

Demand Has Shape: Exports, Entrepreneurs, and the Eighteenth Century Economy

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The debate on the export trade's contribution to Britain's economic growth in the eighteenth century has followed a cyclical path much like the larger debate on the causes and nature of the industrial revolution. In an earlier era that favored a more dramatic account of the revolution, trade was seen as making crucial contribution to the industrial "take-off" [Deane, 1979; Hobsbawm, 1968]. This position was then challenged on one side by econometric studies which emphasize the hidden costs of the export trade and the significance of home demand and on the other side by studies which stress the supply-side origins of industrialization and economic growth [Thomas, 1981; Davis, 1979; McKendrick, 1974; Fine, 1990; Mokyr, 1977, 1992]. More recently, there are signs that the pendulum is swinging back in the other direction. Simon Smith has analyzed the differential impact of the European and North American export markets for wool textiles, and Patrick O'Brien and Stanley Engerman have argued that foreign trade consumed a significant proportion of the growth in industrial output. Both are thus suggesting that demand for exports was at least partly exogenous and that the production of goods for export used resources which would not otherwise have been employed [Smith, 1995; O'Brien, 1991]. While this work, by continuing to approach the problem from a macro perspective, completes the historiographical cycle, the possibility of new avenues of enquiry has been opened by those who have begun to explore how overseas trade might have affected the way in which the eighteenth-century economy worked. Jacob Price stresses the importance of the financial links created by eighteenth-century merchants, while Nuala Zahedieh points out that the different characteristics of overseas markets may have affected the ways in which goods were produced [Price, 1989; Zahedieh, 1994].

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This paper seeks to develop this perspective further, focusing not on the absolute quantity of demand but on its quality. Demand – particularly export demand – has shape.² It cannot be measured as one would a liquid – as an abstract volume which causes an effortless flow of goods; rather, it has to be thought of in terms of the shapes and holes of a child's sorting box. This metaphor forces us to recognize that demand for woolen goods in Europe was a demand for particular kinds of cloth in particular cities or regions. This metaphor also forces us to recognize – imagine a two-year old trying to put shapes in the right holes – that the process of getting the goods from producer to consumer (and getting payment back again) is as important as having the right goods for the right market in the first place. Thinking of demand as something which has shape, then, focuses our attention on the complex flow of goods, money, and information between producers, merchants, and consumers. This in turn enhances our understanding of the relationship between exports and industrialization because by paying attention to the particular shape of the demand confronted by producers and merchants in export markets we can explain why and how production and marketing systems changed in ways which made the economic growth of the later eighteenth century possible.³

The Shape of Demand in the European Market

This paper will develop the argument outlined above by examining two firms active in exporting woolen textiles to Europe in the second half of the eighteenth century. These two firms are both representative of the wool textile industries of their respective regions in the second half of the eighteenth century. Philip Stannard, running a firm in partnership with Philip Taylor and later John Taxtor, was a manufacturer from Norwich with a capital of at least £10,000 and an annual turnover of £45,000.⁴ Norwich had long been famous for its worsted stuffs, a fairly thin, smooth cloth produced in a bewildering array of designs and colors and also in a wide range of prices. Originally made

² Though the argument which follows is true of demand in general, export demand is particularly significant because demand was concentrated, shipments were large, and products were quite differentiated.

³ This argument explicitly rejects the assumption that the economic growth of the eighteenth century was fundamentally different from and unconnected to that of the industrial revolution “proper” of the nineteenth century [Wrigley, 1988; Mokyr, 1992; Crafts, 1995; Landes, 1994]. First, the distinction between the so-called traditional and modern industrial sectors upon which that assumption rests is overdrawn [Berg, 1994; Daunton, 1995]. Second, one cannot dismiss the kinds of developments I will be discussing as ‘merely’ gains from trade and thus fundamentally limited because they do not involve dramatic supply-side innovations. Doing so misses the extent to which they established a culture and structure of production within which such supply-side innovations, with their undoubtedly transformation implications, made sense.

⁴ The firms papers are housed at the Norfolk Record Office in Norwich, BR 211/1, ledger 1763-69; BR 211/3, foreign trade ledger, 1766-69; BR 211/7, invoice book, 1764-70; BR 211/10, annual stock account, 1758-669; BR 211/12, letterbook, 1751-63. Parts of the letter book have been published with an introduction [Priestly, 1994].

by small independent master weavers, the trade had become concentrated in the hands of large merchant manufacturers during the first half of the eighteenth century. These manufacturers, of whom Stannard was one, bought yarn, had it dyed, woven, and finished, and then sold the cloth to merchants in London, many of whom then exported it abroad [Priestly, 1990, pp. 19-38]. Building on these developments, the 1750s and 1760s saw a further expansion of the Norwich manufacturers' control over the market, for in this period many of the larger firms began exporting cloth to Europe on their own accounts, bypassing the London consignees [Fawcett, 1985]. After 1762, Philip Stannard followed suit, and it is this aspect of his business which will be examined here [Priestly, 1994, p. 16].

Up in Yorkshire, the Tolson family, Peter Sr., and his sons Richard and Peter Jr., ran a firm which was also involved in the export trade to Europe. Theirs was a somewhat smaller operation – with an annual turnover of only £9000 – founded around 1780 specifically to export woolen cloth, both plain and patterned.⁵ Woolen broadcloths were but one of the four main products of the Yorkshire wool textile industry, which also produced narrow woolens, worsted goods, and various mixed woolen and worsted fabrics. Although manufacturers existed in some branches of the Yorkshire trade, most of the broadcloth exported by the Tolsons was made by independent clothiers who sold their goods in the local cloth markets or directly to merchants [Heaton, 1965; Hudson, 1981; Hudson, 1983]. As was true in Norwich, the exports of Yorkshire-made cloth to Europe were extensive. During the second quarter of the eighteenth century, markets in the Mediterranean and the Baltic had been developed, complementing the still important trade across the North Sea to Holland and Germany [Wilson, 1971, pp. 46-7]. Dominating the trade were a handful of large merchant houses based in Leeds, firms four to five times larger than the Tolsons, but there were also a number of small and medium-sized merchant firms of whom the Tolsons were quite typical [Wilson, 1971, pp. 239-40].

Though active in different branches of England's wool textile industry, these two firms are linked by their similar responses to the market conditions which faced them in the European trade in the second half of the eighteenth century. Perhaps most striking is that both built their export businesses around a marketing strategy which relied upon traveling salesmen to generate orders [Stannard, 12 June 1763; Priestly, 1994, pp. 117-18; Tolson, 1776]. The fact that both of these firms, and their competitors in both Norwich and Yorkshire, began to make use of travelers reveals two important features of the shape of the demand these firms faced. First, the use of travelers indicates the increasing retail orientation of the export trade of woolen textiles to Europe in the second half of the eighteenth century. As a contemporary of the Tolson's succinctly put it, Europe's retailers were increasingly "making applications to the

⁵ The records consist of a series of letters written to Richard while he was traveling in Europe: West Yorkshire Archive Service, Huddersfield, DD/TO/11, 1780 and DD/TO/12, 1781. It is probable that the father had been a master cloth dresser or dyer before attempting to turn himself and his sons into merchants. For the turnover estimate see Wilson, 1971, p. 239.

fountain's head," [suppliers in England] and bypassing houses of "the very first repute" [Hill, 20 Feb. 1775]. Travelers were crucial for such a trade, for only by this means could a firm obtain orders from a large number of small firms which had traditionally obtained their goods from large wholesale houses on the continent. Indeed, in the Tolsons case, selling by means of a traveler was the only way for this relatively new and relatively small firm to get its foot in the door [Tolson, 1780, 20 Dec.]. The development of this marketing system suggests that many of the constraints evident in the export trade in the first part of the eighteenth century – intelligence about particular markets and firms, the availability and cost of shipping and insurance, the availability and security of remittances, issues of risk and credit – were beginning to ease [Zahadieh, 1994; Price, 1989]. While the Tolsons often agonized over whether to accept an order from a merchant who had a reputation for exacting standards and slow payments, they had the information to agonize over, and, having accepted an order, they never expressed concerns about how the cloth would get to the customer, nor of how he or she would make a remittance. [Tolson, 1780, 14 Oct.]. But if barriers to the export trade had been eased, competition was also increased, for links between merchants which had previously relied on a mastery of channels of trade and on an accumulated reservoir of trust were now easily broken if one's European correspondent was visited by a traveler employed by rival firm offering cheaper or better or even just different cloth.

Second, the use of travelers by these two firms indicates the increasing importance of novelty and product range in the English wool textile industry in the second half of the eighteenth century. Both Stannard and the Tolsons offered their customers a range of goods, many of which were attractive precisely because they were new. As was typical of merchant manufacturers in the Norwich trade, Stannard offered a truly staggering number – well over 500 – of distinct patterns of cloth varying by weave, design, color, and finish [Priestly, 1994, p. 100]. Moreover, these designs were constantly changing as new patterns were developed and old ones dropped out of production. The Tolsons, as was typical of the Yorkshire broadcloth trade as a whole, dealt in a smaller but still substantial range, and they too were frequently adding new items to their offerings [Tolson, 1780, 5 Aug.]. In both cases, but in particular the Tolsons, having a new item to offer was often what encouraged a correspondent to order other, more ordinary goods, and in both cases, the firms had to be constantly on the lookout for new patterns with which to secure future orders. Given these circumstances, travelers were crucial, for only by means of the samples of cloth pasted into the pattern books they carried could firms convey information about this huge range of patterns to their customers. Equally, it was only by selecting from the patterns in the travelers' book (all of them individually numbered to simplify ordering) that customers could decide what to order.

These two features gave the demand in the European market a particular shape, a shape which among other things, greatly increased the complexity of the businesses of these entrepreneurs. Because they were exporting to merchants operating closer to the retail than the wholesale level, firms had to know more about the tastes of consumers in the host of retail

markets they now served; they had to increase the range of products they offered; and they had to be able to organize production so that an order for a few pieces of perhaps ten different kinds of cloth was ready for shipment at the same time. Before going into the export trade, Stannard had only rarely sold a type of cloth known as a camblet, but after 1762 he increasingly did so, a move which required him to master the design, production, and demand for a new product line. One of Tolsons' contemporaries, a manufacturer of plain worsteds and narrow woollens was told he would have to enter the broadcloth trade if he hoped to break into the Italian market, since merchants there insisted upon ordering their "thick" and "thin" goods from the same house [Hill, 31 Jan. 1775]. The reason behind this change in the shape of demand must lie in the desire of smaller merchants, which firms like Stannard's and the Tolsons' were now serving, to obtain the correct retail assortment of cloths from one source. Formerly that function had been proved by a wholesale house which assembled from a number of different sources all the types of cloths needed by the retailers it served.

More significant perhaps are a related set of implications that this marketing system had on the ways in which both merchants such as the Tolsons or merchant manufacturers such as Stannard obtained the goods which they exported. One inescapable feature of the demand which these firms faced was the need to produce goods to order. In Stannard's case, everything he sold was manufactured to order. If, among other varieties, a correspondent was ordering striped and flowered satins, there was no way Stannard could possibly know in advance which of the 30 different patterns of these cloths in the pattern book the customer would want, let alone in what colors. The Tolsons were less reliant on making to order, for some of the goods their customers wanted could be purchased in the region's cloth halls. However, almost all of their patterned goods were "bespoke." A pattern card of cassimeres sent to Richard in 1780 came with the note: "we can also send any figure or flower upon any ground... For instance if a piece [is] wanted with a snuff ground as [in pattern] No. 1; we can put the figure as [in pattern] No. 2 with a dart and spot upon it." The figures on these cassimeres – which was incidentally a new type of cloth in Yorkshire in this period – were also available on ordinary 6/4 wide broad cloth [Tolson, 1780, 8 Nov.].

Another consequence of the marketing system characteristic of the export trade to Europe in this period is that in accepting an order generated by the pattern cards which their traveler carried around, merchants were making a series of promises which had to be fulfilled in the production of the piece. The cloth was promised as having a particular look and quality; it was promised at a particular price, and it was promised for delivery by a particular date. Keeping all three promises (or having a good excuse) was essential for the survival let alone success of the firm, for cloth made to pattern, of sufficient quality to justify the price, and delivered on time would generate future orders. The effect on firms such as Stannard's and the Tolsons' was to focus entrepreneurial attention on the production process in a way that linked marketing and production.

The Shape of Demand and Industrialization

In both Yorkshire and Norwich, firms operating in the European market in the second half of the eighteenth century were selling a large and ever changing range of products to a large number of correspondents and using travelers and pattern books to do so. The demand which firms like the Tolsons or Stannard satisfied thus had a very particular shape, a shape which had a series of implications for the ways in which they did business.⁶ Those implications, in turn, shaped the ways in which firms in these two branches of the English woolen industry developed in the latter part of the eighteenth century, a period in which Yorkshire eclipsed its regional rivals (including Norwich) to become the dominant wool textile manufacturing (and exporting) region in England [Wilson, 1973; Priestly, 1994, p. 9-10].⁷ Yorkshire's supremacy can be linked to the way that the shape of demand in the export market experienced by firms such as Stannard's and the Tolsons' had induced changes in the structures of production in the different regional trades which were in place at the outset of our story.⁸ On one hand, from an early date, the importance of fashion in Norwich's trade and the fact that most of the city's products were sold via intermediaries in London explains a great deal about the demise of independent master weavers in the city, for both the need for information about fashion and control over marketing favored larger producers [Priestly, 1994, p. 9]. In contrast, in the Yorkshire trade, fashion arrived relatively late and was always an adjunct to the production of ordinary cloths, both of which allowed independent clothiers to remain viable.⁹ Moreover, the

⁶ Put in this fashion, the point is perhaps obvious, but it is a reminder of the limitations inherent in treating demand (or supply for that matter) as an generic quantity, for changes in demand, positive or negative, were experienced by these entrepreneurs as changes in the demand for particular bits of their product line as delivered to particular sets of customers through a complex marketing system.

⁷ I do not intend to cover in detail the historiography of the debate on Yorkshire's supremacy. Wilson has quite convincingly refuted the various factor of supply explanations – waterpower, labor costs and so forth – and focused attention on the dynamism of Yorkshire's merchants. I concur but seek to contextualize and explain this dynamism with reference to the structures of production and marketing found in the period [Wilson, 1973].

⁸ The logic of this argument is patterned after Rosenberg's work on technological change in the nineteenth century [Rosenberg, 1976]. Of course, important factors which affected this history are not attributable to the shape of demand. Most importantly, Yorkshire's established production of cheap and mid-priced cloth, and both fancy and plain cloth, was clearly important given the changing consumption patterns of ordinary Europeans [de Vries, 1993]. In contrast, Norwich's concentration on mid and high priced goods, and goods intended more for "ornamentation" than everyday use, meant that it simply was not possible for its market to grow to the same extent. Though it must be added that the differences between Yorkshire and the other regions in this respect is not as dramatic as is often implied in the survey literature.

⁹ Pat Hudson [1981] has convincingly argued that landholding patterns played an important role in allowing the makers of broadcloths to remain independent, an argument with which I agree; I simply add that factors associated with the shape of demand are also relevant.

vitality and proximity of the region's cloth markets made it possible for these clothiers to sell their goods and have access to the information necessary to keep up with changing fashions and markets.¹⁰

Given this basic difference between the two regions, the imperatives associated with making goods to order which were induced by the shape of demand in the European market led to quite different outcomes in Yorkshire as compared to Norwich. In Norwich these pressures were primarily felt by the merchant manufacturer. While the workers he employed would have had to master new patterns and work to tight deadlines and exacting standards, they were not in a position to react to such pressures in ways which resulted in change [Priestly, 1994, pp. 11-13]. Indeed, the absence of significant change in the Norwich trade after the 1760s is striking. The city's manufacturers increasingly concentrated on the production of fancy goods, and the trade in the 1790s worked pretty much as it had done a generation earlier [Edwards, 1964; Lloyd Prichard, 1950; Clapham, 1910].¹¹ In contrast, in the Tolsons' trade most of the producers to whom they put out particular orders were independent clothiers. The pressures on quality, price, and time were thus felt directly by a host of small producers who were in a position to turn them into opportunities. One sequence of letters from the fall of 1780 includes a series of comments on a clothier they had encountered who had developed an "engine" which could quickly and cheaply stamp designs on their cloth [Tolson, 1780, 14 and 20 Oct.]. More generally, we have to acknowledge that the easy adoption of machines used in the preparation of woolen yarn in Yorkshire is probably related to the fact that clothiers such as those the Tolsons employed were in a position to benefit in both time and money by such innovations. In Yorkshire, then, the shape of demand in the export trade focused entrepreneurial attention on the production process in ways which made possible the kinds of innovations in production and organization which emerged in the industry during that period.

The imperatives associated with the need to keep up with the changing range of products also led to quite different outcomes in Yorkshire as compared to Norwich. Although firms in both regions sought out new patterns from sources including their customers and competitors, firms such as the Tolsons were also able to draw upon new patterns developed by independent clothiers making patterned cloth for them and other merchants. The same clothier who could take a pattern of fine West Country woolen cloth which Peter Tolson Sr. picked up in London and adapt it for more ordinary Yorkshire goods could and did develop new patterns on his own which he would offer to

¹⁰ The memorandum book of a quite ordinary cloth frizzer in the 1760s contains instructions for making types of cloth specific to the North American, Baltic, and European markets [West Yorkshire Archive Service, Leeds, Acc. 1444, Brearly memorandum book].

¹¹ Account and pattern books from firms operating in the 1790s are virtually indistinguishable from those used Philip Stannard in the 1760s. These books survive in the collection of the Bridewell Museum in Norwich, two belonging to unnamed firms and one to the firm of Ives and Basely. The one exception to this lack of innovation lay in the emergence of the shawl manufacturing trade.

merchants [Tolson, 1780, 5 Aug.]. Given the fact that such clothiers were not working exclusively for individual merchants, popular new designs could spread very quickly in the region, causing the spread at the same time of skills, ideas, and information about the markets for which such goods were intended [Tolson, 1780, 5 Aug., 20 Oct.]. One such pattern, for weaving spotted broad cloth “in the weft way,” caused a great stir in the Tolson letters, and for a while it was the hottest thing in the Frankfort market – a fact of which everyone from the weavers to the merchants was aware [Tolson, 1780, 8 Nov.; Tolson, 1781, 20 Jan., 24 Feb., 28 March, 4 April]. Such innovations in design may not have involved a potential for a fundamental transformation in the mode of production, but they are indicative of the way in which the shape of demand in the export trade created an environment in which a host of producers were constantly thinking about innovations.

Finally, it is also important to recognize that part of the reason for Yorkshire’s supremacy may be related to the fact that all of the different kinds of wool textiles were made there, many cheek by jowl. Two implications follow from this. First, in the same way that a marketing system built around sales to a large number of small houses led Philip Stannard to begin dealing in camblets and other relatively coarse worsted cloths, Yorkshire merchants or merchant manufacturers could gain an advantage vis à vis their regional rivals by offering worsted, woolen, and mixed fabrics. Merchants involved in selling different kinds of fabrics, in turn, had the opportunity to become involved in their production as a trend towards merchant manufacturing emerged in the last decades of the century. Charles Hudson of Halifax started as a merchant much like the Tolsons, but he began to produce yarn using a water powered mill he owned in order to make the bays (a mixed fabric) which he sold to merchants in Holland alongside his other cloth. Hudson’s example also illustrates the importance of the cross fertilization which came from having the different sectors of the industry in proximity to each other. In making his bays, Hudson tapped into an existing development in the worsted trade, the emergence of firms which specialized in the production of worsted warps. This made it possible for him to make this kind of cloth without having to master a new branch of the trade.

Conclusion

I have argued that thinking of demand as something which has a specific shape, a shape which reflects the interplay between production and marketing, can help us understand the nature and significance of economic growth in the eighteenth century. In particular, it suggests that the “gains from trade” created by the expansion of Britain’s export industries were, in fact, quite significant, not so much for any contribution to aggregate economic performance, but rather because of the way these industries helped to transform the ways in which the economy worked. I have focused on the export market, not because the factors discussed above were not applicable to the domestic trade, but because the particular nature of export demand enhanced their

implications. The difference lies in the structure of the domestic trade. The surviving account books of Benson and Aldam of Leeds, a firm almost identical in size to the Tolsons but active primarily in the domestic trade, also reveals a trade conducted by using travelers who visited provincial shopkeepers, mercers, and tailors in order to sell them the ever increasing range of goods demanded by the growing fashion market.¹² However, the domestic market was not as complex as the many different European markets served by export firms; orders were smaller, one or two pieces at a time instead of 20 or 30; and orders could be shipped one at a time, which simplified the scheduling of production. Moreover, the domestic trade did not run with such tight deadlines, for carriers left more frequently than ships, and instead of sending goods to be ready for sale at regional fairs as was common in the export trade, travelers in the domestic market took orders at fairs for delivery at a later date. Perhaps most importantly, the fact that the pieces did not have to be exported meant that provincial drapers, mercers, and tailors who bought goods from firms such as Benson and Aldam could assemble the assortment they needed from any number of suppliers, absolving the merchant or merchant manufacturer from the responsibility of understanding the markets for and managing the production of a complete range of goods.

Over time, then, the shape of demand in the export trade had important implications for the development of the production and marketing systems of the Yorkshire wool textile industry. Acting both as a pressure and as an opportunity, the export trade, which involved a bulk trade in a large and ever increasing array of goods shipped with attention to making a retail assortment, induced the exporter's direct participation in the production of the cloth he sold, a connection that brought knowledge of the markets and knowledge of production closer together. In combination, these pressures acted to broaden the range of goods produced in the region in ways which created a skilled work force accustomed to making goods to order and within tight constraints of time and cost. It enhanced the ability of the region to produce goods on demand, thus allowing rapid product innovation in response to or anticipation of market demands. And finally, it led to the emergence of a group of entrepreneurs, large and small, in manufacturing, marketing, or both, whose profits depended upon their ability to manage these emerging systems of marketing and production. In general, the result was a much more adaptive production system with much stronger links to the markets it served, and poised to adopt, adapt, and even seek out the kinds of technological and organizational innovations which we see emerging in the wool textile industry by the end of the century.

¹² Doncaster Record Office, DD.WA/B/5; Aldam, Pease, Birchall and Co. ledger, 1758-1780s; DD.WA/B/4; Aldam, Pease, Birchall and Co. ledger, 1758-1780s; DD.WA/B/6; Aldam, Pease, Birchall and Co. ledger, 1774-1780s. The same contemporary memorandum book which lists the Tolsons' turnover at £8000 records Benson and Aldam's turnover as £10,000 [Wilson, 1971, p. 240].

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