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importance owing to the fact that there are some articles and operations which cannot be carried out by machine.

In normal times, and particularly during the winter season, the straw braid industry, including its auxiliary industries, employs some 2,500 to 3,000 people. These are small numbers it is true, but they can be seen in their true perspective when it is considered that this industry is confined to only a small part of Switzerland, which is essentially rural in character.

There are few outlets in the country itself, and that is why attention was focussed on export right from the very start. Now where millinery is concerned it is a strict rule that the final finishing operations are best carried out at, or as near as possible to the place where the article is to be sold to the public. This is the reason why even to-day, as for the last 200 years, the products of Wohlen are despatched to the workshops of the great towns, to the fashion centres of Paris, London and New York, where they are worked on by the milliners who use them to make their creations; they are also used by hat manufacturers (see article below).

It may be wondered how it is that in a country district of Switzerland, far from all the world fashion centres, an industry so essentially connected with luxury fashion should have succeeded not only in surviving but even, these last few years, in maintaining

its lead. It must be pointed out that this industry is seasonal, that it is dependent on fashion and is only practised in the winter months, from October to May. It does not provide all the year round employment for its workers. That is why conditions in Aargau are so ideal, for most of the population which is occupied in agriculture during the summer months, is free during the winter to work in the straw braid industry. Moreover the energy and enterprise of the manufacturers and merchants play a decisive role with regard to competition, for the existence of their industry depends on the manufacture of high-grade products, on the continual creation of novelties and on a rational organisation of labour.

In Aargau therefore the greatest attention is paid to the professional training of the technical staff; the mechanical plant is continually improved and brought up to date. During these last ten years many technical improvements have been effected in the Swiss straw braid industry. Most of the basic materials used to-day for the manufacture of braid are made in Switzerland.

The strength of this Aargau industry lies principally in the production of novelties and, in this respect, the results have been remarkable, for the manufacturers remain in close touch with Paris, the centre of world fashions, and with the principal markets of both the old and new worlds.



THE MILLINERY INDUSTRY

by Dr. H. R. LÄNG, Erlenbach (Zurich)

It might easily be said that the hat is to a certain extent the dot on the «i» of chic. Without it the silhouette of the best dressed of women would be lacking in harmony and grace. That is why the hatless fashion, the nightmare of the milliner, which is considered by some to be an expression of woman's emancipation, appears to many others as the sign of the worst neglect and consequently deserving only to be despised.

The field of millinery, more than any other, is subject to the sudden passing whims of fashion. The manufacture of women's hats is therefore largely ruled, from the economic point of view, by seasonal variations in production and the great risks arising out of sudden changes in taste; it may therefore be considered as the perfect example of an industry entirely dependent on fashion.

In Switzerland, as in France where the fashion of the day is dictated, the original form of this activity was the small workshop of the milliner who sold, in addition to her own creations, copies of Parisian models imported by wholesalers. The situation changed completely after the first World War when the sudden vogue for felt and straw hats, to the detriment of hats made of fabrics, developed mechanical production while striking a blow at manufacture by hand. The factories opened up at this time were able to meet almost entirely the requirements of the home market as regards hats of the simple type and in the lower price brackets. On the other hand, the «model»



type hat still remains even to-day the undisputed speciality of the milliner.

Swiss producers limit themselves to trimming and finishing hats, so it is only a question of the last stage in manufacture, the necessary material being mainly supplied from abroad. However we must not forget to mention Swiss braid and straw shapes (see page 86) which, together with felt hoods (see «Swiss Textiles» No. 2/1950, page 66), are very highly considered throughout the world and have always been a valued contribution to hat-making.

To-day women's hats are made in Switzerland in about a thousand milliners' workshops and some twenty factories, employing a little more than three

thousand people in all. With the passing of time this industry, which formerly used only to make copies, has broken free and begun to produce a very large proportion of its own models.

The tendency of women's hat manufacturers in Switzerland to draw their inspiration from the creations of Paris only in their main outlines, and to adapt them to the less exclusive tastes of their Swiss customers, has ensured their success.

The increase in the exports of Switzerland's women's hat industry recorded since the end of the last war opens up prospects which enable it to consider its present situation and its chances for the future with a certain optimism.



THE FOOTWEAR INDUSTRY

by Dr. O. A. ZIEGLER, Secretary of the Association of Swiss Footwear Manufacturers, Zurich

Switzerland's footwear industry, like «Swiss Textiles», is celebrating an important event this year; it is a hundred years since C. F. Bally added the mass production of footwear to the weaving of elastic fabric, which makes him the real founder of our industry. He certainly had no idea at the time of the difficulties he would have to face, nor of the great success which was to be his reward once he had overcome all the obstacles in his way. As the Swiss public was at first very suspicious of ready-made shoes, Bally was obliged right from the start to turn to markets abroad. After his first successes in South America, he was able to improve the quality of his

products considerably and then to gain a foothold in France first of all, and subsequently in England. Thus this concern made rapid strides during the lifetime of its founder (C. F. Bally died in 1899), and his successors have completed its development and made it into an important enterprise with worldwide ramifications and numerous manufacturing and sales branches abroad (to-day the C. F. Bally Holding Co. Ltd., established in 1921). The reputation enjoyed by Bally shoes all over the world to-day is due above all to the particularly high standards of design, materials, workmanship and service.

As a result of the general economic development, other enterprising men, following the example of Bally, soon turned to the manufacture of footwear. The foundations of the industry were really laid in the last two decades of the 19th century when most of the important footwear factories in Switzerland were founded. Among these let us mention in particular the firm of Hug, a very progressive concern, and the well-known firms Fretz, Loew, Strub-Glutz and Walder.

Switzerland's footwear industry has known periods of brilliant success as well as periods of crises and difficulties in its struggle for existence. The limitations of the home market, the consequent necessity to export and the threat of foreign competition are the decisive factors in its existence. About 1930 exports which had been prospering suffered a rude shock when the Swiss market was flooded with cheap foreign mass-produced goods. This occurred again after World War II and — home production being very highly developed — there was a glut on the Swiss market, with all the consequences that follow in its train. During the last two years imports into Switzerland have decreased and taken on more reasonable proportions. On the other hand, thanks to progress in the liberalisation of trade, Swiss exports have been able to recover some of their importance although they have not yet reached their pre-war level. The immediate future of Switzerland's footwear industry is dominated by conditions on the international leather and hide market and their repercussions on prices and supplies of raw materials.

