: represents available electric power, heat, etc.
- (3) Transportation: this includes access to public transportation via auto, transit, rail, etc.
- (4) Transportation facilities and terminals: refers to freight facilities for transport of products. Includes parcel post, truck, railroad and airlines.

Material Supply refers to access to textile wholesalers, machine supply dealers, etc.

Remembering the major conclusions of the study, let us test the various locations assigning weights to each locational factor mentioned above with a score of 100 as a possible total.

RATING No. 1 Assuming that Labor Is Most Important Factor

<u>Major Categories</u>	<u>Weight</u>	<u>Hinterland (Rural)</u>	<u>Satellite City</u>	<u>Suburb</u>	<u>CBD-Boston</u>
-------------------------	---------------	---------------------------	-----------------------	---------------	-------------------

Facilities 10

Low Rent	4	4	3	2	-
Avail. Space	3	1	2	2	3
Services - Util.	3 10	2 7	3 8	3 7	3 6

Labor 70

Avail. Labor	30	5	25	25	30
Low Wage Scale	35	35	33	20	15
Sex F	4	1	4	3	4
M	1 70	- 41	1 63	1 49	1 50

Buyers and Market 10

Central Location	5	-	4	4	5
Retail Stores	3	1	2	2	3
Transportation	1	-	1	1	1
Hotels	1 10	- 1	1 8	- 7	1 10

Supply-Distribution 10

Other Mfcrs	4	-	3	2	4
Transp. Facilities & Terminals	4	-	3	2	4
Mat. Supply	2 10	- 0	2 8	1 5	2 10

Totals	100	100	49	87	67	76
--------	-----	-----	----	----	----	----

RATING No. 2 Assuming that Labor, Buyers-Market and Supply-Distribution Are of Equal Value

<u>Major Categories</u>	<u>Weight</u>	<u>Hinterland (Rural)</u>	<u>Satellite City</u>	<u>Suburb</u>	<u>CBD-Boston</u>
<u>Facilities</u> 10					
Low Rent	6	6	6	-	-
Avail. Space	3	1	3	1	3
Services - Util.	<u>1</u> 10	<u>1</u> 8	<u>1</u> 10	<u>1</u> 2	<u>2</u> 8
<u>Labor</u> 30					
Avail. Labor	15	2	12	8	15
Low Wage Scale	10	10	10	5	5
Sex M	1	-	1	-	1
F	<u>4</u> 30	<u>1</u> 13	<u>3</u> 26	<u>2</u> 15	<u>4</u> 25
<u>Buyers and Market</u> 30					
Central Location	15	-	10	8	15
Retail Stores	10	-	5	5	10
Transportation	4	1	2	3	4
Hotels	<u>1</u> 30	<u>-</u> 1	<u>-</u> 17	<u>-</u> 16	<u>1</u> 30
<u>Supply-Distribution</u> 30					
Other Mfcrs	12	-	7	-	12
Transp. Facilities & Terminals	12	-	7	3	12
Mat. Supply	<u>6</u> 30	<u>3</u> 3	<u>2</u> 19	<u>2</u> 8	<u>6</u> 30
Totals	100	25	72	41	93

RATING No. 3 Assuming that Location and Presence of Similar Industries Are the Most Important in Determining Location

<u>Major Categories</u>	<u>Weight</u>	<u>Hinterland (Rural)</u>	<u>Satellite City</u>	<u>Suburb</u>	<u>CBD-Boston</u>
<u>Facilities</u> 8					
Low Rent	4	4	3	2	1
Avail. Space	3	3	2	1	1
Servicies - Util.	<u>1</u> 8	<u>1</u> 8	<u>1</u> 4	<u>1</u> 4	<u>1</u> 3
<u>Labor</u> 22					
Avail. Labor	12	4	10	8	12
Low Wage Scale	7	7	6	3	1
Sex M	1	-	1	-	1
F	<u>2</u> 22	<u>2</u> 13	<u>2</u> 19	<u>2</u> 13	<u>2</u> 16
<u>Buyers and Market</u> 35					
Central Location	20	2	12	11	20
Retail Stores	10	-	8	6	10
Transp. Term.	4	-	2	1	4
Hotels	<u>1</u> 35	<u>1</u> 2	<u>1</u> 23	<u>1</u> 18	<u>1</u> 35
<u>Supply-Distribution</u> 35					
Other Mfcrs	20	-	12	7	20
Transp. Facilities	10	2	8	5	10
Material Supply	<u>5</u> 35	<u>1</u> 2	<u>4</u> 27	<u>4</u> 16	<u>5</u> 35
Totals	100	25	75	51	88

In explanation of how the ratings were arrived at, here is a description of the first Rating Score Sheet:

In rating no. 1 under the category of 'facilities,' the satellite city has the highest score reflecting an assumed combination of available space, moderate rents and adequate utilities. The Central Business District scores the lowest primarily due to higher rents than in areas less centralized.

Under the category of labor, the assumed lower wages plus availability of labor in a satellite city score higher than the Central Business District location with its higher potential labor pool, but also higher wage scale. A suburban location offers a relative good score here.

Considering Buyers and Markets as affecting a manufacturer's choice of location, the Central Business District out-scores the satellite city. This advantage would be even more pronounced if the category weight were higher as it is in the next ratings.

Again in considering the items under Supply and Distribution, the Central Business District outweighs the satellite city as is expected. The relatively high score given to the 'Other Manufacturer' in the satellite city assumes that there would be a grouping of manufacturers as has happened in Fall River and in other cities.

In summarizing the results of this rating of the various locations, we see at once where labor is the prime consideration as it is for the contractor, a satellite city in Massachusetts offers the best choice of location.

When we assume that the major categories of Labor, Buyers-Market, and Supply Distribution are equal in weight as they would be for the manufacturer, then the Central Business District scores highest, as in rating no. 2.

When we assume, as we did in rating no. 3, that a central location and proximity of similar manufacturers are of prime importance, as they are to the jobber, the Central Business District location scores highest again.

In all of the ratings, with the exception of No. 1 with its emphasis on labor, the suburban location scores low due to the proximity of the center city and the lack of ability of the suburb to pull its own in comparison with the center city. The satellite city can attract a minor concentration of the industry without the competition of a nearby center.



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### Interviews

In the course of the survey, during the Fall of 1957, interviews were held with a number of International Ladies' Garment Workers' Union officials in both New York and Boston, with the President of the Garment Manufacturers' Association of Boston (J. Fialco), and with several small manufacturers in the Boston women's apparel industry.