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SHOE AND LEATHER TRADE

. . . IN . . .

FRANCE AND SWITZERLAND

By

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TRANSMITTED TO CONGRESS IN COMPLIANCE WITH THE ACT OF MARCH 4, 1911, AUTHORIZING INVESTIGATIONS OF TRADE CONDITIONS ABROAD

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LETTER OF TRANSMITTAL.

DEPARTMENT OF COMMERCE AND LABOR,
Washington, August 7, 1912.

SIR: I have the honor to transmit herewith, in accordance with the act making appropriations for the legislative, executive, and judicial expenses of the Government for the fiscal year ended June 30, 1912, approved March 4, 1911, a report by Commercial Agent A. B. Butman, of this department, containing the result of his investigations of the shoe and leather trade in France and Switzerland.

Respectfully,

BENJ. S. CABLE,
Acting Secretary.

The SPEAKER OF THE HOUSE OF REPRESENTATIVES.

LETTER OF SUBMITTAL.

DEPARTMENT OF COMMERCE AND LABOR,
BUREAU OF MANUFACTURES,
Washington, June 6, 1912.

SIR: I have the honor to submit herewith a report by Commercial Agent Arthur B. Butman on the shoe and leather trade of France and Switzerland. His investigations followed the lines of work previously done in the United Kingdom and Germany, and included a study of the various factors influencing American trade, chief among which is the production of boots and shoes in native factories.

Respectfully,

A. H. BALDWIN,
Chief of Bureau.

To Hon. CHARLES NAGEL,
Secretary of Commerce and Labor.

SHOE AND LEATHER TRADE IN FRANCE AND SWITZERLAND.

FRANCE.

BOOT AND SHOE MANUFACTURING.

There are about 1,000 factories in France in which footwear is manufactured by machinery. Many, in fact most, of these are small establishments with limited equipment that can hardly be called modern. The more important factories, however, have complete installations of modern shoemaking machinery, and they turn out most creditable products. The output of the factories is steadily increasing and during the last two or three years especially there has been marked improvement in style, fit, and appearance.

The use of machinery in the manufacture of footwear is of long standing in France. About 1863 the Blake sole-sewing machine with fixed horn was manufactured and installed in considerable numbers by one Mr. Goodwin, of Paris, a machinery constructor. Mr. Godillot, the late army contractor, brought from the United States about 1865 an improved Blake sole-sewing machine with revolving horn. Two years later the Blake Sole-Sewing Machine Co., of London, through an agent in Paris, leased at a yearly rental about a dozen of these machines in various parts of France, and about 1873 the company established a branch in Paris. The use of American shoemaking machinery in France may be said to date from that time.

CHIEF MANUFACTURING CENTERS.

Paris, Nancy, Lyon, Nîmes, Marseille, Romans, Nantes, Fougères, Boulogne sur Mer, Amiens, and Liancourt are the principal manufacturing centers, although there are factories scattered all over the country. Shoe manufacturing, generally speaking, has always been an industry of importance in this country. Even at the time of the introduction of American machinery it was in a flourishing condition owing to the export trade. Manufacturing was largely by handwork; the rough stock was cut out by hand screw presses and heels were attached by a like method, the nails being driven from the inside of the shoe. The edges were trimmed in some cases by a machine (made by one Lemercier), and when the soles were attached by screws this was done by a hand machine made by the same firm. The edges of the soles and heels of army shoes were burnished by wooden disks adapted to the Lemercier machine.

"Handmade" shops, or "botteries" as they are termed in France, still exist, but their output at present is limited chiefly to high-grade expensive articles built for the ultraconservative among the well-to-do classes.

The shoemaking machinery installed in French factories is largely supplied by the United Shoe Machinery Co. of France, which is affiliated with the United Shoe Machinery Co. of Boston. In competition with this equipment are machines of French, English, and German origin, which combined constitute about 25 per cent of the total equipment.

A list of the more important boot and shoe manufacturers in France (those with a daily production of at least 100 pairs), with address and statement as to the nature and quantity of output, will be found on pages 40–42.

As the list given contains the names of only those having an output of at least 100 pairs daily, an incorrect impression may be gained of the importance of the various centers of manufacture, as well as of the total boot and shoe production of the country. In addition to those named there are many smaller factories turning out well-made products of various grades, the combined output of which is considerable.

A considerable quantity of so-called "mixed" work is manufactured in France. The term mixed is synonymous with fair-stitched, and means the attaching of the soles by two different machines. For example, the rand is attached to the upper and inner sole or middle sole by a staple tacker, or the middle sole or rand is nailed to the inner sole and upper, and afterwards the sole is stitched to the rand with a Goodyear Rapid stitcher.

CHARACTER OF OUTPUT.

Paris, Romans, and Limoges are the most important centers for high-class work, while articles of very good quality and style are produced at Toulouse. Nancy is a center of production for men's and women's ordinary-class boots, shoes, and slippers in both leather and felt. In Marseille a considerable quantity of boots, shoes, and slippers of ordinary quality is also made. The output of the Fougères factories is principally women's goods of a common class. Large quantities of rope-soled shoes are manufactured in the south of France. These are very cheap articles, the net cost of manufacturing the ordinary quality, with buckles or elastics, being $1.16 per dozen pairs for women's sizes and $1.35 for men's. Like articles of better quality are produced at a net cost of $2.12 per dozen pairs for women's and $2.32 for men's.

Most of the shoe factories in France are constructed with gallery floors, in some instances with two or three galleries one above the other; the lighter machinery is installed in these, which are lighted from above.

In factories not fully equipped with modern machinery, certain operations are accomplished by hand, including pulling over, pounding up, inseam trimming, welt-shank skiving, randing out heel seats, and cleaning uppers and stitches. Much work is also given out to house workers; in fact, I am told that probably 30 per cent of the total work of manufacture is still accomplished by workers in their homes. Female operatives are often employed in French factories in pulling over, pounding up, sole tacking, and finishing heels and edges.

More McKay-sewn boots and shoes are made than any other; mixed work holds second place, followed by Goodyear welt, turned, and nailed, in the order mentioned. There is comparatively little speciali-

zation, probably not more than 10 per cent of the manufacturers having specialized outputs.

French-made shoes are, on the whole, of good quality for grade and price. Most of the prominent manufacturers are now using American-shaped lasts and military or Cuban heels, although the French-style last, long and flat, with a low and medium heel for men's and a long toe with spring shank and Louis XV heel for women's goods, are employed to a certain extent. Glazed kid and box calf for men's and glazed kid, patent calf, and patent kid for women's lines are the principal leathers used.

LABOR CONDITIONS—WAGES.

The length of the working day for shoe operatives is usually 10 hours. Work commences at 6.30 a. m. and continues till 12 noon, with a half hour's rest from 8 to 8.30; work commences again at 1.30 p. m., and the day ends at 6.30 p. m. In some localities the hours are from 7 a. m. to 6 p. m. with an hour's rest at noon.

The labor cost in the boot and shoe industry is governed largely by locality, living conditions in the various towns where the industry centers influencing the scale of wages. Two systems of payment obtain, a fixed daily wage and the piecework system.

It is stated that the overcautiousness of the individual manufacturer as regards exceeding what is considered the standard rate of wage in his locality constitutes a great drawback to increased output. As a result of this prudence, individual employees operating certain machines, in turn, produce only what they individually or collectively consider sufficient, fearing a reduction in the piecework price should they increase their output.

A general idea of the labor cost in France may be obtained from the following lists of average wages paid in various towns:

Paris.

GOODYEAR-WELTED AND McKAY-SEWN BOOTS AND SHOES.

Operations.	Rate.
Rough-stuff cutting, per day	$1.35
Channeling:	
Goodyear soles, do	1.16–1.35
McKay soles, do	1.16–1.35
Sole molding, do	1.16
Channel opening for McKay, do	1.16
Gumming insoles, including lip turning and laying cloth, per 100 pairs	.77
Cutting, or clicking, per pair	.048
Upper fitting and stitching, do	.115
Counter skiving, per day	1.16
Box-toes skiving, do	1.16
Pulling over, by hand, per pair	.038–.048
Lasting on Consolidated, per dozen pairs	.162
Welt sewing on Goodyear machine:	
Men's, do	.154
Women's, do	.173
Sole sewing on McKay machine, do	.048
Inseam trimming, do	.077
Welt hammering, do	.019
Pounding up by hand after lasting for Goodyear, per 100 pairs	.772–.965
Filling and fixing shank pieces, per dozen pairs	.193
Sole laying (Goodyear), do	.077
McKay sole laying, taper tacker, do	.048
Rounding and channeling on last, do	.096
Shank skiving on last, do	.028
Channel opening on last, do	.028

Paris—Continued.

GOODYEAR-WELTED AND McKAY-SEWN BOOTS AND SHOES—Continued.

Operations.	Rate.
Sole stitching (Goodyear Rapid):	
Men's, per dozen pairs	$0.154
Women's, do	.173
Sole sewing (McKay) all around the forepart, including the shank, do	.057
For the shank only, do	.038
Channel laying, do	.038
Beating out and leveling the soles, do	.096
Nailing heel seats, do	.019
Stitch separating, by machine, do	.038
Heel stamping, per 100 pairs	.144
Heel attaching, per dozen pairs	.057
Toppiece slugging, by machine, do	.028
Heel trimming, do	.028
Heel breasting, do	.028
Edge trimming (randing out included), do	.135
Heel scouring, do	.038
Inking and edge setting, do	.115 .135 .154 .173 .193 .212
Inking and finishing heels and seat wheeling, do	.038
Sole buffing, do	.048
Shank and sole buffing, by Naumkeag, do	.057
Sole and shank finishing, including laying the colors, do	.135–.154
Cleaning up and taking out the last, do	.193

UPPERS: STITCHING, SKIVING, FOLDING, AND ASSEMBLING.

Skiving on Amazeen machine (all articles), per 100 pairs	$0.386
Folding on Lufkin machine:	
Vamps, do	.386
Upper for button boots, do	.482
Bals and low-cut shoes, do	.386
Tips, do	.144
Marking sizes on lining and upper, do	.144
Reece buttonholes (operative not supplying silk), per 1,000 buttonholes	.289
Button sewing, by machine, do	.193
Eyelet setting, by power machine, per 1,000 eyelets	.057
Fitting on block, one piece, men's and women's vamps, per 10 pairs	.077

STITCHING, OPERATIVE PAYING FOR FINDINGS.

Operations.	Rate per 10 pairs.	
	With thread.	With silk.
LACE LOW-CUT SHOES.		
Stitching lining and upper together	$0.019	$0.028
Stitching inside back stays	.038	.048
Stitching top and front	.038	.057
Trimming and tying ends of thread	.019	.028
Stitching lining to the vamp	.019	.019
Vamping	.048	.066
Top stays	.019	.028
BUTTON BOOT, SQUARE VAMP.		
Lining	.048	.048
Assembling	.038	.038
Stitching inside back stays	.066	.096
Stitching outside back stays	.028	.048
Vamping	.096	.144
Vamp closing	.077	.096

Paris—Continued.

DIVIDED WORK, LADIES' UPPERS, SQUARE VAMPS.

Operations.	Rate per 6 pairs.	
	With thread.	With silk.
Skiving	$0.023	$0.023
Folding	.057	.057
Lining	.048	.048
Assembling	.038	.038
Stitching inside stays	.066	.096
Stitching outside back stays	.028	.048
Vamping	.096	.144
Vamp closing	.077	.096
	.433	.550

The price per 1,000 for buttonholes, the operative supplying the silk at $5.62 per 2.2 pounds, the cord, and the needle, is $0.772; if the operative does not supply the findings, $0.289. If silk at $11.24 per 2.2 pounds is used, the rate is $0.965 per 1,000 buttonholes.

Nancy.

GOODYEAR-WELTED AND McKAY-SEWN BOOTS AND SHOES.

Operations.	Rate.
Rough-stuff cutting, per day	$0.675 –$1.16
Channeling Goodyear soles, per dozen pairs	.0096
Channeling McKay soles, do	.0096
Sole molding, per day	.579
Sole molding, per dozen pairs	.0057– .0077
Channel opening for McKay [1], do	.0038– .0077
Gumming insoles, do	.0096– .0135
Cutting or clicking, per dozen pairs uppers	.386
Cutting or clicking, per day	.868 – 1.16
Upper fitting, per dozen pairs	.096
Upper stitching, do	.386 – .675
Counter skiving, do	.0057
Box-toes skiving, do	.0096
Pulling over, by hand and machine, per pair	.0096– .0193
Lasting on Consolidated machine, do	.0096– .0135
Welt sewing on Goodyear machine, per day	.965 – 1.25
Sole sewing on McKay machine, per dozen pairs	.028 – .057
Inseam trimming, per day	.579 – .675
Welt hammering, do	.579 – .675
Pounding up by hand after lasting for Goodyear, do	.579 – .868
Filling and fixing shank pieces, per dozen pairs	.115 – .144
Sole laying (Goodyear), per day	.965 – 1.16
McKay sole laying by taper tacker [2], per dozen pairs	.0057– .0135
Rounding and channeling on last, per day	.965 – 1.16
Shank skiving on last, do	.386 – .482
Channel opening on last, do	.386 – .482
Sole stitching (Goodyear Rapid), do	1.06 – 1.16
Beating out and leveling the soles [3], per dozen pairs	.048 – .096
Nailing heel seats, per day	.579 – .675
Stitch separating, by machine, do	.579 – .675
Heel stamping, do	.772 – .868
Heel attaching, do	.772 – .868
Heel attaching, per dozen pairs	.023
Top slugging, by machine, per day	.579 – .772
Heel trimming, do	.772 – .965
Heel breasting, do	.772 – .965
Edge trimming, do	.965 – 1.16
Heel scouring, do	.579 – .675
Inking and edge setting, do	.868 – .965
Inking and edge setting, per dozen pairs	.096
Inking and finishing heels and seat wheeling, per day	.579 – .868
Sole buffing, do	.386 – .675
Sole buffing, per dozen pairs	.019
Shank and sole buffing, by Naumkeag, per day	.386 – .675
Shank and sole buffing, by Naumkeag, per dozen pairs	.019
Sole and shank finishing, including laying the colors, per day	.482 – .868
Cleaning up and taking out the last, do	.386 – .675

[1] In some factories this work is done by the lasters.
[2] Operator pays for the tack strip out of this amount and takes out the lasts.
[3] Channel laying is included in the operation of beating out and leveling the soles.

Nancy—Continued.

UPPERS: WORK PREPARED AND STITCHED BY SAME WOMAN, SKIVING DONE SEPARATELY.

Operations.	Rate per pair.	
	With thread.	With silk.
Lace shoes:		
Vamp stitched on to the quarters	$0.0347	$0.0386
Folded vamp	.0386	.0424
Button shoes:		
Vamp stitched on to the quarters	.0386	.0424
Folded vamp	.0463	.05
Tips (extra)	.0067	.0067
Imitation tips (extra)	.0028	.0028
Low-cut shoes, 3 button:		
Folded	.0424	.0463
Nonfolded	.0386	.0424
Goatskin slippers	.028	.....
Felt slippers	.015	.....
Babies' felt shoes	.02	.....
Girls' uppers, 3 rows stitching	.0366	.04
Stitching of women's uppers:		
Lace boot	.0279	.0318
Lace boot, stitching right round the vamp, imitation tip	.0366	.0386

NOTE.—Nondivided work: Preparation, vamp to be stitched over the quarters, $0.0347 per pair; vamp to be stitched under the quarters, $0.0386.

Brittany.

MEN'S BOOTS.

Operations.	Rate.
Pulling over:	
Nonlined, split-leather articles, per pair	$0.0193
Canvas or linen lined, including first trimming, do	.023
Operator on Consolidated lasting machine, do	.0965
Welt sewing, per hour	.0965
Pounding up and toe trimming, per pair	.0096
Filling and sole laying, do	.0328
Sole stitching (Goodyear Rapid), per hour	.0965
Taking out the last and leveling, by hand, per pair	.0115
Heel screwing and toppiece attaching, by hand, do	.023
Randing and edge and shank trimming, per dozen pairs	.0965
Heel trimming, do	.019
Heel scouring and joining, do	.048
Edge setting, do	.1158
Sole and toppiece buffing, do	.0386
Sandpapering, do	.0386
Inking and heel and shank finishing, do	.0579
Inking and sole finishing, do	.0965
Treeing, do	.1158

WOMEN'S COMMON-CLASS MIXED WORK (IN FOURGÈRES).

Tacking on and nailing round middle sole with staple tacker, per pair	$0.0038
Wire, do	.0019
Stitching forepart with Goodyear Rapid, do	.0048
Thread, do	.0048
Royalty, Red Rapid (small stitch), do	.0048
Nailing shank in channel with staple tacker, do	.0027
Wire, do	.0011
Total	.0239

NOTE.—The above prices for women's common-class mixed work can be obtained where there is sufficient work to organize properly. Of course, this cost would all be in addition to that of lasting an ordinary McKay shoe.

North of France (Glageon).

HEAVY BROGANS.

Operations.	Rate per 100 pairs.
Assembling, tacking on inner soles included	$0.386
Pulling over (Rex)	.289
Lasting (Consolidated)	.772
Pounding up (Rex)	.193
Sole laying (loose nailer)	.193
Sole nailing (loose nailer) once round	.193
Royalty	.87
Total	2.896

NOTE.—Men earn at least $1.16, and boys $0.48 per day.

COST OF LASTING SLIPPERS AT PONT-DE-L'ARCHE (NEAR ROUEN).

The operator on the Consolidated machine is paid by piecework at the rate of 5.4 cents per dozen pairs. This includes the pulling over and lasting, leaving the slipper ready to have the sole tacked or stuck on. Out of this price the operator has to pay a young man for pulling over; this operation consists of putting in the stiffener, one tack at the toe, and one tack on each side of the toe. The rate of 5.4 cents per dozen pairs is for sizes up to No. 7, inclusive (about 45 cents a hundred); above these sizes it is 7.14 cents per dozen pairs.

These wages are increased by 1.35 cents a dozen pairs if there is any patent leather at the toes or wings of the uppers. Each operator on the lasting machine does from 35 to 40 dozen pairs a day.

One boy sticks the filling on the sole at the rate of 60 to 70 dozen pairs a day for 1.35 cents a dozen pairs, and the soles, after being thus prepared, are stuck, under a small press, to the shoe; for the latter operation, also at the rate of 60 or 70 dozen pairs per day, the wage is 1.35 cents per dozen pairs.

COST OF BOTTOMING MEN'S FIRST-CLASS WORK IN FRANCE.

Operations.	Rate per 100 pairs.	Operations.	Rate per 100 pairs.
Tacking on insoles	$0.2895	Heel attaching	$0.434
Sticking box toes and counters	.1447	Toppiece slugging	.2895
Assembling	.386	Heel trimming	.193
Pulling over (Rex)[1]	.579	Heel breasting	.26
Lasting on Consolidated[1]	1.25	Pounding up heel seats	.3377
Pounding up toes and heels, by hand	.675	Stitch separating	.386
Welt sewing	.965	Edge trimming	.82
Inseam trimming	.48	Heel scouring[1]	.434
Welt shank skiving	.1447	Heel and heel-breast buffing	.2895
Welt hammering	.193	Jointing shanks and heels	.154
Filling	.772	Edge setting	1.25
Sole laying	.48	Sole buffing and cleaning on Naumkeag[1]	.549
Rounding and channeling	.675	Finishing heels and seat wheeling	.386
Shank skiving and channel opening	.386	Sole finishing	.772
Sole attaching on Goodyear Rapid and randing	1.06	Inking	.24
Nailing and trimming heel seats	.48	Cleaning up, treeing	.87
Channel laying	.1447	Taking out the last	.2895
Sole beating and leveling	.386	Sticking sock lining	.193

[1] Findings paid for by operator.

COST OF MANUFACTURING HEELS.

The following statements show the average cost of labor in France on the manufacture of heels. Lifts are cut out by men earning an average of $0.965 per day, and heels are built by women earning $0.48.

The prices given are the average paid in shoe factories. Heel manufacturers pay a little less, perhaps 10 per cent less on the building, but the price of cutting remains the same. Stamping the heels on No. 4 compressor is paid for at the rate of 2.12 cents per 100 pairs.

Operations.	Rate.
CUTTING OUT LIFTS.	*Cents.*
Leather heel lifts, in one piece.....per pound..	1.27
Heel lifts, in several pieces.....do....	2.54
Heel lifts of cardboard and artificial leather.....do....	.52
Attaching sectional heel lifts by machine.....do....	.69
BUILDING OF HEELS.	
Men's 6/8.....per 100 pairs..	10.6
Men's 8/8.....do....	14.4
Men's and women's 10/8.....do....	19.3
Women's Cuban and hollow 12/8.....do....	24
Women's Louis XV.....do....	33.77

LABOR COST AT LEROY FACTORY.

The actual cost of labor on a well-known shoe called the "Incroyable," manufactured at the factory of A. Leroy, Nancy, and retailing at $1.93 per pair, is as follows:

Operations.	Rate.	Operations.	Rate.
Tacking on insoles (500 pairs)..per day..	$0.386	Heel trimming.....per 10 pairs..	$0.0193
Assembling counters and toes (500 pairs).....per day..	.48	Edge trimming.....do....	.0386
Pulling over on machine (500 pairs) .....per day..	1.25	Sandpapering heels.....do....	.028
Consolidated lasting.....per 100 pairs..	1.06	Sandpapering heel breast.....do....	.0193
Pounding up, tacking the soles, and taking out the lasts.....per 100 pairs..	1.109	Edge setting.....do....	.0772
Sewing on McKay machine.per 10 pairs..	.0386	Imitation stitch wheeling.....do....	.0193
Leveling.....do....	.0579	Sandpapering top lifts.....do....	.0096
Heeling.....do....	.023	Sandpapering soles.....do....	.0193
Universal slugging.....do....	.0096	Coloring soles.....do....	.0193
Breasting.....do....	.0096	Finishing the soles.....do....	.0386
Relasting.....do....	.0154	Heel-seat beading.....do....	.0057
		Cleaning the uppers.....do....	.0096
		Treeing and taking out lasts.....do....	.1158

LABOR COST AT LEVY FACTORY.

The cost of labor at the factory of A. & J. Levy, Nancy, for McKay and mixed work is as follows:

Operations.	Rate.	Operations.	Rate.
Tacking insoles (500 pairs).....per day..	$0.386	Slugging.....per dozen pairs..	$0.0077
Sticking counters (500 pairs).....do....	.386	Power heel breasting.....do....	.077
Sticking toes (500 pairs).....do....	.434	Relasting.....do....	.0135
Assembling uppers.....do....	.965	Heel trimming.....do....	.0154
Operator on pulling over machine (500 pairs).....per day..	1.25	Plowing out the edges.....do....	.0154
Consolidated McKay.....per 100 pairs..	.87	Edge trimming.....do....	.0154
Pounding up on rotary machine (500 pairs).....per day..	.579	Heel scouring.....do....	.0212
Filling and shanks.....do....	.53	Heel-breast scouring.....do....	.0057
Tacking middle soles on the staple tacker.....per 100 pairs..	.2895	Jointing shanks and heels.....do....	.0077
Tacking soles (taper tacker).....do....	.24	Edge setting.....do....	.0965
Rapid stitching .....per dozen pairs..	.028	Sole sandpapering.....do....	.0135
McKay sewing (400 pairs).....per day..	.965	Sandpapering top lifts.....do....	.0057
Leveling.....per dozen pairs..	.0579	Buffing shanks.....do....	.0057
Stitch separating.....do....	.0077	Blacking the soles and heels.....do....	.0077
Heeling.....do....	.0366	Finishing heels.....do....	.0057
		Finishing soles.....do....	.048
		Heel-seat beading.....do....	.0077
		Treeing and pulling out the lasts..do....	.0965

LABOR COST AT MARTIN & PICARD FACTORY.

The cost of labor at the factory of Martin & Picard, Nancy, is shown by the following statement:

Operations.	Rate.	Operations.	Rate.
Preparing for the lasting (500 pairs) per day	$0.579	Slugging.....per 100 pairs..	$0.0965
Pulling-over operator.....per day..	1.16	Heel trimming (man finds the knives) per 100 pairs	.2895
Consolidated lasting:		Heel breasting.....per 100 pairs..	.077
Men's.....per 100 pairs..	1.16	Sandpapering heels (woman pays for sandpaper).....per 100 pairs..	.386
Women's and girls'.....do....	.772	Edge trimming.....do....	.965
Leveling.....do....	.289	Edge setting.....do....	.579
Filling and putting in shanks (200 pairs) per day	.579	Scouring and buffing (woman pays for sandpaper).....per 100 pairs..	.386
Tacking soles on taper tacker, per 100 pairs	.24	Coloring.....do....	.193
McKay sewing.....per 100 pairs..	.2895	Finishing.....do....	.579
Leveling.....do....	.772	Treeing and pulling out the lasts...do....	.965
Heeling (man finds the nails).....do....	.328		

LABOR COST AT NOUGAYROL FACTORY.

The cost of labor at the Nougayrol factory, Toulouse, for McKay and mixed work is shown in the following:

Operations.	Rate per 100 pairs.	Operations.	Rate per 100 pairs.
Looking up lasts	$0.0965	McKay sewing in the shanks	$0.1447
Laying insoles	.0965	Cementing and channel closing	.1447
Stitching in counters, box toes	.386	Automatic leveling out the soles	.24
Pulling over	.24	Heel nailing on Lightning heeler	.193
Consolidated lasting	.579	Top lift slugging on Universal machine	.1447
Pounding up and toe trimming	.193	Heel trimming	.1158
Covering up	.2895	Heel breasting	.0965
Filling and putting in shanks	.386	Edge and edge-shank trimming	.48
Tacking middle soles	.0965	Heel scouring	.386
Welt tacking on staple tacker	.48	Edge setting	.386
Sole laying, taper tacker	.193	Sole scouring	.193
Rough rounding on mixed work	.386	Naumkeag buffing	.0965
Channel opening on the last	.0965	Blacking	.193
Stitching the forepart	.386	Sole finishing	.386
Stitching all round	.579	Treeing, by machine	.2895
Tacking the toes	.0965	Heel-seat beading	.0772
Tacking the heel seats	.0965	Sticking the insoles	.048
Pulling out the lasts	.2895	Stitch separating, by hand	.048
McKay sewing all around	.2895	Taking off the covers	.579

COST OF LABOR IN FACTORY AT TOURS.

A Tours manufacturer of a woman's laced Richelieu shoe, McKay-sewn, with a 6/8 heel, single sole, and with an entire middle sole of cardboard, gets this class of work lasted by hand (by women) ready for sewing on the McKay machine, channels not opened, at 15.4 cents per dozen pairs, and each woman earns at this rate from 57.9 to 77.2 cents per day. The same class of shoes, with an 11/8 heel and a patent-leather toe cap (the woman finding lasting tacks and paste for pasting in the box toe), is paid for at the rate of 18.29 cents per dozen pairs; this increase in price is due to a shank piece in wood or cardboard, the toe cap not being of first-class leather. Only 4 dozen pairs of this description can be produced daily by a woman. These articles are sold in retail shops at 95.5 cents for the former, and $1.15 for the latter. The manufacturer produces daily 200 dozen pairs.

COMPLETE COST IN TOULOUSE FACTORY.

A general idea of the labor cost will have been gained from the foregoing statements. It is difficult to formulate an exact cost statement for France as a whole, since, as already stated, wages vary. I have, however, been furnished the following statement of the labor cost of a good grade of men's and women's shoes (high cuts) Goodyear-welted, as made at Toulouse, which may perhaps be considered a fair average for the country on similar goods. The statement embraces all items, both hand and machine labor, from cutting out bottom stuff and uppers to placing in cardboard boxes ready for shipment.

Operations.	Cost per pair.
DIEING OUT ROUGH STUFF FOR BOTTOMING.	*Cents.*
Operative (paid an average of $1.44 for dieing out soles, inner soles, counters, and box toes from 220 pounds of suitable leather)	0.96
HEELS.	
Dieing out lifts	.63
Building	.01
Compressing on No. 4 compressor (2.5 cents per 100)	.025
Total	.755
UPPERS.	
Dieing out by Ideal press	1.35
Cutting linings by hand knife	.007
Fitting, skiving, folding, and stitching complete (cost of silk included), button boot	8.299
Total	9.656
PREPARATION.	
Channeling inner soles	.115
Gumming, including lip turning	.772
Skiving counters	.096
Skiving box toes	.096
Total	1.079
LASTING.	
Selecting lasts	.096
Tacking on inner soles	.096
Fitting counters, pasting box toes (assembling)	.482
Pulling over, on machine	.386
Lasting (Consolidated machine)	.868
Covering uppers	.289
Total	2.217
SEWING WELT AND STITCHING SOLE, ETC.	
Tack pulling and upper trimming	.019
Inseam trimming	.241
SEWING WELT AND STITCHING SOLE, ETC.—continued.	*Cents.*
Sewing in welt	0.868
Welt hammering	.144
Skiving welt in shank	.144
Fixing shank pieces	.144
Bestos filling	.386
Sole laying	.289
Rough rounding and channeling	.675
Shank skiving	.193
Opening outsole channel	.135
Stitching on outsole	.868
Total	4.106
HEELING AND FINISHING.	
Heel-seat nailing	.144
Cementing outside channels	.096
Closing outsole channels	.193
Leveling soles on Auto leveler	.386
Heel-seat trimming	.096
Imitation stitch wheeling (2 operations)	.386
Heel attaching (Lightning heeler)	.337
Toppiece slugging	.289
Heel trimming	.289
Heel breasting (power breaster)	.193
Shank and edge trimming	.579
Finishing junction of heel breast and shank	.289
Heel-breast scouring	.579
Edge and shank-edge finishing	.579
Sandpapering sole and toppiece	.289
Buffing soles and toppieces (Naumkeag)	.144
Coloring soles, edges, and heels	.241
Finishing soles	.482
Heel finishing and seat wheeling (Xpedite machine)	.241
Removing cover from upper	.579
Pulling out last and treeing	.289
Pasting in sock lining	.048
Cleaning linings	.096
Placing in cardboard boxes (250 pairs per day at 38.6 cents)	.154
Total	6.998
Grand total	25.771

COST OF PRODUCTION IN VARIOUS CITIES.

One manufacturer in Marseille making 450 pairs per day of all-round McKay work employs 155 hands, as follows: 75 men at $1 per day, 10 youths at 38.6 cents, 55 women at 54 cents, and 15 girls at 24 cents. His output costs for labor, from the cutting of rough stock to placing in cartons, 24.7 cents per pair for both men's and women's goods.

In the same town another manufacturer employs 290 hands and produces 180 pairs of Goodyear-welt and 645 pairs of McKay work daily. He pays in daily wages: 140 men at 91.6 cents, 30 youths at 33.7 cents; 85 women at 51 cents, and 35 girls at 24 cents. His boots and shoes cost for labor, from rough-stuff cutting to putting in cartons: Men's and women's Goodyear welt, 27.4 cents per pair; men's and women's McKay-sewn, 21.2 cents.

In Limoges for high-class work, the cost of labor from cutting of rough stock to placing in cartons, on men's and women's Goodyear-welt work is 51 cents per pair; on men's and women's McKay-sewn, 47.2 cents per pair. The following daily wages are paid: Men, $1.158; youths, 57.9 cents; women, 53.7 cents; girls, 33.7 cents.

In Romans the rate of wages is: Men, 86.8 to 96.5 cents; youths 19.3 to 38.6 cents; women, 48.2 to 67.5 cents; girls, 19.3 to 38.6 cents. The labor cost on a pair of men's boots (all operations and placed in cartons), very high-class work, Goodyear-welt is 51 cents. Another Romans firm's labor cost for women's Goodyear-welt work is 57.9 cents per pair; McKay-sewn, 50.18 cents, and cheaper-grade McKay-sewn, 48.2 cents.

SALES SYSTEM—LABOR ORGANIZATIONS.

A number of manufacturers maintain retail stores for the disposition of their products. The terms usually given to dealers by French manufacturers vary; some give 30 days, others 60, and still others 90 days, without counting the month of the invoice. In addition, 2 or 3 per cent is also granted in certain instances.

In France, as in other countries, labor difficulties are more or less frequent in the shoe industry. In the chief centers of manufacture the employers have an association known as "Chambre Syndicale," and the employees likewise have syndicates, or unions. In Fougères, for example, the workmen not only have their syndicate but also a bourse du travail, corresponding to the central labor union or trades council in the United States. Within the last few years the latter organization has erected a house in which there is a hall for meetings and a theater. The syndicate in Fougères, in fact, is one of the most completely organized in France. Labor troubles are frequent, a week rarely passing without some quibble between masters and men. The operatives are somewhat opposed to the use of machinery, particularly the cutters against the clicking press.

COST OF BUILDINGS—POWER—EXPORT STATISTICS.

As to the cost of building sites and the construction of factories in France, I am informed that in provincial towns such as Nancy, Romans, and Limoges, the average cost of land is about 10 francs per square meter ($1.61 per square yard). The cost of building a one-story factory with light walls, inside fulcrums of light columns, roof of iron tiles and glass, with cemented ground, is reckoned at about 100 francs per square meter ($16.14 per square yard) for large surfaces; if there are two stories, 200 francs per square meter ($32.28 per square yard); if three stories, 300 francs per square meter ($48.42 per square yard).

Rentals are reckoned at about 8 per cent of the value of the factory building. City taxes amount to about 10 per cent of the rental paid. Shoe manufacturers are also taxed according to the number of machines used and workmen employed. For each machine worked by hand the tax is $1.16 per year; for each power machine, $2.32; for each workman employed, 58 cents.

The motive power used is approximately as follows: Electricity, 70 per cent; water gas, 15 per cent; steam, 10 per cent; city gas, 5 per cent.

During 1910 the exports of boots and shoes of domestic manufacture from France were valued at $2,123,771. The quantities exported to various countries were as follows:

Countries.	Pounds.	Countries.	Pounds.
Belgium	213,840	Turkey	58,300
Egypt	30,800	United Kingdom	143,880
French possessions	1,165,560	All other countries	174,900
Germany	54,780		
Morocco	73,920	Total	2,017,400
Switzerland	101,420		

HIDE AND SKIN TRADE.

Imports of hides and skins into France exceed exports, as a whole, but exports of sheep, lamb, and calf skins are greater than the imports. The following table shows the quantity and value of the imports and the value of the exports during 1910:

Articles.	Quantity.	Value.
IMPORTS.		
	Pounds.	
Raw hides, wet or dry	114,399,560	$20,059,025
Sheep and lamb skins	5,571,940	887,261
Goat and kid skins	24,836,020	8,889,390
Calfskins	9,316,560	3,759,655
Other small skins	1,421,880	658,792
Total	155,545,960	34,254,123
EXPORTS.		
Large hides		10,455,524
Sheep and lamb skins		2,896,203
Goat and kid skins		2,728,800
Calfskins		5,373,444
Other hides and skins		824,559
Total		22,278,530

Reexports of hides are small, most of the imports being retained for consumption in the country.

COUNTRIES SUPPLYING IMPORTS.

The source of the imports is indicated in the following table:

Articles and countries.	Pounds.
RAW HIDES, WET OR DRY.	
Argentina	4,907,980
Belgium	11,159,060
Brazil	15,700,740
British India	2,324,300
Chile	7,666,340
China	5,778,300
French possessions	9,600,140
Germany	9,323,160
Italy	8,537,100
Mexico	2,359,500
Netherlands	2,806,540
Peru	1,744,600
Spain	2,314,620
Switzerland	2,739,880
United Kingdom	2,608,760
United States	5,686,340
Uruguay	7,908,120
All other countries	11,234,080
Total	114,399,560
SHEEP AND LAMB SKINS.	
Argentina	2,273,480
Belgium	669,900
French possessions	639,980
Germany	300,520
Russia	181,500
Spain	400,840
Switzerland	568,480
United Kingdom	125,400
All other countries	411,840
Total	5,571,940
GOAT AND KID SKINS.	
Argentina	1,478,840
Austria-Hungary	799,920
British India	4,143,040
China	669,680
Egypt	712,140
GOAT AND KID SKINS—continued.	
French possessions	2,615,360
Germany	1,181,400
Italy	1,098,680
Morocco	1,621,620
Russia	1,151,920
Spain	2,978,140
Turkey	1,878,140
United Kingdom	683,760
All other countries	3,823,380
Total	24,836,020
CALFSKINS.	
Argentina	433,620
Australia	340,120
Austria-Hungary	1,012,880
Belgium	1,045,000
French possessions	51,480
Germany	2,925,120
Italy	565,840
Netherlands	565,180
Russia	410,520
Switzerland	461,560
United Kingdom	360,360
Uruguay	772,200
All other countries	372,680
Total	9,316,560
OTHER SMALL SKINS.	
Austria-Hungary	53,680
Belgium	148,500
British India	93,940
French possessions	41,140
Germany	625,900
Russia	94,380
Switzerland	57,420
United Kingdom	200,220
All other countries	106,700
Total	1,421,880

EXPORTS—PRICES—SALES METHODS.

Exports of hides and skins from France are chiefly steer and horse hides, with small quantities of bull and cow hides. Hides and skins are sold at public auction, with official catalogues and printed report of the sales; also by mutual agreements renewed either monthly or annually.

Prices of raw hides and skins vary widely, according to the season, region of the country, and condition. Prices in Paris on March 1, 1912, for fresh hides, with skulls and horns, taken at the shambles, were as follows per 100 pounds: Oxen, $12.30; cow, $11.60; bull, $10.35; calf, $19.25. These prices were obtained at public sales and are an increase of about 20 per cent over those of 10 years ago.

All sales for export are understood firm, and paid cash against documents, or on bankers' credit three or four months' sight. A few French concerns having branches abroad consign hides and skins to these branches, but this is rather exceptional and is not considered a sale.

The hide and skin market in France is at present (April, 1912) very firm and active. In 1911 (detailed statistics for which are not yet published) the country still imported a larger quantity of hides and

skins than it exported, while the only countries to which exports are increasing are Germany and the United States.

TANNING INDUSTRY.

There is no official industrial census in France and it is therefore difficult to state accurately the number of tanneries; but there are approximately 1,000 scattered throughout the country. Probably about 50 per cent of these are worked by machinery, the remainder being small concerns employing no more than 8 or 10 persons and working with the old process.

There is more or less specialization in manufacture, grouped under the usual heads, namely, upper leather, sole leather, leather belting, fancy leather, and glove leather. The names and addresses of some of the principal tanning firms in each of the classes mentioned, except glove leather, with a statement as to the nature and quantity of their daily output, are given on page 43.

Three-fourths of the output of the upper-leather tanners is mineral and one-fourth vegetable tannage. The sole leather is chiefly of oak and chestnut bark tannage, and the leather belting oak bark. Most of the fancy leather is of sumac tannage for bookbinding, moroccos, fancy articles, etc.

TANNING CENTERS—RAW MATERIALS—WAGES.

The chief centers for glove-leather manufacture are Grenoble, with about 30 tanneries having individual daily outputs of 200 dozen small goat and lamb skins; Annonay, with 10 factories of about the same capacity; Millau, with 20 factories, and St. Junien, with 10 factories.

It must not be inferred that the entire number of tanneries in this country previously mentioned as working with machinery are fully equipped with modern machinery. Many are comparatively small establishments, with equipments scarcely modern. The fair-sized tanneries have modern machinery, and the larger and more important plants have full modern equipment and employ large numbers of workpeople. The French tanner, in general, is very conservative.

While no statistics are available as to the annual consumption of raw material (hides and skins), an idea of the approximate quantity worked may be gained by comparing the annual slaughter in France, figures for which are published by the Department of Agriculture, with the exports of domestic hides and skins, and imports from foreign countries, previously given. The annual slaughter in France is as follows: Oxen, cows, and bulls, 1,950,000; heifers, 187,000; calves, 3,522,000; sheep, 7,000,000; lambs, 1,434,000; goats and kids, 1,030,000.

The time required for tanning sole and belting leather varies greatly. Many tanners take from six to nine months, others from three to five months, and a few from one to two months. Box calf, goat, and sheep skin manufacturers turn out their stocks, as a rule, in from four to six weeks' time.

Confronted by the gradual increase in prices of raw material, the tanner here, as in Germany, complains of his inability to do business with even fair profit. Ten or fifteen years ago the French tanner held a very enviable position, owing to his ability to secure the specially good home pelts that are now being sought by foreign buyers at prices the French tanner considers exorbitant.

In the Department of the Seine, Paris and its vicinity, 10 hours constitute a days' work, and a tanner or currier receives up to $1.54

daily. The average, however, is $1.16 for men and $0.58 for women. These wages are considered high for France, being necessitated by the present high cost of living. In 1860 the daily wage for men was 87 cents and in 1900 it was $1.06.

In the Provinces a day's work is from 10½ to 10¾ hours; the average daily wage for men is 77 cents and for women 39 cents.

LEATHER IMPORTS AND EXPORTS.

The following table shows the value of the imports into and exports from France of partially and wholly prepared and finished leathers during 1910:

Articles.	Imports.	Exports.
Goat, sheep, and lamb skins, tanned or tawed only	$1,803,382	$3,158,454
Other skins, tanned or tawed only	3,951,935	3,168,809
Calfskins, finished or ready to finish, tawed or prepared by vegetable tannage	309,041	866,415
Goat, kid, sheep, lamb, calf skins, etc., of natural color, dyed, or black	1,103,303	11,023,774
Cow and other large hides	555,801	1,176,315
Goat, sheep, and lamb skins, prepared by mineral tannage	1,194,670	213,404
Other skins, prepared by mineral tannage	1,244,155	200,623
Varnished or japanned leather	1,001,320	627,423
Leather, prepared and finished, not otherwise specified	783,271	542,899
Leather belting	435,522	485,945
Total	12,382,400	21,464,061

LEATHER TRADE.

The American leather trade with France is seriously handicapped by the fact that most American products are subject to the general, or highest, tariff rates. The only American leather entering under the minimum tariff is vegetable-tanned waxed calf, which is now seldom manufactured by tanners in the United States. In the following table, giving the tariff on leather, the special rates accorded the United States are printed in italics; otherwise the general rates are applicable.

Tariff No.	Articles.	General tariff.	Minimum tariff.
476	Hides and skins, prepared:		
	By vegetable tanning or tawed—	*Per 100 pounds.*	*Per 100 pounds.*
	Merely tanned or tawed—		
	Goat, kid, sheep, and lamb skins	$1.31	$0.88
	Other—		
	Neither split nor fleshed—		
	Untrimmed	4.38	2.19
	Backs	5.25	2.81
	Leavings and flesh splits	3.50	1.58
	Split or fleshed: *Dutiable as the tanned hide or skin, according to kind, plus*	.88	.26
	Curried—		
	Calfskins, waxed or ready to be waxed, but not having undergone any of the processes mentioned in the following paragraph	6.57	[1] 4.38
	Goat, kid, sheep, lamb, calf, and other skins, of natural color, dyed or blackened in the bath or by the brush, sleeked, grained, checkered, stamped, morocooed, glossed, or dull	7.88	5.25
	Cow and other hides, dyed or blackened in the bath or by the brush, sleeked, grained, checkered, stamped, morocooed, glossed, or dull	7.00	4.38
	Imports originating in the United States and Porto Rico	*6.13*	.....
	Trimmed for fine saddlery, and pigskins of natural color, black, browned, or dyed [2]	6.57	3.50
	Sheepskins, prepared in Europe or elsewhere from raw skins from non-European countries, not pared, dyed, dull, or sleeked, for shoe linings, etc	7.00	3.94
	Imports originating in the United States and Porto Rico	*6.13*	.....

[1] Applies to imports originating in the United States and Porto Rico.

[2] Imitation pigskin obtained by stamping cow or other hides dutiable as "Other prepared hides and skins not specified."

Tariff No.	Articles.	General tariff.	Minimum tariff.
476	Hides and skins, prepared—Continued.		
	Hides and skins, mineral tanned, other than those exclusively alum tanned—[1]	*Per 100 pounds.*	*Per 100 pounds.*
	Goat, kid, sheep, or lamb: *Rates applicable to the hide or skin, according to kind, increased*	50 p. ct.	35 p. ct.
	Other: *Rates applicable to the hide or skin, according to kind, increased*	40 p. ct.	25 p. ct.
	Patent leather [1]	16.63	10.94
	Chamois-dressed or parchment-dressed leather, dyed or not, or tawed and dyed	7.88	5.28
	Imports originating in the United States and Porto Rico	*6.48*	.....
	Hungarian leather and other prepared hides and skins not specified, not dyed	6.57	3.50
	Imports originating in the United States and Porto Rico	*5.25*	.....
477	Artificial leather, common, or leather board:		
	Unworked	2.63	1.75
	Worked (soles, heels, stiffeners, and similar articles, complete or in cut parts, etc.)	3.50	2.19
477bis	Artificial leather with balata, india rubber, or similar base	9.19	6.12

[1] Patent leather, when mineral tanned, except with a substance having a base exclusively of alum, is subject to one-half the surtax imposed on that process, according to the kind of hide or skin.

ORIGIN OF LEATHER IMPORTS.

The source of the imports of leathers is indicated by the following table, giving the quantity imported from the principal countries:

Articles and countries.	Pounds.	Articles and countries.	Pounds.
Goat, sheep, and lamb skins, tanned or tawed only:		Goat, kid, sheep, and lamb skins, prepared by mineral tannage:	
Spain	751,080	Germany	121,660
Turkey	28,380	United Kingdom	67,100
United Kingdom	1,506,120	United States	343,860
All other countries	133,100	All other countries	12,100
Total	2,418,680	Total	544,720
Other skins, tanned or tawed only:		Other skins prepared by mineral tannage:	
Belgium	2,147,420	Austria-Hungary	141,460
Germany	1,408,220	Germany	498,960
United Kingdom	5,853,100	United Kingdom	109,560
United States	107,360	United States	51,480
All other countries	494,560	All other countries	32,780
Total	10,010,660	Total	834,240
Calfskins, finished or ready to finish, tawed or prepared by vegetable tannage:		Varnished or japanned leather:	
Germany	156,420	Belgium	85,140
United Kingdom	71,280	Germany	480,260
All other countries	54,120	United Kingdom	100,760
Total	281,820	United States	47,960
		All other countries	6,380
		Total	720,500
Goat, kid, sheep, lamb, calf skins, etc., of natural color, dyed, or black:		Leather, prepared and finished, not otherwise specified:	
Belgium	33,660	Belgium	261,140
Germany	333,080	Germany	220,440
United Kingdom	172,260	United Kingdom	423,500
Uinted States	89,760	All other countries	34,760
All other countries	72,160	Total	939,840
Total	701,020	Leather belting:	
Cow and other large hides:		Belgium	299,640
Austria-Hungary	74,140	Germany	66,000
Belgium	106,700	Switzerland	14,960
Germany	165,660	United Kingdom	139,480
United Kingdom	526,020	United States	7,920
All other countries	32,560	All other countries	8,580
Total	905,080	Total	536,580

CHARACTER OF LEATHERS IN DEMAND.

The leathers desired by the French market include hemlock sole leather, especially in the cheaper grades; rough splits; waxed splits; box calf, black and colored; glazed kid, black and colored; patent kid; patent sides; white washable chrome leather, in sides and in skins; carriage leathers; harness and bag leathers.

As a rule, the French market requires chiefly the better grades, but there are exceptions, as, for instance, hemlock sole leather, the cheaper lines of which would find a ready sale but for tariff disadvantages.

The leather trade in this country is gradually being concentrated in districts, although not to the same extent as in Great Britain. The principal leather districts are Paris, Nancy, Fougères, Limoges, Romans, Lyon, Toulouse, and Bordeaux.

The special demands of the various localities mentioned (the more important shoe-manufacturing districts) may be stated as follows: Paris uses chiefly the better grades of upper leathers, but there is a certain sale for the commoner grades, including those at 12 cents per foot and better grades up to 45 cents. Nancy uses medium-priced and common grades, at prices ranging from 10 to 35 cents per foot. Fougeres uses mostly the cheaper grades, ranging in price from 5 to 30 cents per foot. Limoges, Lyon, and Toulouse use the fairly good and better grades of upper stocks, paying 12 to 45 cents per foot. Bordeaux uses some of the very best grades and pays from 16 up to 59 cents per foot.

German and English tanned leathers, together with those of domestic manufacture, compete with the American on the French market. Prices of the latter are naturally higher on most lines, owing to the higher customs duty. In some instances the prices of American leathers compare favorably with competing lines, but only because few such goods are produced in other countries; moreover, these lines represent only a small percentage of the total amount of leather consumed.

It is stated by those having an intimate knowledge of the leather trade in this country that at the same price, provided deliveries were guaranteed to arrive equal to sample, preference would be given to American upper leathers.

I am assured that if American leathers could be entered at the same rate of duty granted to German and English leathers, the prospects for American leather trade with France would be excellent, and that American tanners would then have in France one of the best markets in Europe. Care would also have to be taken in selection and terms. Drawing on the buyers, bills to be accepted after the goods have been checked and found up to sample submitted, would prove most satisfactory.

If equal tariff conditions existed American tanners would doubtless find it to their advantage to open branch houses in Paris, with sales offices in the different leather districts, as has been done in Great Britain. Deliveries for this market must be made punctually on the dates specified when sale is effected, and the goods must be strictly up to sample. In the latter respect the French manufacturers are especially particular. Buyers in this country are unwilling to accept one delivery perhaps superior to sample, and the next

delivery inferior, the one to balance the other. They insist upon uniformity, each delivery to be strictly equal to the sample from which lots were selected.

BOOT AND SHOE TRADE.

The present American boot and shoe trade with France is gratifying. According to the United States Bureau of Statistics, exports of boots and shoes to France have been as follows:

Fiscal year ended June 30—	Pairs.	Value.	Fiscal year ended June 30—	Pairs.	Value.
1903	45,099	$109,874	1908	73,654	$238,702
1904	30,817	87,553	1909	102,431	340,324
1905	21,292	64,723	1910	141,594	425,021
1906	40,220	126,239	1911	111,306	362,904
1907	87,697	262,485			

American footwear has become popular to a marked degree. In Paris especially the trade is cosmopolitan in character and has a broad clientele, yet includes all classes of French people. Outside of Paris American footwear finds sale more largely among the well-to-do classes.

REQUIREMENTS OF FRENCH TRADE.

The French customer demands the most advanced fashion in every respect, and almost invariably light-weight lines. The Louis XV heel so generally worn by French women five years ago has been largely supplanted by the Cuban heel. Louis XV heels are still used on house and evening shoes for women, but it is stated that requests for street shoes with French heels are about one-tenth of what they were five years ago. The long straight French "forme" has also been to a large extent displaced by the typical American last. Elegance and comfort, combined with style and finish, and variety in shape and shade are characteristic requirements of the trade.

The present season is largely given over to colors and fancy combinations for both men's and women's footwear. Colored cloth or gaiter tops, with vamp of self, or darker toned, or black or white leather, and black and white gaiter tops with black patent vamp are combinations frequently seen. Boots of this character are worn, as previously stated, by both men and women, and for ordinary street wear, the combination often carrying out in the gaiter top the color of trousers or costume.

Sizes and widths desired are practically the same as in the United States, with a larger proportion of small sizes (1½ and 2) for women.

SOURCE OF IMPORTS.

Imports of boots and shoes into France in 1910 were valued at $3,346,108. The following table shows the quantity imported from various countries:

Countries.	Pairs.	Countries.	Pairs.
Austria-Hungary	20,095	United Kingdom	660,089
Belgium	64,476	United States	115,141
Germany	88,295	All other countries	22,365
Italy	6,693		
Spain	29,068	Total	1,155,889
Switzerland	149,667		

CUSTOMS DUTIES.

The fact that the United States does not enjoy the minimum tariff on boots and shoes entering France, which rates are granted to competing countries, constitutes a handicap to the rapid increase of American trade. The following table gives the general and minimum rates on boots and shoes. Rates other than the general rates that are applicable to American products are in italics.

Tariff No.	Articles.	General tariff.	Minimum tariff.
	Manufactures of hides and skins, and leather, natural or artificial:	*Per 100 pounds.*	*Per 100 pounds.*
478	Straps for clogs, soles cut out of beaten and sleeked leather, heels, stiffeners, and the like, complete or in cut parts, of natural leather.	$7.00	$4.38
479	Boot and shoe uppers, gaiters, leggings, vamps, insteps (shaped or not), and quarters, of calf, cow, horse, goat, or kid leather—		
	Of other than patent leather	16.63	10.94
	Imports originating in the United States and Porto Rico	*15.32*	.....
	Of patent leather	23.20	15.32
480	Top boots (bottes)—	*Per pair.*	*Per pair.*
	With leather soles, nailed, or wooden soles	.58	.39
	Imports originating in the United States and Porto Rico	*.48*	.....
	With leather soles sewed on	.96	[1].58
481	High shoes—		
	Woolen, cotton, or hemp, with leather soles	.29	.19
	Woolen, cotton, or hemp, with fittings of leather, of sheepskin, black goatskin, or flesh split of cowhide	.48	.29
	Of dyed goatskin, kid or imitation thereof, morocco, colt skin, of tawed, waxed, natural, patent leather or glazed calfskin, of any other leather not specified, or of silk or silk mixed with other materials	.58	.39
482	Low shoes—		
	Woolen, cotton, or hemp, without fancy fittings or embroidery, with leather soles	.14	.096
	Woolen, cotton, or hemp, with fancy fittings; of sheepskin, black goatskin, or flesh split of cowhide	.24	.14
	Of dyed goatskin, kid or imitation thereof, morocco, colt skin, of tawed, waxed, natural, or patent leather, glazed calfskin, of any other leather not specified, or of silk or silk mixed with other materials	.29	.19
	Shoes reaching to the ankle: *Dutiable as low shoes, of the corresponding kind, plus*	.077	.048
483	Children's footwear, with leather soles less than 17 cm. in length—		
	Wholly or partly of leather, or of pure silk, or silk mixed with other materials, sewed	.14	.096
	Other	.048	.029

[1] Applies to imports originating in the United States and Porto Rico.

The higher cost of production in the United States, the greater distance from the French consumer, and the tariff necessarily place American footwear at a cost disadvantage as compared with that of competing foreign manufacturers. Further, the American manufacturer must reckon with what I am told may be considered an unprecedented development and improvement in the domestic boot and shoe factories, especially during the past two years.

RANGE OF PRICES—FEWER IMITATION AMERICAN GOODS.

Both French and English boots and shoes as at present manufactured are copies, and in some instances most excellent copies, of the genuine American-made product; consequently buyers of more limited means satisfy their needs with the lower priced article.

Women's American shoes are retailed generally in France at 21 to 40 francs ($4.05 to $7.72) per pair, with special lines as high as 45 francs ($8.69) per pair. Men's shoes are sold at 25 to 40 francs ($4.83

to $7.72) per pair; little gents', or youths', at 21 francs ($4.05); children's, sizes 11½ to 2, at 15.50 to 18.70 francs ($3 to $3.61).

British-made shoes are sold in France at various prices from 11.95 to 32 francs ($2.30 to $6.18) per pair for women's lines, and 16.50 to 35 francs ($3.18 to $6.76) for men's goods.

Imports from Germany are principally in the cheaper grades, while those from Austria-Hungary are mostly handmade house and evening shoes.

I find a marked change in certain aspects of the retail shoe trade in Europe since my former trade investigations in 1906. At that time the genuine American-made shoe was far less common on the market than now, and imitations purporting to be American articles were very frequently shown. This attempt to secure business on the reputation of the American shoe has evidently been discontinued, at least it is not now carried on so generally.

The foreign-made shoe is unmistakably improved in every respect, and fortified by the certain knowledge of this improvement foreign manufacturers and retailers of high-grade goods exhibit and advertise their products on their own merits.

The prices at which women's French-made shoes of classes and qualities competing with American are sold range from 11.25 to 42 francs ($2.17 to $8.11) per pair. Men's goods of corresponding grades are sold at 16.50 to 40 francs ($3.18 to $7.72).

As regards the extension of American shoe trade with France, the situation in this, as in other countries previously reported upon, demands properly directed sales methods, preferably an American retail shoe store personally maintained and directly managed, numerous examples of which already exist in Great Britain and on the Continent. The business of these houses is reported as being satisfactory and constantly increasing. Second in value would be placing the goods on the market through an agency, exclusive, of course, since any agent handling several foreign lines, or goods of his own and foreign lines, is naturally inclined to push the one yielding the larger profit.

The French market is well worth the personal study of any boot and shoe manufacturer who intends entering upon export trade.

SWITZERLAND.

BOOT AND SHOE MANUFACTURING.

Switzerland has between 30 and 40 factories in which boots and shoes are manufactured by machinery. Kreuzlingen and Geneva have four factories each, and Herzogenbuchsee, Olten, Pruntrut, Winterthur, and Aarau two each; the remainder are scattered, one factory to a town, throughout the country.

The most important firm is C. F. Bally (Ltd.), established in 1851, and owning and operating nine factories. The firm manufactures chiefly for a widely distributed export trade, which includes continental Europe, Great Britain, Africa, and South America. It employs in its various factories at present 4,062 persons, of whom 2,028 are males and 2,034 females. In addition, 481 persons are employed as home workers. The principal factory is at Schoenenwerd, about 34 miles from Zurich, in which are employed 2,595 persons. The location of other factories of the firm and the number of employees are as follows: Aarau, 390; Dottikon, 378; Schoeftland, 219; Dranicken, 193; Reitnau, 110; Kulm, 102; Kirchleerau, 61; Nieder-Gosgen, 14.

BALLY FACTORY BUILDINGS.

All the Bally factories are of the most modern construction, built of stone or concrete, well lighted, and with special attention to sanitation. Admirable systems for ventilation and dust collection are installed throughout. There are modern lavatories in every factory, and in the larger factories bathrooms for the use of the operatives. The charge for a hot bath is 30 centimes (6 cents), and for a hot or cold shower 10 centimes (2 cents).

Each factory is also provided with spacious, well-heated, and well-ventilated dressing rooms. A special room is reserved in all the factories for employees who may meet with accident or become ill, and a trained nurse is constantly in attendance. Large dining rooms are set apart in each factory where dinners are provided and served by the company at the fixed prices of 30 and 70 centimes (6 and 14 cents). The lower priced meal includes, for example, rice soup, boiled beef with potatoes, and bread, and is furnished at a loss to the company of about 4 cents per meal per person. All employees who desire it are served a glass of hot milk at 9 o'clock every morning, for which a charge of 45 centimes (9 cents) per week is made.

Most of the Bally factory buildings are surrounded by attractively designed gardens, while the Schoenenwerd factory adjoins a large park belonging to the firm and open to all. The company also has at Schoenenwerd a large recreation building, in which conferences, concerts, and theatricals are held. Many of the employees occupy houses belonging to the firm, which are rented at liberal rates, while the company advances money at a low rate of interest to those who wish to buy homes.

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WELFARE WORK—LACK OF SPECIALIZATION.

Every unmarried man and woman employed at Bally's is obliged to deposit at least 5 per cent of his or her wages in the Canton, or State, savings bank, which sums may be withdrawn only upon marriage or other specified special circumstances. I am informed that many save voluntarily more than the 5 per cent and that the savings of the Bally employees last year aggregated 241,010 francs ($46,515).

Every man and woman employed may become a member of one of the sick funds that are maintained. There are three classes of members in these, the first class paying 12 cents, the second class 22 cents, and the third class 32 cents per month. Every member when ill is entitled to the services of a physician and to medicine free of charge; in addition female members of the second class receive 24 cents and male members 30 cents per day, while members of the third class receive 50 cents per day in addition to a physician's services and medicine. Serious cases of illness demanding hospital treatment or an operation are also provided for at the expense of the fund.

There is also an old-age pension system, the object of which is that the employee, with the help of the company, may accumulate, by yearly payments to a savings bank, such a sum that at 65 years of age he may retire and buy, should he so desire, a life rent, or lease, of a house belonging to the firm for his occupancy. The company contributes from 25 to 62½ per cent of the yearly installments to the old-age pension fund, the amount being determined by the years of service of the employee. Instead of yearly payments to the savings bank, a portion of the amounts may, if preferred, be used for endowment life insurance payable on the attainment of the sixtieth year.

All of Bally's factories are fully equipped with shoemaking machinery, much of which is American; the remainder is German and French. The motive power is electricity. The company endeavors, as far as possible, to specialize the work in its various establishments, but specialization like that found in the United States is out of the question in this country, which, with its 3,750,000 inhabitants, is too small to permit the adoption of American methods. An up-to-date factory here must be able to fill all demands, to supply boots and shoes for infants, children, misses, youths, women, and men. A majority of the shoe dealers in Switzerland stock Bally's goods, and in every locality each dealer wishes to handle lines other than those sold by his neighbor, consequently the manufacture of more kinds and classes is necessary. Furthermore, the large export trade of the firm is distributed among countries of widely differing demands, and extensive specialization is as impossible in the foreign as in the home department.

ACCESSORY DEPARTMENTS—OUTPUT.

Sole and upper cutting are done exclusively in the Schoenenwerd factory, while stitching is done in five and bottoming in six factories. The factories are provided with the following accessory departments: A wooden-heel factory, with an output of about 4,000 pairs of wooden heels daily; a factory where wooden heels are covered with leather, canvas, or celluloid; a factory for inks, blackings, stains, and cements;

a last factory; an elastic-web factory; other departments include the manufacture of standard screw wire, cardboard fillers, shoe patterns, counters, box toes, and shoe cartons. There are also a large machine shop in which certain machines are made and repairing is done, a die shop, and a joiners' shop where wooden articles such as shoe racks are made. There is also a special department for hammering sole leather.

The combined production of the Bally factories is 11,000 pairs per day, as follows: 1,000 pairs infants' turned and nailed, 1,800 pairs girls' McKay sewn and screwed, 4,000 pairs women's McKay sewn and screwed, 2,000 pairs women's turned, 1,200 pairs women's and men's Goodyear welted, 1,000 pairs men's McKay sewn and screwed. The total weekly production of the entire industry in Switzerland at present is 138,600 pairs, including 4,200 pairs of wooden shoes. A list of the Swiss firms, with addresses and statement as to the nature and quantity of output, is given on pages 43 and 44.

STATUS OF INDUSTRY—CHARACTER OF OUTPUT.

The boot and shoe industry in Switzerland has apparently grown but little in recent years; in fact, during the past few years business has fallen off, owing, it is stated, to overproduction. I am told, however, that a new factory, with a daily capacity of 500 pairs, is to be built during the present year by a company known as the Cooperative Society of Switzerland. McKay-sewn, Standard-screwed, and pegged goods will constitute the output, which will be distributed through the cooperative stores of the society maintained in many of the larger Swiss towns. Hitherto this society has imported largely from European countries the footwear it now proposes to manufacture.

Only the more recently constructed factories in Switzerland may be called modern, but most of them are very well equipped with machinery, though all of the latter is not of the latest type. The more progressive manufacturers are ready to adopt up-to-date systems and to install the latest equipment, while others, the majority perhaps, are still conservative as regards undertaking the manufacture of better-grade work. German machinery is the principal competitor of American equipment; France also supplies a certain amount of machinery, principally that made by Johnson & Fils, Paris. The United Shoe Machinery Co., of Boston, maintains an office in Zurich, where a large supply of spare parts, etc., is kept on hand; the Atlas Werke (German) also has an office in the same city. Other competing machinery firms carry on business through agents who make periodical visits to the trade.

McKay-sewn goods forms the bulk of the Swiss boot and shoe production; nailed and pegged, welted, and turned work follow, in the order named. A beautiful turned shoe for women is made at the Bally factories, largely for export trade; Swiss-made McKay-sewn goods in general are very fair, but welted work is not so well understood and is apt to run poor. Goods for the export trade are made as nearly like an American article in appearance as possible, American-shaped lasts being used and all details of finish closely copied. While the tendency for the home trade is toward the American shape, there is possibly a preference for a somewhat modified American shape, a style between the American and the French.

The Swiss manufacturer uses a good grade of leather in his various products, considering the price. The domestic trade for which he largely caters demands a strong article, none other being able to withstand the hard usage of the rough and hilly country. Certain circumstances and conditions peculiar to the country tend to increase the cost of both labor and materials, first of which is the impossibility, from the point of view of the Swiss manufacturer, of specializing. Second, owing to the lack of sufficient efficient workpeople, the industry can not be concentrated in a center or in centers, as in most countries. The Bally company, for instance, manufactures in nine factories, located of necessity in as many towns. Great difficulty is experienced, particularly during the summer months, in procuring a sufficient number of female operatives, service in hotels, with higher wages, including tourists' fees, being preferred to factory work. Third, the Swiss industry is dependent upon foreign countries, not only for factory equipment but also for most of the materials used; consequently larger stocks of upper and bottom leathers than would otherwise be necessary must be kept on hand, at a loss of interest on capital. The cost of production is furthermore increased through the operation of the Swiss employers' liability law, the employer being liable under this act for every accident occurring in his factory, and being compelled to insure the risk at a high premium or at times pay heavy indemnities.

WAGE SCALES.

The daily or weekly system of wage payment prevails; the average wages for the various operations are given in the following:

CUTTING AND STITCHING ROOM.

Operations.	Weekly wages.	Operations.	Weekly wages.
Pattern designing	$15.44	Crimping on Lockett machine	$5.31
Pattern grading on Hartford machine	3.72	Skiving	4.63
Pattern cutting on pattern shears	3.72	Folding, by hand	4.24
Pattern binding	3.72	Perforating on Royal machine	3.86
Lining cutting on revolution press	4.78	Pasting in middle linings on hub-lining cementer	4.24
Lining pricking on Boston machine	2.34	Seam rubbing	3.18
Lining marking, by hand	3.72	Beading tops, by hand	3.18
Cutting outsides	6.37	Hooking on, by hand	3.72
Cutting trimmings, etc., by hand	4.46	Eyeleting on Duplex	4.24
Stamping upper leather on power machine	4.25	Lacing on Ensign lacer	3.86
Blucher-vamp marking	4.25	Closing	5.21

SOLE-LEATHER ROOM.

Dieing out:		Cutting rands from strips with Universal machine	$4.78
Soles	$6.37	Cutting rands from counter offal with Scott machine	3.18
Insoles	6.37	Counter nicking	5.31
Counters and box toes	6.37	Counter rolling	5.31
Side linings, tar felt, and shank pieces	4.78	Counter molding	5.31
Lifts	4.78	Building heels with clinch machine	4.24
Pieced lifts	4.78	Compressing heels with No. 4 press	4.78
Evening, by machine	4.45	Condensing top lifts	4.78
Marking (numbering) soles, insoles, and counters	3.47		
Tacking rands on lifts with power welt tacker	4.63		

McKAY-SEWN AND PEGGED WORK.

Operations.	Weekly wages.	Operations.	Weekly wages.
Sorting lasts	$4.56	Heel scouring	$5.79
Tacking on insoles with staple tacker	3.40	Heel-breast scouring	3.40
Sorting uppers and laying them with lasts	3.18	Jointing shank and heel, by hand	4.78
Pasting counters and box toes	3.18	Edge blacking	3.97
Assembling	3.18	Edge setting:	
Pulling over, by machine	5.84	Without stitch wheeling	5.02
Lasting on Consolidated (complete)	6.95	With stitch wheeling	5.79
Pulling insole staples	3.18	Bottom and top lift scouring	3.40
Pounding with rotary pounding-up machine	4.78	Bottom and top lift buffing (cleaning)	3.40
Tacking on soles and nailing heel seats with taper nail tacker	5.40	Blacking heels and bottom, by hand	3.72
Heel-seat trimming	5.84	Polishing heels and beading edge with Xpedite	4.56
Pounding heel seats and drawing lasts	5.02	Coloring and brushing forepart	3.72
Sewing with Rapid McKay sewer	6.37	Blacking and polishing shank	3.72
Pegging with Davey machine	6.37	Coloring and brushing pegged bottoms with oakaline	3.47
Channel cementing, by hand	3.18	Top ironing	4.44
Channel closing	3.86	Ornamenting shanks	5.21
Leveling with Hercules or Cyclops leveler	5.31	Laying sock lining	3.86
Randing and edge trimming	5.40	Rubbing up bottoms, cleaning slugs, and drawing lasts	4.25
For edges without stitch wheeling	5.02	Cleaning upper leather, by hand	4.25
Attaching heels with Lightning machine	6.37	Stamping trade-mark on soles with Regent	4.25
Slugging	6.90	Cleaning uppers and linings, treeing, dressing, lacing or buttoning, and packing	4.44
Heel trimming	5.84		
Heel breasting	5.31		
Fetching finishing lasts and relasting	5.21		

GOODYEAR-WELTED WORK.

Sorting lasts	$4.56	Leveling	$5.31
Tacking on insole with taper tacker	3.40	Heel-seat nailing with loose nailer or Davey machine	6.37
Tacking on reenforcing piece at heel and trimming heel seat	3.18	Heel-seat trimming	5.84
Sorting uppers and laying them with lasts	3.18	Scouring shank and heel seat before heeling	3.72
Pasting counters and box toes	3.18	Edge trimming in pairs	5.84
Assembling, by machine	3.18	Attaching heels with Lightning machine	6.37
Pulling over, by machine	5.84	Slugging	6.90
Pulling up lining and tacking sides of heel seats	4.78	Heel trimming	5.84
Lasting heel seats and sides, on Consolidated	7.72	Heel breasting	5.31
Lasting toes on No. 5 bed machine	7.72	Heel scouring:	
Trimming upper leather on Rex machine	6.37	Coarse	5.21
Pounding heel seat and tapping up toe on rotary machine	4.78	Fine	6.95
Pulling lasting tacks, removing toe wire, and resetting tacks to hold upper before welting, by hand	4.78	Heel breast scouring	3.40
Inseaming with model K machine	5.31	Jointing shank and heel, by hand	4.78
Pulling insole staples and tacks holding upper	5.31	Gumming and twice blacking edge	2.97
Skiving ends of welts and fastening with small tacks, welt sewing, and welt beating (done by one operator)	7.72	Edge setting	6.37
Filling bottoms	5.31	Stitch burnishing with Booth machine	6.37
Tacking in shank piece	3.18	Top-lift sanding	3.40
Cementing bottoms	5.31	Bottom scouring, forepart	3.40
Sole laying	5.31	Buffing bottom and top lift (cleaning)	3.40
Sole rounding and channeling, channel opening, and stitching with model M machine (done by one operator)	7.72	Blacking heels and bottoms twice, by hand	3.72
Channel cementing	3.86	Coloring and brushing forepart	3.72
Channel closing	3.86	Blacking and polishing shank	3.72
Stitch wheeling with Goodyear indenting and burnishing machine	6.37	Rubbing up bottoms and cleaning slugs	3.72
		Drawing lasts	5.31
		Stamping trade-mark on heels with Regent	4.25
		Laying heel-seat sock lining and examining inside of shoe for tacks	3.86
		Cleaning upper leather with machine	4.25
		Cleaning lining	3.47
		Ironing upper with Miller machine	4.25
		Lacing or buttoning	4.44
		Packing	4.44

WORK DONE BY WOMEN, GIRLS, AND BOYS.

Tacking on, reenforcing piece at heel, and trimming heel seat are done by women; skiving, folding, crimping, and marking, by women and girls; channel cementing, channel closing, heel-breast scouring, bottom and top lift scouring and buffing, coloring and brushing forepart, blacking and polishing shank, tacking on insole with staple tacker, scouring shank and heel seat before heeling, gumming and twice blacking edges, and stamping trade-mark on soles, by girls; edge blacking, by girls or boys; assembling and pulling insole staples, by boys.

ACTUAL COST OF GOODYEAR AND M'KAY WORK.

The following are the actual daily wages paid in one factory for various operations on the best grades of Goodyear-welted and McKay-sewn goods manufactured in Switzerland:

Operations.	Men's boots and shoes.	Women's boots and shoes.	Operations.	Men's boots and shoes.	Women's boots and shoes.
GOODYEAR-WELTED WORK.			M'KAY-SEWN WORK.		
Pulling over by machine	$1.06–$1.35	$1.06–$1.15	Pulling over by machine	$1.35–$1.44	$1.37–$1.43
Lasting:			Lasting on Consolidated	1.46– 1.57	1.53– 1.78
On Consolidated	1.64– 1.79	1.16– 1.41	Sewing	1.16	1.15– 1.56
On No. 5 bed machine	1.13– 1.25	1.22– 1.43	Leveling	1.48– 1.55	1.36– 1.61
Welting	1.38	1.31– 1.39	Heeling	1.24	1.12– 1.25
Rough rounding	1.37– 1.43	1.27– 1.30	Heel trimming	1.38	1.48– 1.78
Stitching	1.12– 1.22	1.30– 1.35	Edge trimming	1.18	1.13– 1.45
Leveling	1.32– 1.64	1.34– 1.43	Edge setting	1.56– 1.64	1.19– 1.70
Heeling	1.27– 1.36	1.06– 1.22			
Heel trimming	1.56	1.54			
Edge trimming	1.33– 1.38	1.28– 1.31			
Edge setting	1.43– 1.60	1.55– 1.75			

In the sole-leather room, sole cutters are paid $1.09 to $1.31 per day and heel builders $0.75 to $0.83. In the cutting room, cutters are paid $1 to $1.24. Various other operations are paid for as follows: Closing, $0.69 to $1.04; eyeleting, $0.78; hook setting, $1.02; packing in cartons, $0.62 to $0.77.

TANNING INDUSTRY AND LEATHER TRADE.

Comparatively little of either sole or upper leather is tanned in Switzerland. Two sole-leather and one upper-leather tannery may be mentioned, they being the only important establishments. Staub & Co., Mannedorf, sole-leather tanners, work about 300 sides daily, and Gerberei Olton, A. G., Olton, tan about 600 sides daily. Both are equipped with modern machinery, and a good quality of sole leather is produced. The products of the Gerberei Olton especially (hemlock extract tannage) enter into keen competition with hemlock sole leather imported from the United States. Swiss-tanned hides are well worked in the bellies and fully cleaned on the flesh side, and a leather of excellent appearance is the result. The combination tannage system requiring from four to six months is usually employed, although some cheaper-grade sole leather is produced by the quick-tannage system.

The only upper leather tannery of importance in Switzerland is located at Aaburg, operating under the firm name of A. Hagnauer & Co. The production is calf leather tanned by both the vegetable and the chrome tannage processes, and the firm employs about 100 hands.

Wages in both sole and upper leather tanneries average about 5 francs (97 cents) per day for ordinary labor, while a skilled tanner receives from 7 to 10 francs ($1.35 to $1.93).

IMPORTS OF LEATHER.

As previously stated the Swiss boot and shoe industry is largely dependent upon foreign tanners for both bottom and upper leathers. The domestic sole-leather tanneries do not produce sufficient bottom leather to meet the demands. The supply of box calf is very limited, and no glazed kid, comparatively large quantities of which are cut, is manufactured in the country.

The total imports of leather into Switzerland during 1910 were valued at $5,532,345, of which sole and upper leathers comprised $4,583,487. The remaining $948,858 worth was made up of harness and saddlery leathers, leathers for military equipment, uppers and soles for shoes previously prepared, etc. The source of the Swiss leather imports is shown in the following statement:

Countries.	Value.	Countries.	Value.
SOLE LEATHER.		COW AND SPLIT LEATHERS.	
Australia	$20,641	Austria-Hungary	$5,790
Austria-Hungary	250,297	France	10,051
Belgium	77,765	Germany	286,686
France	177,287	Italy	19,010
Germany	1,169,174	All other countries	4,661
Italy	9,804		
Netherlands	15,067	Total	326,198
United Kingdom	130,323		
United States	414,216	ALL OTHER LEATHERS, INCLUDING KID AND SHEEP.	
Total	2,264,574		
		Austria-Hungary	40,530
UPPER LEATHER, CALF.		Belgium	16,868
		France	31,497
Austria-Hungary	2,866	Germany	936,411
France	75,882	United Kingdom	175,784
Germany	216,000	United States	433,395
Italy	4,435	All other countries	4,963
United Kingdom	46,291		
United States	7,382	Total	1,639,448
All other countries	411		
		Grand total	4,583,487
Total	353,267		

PRINCIPAL GERMAN EXPORTERS.

Germany supplies by far the larger part of the entire demand of the Swiss sole and upper leather trade. Nearly all the cow and split leathers are supplied by Germany, and while the United States holds second place for all other upper leathers, including glazed kid, it furnishes less than one-half the amounts supplied by Germany.

As regards German competition in the various lines of leather, cowhides are furnished chiefly by Adler & Oppenheimer, Strassburg; Knapps & Schwander, Reutlingen; and Gebrüder Bräuchle, Metzingen.

The grades are first and medium, and range in price from 44 to 57 cents per pound. Lower grade lines are very little used.

Splits come from Adler & Oppenheimer, Strassburg; Knapps & Schwander, Reutlingen; Beeker & Co., Offenbach; and A. Th. Meissner, Stadlilm. First and medium grades, both heavy and light, are supplied at prices varying from 26 to 29 cents per pound for the former, and from 30 to 31 cents for the latter.

Calf (box sides, fatted box, and box calf) comes from Adler & Oppenheimer, Strassburg; Beeker & Co., Offenbach; Cornelius Heyl, Worms; and Doerr & Reinhardt, Worms. The prices paid are, for box calf 24 to 27 cents per square foot and for box sides and fatted box 19.3 to 22 cents per square foot.

Horsehides are supplied by Schmid & Co., Schorndorf; Knecht & Würtemann, Elmshorn; and Julius Kleinert, Mulheim on the Ruhr. Grained horsehide is bought at 13½ to 14½ cents per square foot for heavy goods, box-grained horsehide at 14½ to 17 cents, and glazed horsehide at 17 to 19.3 cents per square foot.

Glazed kid comes chiefly from Adler & Oppenheimer, Strassburg; Cornelius Heyl and Doerr & Reinhardt, Worms; and Meyer & Co., Offenbach. It is used in qualities ranging in price from 15 to 38 cents per square foot. Goatskins run from 11½ to 15 cents per square foot. Sheepskins are bought principally from French tanners at 3½ to 6 cents per square foot.

CHARACTER OF LEATHER IN DEMAND—AMERICAN TRADE.

Cowhides and splits are used principally in black, with limited quantities in natural color; calf is consumed in both black and browns; horsehides are sold in black mostly, with infrequent orders for browns; glazed kid is used in black and browns, and sheepskins in black, brown, and white.

Cowhides and splits run mostly heavy and a few medium; calfskins, medium and light generally, with a few heavy; all other leathers are of medium or light substance, with a tendency to average medium because of the requirements of the hilly country.

The United States enjoys the same customs tariff rate on leathers entering Switzerland as is enjoyed by Germany. Sole leather pays $1.40, box calf $1.57, and wax calf $2.10 per 100 pounds.

When asked why the trade of the Swiss boot and shoe manufacturer is so largely given to the German tanner, substantially the following reply was invariably given by Swiss buyers:

> European tanners, especially the Germans, adapt themselves entirely to the wishes of their Swiss customers, and they supply, as a rule, a stricter selection than the American tanner. German sole leather is cleaner on the flesh side and well worked in the offal; it is also firmer than the American product and the hides have less imperfections, such as brands, cuts, and scratches. The German splits, although a little higher in price, are preferred to the American because the German splits are more supple; German upper leather, too, has a softer feel than the American, and is liked for this reason.

The foregoing is from the point of view of German-Swiss manufacturers, and a certain allowance should be made, of course, for neighborly preference. Nevertheless, it is true that European tanners are more careful in selecting lots and more painstaking in many minor details than the American tanner. Proximity is of course in Germany's favor, likewise the long credits that German exporters

grant. Importers state that on an average two to three weeks is required for delivery of orders from Germany, as against five to six weeks from the United States. German terms are arranged to meet the customers' desires, from 2 per cent 30 days cash, net 90 days, up to 6 and even 8 months' credit, if needed. German tanners invite Swiss boot and shoe manufacturers to make their own selections at the tanneries, and in some instances, at least, even pay the railroad fare thither.

LESSENING DEMAND FOR SPLITS.

The trade in splits which the United States formerly held in Switzerland has almost entirely disappeared. This is due not only to the preference now shown for splits of German tannage, but also to the fact that Swiss trade in this special line is decreasing, having fallen off greatly during the past two or three years. The country people, who constitute the principal customers for split-leather footwear, are demanding lighter goods built from cheap box side or horse box leathers. The demand for the ordinary split-leather shoe is now confined to those forced by the nature of their occupation to wear the heaviest boots and shoes. Small quantities of American cheap splits are used by clog or wooden-shoe manufacturers for clog uppers.

In spite of numerous handicaps the United States is doing a fair trade in sole leather and considerable business in upper leathers other than calf. One Swiss shoe manufacturer stated that from May 1, 1911, to April 30, 1912, the bills of the firm for freight and duty alone on leathers imported from foreign countries amounted to 261,451 francs ($50,460). Possibly American tanners and exporters have not realized the extent of the leather market in Switzerland, and consequently have not directed their efforts toward obtaining a proportionate share of this trade.

BOOT AND SHOE TRADE.

Switzerland's exports of footwear reach nearly $2,000,000 annually, and are increasing. The trade is widely distributed and includes practically all the various lines of goods manufactured in the country. Leather boots and shoes, the exports of which, according to official Swiss statistics, were $1,460,673 in 1909 and $1,497,666 in 1910, form the principal item. Provisional statistics only are available for 1911, and in these the boot and shoe exports are not stated separately.

Large quantities of fancy turned goods for house and evening wear are exported, particularly to Great Britain. The attention of American boot and shoe manufacturers and exporters is directed especially to the volume of trade done by Switzerland with certain South American Republics. During the calendar year 1910, Argentina purchased $189,972 worth of various sorts of Swiss footwear, principally such lines of leather boots and shoes as are made in the United States. During the fiscal year 1910, the United States exported to Argentina $283,045 worth of boots and shoes. Chile bought of Swiss-made leather boots and shoes $78,124 worth, and of other sorts (cloth, velvet, silk, etc.), $4,558 worth, a total of $82,682, during 1910, while exports from the United States to Chile during the fiscal year 1910 were valued at $30,120.

The terms of sale allowed by Swiss shoe manufacturers are in some instances 2 per cent 30 days, net 60 days; and in others 3 per cent 30 days, net 90 days.

DESTINATION OF EXPORTS.

The exports of footwear from Switzerland during 1910 are shown, by countries, in the following table:

Counties.	Value.
LEATHER BOOTS AND SHOES.	
Africa	$12,212
Algiers	891
Argentina	140,140
Austria-Hungary	43,693
Belgium	5,059
British India	4,374
Chile	78,124
Denmark	1,850
Egypt	154,800
France	515,402
Germany	299,634
Italy	4,819
Netherlands	618
New Zealand	1,445
Russia	290
Turkey	13,779
United Kingdom	205,613
United States	95
All other countries	14,828
Total	1,497,666
CANVAS, LASTING, FELT, VELVET, SILK, ETC., SHOES WITH LEATHER SOLES.	
Africa	4,357
Argentina	49,832
Australia	1,876

Countries.	Value.
CANVAS, LASTING, FELT, VELVET, SILK, ETC., SHOES WITH LEATHER SOLES—continued.	
Austria-Hungary	$2,508
Belgium	2,666
Canada	4,076
Chile	4,558
Egypt	25,173
France	31,362
Germany	33,530
New Zealand	8,391
Turkey	3,191
United Kingdom	146,477
All other countries	17,300
Total	335,297
ALL OTHER FOOTWEAR.	
Austria-Hungary	375
France	1,979
Germany	141
Italy	569
Persia	317
Total	3,381
Grand total	1,836,344

SOURCE OF IMPORTS.

Imports of boots and shoes into Switzerland are increasing, the total value of all boots, shoes, and slippers imported during 1910 amounting to $2,070,608, an increase of $294,504 over 1909. Of this increase $239,797 was in leather boots and shoes.

As in the case of finished leather, so also in boots, shoes, and slippers, the demands of the trade are very largely met by goods of German manufacture. Imports during 1910, by countries, were as follows:

Countries.	Value.
LEATHER BOOTS AND SHOES.	
Austria-Hungary	$86,328
Belgium	15,994
France	103,621
Germany	1,284,441
Italy	46,359
Netherlands	55,306
Norway	1,230
Russia	984
United Kingdom	73,440
United States	70,059
Total	1,737,762
CANVAS, LASTING, FELT, VELVET, SILK, ETC., SHOES WITH LEATHER SOLES.	
Austria-Hungary	10,494
France	34,957
Germany	164,922
United Kingdom	2,235

Countries.	Value.
CANVAS, LASTING, FELT, VELVET, SILK, ETC., SHOES WITH LEATHER SOLES—continued.	
United States	$289
All other countries	758
Total	213,655
ALL OTHER FOOTWEAR.	
Austria-Hungary	1,734
France	51,285
Germany	63,297
Italy	818
United Kingdom	1,459
United States	244
All other countries	354
Total	119,191
Grand total	2,070,608

GERMAN SHOES SOLD—AMERICAN TRADE.

Germany furnishes for this market numerous lines of footwear with which American products are unable to compete, including various grades of children's goods and cheaper grades for men and women. The cost of manufacture, including labor and materials, is so much less in Germany that American competition in the cheapest grades of footwear is out of the question. In the better grades for men and women American trade in this country is increasing, and while keen competition must be met with like grades of German and British goods produced on American lines, as well as those of domestic manufacture, which are also close copies of genuine American-made products, the outlook for further development of our trade is very favorable.

It is practically useless for American manufacturers of the cheapest lines of boots and shoes to endeavor to place them on the Swiss market. Certain quantities of the highest grades can be sold, though the demand, while increasing, is limited and will doubtless grow slowly. American goods that sell best are the medium and higher grades, at factory prices ranging from $2.60 to $2.75 for women's and $2 85 to $3.15 for men's.

Customers for American footwear in Switzerland, aside from the foreign clientele that includes visitors, residents, students, etc., are found principally among the younger Swiss folk of both sexes. With all classes, however, American-shaped boots and shoes are growing in popularity; this is true of both men and women, even the more conservative having largely abandoned the wearing of the French or other shaped styles in favor of the American. Naturally, the conservative class demands a more conservative style, the American-shaped last being liked without extreme features.

Retail dealers state that among the younger element the present season's American styles are very popular, the latest fashions in women's fancy footwear with short vamps and high Cuban heels having met with unprecedented sales.

One of the principal dealers in the country estimates that the demand for the latest American styles, both men's and women's, during the present season has been three times as great as in former years.

In the more conservative styles for men and women German competition is especially keen. The shapes of the German shoes are practically the same as the American, while they are lower in price. Children's German-made shoes, as already intimated, are preferred to the American, on account of both price and style. Swiss parents do not take kindly to children's shoes with spring heels, fearing they may cause flat foot.

RETAIL PRICES.

An average retail price in Switzerland for the better grades of German-made boots and shoes is 21 francs ($4.05) per pair. An attempt is being made to popularize a medium-grade German shoe, which is as exact a copy of an American up-to-date product as possible, at fixed retail prices of 16.50 and 20.50 francs ($3.18 and $3.96) per pair for both men's and women's. Other German makes of men's boots and shoes are sold at 19 to 28 francs ($3.67 to $5.40). All

prices mentioned are on lines entering specially into competition with American goods.

Austrian-made footwear sold here is similar to the German products with the exception of a few turned goods. Women's Austrian-made lines are sold at 17 to 22 francs ($3.28 to $4.25) per pair; men's goods are priced generally at 22 to 24 francs ($4.25 to $4.63).

French boots and shoes of a lower grade are sold at 11.50 and 12.50 francs ($2.22 and $2.41) per pair for both men's and women's goods. The better grades are chiefly lighter-weight boots and shoes for women's wear, principally turned goods, which sell at 15 to 24 francs ($2.90 to $4.63) per pair. A very few French-made canvas shoes are also sold. It is stated that American-made canvas shoes are too heavy to suit the Swiss customer; moreover, the demand for canvas articles is quite limited.

Prices of American boots and shoes for men range from 22 to 35 francs ($4.25 to $6.76) per pair, with larger sales for a 25-franc ($4.83) shoe; women's goods range from 21 to 30 francs ($4.05 to $5.79) per pair, with most of the trade in a 22.50-franc ($4.34) product.

STYLES, LEATHERS, AND SIZES.

For spring, summer, and autumn wear glazed kid is the best selling leather in women's footwear; for summer particularly a larger per cent of brown is sold. For the autumn trade some patent leather is also sold, and for winter wear mostly box and chrome calf with some glazed kid and a little patent leather. Women's summer shoes are required in lighter weights than the usual American shoe. Customers are often diverted to a French shoe because of its light weight, hence women's summer goods for this trade should invariably have a light sole. The usual weight sole on American winter lines is satisfactory.

Practically the same leathers are required in men's as in women's footwear for the various seasons, with a larger percentage of calf leathers. Shoes, or oxfords, for both sexes have become very popular, and much larger quantities of them are now sold during the warm weather than of boots, or high cuts.

For the conservative trade, with whom the less extreme styles find favor, men's boots and shoes are desired in sizes 7 to 11½ and women's in sizes 3 to 8. In shapes of latest fashion men's goods are salable in sizes 5 to 10, and women's 2½ to 7. Sales of smaller sizes, 5 and 5½, in men's lines are more limited than of the medium sizes, although a considerable trade is done, particularly with Spanish, Portuguese, and other foreign students at the various Swiss schools and universities.

Some lines of American boots and shoes are bought direct from the manufacturers, others through a general European agent, and still others through commission houses. The customs duty on boots and shoes made of box calf, glazed kid, patent leather, or any other better grade leather, is 80 francs per 100 kilos ($7 per 100 pounds), all duties being collected on gross weight. Shoe cases should be built as light as is consistent with required strength, and be well strapped to minimize opportunity of breakage for theft. As a rule shipments are in 36-pair cases for men's and 60-pair cases for women's goods.

OUTLOOK FOR AMERICAN TRADE.

In the most up-to-date styles of men's and women's boots and shoes the United States now leads all competitors in Switzerland, and it is essential that our preeminence in this particular be maintained. The European manufacturer, by close study of American methods of manufacture and by careful copying of our products, has so far improved his machine-made product that only by vigilance directed toward the special points of advantage peculiarly and preeminently possessed by the American shoe can the United States maintain and increase its export trade, not only in Switzerland, but in France and Germany as well.

At least one French and three German shoe manufacturers maintain retail stores in this country. There is at present no personally maintained American shoe store, the numerous lines of American-made goods on the market being carried by the principal Swiss shoe dealers, and one or two lines by department stores. From the point of view of the European shoe dealer, the placing of American shoes in department stores is prejudicial to the American shoe trade in Europe as a whole, and is not to be recommended. Failing the personally-maintained store, the American manufacturer should send his most advanced styles to this country through personal agents. Great care should be taken to fill all orders with goods up to sample. The American dealer may discount the sample, the Swiss dealer is not so accustomed. Realizing the niceties of trade demands, our competitors are exercising extreme care in every minor detail of finish. The American consumer may not object to cutting off a thread or a loose end from a shoe, but the European customer does object.

I wish emphatically to urge the desirability of having every pair of American boots and shoes for export trade plainly stamped "Made in the United States of America." Although the sale of other than genuine American-made footwear under American style names, with misleading labels on the cartons, the country of origin not being stated but the contents purporting to be of American manufacture, is not done so frequently and so openly as formerly in European countries where genuine American-made shoes have now become well known, it is still done in some instances. I am told that certain lines so designated are exported to various countries, where they doubtless find sale as American goods. Swiss retail dealers state that it is now difficult to sell an American shoe other than those with well-known trade-marks, unless the maker's name and place of manufacture is woven on the strap or facing, or is plainly stamped on the sole.

[Accompanying Mr. Butman's report on Switzerland were five pairs of shoes and seven excellent photographs of the Bally factories, all of which will be loaned to interested firms upon application to the Bureau of Manufactures.]

APPENDIX.

FRENCH BOOT AND SHOE MANUFACTURERS.

NOTE.—Fair-stitched work is known as mixed in France.

Names and addresses of firms.	Daily production.	Class of work.
PARIS.	*Pairs.*	
Behr & Iung	500	Goodyear, McKay, and mixed.
A. Bloch	125	Goodyear and McKay.
Boisselier Fils	200	Do.
Bulard	250	Goodyear, McKay, and mixed.
Chapelier	150	McKay and nailed.
E. Chapuzot	250	McKay and slippers.
Collard	400	McKay and mixed.
Delatour	1,000	Slippers.
Derreal Père & Fils	250	Goodyear and McKay.
Dressoir, Pemartin & Pulm	1,500	Goodyear, McKay, and mixed.
Ehrlich Frères	300	Do.
P. Gregoire	600	McKay and mixed.
Hamelin	400	Goodyear, McKay, and slippers.
Hattat	400	Goodyear and McKay.
E. Lamy & Fils	150	Goodyear, McKay, and mixed.
Martin & Picard	300	Slippers and McKay.
Massot & Negre	150	McKay and mixed.
G. Mayer & Co	125	Goodyear, McKay, and mixed.
Monteux & Co	700	Goodyear.
Ple Frères	600	Goodyear, McKay, and mixed.
Samie	300	McKay and mixed.
Sté. des Fournitures Militaires	200	Goodyear and McKay.
NANCY.		
Claude & Durupt	200	McKay and mixed.
Gustave Collas	150	Do.
A. Discours & Fils	150	Do.
Vve. Doerflinger	150	Do.
René Geny	300	Goodyear, McKay, and mixed.
Vve. Laurent & Fils	500	McKay and mixed.
J. Leprettre	100	Do.
A. Leroy	1,500	Goodyear, McKay, and mixed.
A. & J. Levy	2,000	McKay and slippers.
Martin & Picard	1,500	Goodyear, McKay, mixed, and slippers.
Neobecker	150	McKay and mixed.
Antoine Ney	100	Do.
L. Odenat	300	Goodyear, McKay, and mixed.
Paulus, Lamotte & Bertrand	150	McKay, mixed, and nailed.
A. & P. Pernot	500	Goodyear, McKay, and mixed.
P. Spire	1,200	Goodyear, McKay, mixed, and slippers.
ROMANS.		
Bonnefoy	600	Goodyear, McKay, mixed, and nailed.
Bonneton Jourdan	100	McKay and mixed.
Eisenreich & Co	200	McKay and nailed.
J. Fenestrier	500	Goodyear.
Figuet & Co	300	Goodyear, McKay, and mixed.
E. Granger & Fils	250	Do.
Ph. Grenier Fils	300	Do.
Juven & Co	150	Goodyear and mixed.
Robin	100	McKay.
Rosset & Co	200	Goodyear and mixed.
P. Roux	150	Goodyear, mixed, and McKay
St. Cyr Cheval	200	Do.
L. Turpin	150	Mixed and nailed.
LIMOGES.		
Marcelin Bancaud	100	McKay.
Paul Denis	250	Goodyear, McKay, and mixed.
Dutour Fils	200	Goodyear and McKay.
A. Fougeras & Co	400	Goodyear.
Monteux & Co	1,800	Goodyear, McKay, and mixed.
Pericaut Lionet & Co	200	Goodyear and McKay.
Taluaud Bancaud & Co	200	Do.
L. Trapinaud & Co	300	Do.
Sylvestre Vincent	400	Goodyear, McKay, and mixed.

FRENCH BOOT AND SHOE MANUFACTURERS—Continued.

Names and addresses of firms.	Daily production.	Class of work.
LYON.	*Pairs.*	
Blancher	125	McKay and mixed.
P. Camsat & Co	500	Goodyear and McKay.
A. Celle	200	Do.
Desrayaud Frères	800	Goodyear, McKay, mixed, and nailed.
G. Leplant	800	Goodyear, McKay, and mixed.
Neyron & Co	300	Felt slippers.
Servajean	200	McKay and mixed.
TOULOUSE.		
E. Gardes	150	Goodyear, McKay, and mixed.
Georges Gril & Co	200	Do.
Louis Gril	300	Do.
H. Lenfant	600	McKay and mixed.
A. Moine	1,500	Goodyear, McKay, and mixed.
Nougayrol	900	Do.
A. Pons & Co	200	Do.
L. Vidal	600	Do.
FOUGÈRES.		
J. Bahu Fils Aîné	1,000	Mixed and McKay.
Vve. Bertin	200	Goodyear and McKay.
J. Cochet	1,000	McKay.
H. Cordier & Fils	2,500	McKay and Goodyear.
Girault & Sicard	600	McKay and mixed.
A. Morel	300	McKay.
J. Pichard	500	McKay and mixed.
OLORON.		
Bedat	3,000	Sandals (rope-soled shoes).
E. Bourgeade	150	Goodyear.
J. Carcabal	3,000	Sandals (rope-soled shoes).
Laferrere & Amadou	100	Goodyear, McKay, and mixed.
Laplace & Delor	250	McKay and mixed.
HASPARREN.		
J. B. Amespil Jeune	200	Rope-soled shoes.
Salvat Amespil Fils	800	McKay and mixed.
Sauveur Amespil	150	Do.
Haulon Frères	150	Do.
Hiriart Urruty	400	Do.
MARSEILLE.		
Augusto Cadet	900	Goodyear, McKay, and mixed.
Manufacture de Chaussures du Midi	800	McKay, Goodyear, and mixed.
Charpin & Fils	800	McKay, mixed, and slippers.
Ch. Trolliett	200	McKay and mixed.
NÎMES.		
Ulysse Barre	500	Do.
Dupuis Aumeras	400	Do.
Ricout	100	Do.
L. Therond	1,000	McKay, mixed and slippers.
AMIENS.		
Hunebelle	600	Goodyear and McKay.
G. Lenormand	150	Goodyear and nailed.
Mulliez Frères	400	Goodyear, McKay, and nailed.
Soufflet Vincent	125	Nailed.
OTHER PLACES.		
J. Clerico, Avignon	400	McKay, nailed, and mixed.
Nouveau & Favre, Avignon	150	McKay.
L. Paran, Avignon	150	Mixed, nailed, and McKay.
G. Biset, Bordeaux	200	Goodyear.
Calichon & Tachon, Bordeaux	700	Goodyear, McKay, and mixed.
Trolliet & Fils Aîné, Bordeaux	1,000	Slippers.
H. Boutry Fils, Lille	500	McKay and nailed.
Denis Pollet, Lille	300	McKay.
Hiard Devos, Lille	200	Nailed.
Lemoine, Nantes	600	Goodyear, McKay, mixed, and nailed.
Perrouin Frères, Nantes	500	Goodyear, McKay, and mixed.
Michel Schwartz, Nantes	300	McKay and mixed.
Appalaspe & Bidegain, Mauleonsoule	2,000	Sandals (rope-soled shoes).
Établissement Louis Beguerie, Mauleonsoule	3,000	Do.
P. Cherbero & Co., Mauleonsoule	15,000	Do.

FRENCH BOOT AND SHOE MANUFACTURERS—Continued.

Names and addresses of firms.	Daily production.	Class of work.
OTHER PLACES—continued.	*Pairs.*	
Belliard, Rouen	500	McKay.
J. Carton, Rouen	150	McKay and mixed.
A. Tauvel, Rouen	250	Do.
Vve. Ed. Aubin, Angers	200	Goodyear, McKay, and mixed.
J. Malbert, Angers	300	Goodyear, mixed, and nailed.
Établissement Felix Ruinet, Dijon	1,000	McKay and slippers.
Société Anonyme des Chaussures Belorgey, Dijon.	300	Goodyear, McKay, and mixed.
Société "La Quercitaine," Le Quesnoy	200	McKay, mixed, and nailed.
L. Vitrant, Le Quesnoy	200	McKay and nailed.
Gellee Fils, Mouy	500	Goodyear, McKay, and mixed.
Blassier, Beausang & Dupuis, Mouy	300	McKay and mixed.
Chassain Jardine, Pau	100	Do.
P. Lahitte Fils, Pau	2,000	Sandals (rope-soled shoes).
Carassou Frères, Pontacq	100	Goodyear.
Fouriscot, Pontacq	150	Do.
Faucheur Frères, Pont-à-Mousson	200	Goodyear, McKay, and mixed.
F. Mauroy, Pont-à-Mousson	100	Do.
Marcel Ouin, Pont de l'Arche	2,000	Slippers.
Georges Prieur, Pont de l'Arche	1,200	McKay.
Berthelot Frères, Rennes	150	McKay and mixed.
G. Daisay, Rennes	200	Goodyear, McKay, and mixed.
Paulin Besson, St. Aigulin	200	McKay and mixed.
J. Delpech, St. Aigulin	100	Do.
Brun Durand & Roybet, St. Donat	400	Goodyear, McKay, and mixed.
Lagnel & Meysonnier, St. Donat	150	McKay and mixed.
Adelson Huicq & Fils, Vieuxconde	150	Nailed and mixed.
Peltier, Vieuxconde	200	Goodyear, McKay, and mixed.
Gabriel Haon, Alais	150	Nailed and mixed.
Gounin Frères, Amboise	2,000	Slippers and McKay.
Nemeteau & Co., Angoulême	300	McKay and mixed.
Fils de A. F. Gontard, Avenières	500	Goodyear and McKay.
H. Berthier, Armentières	150	Mixed and nailed.
Rabany, Attigny	1,000	Slippers and McKay.
A. & R. Baque, Beauvais	200	Goodyear, McKay, and mixed.
Rousset Frères, Blois	1,000	Goodyear and McKay.
M. Auroux & J. Nevreux, Boulogne	250	Goodyear.
P. Millou, Bourg-de-Peace	100	McKay and mixed.
Lebrec Pagny, Briouze	1,500	Slippers and McKay.
Houdard & Fontaine, Cambrai	500	Goodyear, mixed, and nailed.
Moindron, Chalais	500	Felt slippers.
Tourtet Bouchet & Gamonet, Chateau-Renard.	300	McKay, nailed, and mixed.
Monteux, Chateau-Thierry	800	Goodyear, mixed, and veldtschoen.
Regnier Frères, Cremieu	600	Goodyear, McKay, and mixed.
Lengagne Defosse Fils, Desvres	200	Nailed and mixed.
Mederic Brihaye, Glageon	400	Mixed and nailed.
Bigot, Le Mans	200	McKay and Goodyear.
J. Olivier, Les Herbiers	800	McKay and nailed.
H. Chevron & Co., Izeaux	500	Goodyear.
Alfred Cornevot, Liancourt	800	McKay, mixed, and Goodyear.
Balland, Libourne	300	Felt slippers.
Aubertel, Ligny en Barrois	2,000	McKay.
Fanien & Delelis, Lillers	1,200	Goodyear, McKay, and mixed.
P. Auzary Aîné, La Reole	600	McKay and mixed.
Servonnat Frères, Morestel	300	Goodyear and McKay.
Bordeau & Trehu, Niort	200	Do.
Marbot, Neveu & Gorsse, Neuvic sur l'Isle	500	McKay and mixed.
Mille Père & Fils, Orange	150	McKay, mixed, and nailed.
Coudert, Perigueux	150	McKay and mixed.
Chapman & Fils, Les Preaux	600	Do.
Les Fils de A. Brinon, Pussay	1,500	Slippers.
G. Pernot, St. Ay	200	McKay and slippers.
Bos Père & Fils, St. Christoly de Blaye	200	Mixed.
Fabrique de l'Abbaye St. Michel, St. Michel.	400	Mixed and nailed.
Paul Ravalee, Ste. Savine	300	McKay and nailed.
Dupoizat Aîné, St. Symphorien D'Ozon	300	McKay, mixed, and nailed.
A. Dufour Fils, Sauve	1,000	McKay.
G. Pommier, Sens	200	Mixed and nailed.
Hublot Fils, Tonneins	600	McKay and mixed.
Lepez Bride, Tourcoing	400	Goodyear, McKay, and mixed.
Clerget Molroguier, La Tour Du Pin	200	Do.
Bourdais, Tours	300	Do.
Cowez Frères & Co., Trelon	200	Nailed.
Laine, Trun	150	Goodyear, McKay, and mixed.
Gautier & Fontellaye, Valenciennes	500	Goodyear, McKay, and nailed.
Pellet Aîné & Fils, Vienne	500	Do.
De Berail, Villeneuve sur Lot	150	Mixed and McKay.
Constant, Visan	600	Do.

FRENCH TANNERS.

Firm names and addresses.	Daily output.
UPPER LEATHER.	
A. Combe Fils & Cie. à St. Denis-Paris	1,200 dozen goatskins.
Ribes, Annonay (Ardèche)	300 dozen calfskins.
Meyzonnier, Annonay (Ardèche)	300 goat and 200 dozen calf skins.
Franc et Cie., Annonay (Ardèche)	300 goat and 200 dozen sheep skins.
Tanneries Lyonnaises, Oullins	200 goat and 200 dozen calf skins.
SOLE LEATHER.	
Les Fils de Luc, Nancy	300 hides.
Willekens, La Flèche	Do.
Wauquiez et Fils, Mouvaux	250 hides.
Clovis Poullet, Les Lannoy	Do.
Hardyau, St. Calais	Do.
Peltereau-Enault, Paris	Do.
Tanneries Lyonnaises, Oullins	200 hides.
LEATHER BELTING.	
Domange et Fils, Paris	250 hides.
Bienfait-Lemaire, Tourcoing	200 hides.
Leverd, Lille (Nord)	150 hides.
Tanneries Lyonnaises, Oullins	Do.
Ulysse Roux et Cie., Romans	Do.
Ottenheim, Versailles	100 hides.
FANCY LEATHER.	
Floquet et Fils, St. Denis	500 dozen sheepskins.
Franc et Cie., Annonay (Ardèche)	200 dozen sheepskins.
Maroquinerie Française, St. Denis	Do.
Rossero & Fils, Gentilly	150 dozen sheepskins.
Berthin, Gentilly (Seine)	Do.
Chabbal, Graulhet (Tarn)	250 dozen sheepskins.
Pagès, Graulhet (Tarn)	Do.
Cathalau, Graulhet (Tarn)	Do.

SWISS BOOT AND SHOE MANUFACTURERS.

Names and addresses of firms.	Weekly production.	Class of work.
	Pairs.	
Schuhf. Kreuzlingen, Kreuzlingen	5,400	Men's, women's, and children's Goodyear welt, McKay sewn, pegged, and felt shoes, and men's and women's screwed.
E. & S. Weill (two factories), Kreuzlingen	3,000	Men's and women's Goodyear welt, and men's, women's, and children's McKay sewn and screwed.
L. Raichle, Kreuzlingen	3,300	Men's, women's, and children's McKay sewn, pegged, and screwed.
"La Barque," Geneva	1,200	Men's, women's, and children's McKay sewn,
G. Reyboubet, Geneva	1,200	Men's, women's, and children's McKay sewn and men's and women's turned and felt.
M. Rochat, Geneva	1,200	Men's, women's, and children's McKay sewn and screwed and children's veldtschoen.
N. & S. Bondanini, Geneva	600	Men's, women's, and children's turned.
J. M. Stangelin, Herzogenbuchsee	600	Men's and women's pegged and screwed.
Ad. Stuber, Herzogenbuchsee	1,800	Men's and women's McKay sewn, pegged, and screwed.
Ad. Schenker, Olten	1,200	Men's, women's, and children's Goodyear welt and screwed.
Strub, Glutz & Cie., Olten	9,000	Men's, women's, and children's Goodyear welt, McKay sewn, turned, pegged, felt, and screwed.
Burrus & Kohler, Pruntrut	1,200	Men's and women's McKay sewn and screwed.
Schuhf. "Minerva," Pruntrut	1,800	Men's, women's, and children's McKay sewn and screwed and men's and women's pegged.
Brattler-Stehli, Winterthur	1,200	Men's and women's McKay sewn and screwed.
Hofman & Co., Winterthur	900	Men's and women's Goodyear welt, McKay sewn, and screwed and children's screwed.
Hans Fretz, Aarau	1,200	Men's, women's, and children's McKay sewn, pegged, and screwed.
C. F. Bally A. G., Schoenenwerd	66,000	Men's and women's Goodyear welt, McKay sewn, turned, pegged, felt, and screwed, and children's McKay sewn, turned, pegged, felt, veldtschoen, and screwed.

SWISS BOOT AND SHOE MANUFACTURERS—Continued.

Names and addresses of firms.	Weekly production.	Class of work.
	Pairs.	
Walder-Appenzeller & Söhne, Bruttisellen	9,000	Men's, women's, and children's Goodyear welt, McKay sewn, turned, pegged, felt, and screwed, and children's veldtschoen.
Schuhf. Frauenfeld, Frauenfeld	4,800	Men's and women's Goodyear welt, McKay sewn, turned, pegged, felt, and screwed, and children's Goodyear welt and McKay sewn.
Gebr. Henke, Stein	2,400	Men's and women's pegged and screwed and children's screwed.
Schuhf. Baden A. G., Baden	2,400	Men's and women's McKay sewn and men's and children's screwed.
Zuberbühler & Cie., Zurzach	2,400	Men's, women's, and children's McKay sewn, pegged, and screwed.
Schuhf. Amriswill, Amriswill	2,700	Men's and women's McKay sewn and screwed and children's veldtschoen.
Schuhf. Brittnau, Brittnau	1,800	Men's and women's McKay sewn and screwed and children's screwed.
Schuhf. Freiberg, Freiberg	1,500	Do.
A. Löw & Cie., Obersach	1,500	Men's and women's McKay sewn, pegged, and screwed.
Schuhf. Allschwil, Allschwil	900	Do.
Schuhf. Buochs, Buochs	1,200	Men's and women's McKay sewn and screwed.
Schuhf. Baden A. G., Lenzburg	600	Men's and women's pegged.
Dierauer-Forrer, Oberuzwil	600	Men's and women's McKay sewn and screwed and children's veldtschoen.
Schuhf. Liestal, Liestal	600	Men's, women's, and children's McKay sewn and screwed.
Schuhf. Weinfelden, Weinfelden	600	Men's, women's, and children's felt shoes.
Russ & Cie., Diessenhofen	300	Men's and women's pegged.
Hans Zehnder, Kölliken	300	Men's, women's, and children's pegged and screwed.
Hug & Cie., Herzogenbuchsee	1,800	Wooden shoes.
Depuis Frères & Cie., Martigny	1,800	Do.
Allenspach, Kurzrickenbach	600	Do.