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ÜBERSETZUNGEN

SEITEN 38–49

Jakob Schlaepfer + Co. AG, St. Gallen

Transparenz ist grosses Thema in der Stilistenmode aus Paris und Mailand. Jakob Schlaepfer variiert es auf höchst einfallsreiche und eigenwillige Weise. Ein gitterartiges Netz aus Raffia oder Grobtüll, regelmässig mit einzelnen Pailletten besetzt, stehen neben feinstem Tüll mit gestickter Goldbordüre oder Glanzgarnstickerei auf Tüll metallisé. Organza und Chiffon dienen als luftleichte Grundgewebe für delikate Guipure-Superposés oder Pailletten, die mit überdruckten Spitzenmustern oder Multicolor-Effekt Trompe-l'œil spielen. Gegensatz zum Luftigen bilden feste Baumwollpiqués, Strukturgewebe und Jerseys mit Applikationen und Paillettenstickereien.

SEITEN 50/51

Abraham AG, Zürich

Wie mit Ölkreidestiften auf grobkörniges Papier gemalt erscheinen flächige Blumenmuster mit aufgerasterten Konturen, die den hellen Fond mit heiteren Farben fast überdecken. Grosses Druckthema neben diesen floralen Impressionen sind bei Abraham für Yves Saint Laurent Rive Gauche Zeichnungen von Tierhäuten und Fellen, stilisiert und oft farblich stark verfremdet. Klassische Seidenqualitäten wie Crêpe-de-Chine, Marocain und Crêpe Georgette kommen dabei ebenso zum Zug wie raffinierte Baumwollgewebe – Cloqué, Faille laqué oder Bengaline. Die Unis bringen die Strahlkraft der Farben ungebrochen zur Wirkung.

SEITEN 52–59

Forster Willi + Co. AG, St. Gallen

Wer Stickerei in Gedanken allsogleich mit Abendmode und grossen Roben in Verbindung bringt, hat nur zum Teil recht. Denn die Sticker haben klug und erfinderisch alle Fährten verfolgt, auf denen die Modemacher wandeln. Das kommt in den Nouveautés von Forster Willi insofern deutlich zum Ausdruck, als sie die Stilisten des Prêt-à-porter in Paris und Mailand gleichermassen für Tages- und Abendmode eingesetzt haben und dabei oft auch mit Kontrasten spielen. Reiche Guipure-blusen oder -kragen zieren sachliche Wollkostüme oder Hosenanzüge, zarte Stickerei auf Organdy wird mit Baumwollkaro kombiniert. Organdy, Chiffon- und Tüllfond interpretieren den Trend zur Transparenz und sind in vielfältigen Dessins und Techniken bestickt – mit grossen und kleinen Blüten, mehrfarbig oder Ton in Ton mit Glanzgarnen, mit feinen Perlen-schnüren und applizierten Motiven. Apart wirken moderne Guipures, die gewissermassen grobe Netze knüpfen oder Ähren in Gitter verflechten.

SEITEN 60–69

Prêt-à-porter Paris Printemps/Été 89

Ein «cooler» Sommer in Sicht

Auf den ersten Blick sieht vieles sehr einfach aus. Aber Einfachheit kann, wie man weiss, ja auch gerade Genussucht von Kennern sein. Offensichtlich rechnet die Modebranche jetzt immer mehr Käuferinnen zu dieser Kategorie. Entspannt statt hochgestylt heisst die Devise des französischen Prêt-à-porter. Möglichst selbstverständlich wirken soll das Gesamtbild. Warum ständen sonst auch Sportswear-Klassiker wieder so hoch im Kurs? Der Marine- und Safari-Stil zeigen sich neu und dennoch vertraut für den Sommer verfremdet. Auch bei aufge-

frischter Blumenmode, Streifen und Punkten schlägt man keine modischen Purzelbäume, sucht nicht verkrampt nach Originalität. Stattdessen hat man sichtlich darüber nachgedacht, worauf es immer mehr Käuferinnen ankommt: Mode ohne viel Firlefanz, gut geschnittene Basisteile, die man umso besser auf individuelle Weise tragen kann. Viel Anspruch lässt daneben die Wahl von Stoffen erkennen. Nicht nur die Fülle seidiger Aspekte sondern ebenso die Vorliebe für reine Baumwolle geben davon ein beeindruckendes Bild.

Weicher geschmeidiger Fall von Stoffen wird zur Voraussetzung für neue Silhouetten. Er nimmt sachlichen, linearen Schnitten die Strenge. Vor allem jedoch gehen runde Linienführungen, geraffte, drapierte und gewickelte Effekte auf den für die Saison typischen Kurs. Schultern verlieren an Breite, aber Ärmel behalten im französischen Konfektionsangebot viel Fülle. Weiche bauschige Weite wird so als Kontrast zur schlichten Linienführung sommerlicher Kostüme vorgeschlagen. Bolero- und Westen-Ideen lockern den Ensemble-Stil erfolgversprechend auf. Das gilt für Blusen ebenso wie für Jacken.

Fest ist das Kleid als ein Gewinner im Lotteriespiel um die Gunst von Käuferinnen eingeplant. Französische Firmen favorisieren es schon für schlichte Eleganz neuer Tagesmode in Uni-Stoffen, die neutral koloriert ganz auf den selbstverständlichen, selbstbewusst «coolen» Kurs der Saison gehen. Viel Abwechslung für das Thema bieten ausserdem Drucke. Tupfen und Blumen heben sich dabei durch Farben, Grösse des Dessins oder spätestens im Styling genügend von Vorgängern im letzten Sommer ab, um Lust auf Neues zu machen. Unverändert setzt man daneben auf die Erfolgsformel Schwarz/Weiss, wie überhaupt klassische Farbstellungen auch mit Marine gut zur zurückhaltenden Stimmung der nächsten Saison passen. Rot- und Orangetöne sorgen für warme, wie von der Sonne gebrannte Farbakzente. Violett setzt auf sommerlichen Stoffen die bereits im Winter begonnene Karriere fort. Typisch für mehr Frische sind Nuancen von Gelb und Grün, die man bei Drucken auch gerne mischt. Weich abgeschattiert verlieren Kontrastfarben

sichtlich an Härte und passen damit perfekt ins Konzept. Denn sanft, einfach aber mit einer unverkennbaren Spur von Raffinesse soll Mode im Sommer 89 sein.

Zeichen für zeitgemässe Einfachheit

Geschmeidiger Fall bei Modellen wird zur Voraussetzung für Neues gemacht. Man setzt weichere und fließende Stoffe dafür ein. Dennoch bieten sie genügend Stand und Struktur, um selbst schmalen einfachen Schnittlinien sozusagen den Stempel der Saison aufzudrücken. Unis betonen mit seidigem Schimmer die sanfte Stimmung. Optimistisch dürfen Farben sein. Neutrals werden durch warmes Orange und Violett ergänzt. Oder es unterstreichen lichte Töne schon bei Tagesmode die Vorliebe für transparente Effekte. Zurückhaltung zeigen Dessins, wenn es um die neue schlichte Eleganz des Sommers geht. Tupfen, Karos und Streifen fügen sich sehr harmonisch in das Gesamtbild ein.

Keineswegs banal die neue Blumenmode

Ein weiterer Blumensommer ist in Sicht. Dabei zeigen Dessins jedoch deutlich neue Vorlieben. Abwechslung zu kleinen Provence-Mustern sollen offensichtlich grössere, weich gezeichnete Blumen bieten. Man variiert sie lebhaft koloriert, aber mildert den Effekt durch den Zusatz von Neutrals und Schwarz. Oder es werden farbige Blumen wie mit Pinsel und Wasserfarbe weich abgeschattiert. Zart koloriert lassen sie fast an Spitzen denken. Selbst grosszügige, ornamental gezeichnete Blumen und Ranken, die für extravagante Modevorschläge oft eine orientalische Richtung einschlagen, lassen erkennen: Im Gesamtbild sollen sich auffällige bis barocke Details jetzt mit entschieden mehr Einfachheit zu einer neuen Einheit mischen.

Sanfte, weiche neue Schnitte

Weicher wirken aktuelle Silhouetten nicht nur durch die neuen Stoffe der Saison. Zusätzlich betont man deren Geschmeidigkeit gerne noch durch angekrauste und bauschige Effekte. Ärmel erscheinen französischen Konfektionsarten dafür besonders prädestiniert, um bei ansonsten schlichten, schmalen Schnitten für Kontrastwir-

kung zu sorgen. Denn die weiche Welle in der Mode gilt jetzt vor allem bei sachlicheren Modellen, Kostümen und Hosen-Ensembles, als hitverdächtig für den Verkauf. Vom Aspekt her strukturierte Stoffe setzt man entsprechend in Fältchen gelegt oder für weich bauschige Effekte ein. Oder es schwingen Röcke und Kleider in fließendem Fall sanft aus.

Volants und Drapierungen neu dosiert

Wie man es mag, wenn Volants und Drapierungen neu auf die Modeszene kommen, stellt das französische Konfektionsangebot nicht nur für festliche Mode klar. Weich drapierte Effekte sollen bei modebewussten Frauen schon in der Tagesmode für Aufsehen sorgen. Sarong- und Sari-Ideen sind selbst in eher sachlich wirkenden Stoffen keine Seltenheit. Bei leichten duftigen Stoffen zeigen sich Drapierungen wie eng an den Körper geschmiegt. Mit Volants sind solche schmale Silhouetten häufig am Saum besetzt, oder es unterstreichen sehr duftige, fast transparente Rüschen und Volants sanft weibliche Stimmung, auf die man jetzt setzt.

PAGES 70–79

La mode qui nous vient d'Allemagne pour le printemps/été 1989

Une vague de souplesse descend du nord

Les halles d'exposition et les show-rooms ayant vu passer le printemps, c'est maintenant aux détaillants d'enranger la récolte. Ils pensent avoir discerné – au cours du pénible marathon des collections – les plus belles fleurs qui vont éclore: une silhouette décidément toujours féminine, assouplie cependant et allégée, telle que Milan et Paris l'ont également présentée. Les tissus y ont une part importante. La «vague douce» atteint les vestes fantaisie, que l'on assortira tant aux jupes étroites qu'à celles plus amples et aux pantalons plus larges. Elle adoucira la robe également, qui sera selon l'humeur un deux-pièces ou un ensemble robe-et-veste. Les ourlets sont l'objet d'appréciations personnelles, c'est-à-dire conditionnés selon le genre, la clientèle et le thème mode choisi. Après les premières commandes dans les colorations neutres ou soutenues, voici qu'apparaissent des «pastels poudrés» – qui plaisent et flattent – expression de ce «soupon de luxe» omniprésent.

La confection allemande exporte environ un tiers de sa production (33,6% qui représentent 3,7 milliards de DM). Cet essor est dû à la qualité, à la fiabilité des livraisons et au rapport avantageux prix-prestation. En ce qui concerne la mode des stylistes, ces seuls critères ne suffisent évidemment pas. «La mode ne peut être promue que par la personnalité qui la crée...» Cette profession de foi d'une personnalité montante de la mode est de plus en plus concrétisée par ceux qui se trouvent au faite de la profession, favorisés par un culte de la personne que soutiennent les PR et la presse. Heureux les photogéniques!

Wolfgang Joop est de ceux qui savent ajouter le raffinement à l'ensemble classique. Uta Raasch réussit à habiller la femme jeune et aisée avec un penchant pour le spectacle. (Ses pullovers à posters – inspirés cette fois-ci par Niki de Saint Phalle et le Pop-Art-Marine ne sont plus que des

«spots» dans une garde-robe passe-partout.) Caren Pflieger cultive un genre de noblesse froide, que soutient même le parfum et le maquillage. Brigitte Haake traduit sa vitalité dans ses créations, même à l'usage des clientes moins fluettes. Iris von Arnim s'est hissée, lentement mais sûrement, au sommet de la «maille» à la mode. Ses pullovers à motifs originaux, sans jamais être agressifs, s'accompagnent maintenant de coordonnés unis et de T-shirts. Daniela Bechtolf incarne le style puriste de la jeune avant-garde – en allemand – également lors de la présentation IWS des défilés de stylistes parisiens. Beatrice Hympehdahl, elle, montre un faible pour un aspect gracieux très «femme-femme», cette fois-ci avec de nombreuses variations sur le thème du pantalon.

La tendance exigeante, le «soupon de luxe» n'est pas sensible uniquement dans les sphères supérieures du prêt-à-porter allemand. Elle transparaît également dans les détails précieux, les accessoires et, en premier lieu, dans le choix des tissus. L'élégance est «in», ce qui ouvre de belles perspectives aux tissus suisses réputés dans ce domaine. Piqué pur coton, satin, voile, cambray ont la cote en uni ou fond pour imprimés, au même titre que les belles qualités de viscose. Impossible d'imaginer l'été prochain sans broderies et dentelles: la foule de blouses blanches dans le style lingerie en exige autant que les petticoats, les garnitures de charme des robes dans le style des années trente et des tailleurs d'été habillés. Les nouveautés des soieries suisses sont présentes le soir – taffetas et duchesse – un vaste éventail que complètent broderies, paillettes et applications. Plus l'aspect se rapproche du «fait main» et de la Haute Couture et mieux ce sera...

PAGES 80–95

Collection des stylistes viennois automne/hiver 89/90

Bistro-Disco

«Je sors vainqueur de trente années de lutte: enfin j'ai pu libérer l'humanité des ornements superflus.» Adolf Looser, un des premiers défenseurs du design fonctionnel exprimait ainsi sa satisfaction. On croirait presque que les jeunes stylistes viennois de la mode sont les descendants directs de cet architecte célèbre. Ils montrent peu de goût pour l'ornement gratuit et les détails flatteurs. Les exagérations et autres idées fulgurantes de même que l'abus des métrages de tissus ne sont pas dans leur ligne non plus. Au contraire se manifeste un penchant irrésistible pour le noir, les silhouettes pures et un certain «understatement». Ils ne se différencient guère en cela des autres jeunes stylistes qui – lorsqu'ils ne créent pas une mode «flip» et rigolarde – préfèrent les lignes épurées et une certaine gravité aux idées extrémistes et aux couleurs étincelantes. Le charme viennois ne se manifeste que timidement à l'avant-garde. La netteté est actuelle, la «discretion» un point d'honneur.

La retenue domine en tout cas dans la conception de la mode du soir non conventionnelle présentée ici comme annonciatrice de l'hiver prochain. Le thème qu'ont choisi les stylistes viennois pour la collection automne/hiver 89/90 réalisée dans des tissus suisses s'intitule «Bistro-Disco»; une sorte d'avant-propos sur les tendances prochaines. Tout ce qui ne concerne pas le grand gala trouve place sous ce chapiteau. Les représentants du nouveau design, qui se sont récemment fait remarquer à l'occasion d'une Foire viennoise de l'avant-garde, penchent nettement pour la «petite soirée», le bistrot ou la guinguette. Les lignes fondamentales simples s'accordent mieux avec ce milieu, les robes discrètes et les variations actuelles sur le thème du pantalon. Dans le genre «Disco», rehaussé d'éclats et de scintillements, le style se fait plutôt «cool».

Dans cette optique, les tissus choisis étayaient ce penchant pour la modestie – qui ne sacrifie guère à la séduction

charnelle — ou alors très discrètement dans les qualités merveilleusement douces et fluides, par un tendre éclat soyeux ou une broderie raffinée ton sur ton. Les dessins marquants, les contrastes et les teintes vives et lumineuses n'ont pas cours ici. «Black is beautiful», l'uni recueille tous les suffrages, velours et crêpe sont parfois appréciés. De rares accents brillants — lurex argent et paillettes — se fauillent au Disco afin de briller sous les feux scintillants des lumières amplifiées au laser.

PAGES 98—113

La chemise nouvelle tendance

Les spécialistes suisses des tissus pour chemises présentent les nouveautés de l'hiver 89/90.

Les confectionneurs de chemises tessinois ont créé et réalisé trois mois à l'avance leurs modèles dans ces qualités à la pointe de l'actualité. Ils les proposeront aux commerçants en début 1989, en même temps que leurs collections régulières automne/hiver.

«Se présenter en chemise» n'est pas du goût de chacun — ni son ambition, puisque cela pourrait être interprété comme s'il ne lui restait plus que sa chemise pour toute fortune. Mais une chemise mode sera arborée avec plaisir, car la mode a considérablement revalorisé ce vêtement considéré autrefois comme une simple pièce de lingerie.

La mode de la chemise ou la chemise à la mode est devenue un thème de conversation renouvelé de saison en saison et que justifie l'intérêt que ses mutations suscitent. Les stylistes de renom s'en sont mêlés, afin de négliger aucun point dans la tenue vestimentaire de l'homme. Et voilà: la chemise cesse d'être éternelle chemise bleu ciel ou discrètement rayée, pour aller partout et dans n'importe quelle situation. Teinte, tissu, coupe et détails s'unissent en un genre précis, exprimant un style mode qui valorise l'aspect général. Fréquemment même, la chemise pose l'accent décisif — pour l'été

prochain par exemple — en combinaison avec une veste fantaisie, où elle jouera le rôle de «top» indépendant. Les choryphées de la mode à Paris et Milan ont pris les devants dans leurs nouvelles collections, réalisant une multitude de versions intéressantes et de nouvelles associations chemise/gilet.

Aucun doute, le soin que les créateurs accordent à ce thème trouvera son écho dans l'offre commerciale et les impulsions des stylistes se maintiendront en hiver 1989/90, même si l'originalité de la chemise (conditionnée par la météo) doit être partiellement atténuée pour lui rendre sa fonction première: accompagner le complet masculin.

Le complet reste en effet la pièce maîtresse du vêtement masculin. Il est travaillé en souplesse et son élégance nonchalante imprègne la mode en ville. La chemise ville joue donc un rôle important, elle souligne le chic évident de la silhouette. «Falsamente formale», c'est ainsi que les stylistes italiens désignent ce nouvel aspect d'un classicisme qui, d'ailleurs, ne l'est pas autant qu'il pourrait le paraître à première vue. L'inédit réside avant tout dans le choix du tissu — un éventail considérablement élargi — qui est proposé à l'homme et à la mode qui le concerne, qu'il s'agisse du complet ou de la chemise.

Tissus de luxe pour chemises

«Les hommes peu à peu se familiarisent avec la mode» disait il y a peu un stylistes réputé. A la suite des sportifs et des machos, voici que des nuances plus douces viennent accommoder la mode, le type masculin tendre devient actuel. Le sens de la qualité et de l'esthétique s'est affiné. Ce que le tissage produit de plus raffiné est apprécié.

Une conception généralement plus libre de la mode élargit la gamme des chemises masculines. Les possibilités d'utilisation des tissus de chemises ont augmenté. La chemise de ville ne se contente plus d'être rayée bleu-blanc. La tendance est nette dans les nouvelles collections automne/hiver 1989/90 des spécialistes suisses en tissus pour chemises.

Il est surprenant de constater la diversification — même sur le thème des rayures — due aux nouvelles

techniques d'armures raffinées et aux modifications dans les coloris. Les rayures apparaissent plus fines, leur disposition plus complexe, leur coloration plus discrète. Le pur coton est de plus en plus doux au toucher, car les spécialistes suisses se font un point d'honneur de produire les qualités les plus nobles à partir de pures fibres naturelles. Pour la nouvelle saison on tisse des fils fins et superfins en coton, pure soie, coton et laine mélangés et un peu de viscose/coton, afin de répondre aux exigences du marché concernant la finesse et la souplesse. Les tissus suisses pour chemises étant synonyme de haute qualité, les confectionneurs exigeants et les spécialistes du sur mesure pourront choisir parmi les popelines les plus fines, batistes, toiles de soie, soies poncées et lavées, jerseys et cotonnades rebrodées.

Voici, choisis dans la profusion des nouveautés présentées, quelques points forts de cette mode. Pour la chemise de ville habillée: des qualités pur fil. Les rayures sont interprétées sur tous les registres, la rayure bloc classique ayant fait son temps. Par contre, les traits très fins, multicolores parfois et reliés en faisceaux ou disposés de manière asymétrique sont actuels, à côté de rayures rapprochées en points piqués, de rayures côtelées, en cordonnet ou fil-à-fil caché, souvent encadrées de bandes de satin ajoutées. La majeure partie des fonds blanc pur font ressortir de manière raffinée les délicates combinaisons de couleurs: pétrole avec bleu et prune, brun toscan et bleu lagune ou olive et lilas, bleu et brun. Des rouges soutenus créent de nouvelles harmonies, mêlés partiellement à du bleu et du blanc. Les spécialistes suisses proposent de la fine popeline de soie pour la chemise de luxe, en uni, ou agrémentée de rayures composées. Un aspect «vieilli» et le toucher que l'on veut doux sont réalisés avec de la soie légèrement poncée.

La chemise sport affiche également son côté chic. Ici, les fonds blancs voisinent avec d'autres plutôt foncés, égayés de rayures colorées. Elles sont réalisées en cordonnet, jacquard et jusqu'à la fine rayure de bordure, avec des effets brochés qui semblent avoir été brodés. La popeline à

dessins, effets tissés et structures sert de fond aux fines rayures colorées en satin. Le twill de coton fin convient à la chemise sport-chic. Là, ce sont de discrets dessins allant du linéaire aux carreaux petits et fins genre papier quadrillé et aux «tattersalls» réinventés qui seront les garants du succès. Les jerseys animent également le secteur des tissus de chemises, qu'ils soient de coton ou de coton et viscose mélangés. Autres nouveautés: de fins moulins, unis avec des aspects jacquard, des piqués et des jerseys structurés. La douceur au toucher est réalisée au moyen d'une légère abrasion de la surface. Des colorations foncées et chaudes introduisent l'offre de chemises pour les loisirs hivernaux. Les twills en mélange coton/laine jouent un rôle de premier plan dans ce groupe, à carreaux ombrés moyens et carreaux mélangés ainsi que dans des teintes foncées et soutenues. Les couleurs des forêts et des prés rappellent les paysages d'automne et de joyeuses parties de chasse.

Que seraient cependant les tissus de chemises sans l'offre de base des unis? Pour l'hiver, des dessins ratière raffinés apparaissent, rehaussés de minuscules motifs et d'armures particulières. Les structures apportent un brillant discret. Le blanc gagne en importance. Le coton mercerisé de plus en plus fin constitue la base de chemises élégantes pour les dîners et les soirées. La créativité croissante dans ce secteur est en partie due à l'influence d'une nouvelle génération redécouvrant le plaisir des manifestations de gala. Les nouveautés qui accompagnent les plis tissés et les plastrons de piqué sont de discrets jacquards ponctués d'un soupçon de Lurex or et argent, des piqués verticaux à effet tissé, des bordures blanc sur blanc et — à ne pas négliger — des tissus brodés originaux. Ils sont agrémentés de broderie anglaise et leurs ornements de type graphique ne se satisfont pas du seul plastron mais débordent sur les poches, cols et manchettes en une décoration de grand raffinement.

Moderne, l'industrie tessinoise de la chemise

Huit chemises de coton sur dix produites en Suisse proviennent du Tessin. La raison tient à l'histoire

économique de ce canton. Les débuts datent du siècle dernier avec l'avènement du tissage de la soie qui, à l'époque, devint l'industrie la plus importante mais dont le rôle diminua au début de notre siècle. Ce fut le début de l'industrie de l'habillement. L'essor qui se manifesta après la Seconde Guerre mondiale eut pour conséquence que cette branche devint de plus en plus dépendante des travailleurs venus de l'Italie voisine et les choses n'ont pas changé depuis lors.

Actuellement le Tessin compte 27% des entreprises suisses de l'habillement et 30% de l'ensemble des travailleurs de cette branche, c'est-à-dire 37 entreprises occupant 5300 personnes, concentrées en majeure partie dans la partie sud du canton, au Mendrisiotto. Le secteur chemises et blouses occupe environ 2000 personnes et la part des frontaliers — pour la plupart des couturières — oscille entre 80 et 90 pour cent. Sans elles, la production serait pratiquement impossible. 14 entreprises créent et produisent leurs propres collections, neuf dans le secteur des chemises, cinq dans celui des blouses féminines. S'ajoute à cela la production sous licence pour des maisons réputées telles Givenchy, Lanvin, Van Laack.

Le chiffre d'affaires actuel de l'ensemble de la branche s'élève à plus de 120 millions de francs. Les tissus utilisés sont pour la moitié d'origine suisse; là où seuls la meilleure qualité et un finissage de haut niveau entrent en ligne de compte, les fournisseurs de tissus suisses occupent la première place.

L'industrie tessinoise des chemises est fortement orientée vers l'exportation et en dépend. Plus de deux tiers de la production partent à l'étranger, en premier lieu dans les pays de la CE et de l'AELE. Que ce soit à Bond Street, à la rue de Rivoli ou la Via Condotti — partout l'on trouvera les chemises «made in Switzerland». Des contingents plus modestes sont exportés dans les pays scandinaves, au Japon, aux Etats-Unis, mais également à Hongkong, Taïwan, Singapour, les émirats arabes et au Vénézuéla.

On comprend dès lors aisément que l'industrie tessinoise des chemises soit soumise à une forte concurrence. Il suffit d'évoquer les termes clés de

protectionnisme à l'étranger, face à l'importation libre en Suisse, de contingentement, de problèmes des changes. C'est pourquoi les efforts conjoints du marketing visent les marchés existants et la conquête de nouveaux marchés. Afin de survivre et de rentabiliser les innovations des années écoulées, cette industrie a dû réaliser d'importantes mesures de rationalisation, un processus qui n'est pas encore terminé. Cependant, les innovations concernent actuellement moins la modernisation du parc des machines que les investissements au niveau de la créativité, la prospection de nouveaux clients, le marketing. Il s'agit avant tout de valoriser encore mieux la force d'un produit suisse: qualité de pointe dans le haut de gamme, adaptabilité, exactitude dans les livraisons, sans oublier la créativité, la personnalisation — qui sont autant de caractéristiques distinctives face à la production de masse bon marché, et de promouvoir la chemise comme produit mode.

PAGES 114—119

De la broderie pour les juniors

Le magazine américain «New York Woman», préféré de l'élément féminin des «Youpies», a publié dernièrement un article important qui nous apprend que ces personnes souhaitent elles aussi avoir des enfants, généralement vers la fin de la trentaine. Ce ne sont pourtant pas uniquement les enfants qui font la joie des parents exerçant une profession, l'équipement de leur progéniture est aussi l'un des grands plaisirs de ces parents un peu «tardifs». Après s'être offert à l'époque de leur «indépendance» à peu près tout ce que leur style de vie offrait de plus attrayant, ils se concentrent maintenant au bien-être des enfants — les chiffres d'affaires des boutiques spécialisées à la mode le prouvent largement. Ce qui vaut aux Etats-Unis pourrait — d'une manière quelque peu atténuée — se répéter en Europe également. De tout temps, les

parents des pays méditerranéens mettent leur point d'honneur dans la garde-robe de leurs bambins, juniors ou «niños».

La Suisse, traditionnellement, présente ses créations sur ces marchés et, en particulier, ses broderies.

Les broderies décoratives accompagnent l'enfant dès son plus tendre âge jusqu'à l'adolescence: la robe de baptême pour commencer, avec ses petits cols brodés, rubans et dentelles, trou-trous et volants; puis les chemisettes et petites robes décorées lui emboîtent le pas, suivies des garnitures blanches et décoratives sur les robettes estivales à smocks imprimées, en Liberty-prints fleuris et une foule de petits dessins délicats. Ensuite interviendront les applications de tout genre, qu'il faille les apposer au fer sur un vêtement en denim ou qu'il s'agisse des nouveaux modèles ouatinés, brillants et satinés qui habillent le sweat-shirt traditionnel. Les associations imprimé-broderie sont originales, ainsi que les motifs enrichis de strass ou brodés de teintes vives. La fantaisie ne connaît pas de freins lorsqu'il s'agit d'agrémenter les vêtements de ces chers petits.

C'est à St-Gall et dans les environs que naissent la plupart des garnitures et ornements destinés aux vêtements des petits un peu partout dans le monde et qui font la joie des grands et petits. Les fabricants suisses expliquent leur succès dans ce secteur particulier de la broderie par quelques arguments de poids sur ce marché très convoité: en premier lieu, le service fiable qui ne se limite pas aux seules livraisons ponctuelles, mais comprend une réaction rapide aux idées nouvelles que propose la mode. S'ajoutent à cela l'élargissement constant des collections, les nouveaux dessins et matières, les associations originales.

Ce n'est d'ailleurs qu'à ces conditions — fiabilité et souplesse — que la Suisse peut faire face à la concurrence de l'Extrême-Orient. L'aspect mode des nouvelles offres est caractérisé par une palette étendue, reflet des multiples tendances. Rétro et college-style font bon ménage et nombre d'idées nouvelles sont empruntées au folklore, ou encore sont-ce des concessions à la tradition brodée toujours très prisée, empruntées à d'anciens recueils de modèles. Les motifs à fixer

au fer (destinés par exemple aux T-shirts, à la lingerie, aux jeans) et les applications de thèmes éprouvés — sport, héraldique, animaux, fruits — sont complétés par d'autres, en polyester brillant et ouatiné à dessins fantaisie et effets de relief.

La tendance romantique propose des motifs à incruster et des cols ornés d'applications et de broderie chimique, papillons ou fleurs. Les alovers classiques, les volants, galons et entre-deux s'assortissent de rubans brodés, dont le raffinement est rehaussé d'un dessin complémentaire imprimé. De nouveaux effets sont obtenus avec les nombreux motifs thermo-catoon, destinés aux plastrons ou cols appropriés; les confectionneurs de vêtements pour les nourrissons et enfants en bas âge n'auront que l'embarras du choix. Que ceux qui prétendent que les broderies ne se vendent que pour les bébés et les petites filles soient assurés du contraire. A la manière des nouvelles chemises masculines souvent garnies de pattes de bouton-nage brodées et multicolores, certains rubans brodés dans un style mexicain attirent l'attention et sauront plaire sans doute à maint petit garçon.

Les thèmes tirés du folklore arborent de moins en moins d'edelweiss et de gentianes et les remplacent par des motifs rappelant d'anciens rubans norvégiens brodés au point de croix. Pour les fonds, le coton et la batiste viennent en tête. Le polyester plaît surtout pour son brillant. Souvent, les fils utilisés sont brillants aussi, multicolores et fluorescents ou, au contraire, suavement ombrés.

Autant de broderies créées pour la garde-robe enfantine s'accordent avec la constatation concernant l'ensemble de la branche d'un fabricant saint-gallois de renom: «Si l'on veut faire des affaires il faut être créatif.»

TRANSLATIONS

PAGES 30–37

Avantgarde Stylists in Paris and Milan – Spring/Summer 1989

Nouvelle formule

La folie est passée... A revolution in fashion has already quietly announced its arrival for this winter. The desire for opulent styling has now finally abated, the penchant for exaggerated accentuation of the female charms has at last disappeared, at least in the eyes of the trend-setting prêt-à-porter designers. Skin-tight and super-short no longer have the desired effect. What appeared elaborate and artificial in previous seasons now comes over as relaxed, natural, second nature. After a brief excursion into the realms of luxurious, couture-type tailoring, the new rule now goes once again by the name of "simplicity". Simplicity steals the (fashion) show, is the unanimous message.

Of course, this slackening of the reins is not quite as simple as all that. The new simplicity seems very subtly balanced and does not take kindly to hackneyed interpretations. Neither does it show much tendency towards puristic sterility, being characterized more by generous styling and soft vitality. The new simplicity is also full of ideas and is open to the most varied stimuli, but without interpreting them too literally. Ethnic elements can be identified from South America and India, from Africa and Mexico; nostalgic tendencies, still lingering on here and there in fashion, reveal themselves for the most part discreetly.

The widely publicized outburst of colour has not found that many advocates amongst trend-setting stylists, although there is no lack of colour on the summer scene. Carefully measured doses are administered, with highlighting mainly confined to the red-orange-yellow scale but remaining on the whole rather restrained with classic navy, black and white and almost colourless pastel shades. And single colours are far more valued than patterned fabrics.

Nevertheless, it is neither colours nor shapes nor even the return of the

longer hemline which form the main characteristic of the coming season. One basic theme overrides all others, dominating the current fashion scene: the soft wave. "Everything flows...": this pronouncement attributed to Heraclitus has been taken literally by designers and they are allowing fabrics to flow and glide and occasionally float like delicate veils. "Soft" is the key word at the heart of it all. It embraces everything that goes to make up the new fashion: virtual weightlessness, with lively silhouettes and featherlight fabrics; translucence: soft, flattering surfaces; softness morning, noon and night, for trousers and dresses.

Trousers are mentioned first on purpose here, since they form the second important theme. Every fashion designer without exception has taken this up, managing to coax from it the most amazing variety of lengths, widths and styles. "Trousers look like skirts and skirts like trousers" – is how Armani describes the complexities resulting from the rich abundance of flowing fabrics. Women are wearing the trousers and looking more feminine than ever in them.

And that indeed summarizes what is left over by way of lasting change from that now obsolete recourse to the couture-dominated Sixties, characterized by female role-behaviour: fashion has become basically softer and more feminine in outlook. And for all the reflecting back on simple lines and shapes, that is no insignificant change.

PAGES 60–69

Paris Prêt-à-porter Spring/Summer 89

A temperate season in sight

At first sight, many things look very simple. But simplicity, as everyone knows, can also be outright craving for pleasure by connoisseurs. Obviously, the fashion sector is banking on an increasing number of consumers in this category.

Relaxed rather than sophisticated is the French prêt-à-porter motto. The overall picture is supremely matter-of-fact. Otherwise why are sportswear classics back near the top of the fashion pops? The new look in navy and safari styles is ideally adapted to summer. Even with face-lifted floral fashions, stripes, and dots there are no somersaults and no tense striving for originality.

Instead, much thought has obviously been given to what is becoming increasingly important to women buyers: fashion without too much frippery, well-cut basic styles, that can therefore be worn all the more easily with an individual flair. This is captured very impressively by the realms of silky looks and the preference for pure cotton.

A soft, flattering fall in fabrics is a prerequisite for the new silhouettes, to temper the severity of functional, linear cuts. In the main, however, round lines and gathered, draped and swathed effects are typical season's favorites.

Shoulders are narrower, but sleeves have plenty of fullness in the French prêt-à-porter range. Soft puffed width is proposed as a contrast to the simple lines of summer costumes. Boleros and vests successfully liven up the ensemble style, as do blouses and jackets.

The dress has been planned as a certain winner in the lottery to secure buyers' favours. French firms prefer it for the sleek elegance of the new daywear fashions in solid-coloureds, especially in neutral shades that are perfectly attuned to the season's matter-of-fact, self-assured, "cool" look. Many additional changes are rung on the theme by prints, while dots and flowers differ sufficiently

from last summer's predecessors as regards colours, pattern sizes, and styling, to whet the appetite for novelty.

The ever-popular success formula black/white and classic colourings in general, including navy, go well with the quiet mood of the coming season. Red and orange tones set warm, sunburnt accents. Violet pursues the career launched last winter in the summery fabrics. Typical of the fresher look are yellow and green nuances, often mixed with prints. Delicate shading softens the harshness of contrasting colours, which fit perfectly into the theme. Because summer '89 will be soft and simple with an unmistakable trace of refinement.

Signals for the new simplicity

Flattering fall is a must for novelty models. These are made up in softer, flowing fabrics which nevertheless possess sufficient body and structure to set the season's seal so to speak on narrow simple cuts. Plain-coloureds with a silky sheen highlight the soft mood. Colours are optimistic. Neutrals are complemented by orange and violet, while light shades underscore the preference for sheer effects even in daywear. Designs are understated for the new sleek summer smartness. Spots, checks, and stripes blend harmoniously into the overall picture.

New variations on a floral theme

Another flowery summer is in sight. But new preferences in designs are clearly emerging. Larger, delicately interpreted flowers offer an alternative to small provençal patterns. Vivid colourings provide variants but the effect is toned down by the addition of neutrals and black. Coloured flowers are gently gradated in water colour technique. Delicate colours are evocative of laces. Even expansive, ornamentally interpreted flowers and garlands, which for more extravagant fashions often draw their inspiration from oriental sources, indicate that in the overall picture details from stunning to baroque are now fused with much greater simplicity into a new unity.

Soft cuts and lines

Fashionable silhouettes are softer but not merely because of the season's new fabrics. In addition, their suppleness is further enhanced by ruffled and puffed effects. Sleeves seem predestined to allow French clothing manufacturers to achieve contrasts to otherwise plain, narrow cuts, because the soft wave in fashion predominates now in more functional models, costumes, and pant suits. For textured fabrics, pleats or softly gathered effects are popular while skirts and dresses favour gentle flares.

Drapes and frills galore

Although frills and drapes have arrived on the fashion scene, the French prêt-à-porter range is not geared uniquely to festive fashions. Softly draped effects cater for the fashion-conscious woman in day wear as well. Sarong and sari inspirations are not uncommon even in somewhat functional fabrics. In light flimsy materials, drapes cling flatteringly to body contours. These narrow silhouettes are frequently trimmed with hemline frills, while very flimsy almost sheer ruches and frills highlight the popular new soft feminine mood.

PAGES 70-79

Fashion from Germany for Spring/Summer 1989

The soft wave in the north

Now that spring is over in the German exhibition halls and showrooms, it's time for retailers to start gathering in the harvest. They are confident of having picked out from the arduous round of collection presentations those elements which are going to thrive: continued emphasis on the feminine silhouette, but with softer, more relaxed lines, as confirmed in Milan and Paris. The appearance of the fabric plays a

large part in this. The "soft wave" incorporates fancy jackets, which are equally at home teamed with both slim or moderately wide skirts and wider-width trousers, and it should also give a fresh impetus to dresses, be they deux-pieces or dress and jacket ensembles. Hemlines are left to individual taste, according to genre, customer and fashion theme. Following on from the neutral and rich shades of the initial round of orders are the powder-pastels – the optically flattering expression of an all-pervasive "touch of luxury".

The ladies' outerwear industry in Germany exports about one-third of its production (33.6%, with a value of 3.7 thousand million DM). Quality, reliability of supplies and a favourable price/performance ratio are quoted time and again as the impetus for this. Of course, when it comes to designer fashion, these criteria cannot stand alone. "Fashion can only be stimulated by the person behind it..." This sentiment expressed by an aspiring fashion star is increasingly being followed up by established designers, encouraged by a public relations and media-orientated personality cult. Blessed is (s) he who is photogenic!

Wolfgang Joop has a special flair for endowing the classic suit with style. Uta Raasch succeeds in clothing young women with plenty of money to spend and a taste for the spectacular. (Her poster sweaters – this time with inspiration from Niki de Saint Phalle and Pop-Art-Navy – are really the ultimate "look" for the all-round wardrobe). Caren Pflieger cultivates a slightly cooler elegance and includes perfumes and cosmetics. Brigitte Haarke stamps her fashion with her own lively personality, even for her "weightier" customers. Iris von Arnim has slowly but surely worked her way up to a leading position amongst knitwear fashion designers and has recently added single-colour coordinates and T-shirts to her range of imaginative, but never ostentatious, motif sweaters. Daniela Bechtolf embodies the purist style of the young German avantgarde – as seen again at the IWS presentation during the Paris designer shows – whereas Beatrice Hymppendahl demonstrates a flair for the graceful, feminine look, this time

with plenty of variations on the trouser theme.

This trend towards the discerning, the "touch of luxury", is not just apparent at the upper levels of German prêt-à-porter fashion. It is also displayed in expensive-looking details and accessories and, above all, in fabrics. Elegance is "in" and this creates opportunities for those famously elegant Swiss fabrics. Pure cottons – piqués, satins, voiles, chambrays – are valued as single-colour fabrics or as backgrounds for printing, as are the high-class viscose qualities. It is hard to imagine next summer without embroidery and lace: indispensable both for the array of lingerie-style white blouses as well as for petticoats, for neat trimmings on thirties-style dresses and for elegant summer tailleurs. Evening wear offers rich pickings for Swiss silk novelties in taffeta or duchesse and sequined or appliqué embroideries. The greater the needlework and couture effect, the better...

PAGES 80-95

Viennese designers Collection Autumn/Winter 89/90

Bistro-disco

"I have emerged victorious from a thirty-year struggle: I have freed mankind from superfluous ornament", claimed Adolf Loos, former champion of functional design, triumphantly. The young Viennese stylists might almost be the renowned architect's direct descendants. For they care little for decoration, pure ornament, or flattering detail. Nor are they keen on exaggerations or startling ideas and only rarely do they indulge in fabrics. On the contrary, they display an undeniable penchant for black, puristic silhouettes, and understatement. In that respect, they resemble many other young designers the world over (at least those who don't create flippant, whimsical fashions) who extract more from simple

lines with a serious undertone than from arresting ideas and dazzling colours. Viennese charm is given only hesitant expression by the new avant-garde. Austere is modern, "mimicry of unobtrusiveness" is a leitmotiv.

Restraint nevertheless dominates the conception of unconventional evening fashion, as expressed here in next winter's forerunners. "Bistro-disco" is the name of the theme for the Autumn/Winter 89/90 Collection that Viennese designers have created from Swiss fashion fabrics, as the preferred interpretation so to speak of emerging trends. Under this motto, there's room for everything barring the gala evening. Significantly, these representatives of the so-called new designer scene, which formerly attracted attention with its own Vienna Avant-Garde Fair amongst other things, prefer the "small" evening, the bistro or "Beisl". For this, they prefer simple basic shapes, plain dresses with a discreet accent, or contemporary trouser variations. When the disco is targeted with a little dazzle and glitter, then the styling is "cool". The choice of fabrics reflects this tendency to underplay which does not succumb to sensual temptation – or at least does so only secretly in wonderfully soft, flowing qualities with a delicate silky sheen or refined self-toned embroidery. Because starkly contrasting designs and brilliant colours are not in demand here. Black is beautiful, and preference is shown for solid-coloureds, occasionally velvet and crêpe. Sparing highlights with silver lurex and paillettes mix in the disco under the flashing laser lights.

PAGES 98–113

The shirt trend

Swiss shirting specialists present their latest collections for Winter 89/90.

Tessin shirt manufacturers designed and made up sample shirts in these up-to-the-minute qualities three months in advance. They will be offered to retailers at the beginning of 1989 as part of the regular Autumn/Winter shirt collections.

Being "stripped to the shirt" is not to everyone's taste – nor is it something every man desires, as taken metaphorically it can mean that he's been left with nothing in the world but the shirt on his back. But perhaps he wouldn't mind so much if it were one of today's stylish shirts, since fashion has greatly reevaluated this (sometimes rather unjustly neglected) garment, once ungraciously referred to merely as underwear.

Shirt fashion now provides a fresh topic of conversation every season, and this justifies a detailed study of the changes it has undergone. Trend-setting designers have joined in, intent on bringing style to every part of a man's outfit. And behold: one shirt is no longer the same as another, the eternal light blues and unobtrusive stripes no longer have to serve as a passe-partout for every occasion. Colour, fabric, cut and detailing combine to form a precise statement, underlining the style of the outfit as a whole. In certain cases it is the shirt which sets the fundamental tone and, for next summer at least, it has progressed to the status of a top in its own right, teamed perhaps with a decoratively patterned waistcoat. Prominent designers in Paris and Milan have shown how this can be done in their imaginative new collections, which contain a number of interesting shirt styles and shirt/waistcoat combinations.

There is no doubt that creative handling of this theme by the trend leaders will also be reflected in the high street and that these styling impulses will continue to have an

effect on into Winter 89/90, even though the weather will generally cause the shirt to lose its independence and become mainly an accessory item, complementing the suit.

For the suit is unquestionably the focus of male fashion. Its soft construction and relaxed elegance characterize city fashion. Just as important is the town shirt, which supports and emphasises this natural elegance. "Falsamente formale" is how Italian designers describe this new classicism, which is in fact nowhere near as classical as it appears at first glance. The greatest innovations are apparent in the vastly extended range of fabrics now available to a man and his fashion, be it for suit or shirt.

Sophisticated Fabrics for Men's Shirts

As one well-known designer recently remarked: "men are now learning to cope with fashion". Sportsmen and macho types have had their day and the fashion scene echoes to gentler tones, for it is now the turn of the sensitive man. Perceptions of quality and aesthetics have become more refined. Importance is now attached to the nobler fruits of the loom.

A generally more liberal attitude to fashion also allows greater scope for shirts and the range of applications for shirting fabrics has increased. The blue-striped city shirt is no longer "de rigueur", as the Swiss shirting specialists effectively demonstrate in their new Autumn/Winter 1989/90 collections.

It is amazing to observe how even the humble stripe can be revived over and over again by means of clever weave techniques and colour changes. Stripes appear in a more refined form, their grouping more imaginative, their colour more discreet. Pure cottons are also becoming much finer in handle, for it has practically become a philosophy of Swiss specialists that sophisticated shirting fabrics should be made from natural fibres. Their weaves for the new season again include fine and superfine cotton yarns, pure silks, cotton and wool mixes and some viscose/cottons to satisfy the market desire for drape and softness. And because Swiss shirting fabrics go hand in hand with notions of high quality,

the new season will also see finest poplins, batistes, toiles-de-soie, emerized and washed silks, jerseys and embroidered cottons being presented to both discerning shirt manufacturers and specialists in in tailor-made shirts.

The following fashion highlights have been selected from the wealth of new ideas. Sophisticated city shirts are featured in full-twist cottons. Stripes are now interpreted in a wide variety of ways – the fashion life of the classic block stripe is over. Today's new look calls for very fine stripes, sometimes parcelled together in several colours or positioned asymmetrically, as well as closely-set lockstitch stripes, rib, cord and hidden fil-à-fil stripes, frequently set in overlaid satin stripes. The fine colour combinations look effective on a predominantly pure white background: petrol is teamed with blue and purple, toscana brown with lagoon blue or olive with lilac, blue and brown. Dark red tones are attractive in fresh combinations, occasionally mixed with blue or white. For luxury shirts, the Swiss specialists are offering fine silk poplins in single colours or as companion stripes. Lightly emerized silks offer an antique look and a fashionable soft handle.

The sports shirt also conforms to the sophisticated look. Here both dark and light backgrounds are teamed with brighter coloured stripes. These range from cord and jacquard to narrow border stripes with brocade effects which look as though they have been embroidered. Patterned poplins with woven and structured effects also form a base for thin, coloured satin stripes. Finely twilled cotton lends itself to the more elegant sports shirt. The fine patterning, ranging from linear and graph-paper checks to modified tattersalls, guarantees good sales.

The fact that plenty is happening in shirting fabrics is proven by the jerseys, which are being offered in cotton or cotton/viscose mixes. Fine moulinés, single colours with jacquard effects, fine piqués and structured jerseys are all new. Lightly polished surfaces fulfil the desire for the "soft touch" and the dark-warm colouring forms a link with the range of winter leisure shirts. Dominating

this group are cotton and wool mix twills with medium-sized ombré or blended checks and a rich, dark colour interpretation. Shades of forest and heath bring to mind autumnal landscapes and merry hunting trips.

Where would shirting fabrics be, though, without a basic supply of plain colours? It is precisely here that clever dobby-weave patterns catch the eye for winter, revealed in fine weave effects and tiny designs. Structuring gives a discreet sheen. White is becoming more important as a colour. Cottons are mercerised, becoming finer all the time and forming the basic quality for elegant evening and dinner shirts. The increased creativity in this sector has a lot to do with the influence of the younger generation, which is again enjoying "gala appearances". Novelty appears in the form of woven plissés and piqué fronts, alongside discreet jacquards with a little gold and silver lurex, vertical piqués with weave effects, white-on-white borders and – last but not least – imaginative embroidery fabrics. Their fine open-work effects, which extend right up to graphically inspired ornamental embroidery, are used a decoration not only on fronts but also on pockets, collars and cuffs.

The Modern Tessin Shirt Industry

Eight out of every ten cotton shirts made in Switzerland come from the Tessin. The reason for this can be explained by taking a look back over the economic history of the canton. It all began last century with silk spinning, which at that time went on to become the most important industry in the region. However, its significance diminished at the beginning of this century, making way for the developing garment industry. During the boom years after World War II, this industry came to rely more and more on labour from neighbouring Italy and that situation has remained unchanged to this day.

Today, 27% of all Swiss garment manufacturers are to be found in the Tessin and 30% of all those employed in the industry, namely 37 companies with 5300 employees, are concentrated mainly in the southern part of the canton, in Mendrisiotto.

Some two thousand people are employed in making shirts and blouses and the proportion of border commuters — for the most part female seamstresses — varies between 80 and 90%. Production would be simply inconceivable without them. Fourteen companies design and produce their own collections, 9 for shirts and 5 for ladies' blouses. Added to this are those garments produced under licence for well-known fashion houses like Givenchy, Lanvin, Van Laack.

The industry currently achieves an estimated turnover of more than 120 million Swiss francs. Half of the fabrics used come from Switzerland; for Swiss fabric suppliers take first place when it comes to top-class quality and finishing.

The Tessin shirt industry exports a great deal and is dependent upon its exports. Over two-thirds of the garments produced find their way abroad, mainly to EEC and EFTA countries. Whether it be Bond Street, the Rue Rivoli or the Via Condotti — shirts made in Switzerland are found everywhere. Smaller quantities are exported to Scandinavia, Japan, America and also to Hong Kong, Taiwan, Singapore, the Arab Emirates and to Venezuela.

It therefore goes without saying that the Tessin shirt industry is exposed to tough competition. One only has to think of the bywords protectionism abroad versus total freedom of imports in Switzerland, quota restrictions, and foreign exchange problems. The combined marketing efforts are therefore geared to the active cultivation of existing markets and the acquisition of new ones. The shirt industry has been forced to take harsh rationalisation measures in order to be able to survive and keep up with the renewal process of recent years and this is still going on. However, as far as innovations are concerned, attention is now focused less on modernising the machinery and more on investing in creativity, winning new customers, and marketing. And this can only mean increased emphasis being placed on the strengths of products made in Switzerland: high quality in the upper and topmost market sectors, flexibility, prompt delivery, but also creativity and individuality — in other

words, all those characteristics which stand out against cheap mass production and distinguish the shirt as an item of fashion.

PAGES 114–119

Embroidered Finery for the Little Ones

The American magazine "New York Woman", that favourite publication of the female section of the trendy Yuppies, recently devoted a sizeable article to the subject of childbearing and how it is now apparently the done thing for these women, usually when they reach their late thirties. However, the children themselves are not the only thing to bring great joy to their usually career-minded parents. Dressing the offspring up is the second most enjoyable part for these eleventh-hour mothers and fathers. Having afforded themselves practically everything which enhanced the glamour of their lifestyle during their childless years, these parents are now concentrating their efforts on their children — and turnover in the children's boutiques in Manhattan is proof of this trend. What is good for the USA is often found to hold good for Europe, too, albeit in a somewhat milder form. Parents in Mediterranean countries have always paid close attention to the wardrobe of their bambini, enfants, or niños and products from Switzerland have traditionally found favour in these markets, particularly the embroideries.

Decorative embroidery accompanies the child from tender infancy right up to the teenage years: first there is the christening gown, then the baby tops and dresses trimmed with embroidered collars, lace ribbons or frills, or the decorative white trimmings on smocked summer dresses in floral Liberty prints or other fine-patterned designs; once the children are a little older, embroidered appliqué work of every type is more

likely to find favour, whether it be iron-on motifs to complement a denim garment or the new padded shiny satin decorations to bring a sweatshirt right up-to-date. Print is imaginatively combined with embroidery, motifs are enriched with glittering strass or embroidered in dazzling colours. There seems to be no limit to the imagination when it comes to decorating children's clothes.

Most of what adorns children's clothing in diverse ways throughout the world, bringing joy to parents and children alike, has its origins in St. Gall and the surrounding area. Swiss manufacturers have several reasons with which to justify their success in this specialised area of embroidery and these gain special significance in a highly competitive market: good service comes top of the list, not only in respect of prompt deliveries, but also a quick reaction to new fashion ideas. This also includes constantly adding new designs to their collections, in new materials and combinations. Only by displaying such versatility and reliability can the competition from the Far East be kept at bay.

As far as the fashion statement of these new products is concerned, it is the diversity which is most noticeable, and this points to a number of different trends. Nostalgia is there, as is the college style; many of the new ideas are borrowed from folklore, or else concessions are made to the ever-popular traditional embroidery motifs by falling back on old pattern books. Iron-on motifs (e.g. for T-shirts, lingerie or denim) and appliques with traditional themes, such as sport, heraldry, animals and fruits, are found alongside decorative trims in padded, shiny polyester with fantasy designs in relief effect.

The romantic theme offers inserts and collars with etched appliques depicting butterflies or flowers. Classical frills, braids and entre-deux are joined by embroidered ribbons, their stylish effect achieved by means of an additional print design. Various types of transfer motifs to complement plastrons or collars provide manufacturers with new opportunities in the field of children's clothing. And those who maintain that embroidery is only bought for babies and girls will soon learn to revise their

opinion. Inspired by the current fashion in men's shirts for colourfully embroidered front plackets, Mexican-inspired embroidered braids catch the eye and would no doubt please many a young lad. Motifs reminiscent of old Norwegian cross-stitch braids indicate that the folklore theme is rapidly moving away from edelweiss and gentian.

Background materials are mostly cottons, with the occasional batiste. Polyester are gaining in popularity, mainly because lustre has become more important. Yarns, too, are often shiny, in gay, fluorescent colours or softly opalescent ombrays. The rich and complex embroideries now available for children's clothing support the observation of one manufacturer from St. Gall and hold good for the industry as a whole: "If you want to do business, you must be creative".

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Finishing, the ennobling of textiles

The German word for finishing, *Vered(e)lung*, contains the word "edel" (noble), making its precise English equivalent "ennobling", a far more expressive term than "finishing", its signification being wider than merely applying a finish or processing to completion. It takes for granted that the substrate is enhanced and beautified thereby. And when it is applied to textiles, and therefore fashion, which of course is all about beauty and the development of a feeling for quality, we can appreciate how appropriate the term "ennobling" actually is.

So it can be truly said that the goal of textile finishing is to make yarns and fabrics "nobler". A more motivating branch of industry, a more challenging task would be difficult to imagine.

Here of course a problem is involved. Textile finishing companies work on a commission basis; they deal in a service and not a product. The finished product, that which the

consumer evaluates and buys, is the work of someone else. In a certain sense commission finishers remain anonymous, even though their contribution is often decisive for achieving the desired look, pleasing handle and convincing properties of the textile material, i.e. even though they are just as creative as the recognized creative sectors of the fabric manufacturing industry.

This report focuses on the contribution of these innovative middlemen; they work relatively in the background but without them the textile and fashion industries would be poorer in many respects.

Interactions

With rare unanimity, fashionmakers at the front are united behind the soft wave. Everything must be flowing, lofty-light and cuddly-soft, both for now and into the immediate future, which we can take as meaning the next few seasons. Previously, designers had decreed their preference for crushed, washed-out fabrics or metallic coatings and high-gloss foils, doing reverence to high tech and the plastic age.

Contrary as these fabric trends may seem, they have one thing in common: the key player in the game is the finisher, the one who, if not entirely responsible for producing the desired effects and properties, must at least make a major contribution to them. Actually, it is astonishing how many of the true innovations in fashion materials in recent years are based on new finishing processes to a decisive extent. This points up the interaction between fashion impulses and chemical-technical solutions to production problems.

Modifications to fabric surfaces have been a major topic for some time. Coatings in a wide variety of variations can be offered as an interesting example of this. The first attempts in the form of chintzed, oiled and rubberized coatings used mainly for sportswear were extended further, resulting in often highly elaborate novelties such as iridescent, mother-of-pearl or lacquer coatings, metallic effects and fanciful combinations of different techniques.

A much less noticeable trend goes in the opposite direction, so to speak;

the preference for the imperfect, paid homage to by the understated, plain to shabby look prized by one facet of the current fashion scene and represented by the crumpled and wrinkled, crash and crinkle fabrics in practically inexhaustible variations. Another result of finishing treatments is the second-hand look, culminating in chafed, washed silk as the quintessence of understatement snob appeal.

Even though the conventional processes of yarn and fabric finishing, especially dyeing and printing, are being constantly refined, today's additional impulses are often introducing really sophisticated innovations into fabric surfaces and constructions. Inventive and playful creators are at work to whom no problem is too difficult for them to want to attack and solve. Whether the result is commercially feasible is another (mostly cost-related) problem.

Yet here precisely is the plus of the Swiss finishing industry; for all its modernization and rationalizing, it consistently follows a strategy of specialities, going of course far beyond fashion articles, from sewing thread to tea bags as well as numerous technical textiles. Flexibility is writ large, and when it's a question of novelties or specialities, the industry will handle even the smallest manufacturing batches.

Interaction makes the difference in the industry's strength — interaction between fashion designers and textile chemists, between experiment and rational production, between traditional craftsmanship and progressive technology, between alchemy and high tech.

Into the age of high tech

The Swiss textile finishing industry is an industry in a state of alert, when one looks at the 29 commission finishers belonging to the ASTI employer's association. Although Switzerland as a manufacturing site causes problems, its favourable capital costs and a growing quality-mindedness on the part of its customers and the consumer are plus factors. To meet the demands for better quality, high flexibility, quick response, environmental regulations

and modern equipment while still achieving an adequate return and remaining competitive and capable of surviving in international competition, the Swiss finishing industry is making increasing use of the latest computerized production, marketing and information technologies.

The structure and size, processing machinery and administrative structure are as a rule in line with the main character of their branch of industry: receiving textile goods from another company, finishing them to that company's specifications and returning them within the time required. The other type of textile finisher is the multistage, vertically integrated textile company that does its own processing, from spinning to weaving or knitting and then finishing. It is obvious that the finishing departments of vertical companies are geared to the company's own production programme.

Commission finishers are confronted with a variety of article categories: yarns, wovens, knits, embroideries, whose properties must often meet ever higher requirements as to colours and colour schemes, designs and surface effects, wear and care properties as well as fastness and processing properties. Their specifications are changing at an ever faster rate, collections are being replaced with greater frequency, lead times are becoming yet shorter and order lots smaller.

The consequences for commission finishers are far-reaching: They must be in a constant state of alert, with extensive machinery and qualified personnel always on hand; in maintaining their flexibility and responsiveness they must be prepared to handle not only to a normal flow of new orders but also seasonal fluctuations, unforeseeable trends and, unfortunately, underoccupation and nonutilized production capacities. Commission finishers must therefore live with the permanent pressure of deadlines, come to terms with constantly changing lot sizes and continually adapt to the wishes of their customers.

Performance-oriented industry. Faces cuthroat competition

The 29 companies belonging to the Swiss Textile Finishing Industry

(ASTI) employing about 3000 people account for an annual net product (turnover not counting value of textiles themselves) of approximately 200 million Swiss francs. This amount makes up about two-thirds of the total volume of textile finishing carried out in Switzerland.

The output achieved by these firms in 1987 attained impressive levels; the quantity of finished yarns produced (not counting silk yarns) amounted to 4 284 056 kg, while that of finished tricot was 3 732 831 kg. The figure for finished embroidery reached 2 188 166 yds. The largest production output fell to single-colour woven fabrics, which came to a total of 49 489 116 running metres, while the orders for printed wovens and knits amounted to 9 880 326 metres. The Swiss commission finishing industry is facing its cuthroat competition with a package of measures that promise success. In addition to qualitatively optimizing its production assortment in the direction of textile specialities and taking up true marketing techniques, the industry is concentrating on the rationalization of production processes, management of textile goods and the administrative sector. One valuable aid which has virtually become an indispensable necessity in these efforts is the computer, with hard and software adapted to the requirements of commission finishing.

New technologies to secure the future

Virtually without exception, Swiss textile finishing companies now have modern production equipment adapted to today's requirements. Their managements have quickly seen that their concern for constant renewal of production machinery, the use of electronic data processing and heightened creativity and efficiency in all sectors is not just going with the flow of the times but an absolute must, if the industry is going to master its present problems and secure its future.

In the goods management and production sectors, computerized measurement and regulation are taking over the control of decisive processing phases to an ever greater extent. Production deadline planning and monitoring are just as much

electronically controlled as the identification of production batches, the (colorimetric) evaluation of reference colours and of dyed and printed goods, the dispensing of dyes and chemicals in the colour kitchen or from the feed tank of the dyeing machine and the state of the treatment liquor, temperature and time. Computer aided design (CAD) has now been taken up by textile finishing on an experimental basis. It goes without saying that in the administrative sector as well, productivity potentials are tracked down and significant advances made with the aid of EDP.

People are still the focal point

Despite all the automation and computerization, however, the essential task of leading, deciding and creating are still in the hands of people, even in finishing companies. In fulfilling these functions, ability, knowledge and creativity are combined together as indispensable requirements for success, precisely in these times of growing problems. This alone is the basis on which textile finishing will hold its ground; and highly promising signs can already be seen. For example, more and more companies are opening up to a wider public so as to present their achievements and promote careers fully capable of offering young people enthusiasm and satisfaction. Managements are attracting attention with new goals and novel market strategies, and specialities are cropping up in production assortments that are obviously the result of highly qualified know-how and innovative creativity.

"Interesting Careers for Talented Young People"

Martin Hugelshofer has been President of the Associations of the Swiss Textile Finishing Industry since 1982. "Textiles Suisses" asked him about the structure and tasks of these associations and the state of the industry.

How is the Swiss textile finishing industry organized?

Commission finishers, who work on a contract basis, finishing the yarns,

embroideries and woven fabrics of their customers according to the latter's specifications are organized in 3 professional associations.

The Employer Association of the Swiss Textile Finishing Industry (ASTI) has 29 members. Besides the VATI (Association of Textile Industry Employers), ASTI is the only association in the entire textile industry that has its own joint employment contract, to which the majority of the companies are subject. A further nine companies belong to the Association of Swiss Yarn and Knitwear Finishers, VEGAT. The Association of the Swiss Textile Finishing Industry, VSTV, comprises 18 members. VEGAT and VSTV are industrial organizations. All these associations are in turn affiliated with national and international associations of the industry, the Swiss Textile Chamber of Commerce and AITIT (Association Internationale de la Teinture et de l'Impression Textiles), the European umbrella organization of the textile industry.

What are the main focuses of the activity of these organizations?

All three of the Swiss textile finishing associations are involved in representing the industry's interests, in services and their own internal operations. They represent Swiss finishing interests to outside parties, while their services are directed internally to their members. The main tasks of the ASTI are employer policy, professional training and social policy, while those of the VEGAT and VSTV are directed to economic policy and market questions. At the same time of course, there are numerous contacts with associations in related branches of industry or further stages of the textile industry such as the clothing and shoe industries.

The Swiss textile industry in general is suffering from a lack of young personnel. What is the situation in the finishing industry?

The problem of the next generation is actually not poorer but also no better than before. Efforts are continually being undertaken which lead to a certain success, but we must continue to work on them. It is the task of the ASTI to produce docu-

mentation and literature which can be used by all our member companies to recruit new talent. Recently a new image film was produced by the joint efforts of associations of the textile and clothing industries. At the moment a number of informational brochures on careers in textile finishing are being newly revised; additional documentation concerning the newly-established occupation of textile laboratory technician is being created.

As a further activity in this area I would like to mention the date of 16 September 1989. On this day numerous companies belonging to several textile associations will open their doors to the general public, and by means of targeted public projects we are seeing to it that this occasion will receive attention throughout Switzerland.

The textile finishing industry is an interesting branch offering numerous careers to capable young people. We are pointing this out on every possible occasion and making every effort to get new recruits interested.

What are the main problems of the Swiss textile finishing industry?

Textile finishing firms must cope with the special problems involved with being located in Switzerland. A number of different factors have the effect of disadvantages relative to foreign competitors; one is the small domestic market, results in a heavy dependency on exports, and another is the hard Swiss franc, making for severe cost pressures. Compared with foreign textile industries, Switzerland has the highest wages in the world. In view of these circumstances, which nobody can do anything about, the central question is how we can nevertheless hold our own in the market. To offset the disadvantages of being located in Switzerland, really top achievements are required.

What must the Swiss finishing industry do in order to remain competitive?

We must distinguish between company efforts that are inwardly directed and those which go in an outward direction. Looking at internal measures, textile finishers must keep abreast of technical innovations. Innovation is demanded, both with

machines and processes. As far as outward-looking efforts are concerned, commission finishers must become more active and carry on purposeful marketing. Greater proximity to the market is necessary. This can be aimed at without verticalization.

Is the Swiss textile finishing industry expecting any special problems in 1992?

The effects of the EC domestic market will not be the same for all member companies, and in any case the problems for this industry as a whole are not yet discernable. In any case, it is certain that it will not be any easier to survive successfully after 1992. However, we can hope that the negotiations with the EC now going on will result in the elimination of any discriminating effects as far as Switzerland is concerned, such as in the case of passive finishing commerce.

In 1987 Switzerland exported textiles amounting to 2,692 million francs. Why do foreign trade partners buy Swiss textile products in such amounts? Because they're good and they meet the demand. If things stay that way, we need have no fear of 1992. There is a demand for high-quality finishing results not only in Switzerland but other countries as well.

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HC Färberei Oberuzwil AG,
Oberuzwil

High performance within the company's own plant

The properties of yarns and ply yarns have a decisive influence on their further processing into finished products. High tensile strength and optimum unwinding properties of the yarn carrier support problem-free manufacturing of the finished fabric. As a result, the finishing treatment is of crucial importance to the desired uniform appearance of the goods. To maintain the high quality of the finish, it is essential to keep all

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processing steps in the production process under control at the company's own plant. Only in this way can the required yarn properties be attained.

This principle is taken to heart by HC Färberei Oberuzwil AG, the newest member of the Swiss commission finishing industry with its headquarters in Oberuzwil, Canton St. Gall, successor company to the former Heer & Co. AG. The management has set itself the goal of increased quality and efficiency as well as more intensive attention to the international market. With an average output of 2–3 tons per day, concentration on the firm's own strengths is important: quality before quantity. This is all the more true as the requirements as to yarns and ply yarns from Switzerland are ceaselessly rising. This quality is based not only on the finishing treatment but also on the high quality of the raw materials used. This is all the more critical, since Färberei Uzwil is not only a commission finisher but also markets its own yarns and ply yarns as a direct business.

Fifty employees dye and finish mainly knotless and spliced yarns of cotton and other cellulose for weaving, embroidery, knitting and further applications. High-fastness dyeings are a major item, in the production programme, while mercerized yarns are produced both on cones and in hank form. One striking speciality is the finishing of multicoloured ombre yarns, now in demand by the latest fashion trends. The production process is very laborious: after dyeing and drying, the coloured hanks are opened and wound on cones, thus producing a multicoloured yarn that is correspondingly colourful as a finished woven or knitted fabric. HC-finished yarns are also used for hand knitting, machine knitting and ply yarns. Depending on the requirement profile, they are also used in other speciality applications.

If the finisher desires to offer his customers something special, he must be able to react quickly to the increasingly rapid influences and changes of fashion. Flexibility is the No. 1 requirement, and batches of less than 100 kg per colour are no rarity. Based on the fast pace of technical developments and the in-

creasing demands on product quality, investments have been continuously made in recent years; the machine plant has been constantly renewed and the aim has been to run the production in closed circuits. So as to increase the flexibility that is demanded, both commission finishing and direct selling are carried on. Intensive contacts with both foregoing and subsequent processing industries are helping to reach these goals. The textile finishers from Oberuzwil are competent specialists who know their job.

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Niederer + Co. AG, Lichtensteig

Quality and service as a promise

How can a company that produces high-quality yarns and desires to be a fashion "subcontractor" define itself to the trade? Printers are able to show their attractive designs by attractive fashion photographs, but a bobbin of yarn tells little about the performance and quality that stands behind it. Niederer AG feels that not all its customers can be effectively approached with classic promotional methods, so another road has been taken.

To get itself talked about, this company offers a comprehensive trend service: Information on the latest fashion trends and coming colours is presented in the form of design sketches and continuously updated yarn colour cards, mainly for high-class knitwear. Further services to the yarn-processing industry are collections of knitted fabric samples, serving to stimulate fashion reactions for knitwear using the yarns and ply yarns from Lichtensteig.

The bulk of the production is dyed ply yarns of supercombed cotton for women's and men's outerwear, underwear and socks. Added to these are specialities are hank-dyed ply yarns for the high demands of the knitting industry and dyed ply knitting yarns.

Over two-thirds of the demand are twisted by the company itself, and practically its entire production is gassed and reeled in its own works. These highly versatile basic operations carried out at its own premises enable quality to be assured from A to Z, all the way from the raw material to the finished dyed ply yarn.

One of Niederer's strengths is its wide range of ply yarns, permitting quick delivery of most ply yarn strengths requested. Highest priority is given to customer wishes for speciality colours, available in amounts from 100 kg per dye lot. The raw materials used are principally high-quality Swiss yarns. All ply yarns carry the Swiss Cotton label, as a guarantee of quality.

Producers of high-class knitwear who are licensees of the Swiss Cotton Institute also have the possibility of putting the Swiss Cotton label on their products made of Niederer ply yarn.

The company is looking to the future with confidence. Its goals are a constant expansion of its services, continuous quality improvement and rationalization measures for increasing flexibility and productivity. In order to achieve this, investments have regularly been made for many years, in amounts of about one million francs per year for modernizing its machinery alone.

For this company with its 140 employees, a considerable part of securing the future lies abroad. With its own sales organization in St. Gall, Textil-Export GmbH, the company desires to increase its share of exports to the most distant markets. Its good contacts with a "home market", extended beyond the Swiss borders, are being further intensified.

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Vereinigte Färbereien + Appretur AG, Thalwil

Specializing and diversifying

To a high degree, commission finishers depend on secure production cycles. In order to avoid constant ups and downs in its production programmes and distribute the entrepreneurial risk on as wide a basis as possible, Vereinigte Färbereien & Appretur AG (VFA) has been striving for the past 15 years to develop in the framework of textile finishing specialities while on the other hand diversifying in related sectors of activity. In addition to the traditional finishing of 100% silk, yarns of all types for socks, hosiery and tights as well as fully fashioned garments are dyed. Its wide range of services includes an industrial laundry with a daily production of 12 tons.

Over the past 3 years, about 2.5 million francs have been invested in production machinery and automation; the production level in the dyehouse is now about 5 tons per day. The use of electronic processing controls has resulted in the optimization and sophistication of the dyehouse operations. In the winding department, digital-controlled winding machines make it possible to fill customer orders at short notice.

The Thalwil company still considers its future to lie in commission finishing, where good quality and a rapid service level are its strong cards. In the garment dyeing sector the management is pinning its future hopes on a wide field of activity which unfortunately is still much too little utilized by clothing manufacturers. The possibilities in this sector are very great: besides trousers, pullovers, T-shirts, etc., ski outfits, shoes, gloves and even high-quality articles of 100% silk are dyed. The success of garment dyeing greatly depends on the final finishing treatment, and here its machinery is a key advantage, together with the know-how from the company's industrial laundry operation. Another group of articles that receive their final finishing touch in Thalwil are hosiery and socks as well as surgical

support stockings, the latter being finished according to the strictest specifications. Hosiery dyeing in particular — obviously fashion-inspired — has undergone a sharp rise; about 350 000–400 000 pieces per month are being dyed. The inventory risk for the manufacturer is reduced by the possibility of dyeing garments made up in the grey state. A new fashion colour trend can be immediately responded to, which by the way also applies to garment-making itself.

A continuing high priority of VFA is the finishing of silk yarns. Unlike the case with its other services, these yarns are sold directly from its own raw yarn stores. This guarantees rapid delivery, which is usually 10 days from receipt of the order. Up to 1980, a high proportion of 100% silk was weighted with tin salts. In the meantime, growing ecology-mindedness has led to the development of an ecologically acceptable weighting process also improves the properties of the silk without affecting its typical «silkeness».

With its 150 employees in the dyehouse and 80 in the laundry, the firm is looking to the future with confidence. Its expansion, performance and determination to carry on, together with an adequate net product, can be considered decisive factors in Switzerland's remaining the company's production site.

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Zwicky + Co. AG, Wallisellen

Dyed ply yarns for every use

People often say, "Fine twisted yarn doesn't hold", but this is not quite true in a literal sense because, provided the ply yarn is of top quality and given the right finish, it holds very well even in the finest forms, whether in heavily strained sportswear seams or technical textiles. The silk ply yarns used in racing tyres, though very fine, must take no less punishment. The common element in all of them is the fact that one and the same company makes and fin-

ishes the yarns and ply yarns for these and many other uses. Zwicky + Co. AG is giving proof of its determination to be flexible, twisting as well as dyeing yarns as well as being equipped to give ply yarns the finish that is precisely and optimally suited to their purpose.

One section of the company's production programme comprises the manufacture, dyeing and finishing of weaving and knitting yarns, 90% of which consist of pure silk for top quality women's and men's fashionwear, dress goods, neckties, shawls, lingerie, socks, hosiery, etc. but also for technical applications such as bolting silk, typewriter ribbons or surgical suturing materials. The silk is dyed in every possible form, from normal boiled-off and raw types to yarns weighted with synthetic resins or tin.

The other production sector consists of a wide assortment of twisted sewing yarns. Besides traditional sewing silk, mercerized cotton as well as synthetic ply yarns are manufactured, dyed and finished. Bonded synthetic twist yarns dyed with a special finish are a recognized speciality in the leather industry. Here too, flexibility comes first; even though a colour card with a rich selection and corresponding inventory is available, dyeing is also carried out according to the customer special wishes.

A product of faultless quality and dyeings of the highest brilliance and fastness properties are indispensable prerequisites for a yarn finisher that deals in specialities and is prepared to invest substantial sums in new technologies and modern equipment. Thus among other things, the bobbin dyehouse for silk is now being expanded, especially since the demand for silk yarns has increased. In this connection a new drying plant is also planned and will go into operation in 1989. In addition a new colorimetric computer system is being installed so as to increase capacity but also to be able to meet differentiated trends extending to the very finest shades with even more precise recipe formulations.

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AG Cilander, Herisau

Performance and creativity, the way to success

To realize ideas, always to adapt to changing market requirements in a dynamic and flexible way, being at the customer's side with advice; such are the basic principles by which Cilander has won the trust of its customers. As a service-oriented company, this successful finisher is grounded in providing good customer service, meeting its deadlines on time and translating special wishes into reality. For this purpose, there is an exceptionally highly qualified staff of employees who are willing to put their wide-ranging know-how and high service level at the service of their highly diverse customers.

An extensive finishing programme supports this service level. Per year, 8 million metres of fabric are processed, mainly wovens of natural, regenerated and synthetic fibres from widely varied sectors: fashion goods, embroideries, home textiles as well as other materials used in technical applications. Cilander is one of the few commission finishers offering one-colour dyeing and printing as a set from the same plant. This is a particularly great advantage for fashion goods, since it means that colour differences are reduced to an absolute minimum. The product assortment can be regarded as exceptional in its variety; from the finest voile all the way to outerwear fabric, virtually all textiles are finished. Even the camouflage suits worn by the Swiss army are prepared for their rugged use in Herisau.

A worldwide exclusive of Cilander is its cultivated finishing of organdy. Providing this ultrafine fabric with a special finish demands experience, high capability and skill. Further production priorities are: pretreatments for dyeing and printing; various finishing effects with various resins, impregnation and handle modifying agents; surface effects such as calendering, shrinking, chintzing, crimping, crashing and crinkling.

The extensive and modern production facilities have been supplemented during the past year by a new rotary printing machine, new, computerized dyeing ranges and a new stenter. The main focus of the company's permanent investments is on rationalization, modernization and the maintenance of its equipment. Further substantial investments have been made in a new, improved colour computer, a high-performing EDP system and in production planning and process control. A wide-ranging product palette together with readiness for short-notice deliveries, even of small yardages demands sophisticated logistics at all levels.

The value of the information handling at Cilander has increased with the EDP equipment installed in the summer of 1987. With the introduction of the system, processing and recipe variants can now be streamlined, optimized and standardized by data processing. Inventory control of textile goods on hand is kept up to the minute. Customers can ring up and be given binding information at a moment's notice as to how many metres of any given fabric are on hand, a further service that is often made use of.

The machine plant, representing the state of the art, and the customer-centred data processing system come to full advantage only when they are handled by capable and enthusiastic employees. As a result, an intensive basic and further training programme for its 200 employees is one of the supporting pillars of Cilander's entrepreneurial policy. Confidence can be created and given to the customer only by people, not machines.

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Bethge AG, Zofingen

Continuity ensured

Piece dyeing has a long tradition in the Swiss textile industry. The bleaching and dyeing of linen and heavy-weight cotton fabric used to be a part

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of every finisher's craft. In recent years, however, the pressure caused by the import of piece-dyed fabrics has compelled many commission finishers to discontinue this activity, resulting in the gradual disappearance of an old craft.

One company that still carries on the tradition, concentrating on medium and heavy-weight goods, is Bethge AG in Zofingen, Canton Aargau. Per year, 6 million metres of woven fabric of cotton, linen, viscose, polyester and polyamide as well as traditional blends are processed at this mill. Fabrics for career and outerwear as well as hospital linens undergo hard wear and make special demands with respect to their end-use and fastness properties; among other things, they must be low-shrinking, resistant to tearing, and fast to light and rubbing. For years Bethge has been recognized as a specialist in this field. The raising of piece goods, carried out in only few mills, is another Bethge speciality, demanding fine discrimination, a lot of experience and a suitable staff. Different raising machines of the latest design, but including a model that is over 40 years old, ensure homogeneous treatments.

The company's finishing know-how is applied to such varied products as household and home textiles (bedlinens of percale and satin), furnishing fabrics, dress and shirting goods and heavy-weight fabrics such as awnings and tent cloth. Even terry towelling finishes are no problem. Further treatments provided are mercerizing, impregnating and chintzing, as well as satin and the traditional flannelette finishing. All these treatments can also be ordered finished according to the sanforized standard.

Special efforts are required for this commission finisher with 40 employees to counter foreign competition, and in doing so Bethge has taken the initiative. In 1984 a new building was erected with the goal of further rationalizing all production lines and operate with more favourable costs. Additional savings of 7% have been achieved thanks to an advanced energy concept with heat recovery systems. So as to meet all wishes of its exacting and up to now mostly Swiss customers, continuous and

purposeful investments are being made in new finishing ranges, permitting widths of 65 to 300 cm to be finished. Recently a new raising machine and a new chintzing calander have gone into operation.

Today, craftsmanlike skill alone is no longer enough to survive. Successful piece dyeing and surface finishing depends to a high degree on rapid execution, on-time delivery and consistent quality. So as to keep the entrepreneurial risk to a minimum at the final manufacturing stage, there is a continuing trend towards shorter lead times and smaller dyelots. So as to take account of this development and bring about greater time savings in handling goods, space is provided to a number of customers for storing their own unfinished goods. So that unfinished goods (and thus tied-up capital) are not blocked for prolonged periods, all production stages and the logistics department must be optimally harmonized. The new building completed in 1985 permits the entire production operation to be carried out on one level and ensures the desired short throughput times.

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Färberei AG, Zofingen

Targeted finishing

Commission finishers are service companies that must do qualitatively fault-free work and react to customer wishes as quickly as possible. Quality costs money, sometimes a lot of money unnecessarily, in the opinion of Färberei AG in Zofingen. Often it would be better, and not only for economic reasons, to harmonize the quality of the finishing treatment to the end use of the product. This is why quality of work is understood at this company as the constant readiness for consultation and dialogue with all links in the production chain, so as to achieve targeted finishing — as good as necessary and not necessarily as good as possible. One-third of the volume of orders falls to the dyeing and finishing of

yarns made of various materials such as wool, cotton and synthetic fibres in dyelots of 5–800 kg. The people at Zofingen are proven specialists for the high-fastness yarn dyeings and finishing treatments required for furnishing and upholstery fabrics, sewing threads and even technical articles. Flame retardant treated yarns are in especially high demand; these are used for upholstery fabrics in the aircraft and automotive industries. Further specialities are carpet yarns, spin-covered yarns for medical support hosiery, chenille yarns and threads for tea bags.

In the piece dyeing and fabric finishing sector, mainly cotton knit goods are handled, but wovens as well as highly elastic polyester knits for swimwear are also finished according to customer wishes. The specialities are circular-knit pile fabric, raised and unraised lining goods and a speciality finish for low-shrink single jersey without synthetic resin. A palette of services of this scope demands optimum production equipment. In an investment programme extending over a number of years, the laboratory plant, dyeing machinery as well as drying and finishing ranges for dyed goods have been renewed. Färberei AG in Zofingen uses 3500 m³ of water and just about 12 tons of fuel oil or the corresponding heat value in natural gas per day. The goal of the investment efforts is further reductions in the consumption of water, energy, dyes and chemicals so as to produce more economically and thus retain competitiveness. The investment programme is being continuously updated in the direction of process automation and rationalization as well as quality improvement; this expenditure amounts to over 1 million francs per year.

The annual finishing capacity for yarns is 850 000 kg and about 2.3 million kg for fabrics. Up to now, exports have accounted for about 20% of the pure dyeing commissions for yarns and fabrics, and the attempt is naturally being made to increase this figure by direct customers both in the yarn and fabric business. In future, Färberei AG Zofingen with its 175 employees desires to intensify further its contacts with foregoing and subsequent

manufacturing stages, get closer to the market, recognize trends and tendencies earlier and increase its readiness to react to continuously changing fashions yet more rapidly.

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Hofmann + Co AG, Uznach

Coating specialist

Fabric coatings have always represented a compromise; they produce the desired properties, but they also involve disadvantages. For example, fabrics for protective clothing can be given a water repellent finish without problems, but the fabric's breathing properties are impaired. Conversely, if particularly breathing-favourable protective clothing is required for sportswear use, the water repellent properties get the short end; the list of compromises taken into account can be lengthened at will. This dilemma is faced by various branches of the textile industry, but it is not least this very situation that the membranes that have been successfully come into use mainly for sports and leisurewear can thank for their development.

As a coating specialist for piece goods, the firm of Hofmann + Co AG in Uznach has given these problems its particular attention and found a solution to them; it has come up with a new coating for active-breathing and yet absolutely water and wind repellent fabrics. Its processing specialists have succeeded in developing a finish that can be specifically geared to the requirements demanded of the final product. This exclusive special finish is applied as an inner film on high-quality textiles. This new development has a further big advantage: it is both washable at 40°C and fast to dry cleaning, something that is not true of all finishes. Its scope of applications is also correspondingly wide: sporty and elegant outerwear, all-weather suits and even fabrics for uniforms and career wear are suitable. And not only garments but also technical wovens can be purposefully finished with this new coating.

Another speciality that has developed from the company's considerable experience with fine coatings are blackout fabrics with an absolutely opaque special coating and flame retardant finish, for use especially in public buildings. Further priorities of the company's piece goods production programme are finishing effects and vat dyeings applied by continuous processing, with maximum colour fastness properties. This processing method has the big advantage of permitting any desired yardage to be finished with the same colour levelness.

So as to be prepared for the future and retain its present state of development, the company has continuously invested in machines and buildings over the past few years at an average rate of one million francs per year. A new stenter, a new mercerising range and a new finished goods control system have already gone into operation. In line with the changed market conditions, contacts with markets abroad are being further intensified. The management attaches particular importance to a good working climate, because only satisfied employees – of which there are 78 in Uznach – bring the required top performance with respect to creativity, quality and customer service.

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*Kopp AG Textilveredlung
Rorschach*

Mastering the future

In a shrinking market, commission finishers are able to try and hold their own in various ways: they may trim down capacities, reduce services, or they may try something quite different; they may take a daring step forward by making new investments, preparing the ground in good time. This is what the firm of Kopp AG has impressively done on the occasion of its recent centenary. The core of the package of measures taken is the new production building

which was completed and started up in 1988. Thanks to the clever machine layout, adapted to the individual production stages, a cost-favourable, ground-level mode of operation is now possible that alone reduces personnel costs appreciably. An environmentally favourable energy concept including heat recovery systems also helps to keep the company competitive in a commission finishing market that is hard-fought and under pressure from over-capacities. Over the past 3 years, 7.5 million Swiss francs have been invested in all these projects. The modern plant has made it possible for Kopp AG to expand its production programme and services. In the dyeing sector, medium and fine wovens of widely varying materials and blends are processed, with high-grade finishes for many applications: women's outerwear, men's shirtings, sportswear, lining fabrics and hygienic articles, to mention only a few. A further priority with Kopp is the finishing of fine net curtain materials and furnishing fabrics of up to 300 cm final width; with the modernization that has taken place the capacity is now 60 000 square metres a day. It should not be overlooked that the company is also regarded as a major Swiss commission finisher of high-quality embroidery. According to estimates, about 25% of domestic production is finished in Rorschach. Besides the classic finishing treatments such as singeing, mercerizing, sanforizing, emerizing/sanding or raising, speciality finishes are also applied. Especially noteworthy among these are coatings applied by hand and immersion mainly for high-quality sportswear and technical woven fabrics.

Even though Kopp AG is equipped for substantial capacities, smaller orders are also accepted. The company is absolutely determined to maintain the flexibility that is so essential for the production of fashion-sensitive products. Great importance is also attached to the craftsmanship of its finishing specialists. This is shown not least in its promotion of new talent and the permanent further training of its personnel. It employs about 120 people, including the administration staff.

The high amount of investments made by Kopp AG testifies to the company's confidence and its determination to hold its own in the future. To achieve a more rational occupation of its capacities together with better depreciation of its new plant, Kopp AG is aiming at a 3-shift operation. Since it must be assumed that the domestic market will continue to diminish, direct contacts with foreign partners are being sought, so as to achieve maximum utilization of a finishing capacity of about 15 million metres a year.

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Raduner + Co. AG, Horn

Creative piece goods finisher

Textiles are not finished only for their looks, i.e. fashion effects. The various finishing treatments they undergo have definite end-use properties in view. Based on exactly defined requirements, the goal is to achieve tailor-made fabrics, which after being finished must be optimally suited to their purpose. To attain this goal, professional competence is just as necessary as technical know-how. However, even this does not suffice of itself, and it is erroneous to suppose that a finisher of piece goods must be a good technical specialist but need not necessarily be creative. Creativity in the textile industry is not limited to coloration and design; it is also demanded for the creation of new finishing processes.

Raduner employs approximately 200 persons, making it a middle-sized company in the finishing industry. It has set itself the goal of being creative and attracting attention for interesting developments of its own, in other words, to define itself by innovation. An appropriate importance is attached to research so that the market can be approached via finishing novelties. To secure the continuance of this important finisher with an annual production of over 15 million metres, one year ago

a small group of Swiss textile firms acquired Raduner & Co. AG, which now wants to concentrate exclusively on high-quality surface finishing. A wide palette of materials are treated: cotton, viscose, as well as viscose-acetate, synthetics and fibre blends. Besides fabric preparation and dyeing, special importance is attached to finishes which employ versatile processing procedures to give the fabric the final touch, whether from the standpoint of appearance or properties.

The finishing company located at Horn has always been a specialist in new processes. Thus Raduner is today a leader in applying a permanent non-iron finish on shirting and blouse fabrics, and this has become one of the pillars of its business. This know-how also stands the company in good stead in the finishing of low-shrink lingerie interlinings, exported all over the world and highly prized thanks to their good end-use properties. Raduner is also a specialist in three-dimensional surface effects on widely varied fashion and classic wovens as well as the finishing of tumble dry-fast single jersey.

The company's customers are not only from the garment industry, technical textiles are also finished. Various composites of film, foams and wovens are also manufactured by laminating and bonding. The firm takes particular pride in the fact that the fabric used for the outfits of the successful Swiss national ski team receives its finish in Horn.

It goes without saying that work is continuously in progress on new processes. A new process just about to be released to the market is a non-iron finish for medium and heavy weight career wear fabrics. All tests have already proved successful. Great efforts are also being made in the protective clothing sector, which is regarded as increasingly important in a high tech world.

So as to offset seasonal fluctuations in the fashion sector, the development of season-related articles is being further intensified.

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*Terlinden Textilveredlung AG,
Küsnacht***Knitwear specialist**

Enormous efforts are necessary especially to hold one's own against cheap imported knit goods. This applies both to Swiss fabric manufacturers and particularly to domestic commission finishers. Terlinden Textilveredlung AG is a specialist in knitwear finishing whose technologies are distinctly superior to those of cheap goods. The company's equipment for reaching this standard is unique in the industry. A great deal of energy is expended in investments and developments of new finishing technologies and application processes to keep always one step ahead everyone else. Quality begins with the raw material and ends with the user, for which reason there are intensive contacts between Terlinden and all stages of the textile production chain.

A modern and highly diversified machine plant is available to offer a wide variety of services. The finishing programme includes all types of single-shade finishing as well as special surface treatments such as singeing, mercerizing, raising, shearing, emerizing, chintzing and decatizing. The finished knit fabrics are of natural fibres as well as synthetics and their blends, and when finished the fabrics are approximately equally divided between open and tubular knits. Today the finishing of knit fabric in tubular form has attained a high level of specialization, and here Terlinden had an active part in developing the first machine for mercerizing and singeing tubular knits. Both fine rib in body measurements and single jersey for bed linens and nightwear can now be finished by this method. Other fabrics finished in Küsnacht are destined for sport and leisurewear articles or women's outerwear fashions. Further items in the programme are textiles for technical applications. The new machinery for the piece dyeing of sample goods is particularly appreciated; it permits the dyeing of short yardages (up to 30 m) according to

production standards. This is an important service to customers, especially as it is supported by a colorimetric computer system for efficient processing of new sample collections.

Highest importance is attached to quality assurance, ensuring that the customer gets consistent quality. Within the plant's own production and development laboratory, a qualified team is continuously working on new developments and process optimization. The main focus of the investment programme is on the constant modernization of the dye-house together with new processing technologies in the tubular knit sector.

For the 125 employees at Terlinden, securing the future means customer-oriented special finishes with a high innovative value, permanent optimization of the quality standard, flexibility in the face of rapidly changing customer and market trends and close collaboration with the foregoing and subsequent stages of the textile manufacturing chain.

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*AG Carl Weber, Winterthur***The only printer of silk piece goods in Switzerland**

Swiss textile finishers are currently engaged in a struggle on various fronts. The external influences are sufficiently well known: a drop in the volume of orders coupled with continuously rising labour and production costs are putting on enormous pressure. If one gives way to it, then the very continuance of the company will be at risk due to loss of substance when production operations do not cover costs. But the alternative to this is also well known: To develop textile specialities.

"Produce outstanding achievements" — a commonplace remark? Perhaps, but also a spur to overcome obstacles. The firm of AG Carl Weber, a company of manageable size, is distinguished by its experienced specialist personnel, with its equal mastery both of traditional craftsmanship and the very latest finishing

technologies. This company is the only printer of silk piece goods in Switzerland, concentrating on the finishing of highest-quality wovens and knits of silk, cotton and wool. A particular speciality is delicate fibre blends such as silk with viscose. The company at all events has gained a reputation as the finishing specialist for delicate materials. Its innovative staff, supported by a modern plant that has been completely renewed over the last 10 years, strives to achieve new looks and properties in fabrics finished by the latest methods. Besides high-fashion articles for outerwear, home and furnishing fabrics are also processed which include decorative items such as silk/wool blends with highly sophisticated surfaces. In line with the trend to large beds, finishes on bedlinens of up to 300 cm in width are possible. In fact, the entire machine plant is designed for this width, so that even mercerizing in over-widths is no problem. This condition is also unique.

Substantial amounts have been invested not only in machinery but also in construction. At the moment a new hall is being built on the works site that will not expand but actually replace the existing structure. With the new construction, working procedures will be further optimized, heat recovery intensified and climatic conditions in the production department improved.

For a long time, Africa and Asia were among the main importers of Swiss textiles. In the meantime, however, it can no longer be overlooked that there has been a worldwide change in the flow of goods. Instead of finished textiles, it is textile machines that are now exported from Switzerland to industrially developing countries. These in their turn are now producing a now greater than ever flow of made-up garments, aimed at a wide consumer market, which for cost reasons domestic manufacturers cannot compete with. But all the same, rising incomes accompanied by higher demands on fashionableness and better quality of textile products are also making themselves felt in non-European countries. They are opening up a chance for the domestic finishing industry to win back lost ground.

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*Heberlein Textildruck AG, Wattwil***Market leader in the printing sector**

Besides its carefully maintained, traditional printing of fashion dress goods, in recent years Heberlein has applied its great professional competence and enormous technical and creative know-how to build up a business in furnishing and upholstery fabrics that has received worldwide recognition.

Most recently, its efforts to achieve technical and fashion quality have gained a particularly pleasing form of recognition: At an international designer competition for textile and fashion, three furnishing fabric designs were awarded certificates for innovation and execution.

With about 500 employees, including 40 apprentices of both sexes, Heberlein is the largest printer of piece goods in Switzerland. From 7–9 million metres per year are finished, an amount which is about half that of the entire domestic production of printed goods. Both woven and knit fabrics are bleached, mercerized in the piece, dyed, printed and finished in a wide variety of qualities in cotton, linen, wool, natural silk, viscose, synthetics and blends.

The customer is able to benefit from a variety of printing processes that is unique in Switzerland, i.e. flat screen, rotary screen and roller printing. Up to 12 colours can be printed on the fabric by the rotary screen process and with flat screen printing, no less than 24 shades can be applied on widths up to 240 cm and in repeat lengths of up to 300 cm. Moreover, a state of the art engraving system using a special computer together with a design studio sees to the correct transfer of the design onto the printing screens, and a high-performing colour scheme and sample printing department looks after the preparation of small-sized sample fabrics and printed swatches.

Service is writ large; individual customer consulting and flexibility in meeting customer wishes are high priorities with Heberlein. For example, one of its strengths is the

printing of smaller yardages, which is practically no longer done in other countries. The company's own development department with a staff of 12 specialists is available to rapidly convert the customer's ideas into reality, carry out the company's own creations and generate creative impulses.

Besides its wide palette of printing processes for the dress and home textiles sector and in addition to its vast experience in printing pretreatment and traditional techniques such as chintzing, Heberlein has recently defined itself particularly with fashion fabric surface modifications like crash, crinkle and crushed effects, or highly sophisticated, iridescent, metallic, mother-of-pearl or matt/lustre effects. Carried out by an often ingenious combination of different techniques, these effective finish effects are shown to full effect particularly in luxurious furnishing fabrics. The flowing look now so highly in fashion demands new-type, super-soft finishes that are also contained in Heberlein's current programme, for which novel and special technical equipment has been acquired. To remain competitive on an international scale, it is essential to make continuous and well-targeted investments in order to keep abreast of the latest technological developments and as far as possible, rationalize production and administration.

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Seidendruckerei Mitlödi AG, Mitlödi

Special and exclusive

The entrepreneurial philosophy of this silk printing company in Canton Glarus can be described in a few words: Not to be a large-scale operation, to offer the absolute best in flat-screen printing and to raise the quality of its products and customer service to a higher than average level in every respect.

Standing behind this statement are 130 employees of a company that is

firmly determined to convert this intention into fact. People are indeed at the centre of the company's operation; it is their personal commitment that makes a raw piece of fabric into a living textile, despite the latest machinery and technical know-how. The management sees a major part of its task precisely here: to communicate to young textile workers not just skill but a love for their work, as a spur to exceptional attainments.

The result of these efforts has been impressive. It is difficult to emphasize any one of the company's creations over another; many of them from "Glarnerland" are specialties. In keeping with its goals, the focus is on high-quality screen printing. So as to meet all customer wishes as much as possible, a wide assortment of fabrics are printed, from light to heavy-weight woven and knit goods, mostly made of natural fibres.

A particular speciality is the resumption of the technique of warp printing or Chiné, which with the close partnership and collaboration of the firm of Gessner AG, Wädenswil, has become a widely-acclaimed speciality within the upholstery and furnishing fabrics sector.

A further possibility is multicoloured striped printing, where an unlimited number of colours can be printed without screens. A special machine has been developed for this process in the company's own plant.

Since the beginning of the 1980s, the foundation then laid for a second supporting pillar within textile printing in the furnishing and upholstery fabrics sector has in the meantime actually become one, with a total share of nearly 50%. Here, unlike the classic women's outerwear business, Mitlödi markets its own basic qualities. The major portion of these articles are for export, where W. Germany and the USA are the main markets. For this very reason the company maintains an office in New York together with the firm of Gessner.

So as to attain yet further diversification within the printing business, since the beginning of this year bedlinens have been added to the assortment of Mitlödi products.

So as to keep its manufacturing plant on a state-of-the-art level, following

an overall plan begun in 1973, a new building has been constructed and the entire machine plant renewed. There is confidence in the future at Mitlödi; if the expensive products of the textile industry offer a corresponding value in creativity, quality and service, Switzerland will lose none of its importance as a production site in the years to come.

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Textil-Werke Blumenegg AG, Goldach

Synchronized with the pulse of fashion

So that silk can shimmer as nobly as its reputation demands, so that cotton can feel as pleasing as its long-stapled natural fibre promises, qualified specialists are necessary in order to produce the desired properties in these coveted materials. Textil-Werke Blumenegg AG has these specialists and is equipped to meet the highest demands. Five chemists and a further staff of 135 employees see to the quality of the firm's finishing production, which is of course is especially important with precious raw materials such as silk, since the proportion of defective finished raw material must be kept to an absolute minimum. The company management is particularly proud of the fact that for years now, the percentage of rejects has been below 2% — no small achievement for a printer of absolute novelties on delicate raw materials.

Planning at Goldach envisages long time periods, so as to secure the future on a long-term basis. As early as 1969 a twenty-year overall investment plan was drawn up. This project, financed entirely by the company's own means, is now completed and the result is impressive; a newly-constructed building with large, clean production areas containing modern finishing machines for bleaching, pretreatment and dyeing as well as flat-screen, rotary and flat-bed printing and the application of finishes. The annual production at present is quantified at 1.8 million running metres, and with

the new machinery now installed this figure is expected to rise to over 2 million metres per year.

The main materials processed are the natural fibres — silk, cotton and wool, although synthetics and viscose fabrics are also printed. The principal form of material processed is woven fabric, but knit goods are also finished on request. A striking feature is the particularly high level of fabric qualities produced, including exclusive fashion novelties. Indeed, Blumenegg has earned itself the reputation of meeting the highest requirements. Among its cultivated specialties are foulards, vividly coloured women's dress prints and synthetic flag and bunting fabrics. Although in recent years the Swiss commission finishing industry has shrunk to some extent, just as the textile and garment industry as a whole, Textil-Werke Blumenegg AG has modernized and expanded. In order that the vast experience and capability of this branch is not gradually lost, the know-how in this company has increased in a unique manner and has made possible maximum occupation of its production equipment for years, ensuring a good earnings position. Without the traditional structure of the Swiss finishing industry, the labour of textile buyers and distributors would be endangered. If a company is going to operate in synchronization with the pulse of fashion, it must constantly be on the lookout for new ideas, and to a decisive degree these involve new finishing techniques. In recent years, internal development and innovative experiments have been strongly pushed forward. As a rule, commission finishers operate with few partners or in the background, away from the fashion front. In the opinion of the company management, this situation has changed: commission finishers are increasingly seeking contacts and collaboration with spinning mills, weavers and fabric buyers. The traditional contacts of finishers as pure service-oriented partners are thus improved and offer the customers a background and better security for the future. Joint developments obviously have the effect of reserving the customer for a certain period of time, thus guaranteeing exclusivity.