

Zeitschrift: Textiles suisses [Édition multilingue]
Herausgeber: Textilverband Schweiz
Band: - (1984)
Heft: 58

Artikel: US shirt market : a bouyant market
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DOI: <https://doi.org/10.5169/seals-795225>

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US SHIRT MARKET

By Beatrice Feisst



▷ Upholding the tradition of fine quality: Hathaway premium men's furnishings.

▷▷ Crafting a quality shirt: Hathaway fine cotton shirtings and single-needle tailoring.

A BUOYANT MARKET

At the last count, the male population of the United States numbered 113 million. Fifty million are in the 20 to 50 age group which – in terms of numbers and purchasing power – represents the greatest growth segment. It may be safely assumed that every one of these millions of Americans owns at least one shirt and is probably in the market to buy an additional one each year.

HOME PRODUCTION

The industry catering to the shirt requirements of this large consumer potential counts about 800 manufacturing companies giving work to some 90,000 employees. Leading manufacturing states are New York (156 plants) and California (130 plants). In 1982, home production of men's dress and business shirts, including uniform shirts, amounted to 7 million dozen or \$766 million in shipment value, with 1.5 million dozen made of all cotton or chiefly cotton fabrics. The same year, production of woven sport shirts reached 4 million dozen or \$390 million in ship-

ment value, with 1 million dozen made of all cotton or chiefly cotton fabrics. The almost 50% share in total industry shipments accounted for by the 20 largest companies illustrates the concentration of the industry.

IMPORT/EXPORT

Every third shirt sold at retail level in America is imported. Latest available data (1981) on cotton dress shirts record imports of one million dozen at \$60,000 C.I.F. value and for the past three years annual increases of plus 25% in value.



Main supply sources are Hong Kong (535 thous. doz.), Singapore (115 thous. doz.) and India (104 thous. doz.). In the same year and shirt category, exports from the United States totaled 97,000 dozen worth \$3.8 million.

RETAIL SALES

In terms of the American economy, 1982 was the worst since the great depression. Nevertheless, sales of dress shirts increased by approximately 6%. Shirts, as well as other men's furnishings, have been seen as an inexpensive method of refurbishing an aging wardrobe, with consumers tending to pay higher prices for their shirts. As the better-priced dress shirt boom continued, retail sales in the under-\$15 price range dropped sharply, whereas the \$15 to \$20 price range picked up 25% and the over-\$20 price range jumped to a 50% gain in units and value. Yet, in spite of this swing to upscale prices, out of 100 dress shirts sold to consumers only 7 carry an over-\$20 price tag, only 6 are all cotton and only 13 cotton-rich blends.



*On historic grounds:
The Hathaway plant
at Waterville/Maine.*

CONSUMER TRENDS

Of the 2.6 billion dollars spent by Americans on dress and sport shirts in 1982, department stores raked in a major portion. Their current market share is about 33% of all units sold, followed by chain stores (25%), discounters (20%) and specialty stores (15%). As consumer awareness focuses on a fair exchange of value for money, designer brands are expected to give way to a growing demand for private labels.

HATHAWAY

A LEADING BRAND IN READY-MADE SHIRTS

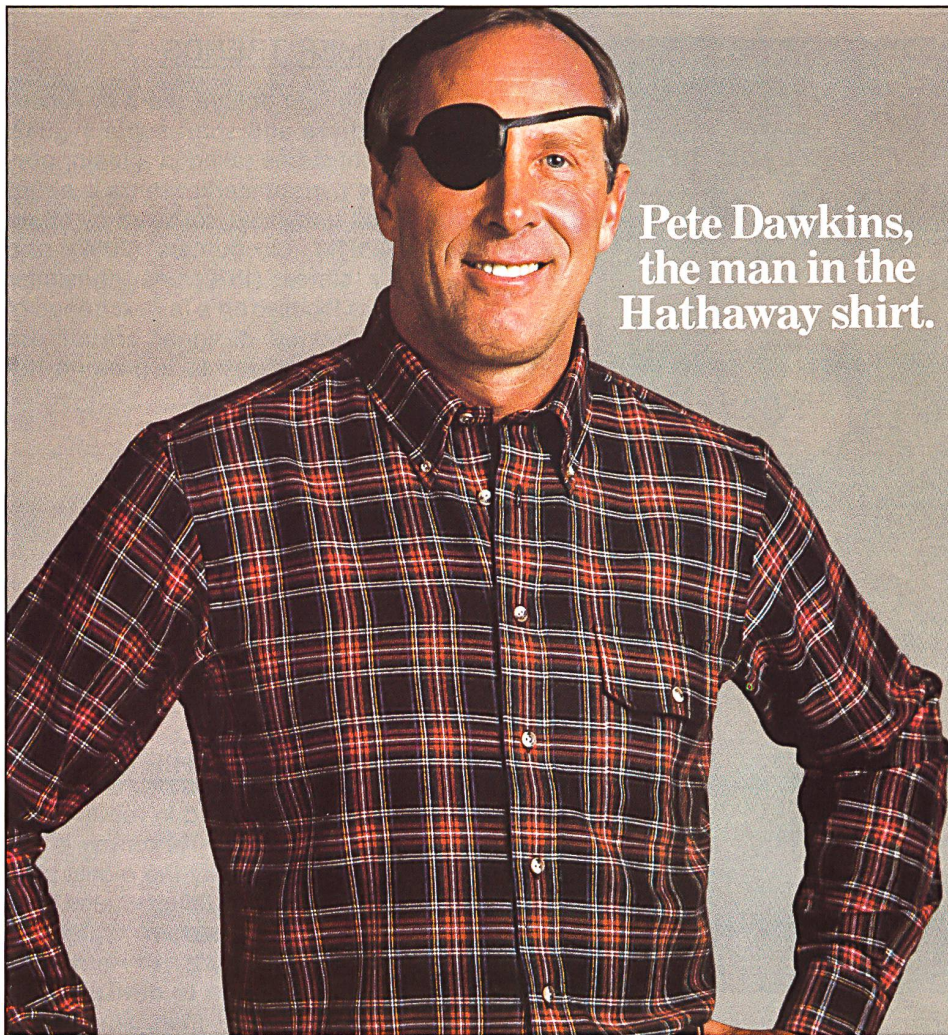
A major American brand in ready-made dress and sport shirts, Hathaway is not the largest but certainly the oldest shirt manufacturer in the United States. The company was founded in Waterville/Maine in 1837 by Charles F. Hathaway, who was the first man to devise ready-made shirts. Up until then, shirts were either home-made or tailor-made. Since

the days when C.F. Hathaway took his weekly production of two dozen dress shirts by stage coach to Boston stores and — because of their exceptional quality — returned with more orders than he could fill, the company's facilities, markets and image have evolved. But, to this day, the tra-

dition of quality has always been upheld at Hathaway.

A Division of Warnaco since 1960, Hathaway numbers about 1000 employees at their Waterville plant and their Division Headquarters on New York's Park Avenue. As a top-of-the-line brand with retail prices starting at \$31 for cotton-rich blends and \$42.50 up to \$70 for all cotton shirts, the firm has been profiting by the American consumers' new awareness of quality and their return to better brand names. Last year, Hathaway brand sales 115

US SHIRT MARKET

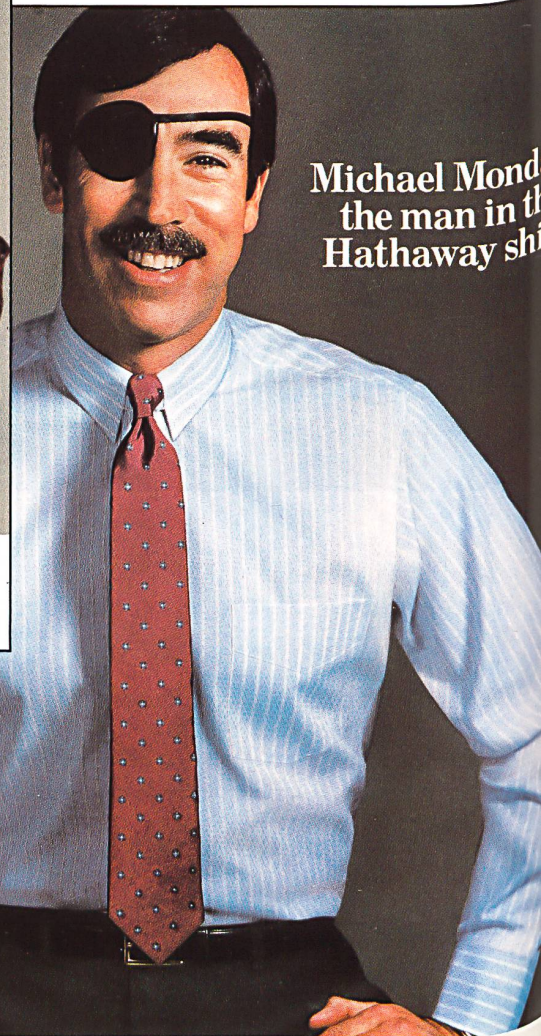


**Pete Dawkins,
the man in the
Hathaway shirt.**

◁ A mainstay of the Hathaway sport shirt collection:
The Lochlana sport shirt in 80% cotton/20% wool flannel by Hausamann + Moos.

▽ The man in the Hathaway shirt:
Distinguished dress shirt and neckwear, management style à la Hathaway.

Every man has his own management style, at work or at ease.
Take Pete Dawkins. Assured, accomplished, distinguished as a Brigadier General, Heisman Trophy winner and Rhodes Scholar.
And there's a Hathaway sport shirt to match. Does that mean there's a Hathaway shirt for every management style?
No, only successful ones. **Management Style. Hathaway.**



**Michael Mondavi,
the man in the
Hathaway shirt.**

Every man has his own management style.
Take Michael Mondavi. Proud, persistent, dedicated to a tradition of quality winemaking.
And there's a Hathaway shirt to match. Does that mean there's a Hathaway shirt for every management style?
No, only successful ones. **Management Style. Hathaway.**

approximated 190,000 dozen shirts, all manufactured at Waterville and sold to the country's prestige retail stores. The Hathaway Division is also the largest marketer of Christian Dior men's furnishings in the world and of a wide array of products under the Chaps by Ralph Lauren label.

Since his first appearance in 1951, the man with the black eye patch has been the company's internationally recognized hallmark. This year, for the first time in its history, Hathaway is investing up to \$2 million in a national advertising campaign which features business celebrities wearing the famous patch. Management style à la Hathaway should appeal to the company's main consumer target group: the over-35 years, over \$35,000 annual income business executive.

CHRIS-ARTO

MAKERS OF CUSTOM-MADE QUALITY SHIRTS

From his arrival in America some 30 years ago to this day, Greece-born shirt designer Chris Batsides has been dedicated to the making of quality shirts in the best tradition of custom-tailoring. The mini empire which he and his partners founded and manage is probably the most unique operation in the American shirt industry.

To start with, there is Andros Imported Shirts, established ten years ago as importers of fine Swiss cotton shirtings. The firm carries large stocks of classical shirtings in pure cotton, pure silk and natural wool/cotton blends. Many designs are exclusive to their label. Sales to manufacturers of custom-made and top-of-the-line ready-made shirts located throughout America amount to 300,000 yards a year. Chris Batsides, who styles the line on his regular trips to Europe, goes for a conservative look in shirting designs and for pastel colorations. In Switzerland

he works with Hausammann + Moos whom he names as his number one supplier because "they offer quality goods, creativity in design, nice colorations and prompt deliveries". Another Swiss source of supply is Weberei Steg. In addition to the poplin and voile dress shirtings, the prints and wool/cotton sport shirtings, Andros also import interlinings from Switzerland.

According to Tom Vier, Merchandising Director Dress and Sport Shirts, the Hathaway brand is based on classic white-ground shirtings of the highest quality. All shirts still have single-needle tailoring and quality control is probably one of the toughest in the industry, both of outgoing manufactured and incoming piece goods. Switzerland, England, Japan and America are all sources for Hathaway fabric purchase. With regard to their Swiss suppliers, Tom Vier said in a recent interview:

"Our relationship with the Swiss shirting mill Hausammann + Moos goes back 35 or 40 years. There are two reasons why we buy from them. The first reason is quality. We consider the quality of their fabrics one of the finest, if not the finest, in the world. There is perception and sophistication in the cotton shirtings they show us, and we often find their colours and designs very directional. The second reason is psychological. In this country, Swiss goods are perceived as being the best. Swiss watches, Swiss chocolates, Swiss fabrics – there is mystique to it. That is why we put 'woven in Switzerland' right on our shirt labels."



CHRISTOPHER MOORE

Chris Batsides and Arto Barikyan: Taking pride in a product that sells by word of mouth recommendation.

US SHIRT MARKET

Also located at 39 West 32nd Street in Manhattan is the Chris-Arto Custom Shirt Company, makers of fine custom-made shirts and a major customer of Andros. Founded in 1964 by Chris Batsides and Arto Barikyan, the firm now tailors 500 shirts a week from a wide selection of pure Swiss cotton and pure silk shirtings. At Chris-Arto, a new customer starts out with a paper pattern prepared to his measurements and a sample shirt which will be fitted and altered until perfect. The minimum order is six shirts, but there are customers who will order 150 shirts at a time, running up a bill of \$20,000 and more.

Each shirt is cut separately by hand, single-needle stitched, with hand-sewn monogram and mother-of-pearl buttons. Before delivery to the customer, the shirt is laundered and ironed by hand on the premises. As an added service, Chris-Arto also do custom laundry. Each week dozens of shirts arrive from customers all over America, to be laundered, hand-pressed and return mailed within the week. At prices ranging from \$100 to \$150 a shirt, Chris-Arto cater to a distinguished clientele of top executives, politicians and show-business personalities. Or, as Chris Batsides puts it: "This is the place where the rich and famous get their shirts in the United States."

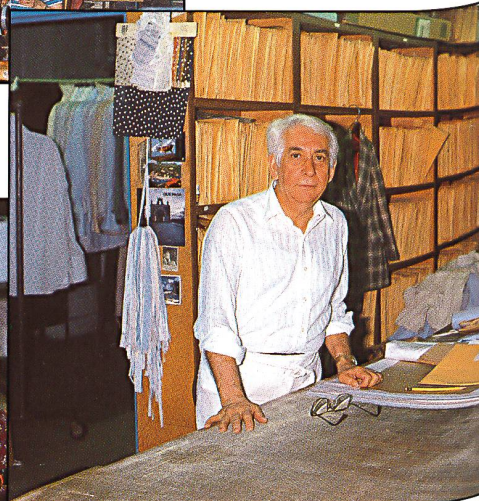
Rounding up the operation, the Lucerne Shirt Company in Houston, Texas, offers ready-made shirts with a custom touch from the same fine imported shirtings used at Chris-Arto. The firm was founded five years ago. Their weekly production of 1200 shirts is sold to a large extent under private label. The single-needle stitched, hand-finished Lucerne shirts retail at \$75 and up. Customers are renowned specialty stores, such as Frost Brothers in Texas, Alfred Dunhill and H. Herzfeld in New York, which Chris Batsides considers one of the finest stores in the country. ("Nobody knows the business better than Mr. Herzfeld.")



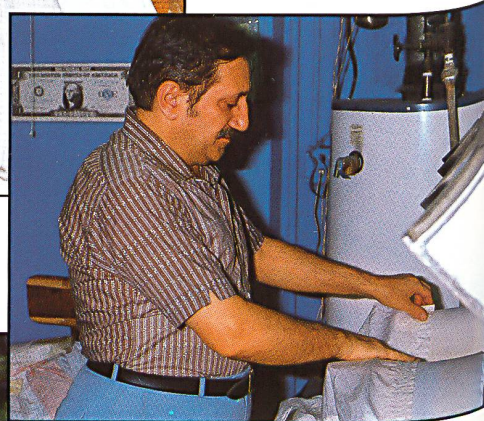
At Chris-Arto custom-made shirts are...



single-needle stitched...



cut separately by hand from brown paper patterns...



laundered on the premises...



and ironed by hand.



CHRISTOPHER MOORE

A landmark on Madison Avenue: H. Herzfeld, finest menswear and haberdashery for over 30 years.

H. HERZFELD

FURNISHERS OF FINE HABERDASHERY

Chandelier lit, with old-fashioned wooden shelves lining the walls and an incredible profusion of premium-branded men's furnishings stacked everywhere, H. Herzfeld of 509 Madison Avenue offers the old-world charm of a traditional haberdashery store. The image is not too far-fetched. The Herzfeld family has been furnishers of men's wear and haberdashery for three generations, first in Hannover, Germany, and since 1949 in New York. Though the firm will move to larger premises at 507 Madison Avenue in mid-June, the new store will also be appointed in the best of haberdashery tradition.

In addition to their Scottish cashmeres, English raincoats and silk ties, their Swiss-produced Zimmerli underwear and Fisba handkerchiefs, Herzfeld sells some 10,000 shirts a year. Considering the exceptionally fine quality, they are competitively priced at \$45 to \$80 for cotton dress shirts and at \$50 to \$100 for cotton sport shirts. At any time the store carries stocks of as many as 5000 shirts. Their selection includes ready-made top American brands and shirts-to-measure, cut from the finest imported Swiss and English shirtings. Serving a discerning international clientele, store owner Wolfgang Herzfeld specializes in elegant classical shirting designs and a color palette favoring blue. His single-needle stitched cotton shirts with real mother-of-pearl buttons and monogram are tagged \$75 and up.

Herzfeld have been a loyal customer of Swiss shirting mills, in particular of Hausammann + Moos, whose consistent superior quality in shirtings earns their highest praise. Their private label not only proudly proclaims that the fabric is woven by Hausammann + Moos, Switzerland, of 100% pure cotton, it also carries the Swiss Fabric symbol. Poplins, voiles, chambrays, oxfords and some small check wool/cotton flannels make up the bulk of their 10 to 15,000 yards annual imports of Swiss piece goods. Assisted by a highly professional staff of five employees of many years' standing, Wolfgang Herzfeld offers individual service and expert counsel to his customers. As in the past, his new store will continue to uphold the grand tradition of a fine men's furnishings specialty store.