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Wielding the thread: Local textile markets and global competition in the periphery, circa 1860-1960

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Abstract: This paper analyzes domestic cloth production in relation to consumer preference in Java and sub-Saharan Africa, with the aim of uncovering how local industries coped with the effects of broader global and colonial forces during the nineteenth and early twentieth centuries. Market-oriented deindustrialization theories based on Ricardian theory purport that, by the nineteenth century, world regions with a comparative advantage in manufacturing (primarily the West) prevailed as providers of industrial goods to the global market place, while regions with a comparative advantage in raw materials production (the Global South) abandoned industrial manufacturing for domestic markets in favor of tropical commodity production oriented toward global markets. However, the survival of numerous handicraft industries well into the twentieth century is a clear indication that simple comparative advantage is an insufficient explanation of industrial vitality. Inspired by contemporary business theory, we argue that many domestic handicraft producers in the Global South in the nineteenth and early twentieth centuries wielded certain competitive advantages – derived from the very different production and marketing strategies pursued by handicraft manufacturers relative to factory producers – which provided competitive protection despite increasing globalization. We place particular emphasis on one crucial, yet understudied element in the explanation for the resilience of local production: the capacity of local producers to accommodate local consumer preference. Specifically, strategies of product differentiation and responsiveness to shifting consumer needs, along with flexibility in manufacturing methods, enabled local producers to remain competitive in confrontation with mounting imports from early factory producers, who typically offered cheap, but lower quality and less unique products. Moreover, some local manufacturers could even compete on the basis of price given the very low labor costs involved in seasonally oriented handicraft production.

Keywords: Textile Production, Competition, Global South, Java, Sub-Saharan Africa

JEL Codes: N87, N30, O14, L67

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1. Introduction

In recent years, an expanding literature has emerged that refutes the longstanding idea in the historiography of a rapid and straightforward de-industrialization in the “global periphery” in the second half of the nineteenth century. The most prominent example for which doubt has been cast on the consequences of globalization and colonialism on the outright decline of industry has been British India, where handicraft manufacturing long continued to thrive alongside machine-made imports.¹ Recently, studies on other parts of the Global South have strengthened the case for a more nuanced take on de-industrialization. For example, regarding colonial Indonesia, where according to Jeffrey Williamson industry was damaged more “than almost anywhere else in the non-European periphery,”² several scholars have argued that various forms of manual textile production survived, and even thrived, despite Dutch colonial policies that targeted the large Javanese population as a market for cloth produced in the Netherlands.³ Likewise, historians have increasingly challenged preconceived assumptions about the deindustrializing effects of globalization and colonization in sub-Saharan Africa.⁴ These works have all shown the importance of incorporating *local factors* into explanations of deindustrialization and the resilience of textile industries. Indeed, global forces affected domestic industries across the Global South quite differently. Whereas in some cases global trade stimulated the development of local industries, in other cases domestic production instead declined.⁵

This paper builds on our previous work on the history of domestic cloth production in Java and sub-Saharan Africa, with the aim of uncovering how local industries coped with the effects of broader global and colonial forces. We focus on a number of distinct characteristics of handicraft manufacturing in the Global South that, in many cases, helped domestic producers thrive amid globalization and colonization during the nineteenth and early twentieth centuries. We place particular emphasis on one crucial, yet understudied element in the explanation for the resilience or relocation of local production: consumer preference. While we derive inspiration from Java and Africa, our conclusions may be more broadly applicable to relationships between global trade and local markets in the broader Global South during the late nineteenth and early twentieth centuries.

Central to our argumentation are four hypotheses: First, we suggest that the ability of many handicraft textile industries to persevere and even flourish in the context of globalization and the rise of export-oriented mechanized factory production was strongly linked to the capacity of local producers to more effectively and efficiently cater to distinct and dynamic local markets than most suppliers of mass-produced imports, which provided domestic producers with a competitive edge. Second, we contend that these local industries often *benefited* from global integration, which could simultaneously boost consumer demand, stimulate the development of new methods, and broaden access to industrial inputs. Third, the capacity of producers to adapt to changing market conditions was indicative

¹ Vicziany (1979); Roy (1993); Haynes (2008, 2012).

² Williamson (2013 [2011], 42).

³ Van der Eng (2013); Van Nederveen Meerkerk (2017).

⁴ For West Africa, see e.g.: Johnson (1978); Roberts (1996); Thornton (1990); Kriger (2006). For East Africa: Clarence-Smith (2014); Alpers (2009); Frederick (2020).

⁵ Frederick (2020).

of the considerable degree of agency exercised by both domestic producers and consumers amid increasing colonial interventions that aimed at diverting raw materials to metropolitan industrialists and funneling metropolitan manufactures into colonial markets. Our fourth hypothesis is a caveat, which helps account for diverse industrial outcomes among handicraft industries in different locales: local conditions influenced the degree to which handicraft producers enjoyed – or effectively wielded – various advantages.

We begin by introducing our theoretical framework, which is inspired by business theories on competitive strategy. Thereafter, we outline unique organizational and strategic characteristics of handicraft production in the Global South that enabled producers to maintain a competitive edge even in the seeming absence of a comparative advantage in industrial production. We focus specifically on how consumer demand particularities and producer access to industrial input supplies in the Global South could help domestic textile industries thrive in the midst of globalization. Thereafter, we detail how various local industries fared when confronted with colonial interventions in local production processes and markets, highlighting the agency of local producers and consumers in response to policies that often directly aimed at undermining manufacturing and securing domestic raw materials for metropolitan industrialists.

2. Complicating the market: Comparative advantage, competitive advantage

Market-oriented deindustrialization arguments derive their theoretical foundations from basic Ricardian theory: from the nineteenth century, world regions with a comparative advantage in manufacturing (primarily the West) prevailed as providers of industrial goods to the global market place, while regions with a comparative advantage in raw materials production (the Global South) abandoned industrial manufacturing for domestic markets in favor of tropical commodity production oriented toward global markets. However, the survival of numerous handicraft industries well into the twentieth century is a clear indication that simple comparative advantage is an insufficient explanation of industrial vitality.

In the late 1970s, business analysts began highlighting *competitive* advantage as a crucial determinant of the ability of producers to thrive in the marketplace.⁶ While the concept arose from studies of strategic competitive practices among largescale modern firms, it provides a surprisingly useful framework for uncovering market dynamics and producer strategies that enabled small-scale handicraft manufacturers to remain viable in the face of mounting competition from machine-produced imports during the nineteenth and early twentieth centuries.⁷

In the nineteenth century, artisanal textile manufacturers and factory-based mass producers shared a unifying industrial thread – both utilized raw materials to turn out cloth geared toward consumers. Here, however, the similarities fade. We argue that much of the oversimplification inherent in market-centered deindustrialization conceptualizations arises from the conflation of what were, in fact, fundamentally different industrial entities. At the heart of competitive advantage theory are two “alternative, viable approaches” to coping

⁶ Porter (1980).

⁷ Singleton (1997) has analyzed the global history of factory textile production using the competitive advantage framework. Here, we focus specifically on comparing the competitive strategies of handicraft producers relative to factory producers.

with competition: “cost leadership,” which centers on delivering the lowest-cost product to compete on the basis of price, and “differentiation,” which entails delivering unique products and/or services to compete on the basis of *quality*.⁸ In addition, while some producers focus on specific niche markets, others cater to a much broader range of consumers.

We argue that as mass manufacturing and global trade began to rapidly increase during the nineteenth and early twentieth centuries, domestic handicraft producers in many parts of the Global South innately pursued clear differentiation strategies, which arose in part from path-dependent structural features of local handicraft industries and provided unique competitive advantages for domestic manufacturers serving highly specified local markets. At the same time, particular characteristics of early factory-based production arising in Europe, the United States, and, eventually, India created certain *disadvantages* that hindered the efforts of burgeoning industrialists to dominate various segments of highly differentiated local textile markets. Consequently, a general rise in demand for textiles was often characterized by increasing consumption of domestic cloth alongside imported manufactures. Even where imported cloth ultimately came to account for a larger overall *share* of local markets, this did not necessarily imply that the output of local industries was in decline. In fact, as Johnson points out, some handicraft sectors may have even been expanding their absolute output well into the second half of the twentieth century.⁹

In sharp contrast to handicraft manufacturers, largescale machine-based textile mills overwhelmingly pursued cost-leadership strategies that hinged upon mass production of comparatively cheap cloth. While a cost advantage might provide machine-produced cloth with a foothold in markets serving lower-income consumers or particular use-value niches, certain features of low-cost production strategies helped ensure a position for specialized local handicraft producers. The divergence in production and targeting strategies between mass manufacturers in the industrializing world and handicraft producers in much of the Global South thus insulated handicraft manufacturers from the harshest effects of competition – in spite of the fact that industrializing regions not only possessed a broader *comparative* advantage in textile manufacturing, but also exerted institutional pressure on local manufacturers in colonized regions.

Handicraft and machine-made products generally diverged sharply in qualitative terms, particularly during the early developmental stages of factory-based manufacturing. As we will illustrate, not only were nineteenth- and early twentieth-century hand-woven products often higher in quality due to a greater focus on craftsmanship, they were more precisely geared toward domestic consumer preferences. This constituted a competitive advantage afforded by both the closeness – in physical and cultural terms – of domestic producers to their consumer base and the greater flexibility of small-scale producers to quickly alter than design methods to accommodate specific consumer demands.

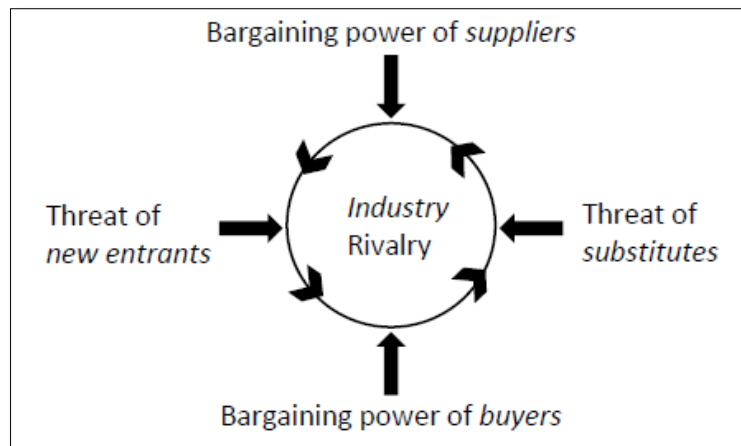
Porter (1980) identifies five broad forces that influence the nature of market competition within a given industry and help determine the optimum competitive strategy of industry players (see Fig. 1). In the following sections, we illustrate that within each of these categories, domestic handicraft producers had the capacity to wield certain unique

⁸ Porter (1980, chapter 2).

⁹ Johnson (1978, 268).

advantages – particularly with respect to their unique relationship with buyers – via differentiation strategies that provided defenses against external competition from suppliers of what we argue were essentially “substitute” products.

Figure 1 – Porter’s forces of industrial competition



Source: Porter 1980

The ability of handicraft manufacturers to effectively exploit these potential advantages was, however, dependent upon local characteristics, which helps account for varying degrees of industrial resilience among handicraft textile industries in the Global South. Chief among these conditions were: ingrained regional textile traditions, which afforded both artisanal know-how and consumer loyalty; an ample industrial labor supply, which was required to labor-intensively produce high-quality materials; proximity (or trade-network connections) to local markets, which provided consumer outlets for both domestic and imported cloth; and, finally, ready access to global markets, which supplied new sources of industrial inputs, stimulus for local manufacturing innovations, and income-generating export opportunities that could boost domestic demand for consumer goods.¹⁰ These local conditions could, in turn, influence the relative capacity of producers to respond flexibly to new international trading challenges (and opportunities) that emerged under colonialism and globalization. A full analysis of the implications of globalization and colonization for domestic handicraft industries must thus move beyond a simple market-oriented accounting of factor prices or dependency-oriented narrative of colonial manipulation and instead closely examine the characteristics of these industries and the markets they served, which helped determine the relative *competitive* advantage and thus viability of local handicraft manufacturers.

¹⁰ For analysis of local conditions that affected relative degrees in industrial resilience in East and West Africa, see chapter 6 in Frederick (2020).

3. Local consumers and the power of preference

For established artisanal textile manufacturers, threats arising from “new entrants” and from existing intra-industry rivalry within the handicraft sector is, generally speaking, relatively low for a number of structural reasons. First, the mobilization of increasing numbers of artisans implies rising demand for handicraft goods, which could thus accommodate increasing supply. Second, the central role of skill in high-quality handicraft production further mitigates the possibility of ruinous competition arising from rapid entry of new artisans. Third, the natural constraints on output associated with labour-intensive handicraft manufacturing limits the capacity of any given artisan, new or otherwise, to corner a significant share of the market. Rather, for handicraft textile producers the larger threat derives from the introduction of possible “substitute” products – in our case, mass-produced machine-woven cloth that differed substantially in qualitative terms, but could nonetheless pose a threat given the increasingly larger quantities entering Global South markets as the nineteenth century progressed. However, while global textile exporters could compete effectively in some segments of local textile markets, they were ill-equipped to compete in others.

As Richardson (1979) has pointed out with respect to sub-Saharan Africa, cloth consumers were highly selective and would regularly reject products that did not suit their tastes or needs. Prestholdt has shown that the specificity of consumer demand in East Africa was so strong that it directly influenced the output of foreign textile producers seeking to capture the region’s market.¹¹ While producers sought to accommodate local demands, the ability of mass manufacturers to efficiently and successfully adapt to specific – and often shifting – local needs was constrained by the very nature of globally oriented mechanized manufacturing. The cost-reducing production tactics pursued by the majority of factory-based manufacturers necessarily relied on a strategy of minimizing “product line proliferation” to keep costs low. While this strategy could effectively minimize prices, it could simultaneously reduce competitiveness in diverse export markets given that local demand patterns differed considerably from place to place, especially in regard to fashion.¹² Moreover, the flexibility of early factory-based production was encumbered by the very machines that helped speed up mass production. Alterations to products was often slow and expensive, leading most to focus on low-cost output of large quantities of standardized products.¹³ Even among advanced industrial producers, Porter notes, where there is “complex segmentation within geographic markets ... the local firm will be well suited to perceive and adapt to the various segments of the local market.”¹⁴

As Thornton has pointed out, “competition [was] not between advanced technology in Europe and underdeveloped technology in Africa. It [was] between hand-produced goods made by very skilled workers in Africa and goods produced by very rudimentary versions of technology in Europe,” a reflection that extends to much of the Global South.¹⁵ Skilled local weavers were well positioned to accommodate high consumer specificity, even down to the demands of particular clients. A missionary in early-twentieth-century Ufipa (southwestern

¹¹ Prestholdt (2008, chapter 3).

¹² Porter (1980, 45, 282).

¹³ Singleton (1997, 98).

¹⁴ Porter (1980, 284).

¹⁵ Thornton (1990, 14).

Tanzania), for example, noted the diverse preferences of consumers, which arose from considerations of “taste, vanity or rank.” These were only “minor complications” for skilled weavers, who could deftly accommodate various requests and alter prices according to the complexity of design.¹⁶

Artisans were also attuned to broader fluctuations in local consumer demand and often responded by developing new designs and fashions to suit shifting tastes. In mid-nineteenth-century Ufipa, rising local incomes – stimulated by the region’s engagement with nineteenth-century ivory traders – led to demand for a wider array of high-quality products among regional elites. Weavers responded by developing methods for spinning finer thread and began incorporating a wider array of colors to produce elaborate patterns.¹⁷ Likewise, in southern Nigeria, female weavers in the Igbo town of Akwete developed elaborate patterned and brocaded cloths in response to rising demand stimulated by growing palm oil exports profits during the mid-nineteenth century.¹⁸ Aronson notes that Akwete weavers, who were producing on a nearly full-time basis well into the late-twentieth century, could skillfully produce “an almost infinite array of designs,” enabling them to accommodate specific consumer commissions and even reproduce high-quality artisanal versions of particularly popular import patterns.¹⁹

Similarly, textile manufacturers in Java were keenly aware of domestic consumer needs. As the next section illustrates, Javanese textile manufacturers developed new products during the nineteenth century to accommodate increasing demand among local consumers. In doing so, they would effectively oust machine-made imports that unsuccessfully attempted to replicate and replace traditional Javanese materials.

Dutch prints in Java and Africa

Broadly speaking, early export-oriented factory producers often struggled to create high-quality differentiated products that could effectively compete with local varieties in Global South markets. The case of European exports to Java illustrates how such efforts often resulted in disappointment. For example, during a brief period of British colonial rule in Java (1811-1816), British merchants attempted to introduce English-made calicoes that they believed would suit local consumer tastes. However, in 1815 Governor-General Sir Thomas Stamford Raffles noted that the quality of these imports left much to be desired:

“A very extensive and valuable assortment of these cottons, imitated after the Javan and Malayan patterns, was recently imported into Java by the East India Company, and on the first sale produced very good prices; but before a second trial could be made, the natives had discovered that the colours would not stand, and the remainder were no longer in demand.”²⁰

¹⁶ Wyckaert (1927, 368).

¹⁷ Willis (1981, 152, 156).

¹⁸ Chuku (2005, 69-70); Kriger (2006, 45-51); Austin (2013, 210).

¹⁹ Aronson (1980, 65-66).

²⁰ Raffles (1830, 241).

Alongside durability, design was also a crucial consideration for the discerning consumer. Many foreign travellers were amazed by the traditional Javanese handicrafts, like hand-painted *batik tulis* textiles, “which, concerning their designs could educate European masters.”²¹ When the Dutch retook colonial control from the British in 1816, they likewise sought to corner Javanese markets with Dutch-made cloth in an effort to stimulate the lagging Dutch textile industry.²² Although imports of cotton cloth from the Netherlands rose dramatically, import quantities supplied no more than one third of local demand. Thus, the majority of Javanese textile consumption was served by indigenous production.²³

Moreover, contemporary reports indicate that by the 1860s, lower-income Javanese consumers, who had initially been attracted to the low prices of imports, lost interest in cheap factory-printed cloth as local producers developed new techniques to compete with printed imports on the basis of quality *and* price. Enterprising Javanese artisans developed wax-print stamping techniques (*cap batik*) that could more closely approximate traditional hand-painted batik designs than could Dutch producers, enabling local artisans to quickly reclaim the lower end of the market. A colonial official noted in 1870:

“The time is gone, that the native exclusively focused on the making of *batiks* as a form of art, which were of exquisite beauty, but had to be recompensed likewise. Nowadays, he delivers products in this genre that, in quality related to price, are in no sense inferior to those fabricated in Europe. To sustain competition with him, the European *batik* producer will need to be able to deliver his manufactures for a much fairer price.”²⁴

Although symmetrical *cap batik* prints did not perfectly replicate the more beautiful (and pricier) hand-painted *batik tulis*, the locally hand-stamped prints still suited local tastes far better than mass-produced imports. Consequently, if Javanese peasants could not afford the more highly prized *batik tulis*, they would overwhelmingly choose the locally stamped *cap batik* over cheaper imported materials.²⁵ One observer around 1900 even called the new technique “the answer of the Javanese *batik* industry to European factory competition.”²⁶ Ultimately, Dutch merchants were forced to seek out alternative markets for their export-oriented prints, particularly in East and West Africa, where they could be more effectively marketed.²⁷

For example, the Dutch textile printing company P.F. Vlissingen & Co. (Vlisco) shifted attention to the Swahili Coast of central East Africa, where global trade was concentrated on the small mainland-adjacent island of Zanzibar. Here, Dutch-made prints proved far more successful than on Java, partly due to specific local circumstances and partly due to particular

²¹ Jasper and Pirngadie (1912, 2).

²² For more on these entangled colonial histories of Java and the Netherlands, see Van Nederveen Meerkerk (2018, 2019).

²³ Although per capita imports rose to around 0.35 kg in 1874, one person required a minimum of about three times as much cloth per year (Van Nederveen Meerkerk (2017, 1231).

²⁴ National Archives The Hague (NA), Koloniën 1850-1900, inv. no, 2362, Verbalen, no. 80, 26 November 1870.

²⁵ Rouffaer (1904, 26-27).

²⁶ Rouffaer (1904, 21-22).

²⁷ Ankersmit (2012).

production and marketing strategies employed by Dutch manufacturers, which ideally suited the region's demand conditions.²⁸ From the mid-nineteenth century, resident Indian merchants and local Swahili women had begun stamping imported cloth to enrich plain textiles.²⁹ A domestic weaving industry was also beginning to emerge on Zanzibar, spurred by the island's rise as a global entrepot and the recent settlement of artisans from India and the Arabian peninsula.³⁰ However, these industrial activities were still in an early developmental phase when Dutch prints (transported by German merchants) entered the market during the final decades of the nineteenth century. Thus, unlike in Java, the prospect of insurmountable competition from locally manufactured prints was consequently minimal, one crucial factor for the success of Dutch prints in the region. At the same time, highly developed information networks on the island of Zanzibar and the adjacent coastline provided foreign merchants with detailed information on local demand that could be quickly transmitted to Dutch printers, thus helping to mitigate the endemic problem of "delays in responding to markets that can be unacceptable" in the business of fashion and undermine the capacity of foreign producers to serve distant consumers.³¹ Indeed, designs, which included "birds, leaves, flowers, words, sentences or even proverbs" were "frequently suggested locally, particularly from Zanzibar."³²

Perhaps most critical, however, was the unique production strategy employed by Dutch printers, who actively favored product differentiation over mass production in order to serve the specific needs of Swahili consumers. As Ryan points out, Dutch textile printers utilized the cheap labor of children and old women to cost-effectively hand-stamp very small quantities of frequently changing patterns – commissioned on the basis of specific demand information obtained from Zanzibar – on cloth imported from Manchester to serve the "insatiable demands" of Swahili women for ever-changing designs of what became known as *kanga* cloths. They had found that "return on investment was guaranteed if the market was carefully considered," while British firms, in contrast, which mass-produced prints using copper rollers, struggled to capture the Swahili market during the nineteenth century.³³ Dutch wax prints had also been introduced with success in the Gold Coast (modern-day Ghana) and other West African markets in the late-nineteenth century, where they continue to remain popular today, with Vlisco maintaining its targeted approach of catering to precise local demand patterns.

Imports: Complements or substitutes?

The marked success of Dutch prints in East Africa helps underscore the importance of product differentiation in Global South markets and illustrates that the differentiation strategy that benefited local artisans, could also be effectively employed by foreign producers – provided that they were willing to preference quality over quantity. Still, however, this did not imply that successful imports were positioned to *displace* domestic textiles. As Porter notes,

²⁸ Ryan (2017, 109).

²⁹ Ryan (2017, 103).

³⁰ Clarence-Smith (2014, 268); Frederick (2020, [??]).

³¹ Porter (1980, 284).

³² Tanganyika trade report for the year ended December 31st 1926, 2-5, reproduced by Ryan (2013, 534-539).

³³ Ryan (2013, 353).

“product differentiation ... creates layers of insulation against competitive warfare because buyers have preferences and loyalties to particular sellers” if they offer highly valued, unique products.³⁴ Consequently, in many cases, cloth imports did not function as direct substitutes for domestic textiles, but took on a more benign position as *complementary* products that were consumed alongside locally made products. Indeed, this principle helps explain why Dutch wax prints struggled in Javanese markets – where similar local cloths outcompeted imports – but performed better among consumers in East and West Africa, where designs inspired by Javanese *batik* were novel complementary products alongside domestic cloth (see Fig. 2).

Figure 2 – Detail of Javanese *batik* & Gold Coast *kente* cloth, late-19th to early 20th century



Sources: Javanese *batik* from Vlisco archives (left): <https://stories.textilehive.com/vlisco-dd07e10c70b4>; Ewe *kente* cloth (right): Brooklyn Museum.

In West Africa, Thornton points out, regions that were significant importers of factory-made cloth also tended to be substantial *producers* of cloth.³⁵ West Africa’s early engagement with Atlantic trading had exposed the region to imported materials for several centuries – comprised of handmade cloth from India and Europe from the seventeenth century and then of machine-made textiles from the nineteenth century.³⁶ Yet local industries remained resilient, even as imports progressively increased and then surged in the nineteenth century. Fage notes that rising imports were illustrative of a growing consumer base that was simply purchasing more cloth and in wider varieties, including *both* domestic styles and products from abroad.³⁷ Consequently, even where imported cloth was met with success in West African markets, the presence of these materials did not result in the demise of popular domestic varieties. Even today, Ghana’s signature loom-patterned *kente* cloth, for example,

³⁴ Porter (1980, 19).

³⁵ Thornton (1990, 18).

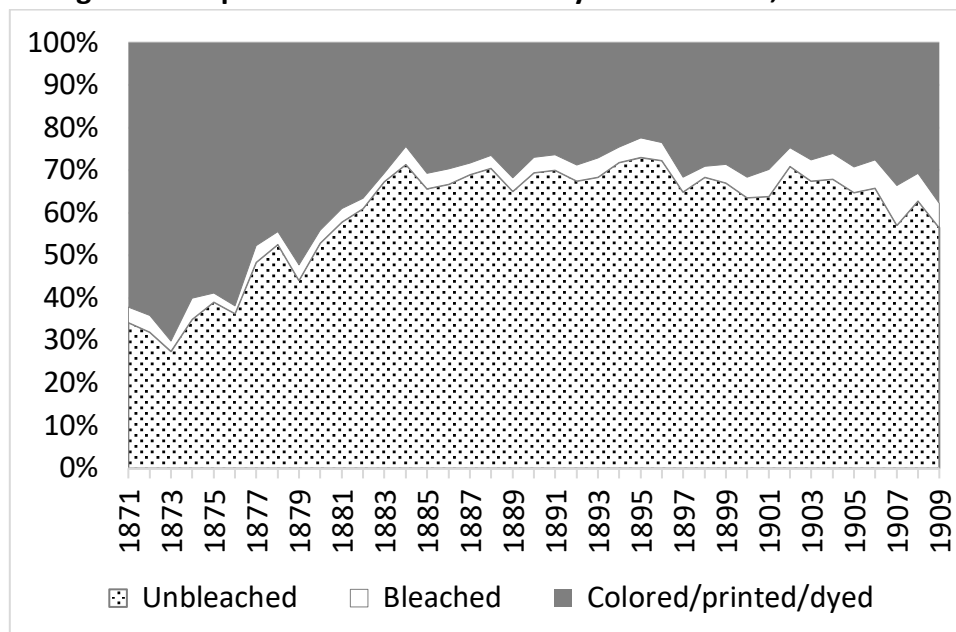
³⁶ Johnson (1978, 262-266).

³⁷ Fage (1978, 272-273); see also Hopkins (1973, 121).

continues to flourish alongside patterned Vlisco prints. In the river delta area of southern Nigeria, where imported cloth has been integrated into the local economy for several centuries, Aronson found in the early 1980s that imported cloth and regionally made textiles (including Akwete cloth) served different functions in local ceremonies, illustrating the depth and persistence of complementarity even as imports have become increasingly plentiful.³⁸

In parts of East Africa, imported cloth likewise served complementary functions alongside domestic cloth in areas with deeply entrenched local textile traditions. Take, for example, the largescale imports of plain machine-made cloth exported to East Africa during the nineteenth century. Nearly all cloth imported from the United States from the 1830s onward was unbleached *merekan* – America’s “greatest trade staple” in East Africa.³⁹ So too was most of the cloth shipped from Bombay, which entered the region in rapidly growing quantities from the late 1870s (see Fig. 3). Both plain unbleached and basic dyed cloths took on unique use-values on the coast – as a form of collateral⁴⁰ – and in much of the interior, where they circulated as the principal commodity currency along caravan trade routes crisscrossing inland Tanzania up to the end of the nineteenth century. As such, imported cloth rose immensely in value in the interior, leaving ample space for locally made cloth to serve clothing functions, particularly in places like Ufipa, where domestic weavers produced elaborate patterned designs often based on particular consumer requests.⁴¹

Figure 3 – Exports of cloth from Bombay to East Africa, 1871-1909



Source: Bombay annual trade reports (Bombay Presidency 1871-1910).

³⁸ Aronson (1980, 63).

³⁹ Prestholdt (2008, 74). For the overwhelming dominance of unbleached cloth in shipping cargoes bound for East Africa from the cloth-exporting town of Salem, see MH 23, MH 235, MSS 901, and MSS 24 series, Peabody Essex Museum, Salem, Massachusetts, USA.

⁴⁰ Brühwiler (2018).

⁴¹ Frederick (2020, chapters 4 and 5).

In contrast, weavers along the Benadir Coast of what is today Somalia, had long specialized in the production of plain white cloth. Consequently, plain imports would ultimately pose a greater competitive threat here, especially unbleached American cloth, renowned for its exceptional durability, which set it apart from products exported by other industrializing countries.⁴² However, competition from abroad incentivized innovation among Benadir weavers rather than destroying the local industry. Weavers deftly adapted by developing a new product – striped *futa benaadir* – which accorded with rising regional demand for patterned cloth. By differentiating their products, Benadir weavers secured a new competitive advantage.⁴³ The striped patterns were so popular that German manufacturers attempted to replicate colorful Benadir products in the early decade of the twentieth century, but the lower-quality imitations – which failed to hold their dye and contained large amounts of gruel (a substance designed to bulk up fabric) – were reportedly “much less esteemed by the natives,” who could detect the imported versions by both feel and smell.⁴⁴

In Ethiopia, plain imported cloth similarly became increasingly available during the nineteenth century, but was generally used for the production of utilitarian trousers, whereas overlaying *shamma* robes, the focal piece of traditional Abyssinian dress, continued to be largely produced by domestic weavers. Foreign mass-manufacturers introduced machine-made *shammas*, but as in the case of Dutch prints in Java and German imitations of *futa benaadir* in Somalia, foreign-made replicas failed to compete with local versions on the basis of quality. A British consular official noted that “native woven *shammas* are of finer quality and more lasting than the imported” and reported that imported versions struggled to compete, particularly as increasing amounts of imported yarn was helping reduce the cost of domestic *shamma* production.⁴⁵

In Java, too, plain imported cloth filled a largely complementary niche alongside elaborate domestic patterned cloth and even helped supplement local industrial developments by providing cheap unbleached “canvases” on which local printers could create fashionable designs for the local market. Thus, while Dutch prints struggled to maintain footing in Java, unbleached and bleached cloth fared better, making up over half of the cloth imports entering the colony between the 1820 and 1930s (see Fig. 4). Similarly, in Zanzibar, local artisans often embellished imported cloth by applying stamped designs and attaching colorful locally woven border pieces.⁴⁶

⁴² On the durability of American cloth: Cave (1898, 13-14 ; 1899, 14).

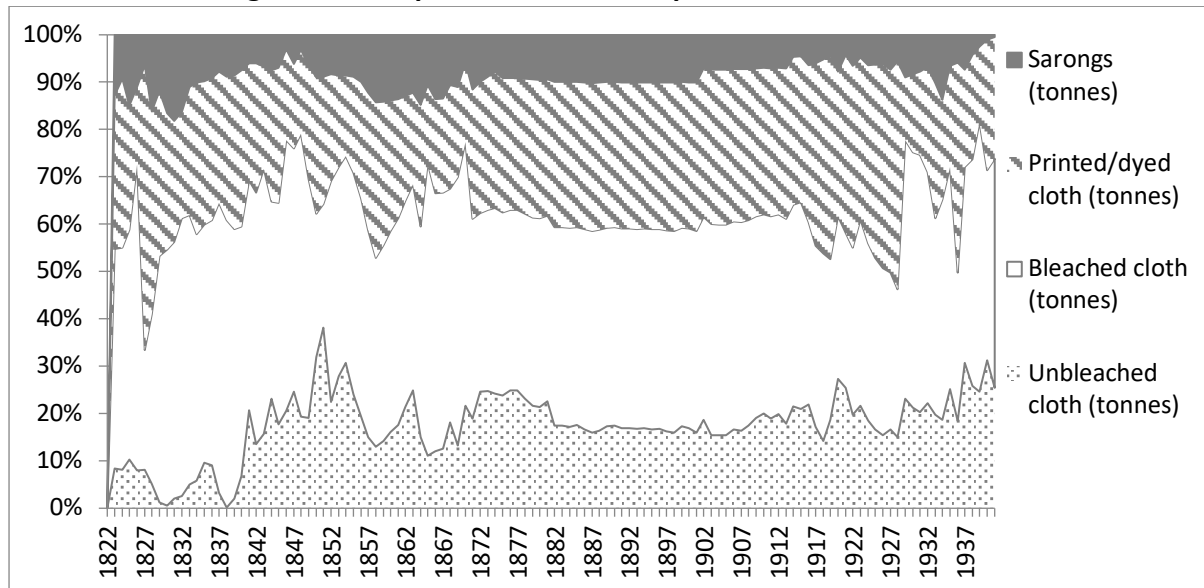
⁴³ For a detailed discussion of the development of patterned *futa benaadir*, see Alpers (2009, 87-90).

⁴⁴ Giuseppe Stefanini quoted in Alpers (2009, 90-91).

⁴⁵ Pankhurst (1968, 261).

⁴⁶ Prestholdt (2008, 68-71).

Figure 4 - Composition of cloth imports to Java, 1822-1940



Based on: Database Indonesian Textiles (Creator: Pierre van der Eng), version 2015.

4. The weaver's tool kit: Industrial inputs in the Global South

The particularities of consumer demand addressed in the preceding section have been given scant attention by most theorists of deindustrialization, who emphasize the purported ability of machine-produced imports to effectively outcompete locally made cloth on the basis of cost. Williamson, for example, highlights declining nineteenth-century transportation costs and technological innovations that enhanced global market integration and stimulated already existing patterns of specialization wherein Global South producers increasingly focused on exporting raw materials – which were rising in price due to growing global demand – while the industrializing Global North countries supplied the world with comparatively low-cost industrial products. The result was widespread de-industrialization in the “periphery.”⁴⁷ Scholars have assumed that, within the context of globalization, geographic protection from global market forces was thus a key determinant of the survival of local textile manufacturers.⁴⁸

Transportation and transaction costs indeed lowered dramatically over the nineteenth century, and a terms-of-trade boom for agricultural products certainly took place in much of the Global South. However, a close inspection of differences in the supply of industrial inputs in handicraft versus factory production systems suggests that assumptions about the superior cost-reducing advantages of factory-based manufacturing require much nuancing, as do suppositions regarding the necessary tradeoff between export-oriented agriculture and locally oriented handicraft manufacturing. Indeed, in this section, we illustrate that alongside the demand-based benefits that helped “insulate” local textile industries from the competition of global substitutes, domestic manufacturers also benefited from specific

⁴⁷ Williamson (2013 [2011]). For an elaboration of this argument and additional critical reflection, see Van Nederveen Meerkerk (2017, 1221-1223).

⁴⁸ Austen (1987, 99).

supply-side advantages that helped them maintain a competitive edge against factory-based manufacturers. The particular supply advantages enjoyed by Global South producers were afforded in part by local conditions that were present in many Global South economies and by new opportunities that emerged with mounting global trade integration.

Seasonality and labor costs

In the context of certain focused differentiation strategies geared toward supplying unique products to elite consumers, price was of little importance. In fact, efforts to reduce price could prove counter-productive since conspicuous consumption among elites often “depends on the expensiveness of the product,” a dynamic not lost on weavers catering to a growing population of “middle class” elites in nineteenth-century southern Nigeria and Ghana, for example.⁴⁹ However, for lower-income domestic consumers, price *did* remain an important consideration. Even here, many Global South handicraft producers serving broader consumer groups enjoyed cost advantages that are obscured in deindustrialization narratives that focus exclusively on technological change as the principal determinant of low prices.

Of particular importance was the nature of supply costs for both labor and raw materials in the Global South, which could weaken the cost advantage of machine-made substitutes. Although manufacturing a piece of handicraft cloth is more labor-intensive than mechanized manufacturing, the labor costs of handicraft manufacturing can be remarkably low within certain local contexts. Where agricultural labor burdens are highly seasonal and weavers concentrate their manufacturing work during the dry, non-agricultural season – as in much of the Global South – the cost of industrial labor could be close to zero. Many weavers in the Global South were self-employed artisans and part-time subsistence farmers who could supply their alimentary needs regardless of income, meaning that their cost of living was not passed on to their consumers in the form of elevated cloth prices. As Marion Johnson has reflected, “The part-time specialist working for pocket-money [...] can undercut the man who has to earn his living by the craft alone, and he can even, under favourable circumstances, undercut factory production.”⁵⁰

Across sub-Saharan Africa, weaving was largely undertaken on a seasonal basis. Consequently, although the continent has historically been comparatively labor-scarce, Austin points out that during the dry season, industrial labor became plentiful and cheap.⁵¹ Moreover, entire households often engaged in various facets of the manufacturing process. On East Africa’s Benadir Coast, for example, nearly all members of industrial households were integrated into manufacturing tasks, providing substantial supplies of industrial labor that required only the “provision of food and shelter,” an advantage that Alpers argues played a significant role in the local industry’s capacity to compete with imports on both a quality and cost basis.⁵²

Similarly, observers in nineteenth-century Java remarked on the competitive prices of high-quality indigenous fabrics, owing to the low cost of weaving labor performed by rural Javanese women who wove seasonally and as a form of low-cost by-employment. As was

⁴⁹ Johnson (1978, 267).

⁵⁰ Johnson (1978, 267).

⁵¹ Austin (2008, 597-598).

⁵² Alpers (2009, 81-84).

noted in 1890: “That which the industrious mother of the house produces more than is needed for the clothing of the family, she brings to the market. Indeed, it is only a plain tissue, but due to the reliability of the good and its low price (Dfl. 1.50 à 3.00), this indigenous fabric can easily compete with the European calicoes, which testifies to the fact that cheap is expensive.”⁵³ Indeed, the high *durability* of cheaply produced, but high quality hand-made cloth – which was similarly noted by observers in sub-Saharan Africa⁵⁴ – further offset possible cost differences given that lower-quality machine-manufactured cloth required more regular replenishing.

At the same time, the fact that weaving often occurred primarily during the agricultural slack season or as a form of by-employment in much of the Global South undermines deindustrialization assumptions that rising exports of tropical commodities necessarily required a reallocation of labor from industry to agriculture in the Global South. Weavers, or members of their household, could engage in export agriculture for part of the year and then shift labor to textile manufacturing when cultivation tasks temporarily abated in the agricultural off-season. In fact, rather than destroying local industry, a rise in agricultural exporting often *stimulated* local manufacturing. Iliffe reflects that in West Africa, domestic industry remained most competitive where cash-crop wealth enhanced demand for high-quality garments.⁵⁵ In southeastern Nigeria’s Igboland, for example, the development of new patterns and brocading methods by Akwete weavers had been stimulated by rising palm-oil export profits that generated demand for new fashions among increasingly variegated consumer classes.⁵⁶ In Java the extractive Cultivation System (1830-ca. 1870, see below) implemented by the Dutch did lead to a notable rise of cash crop production, which consumed more of farming households’ time, and certainly in the first years of the system posed an immense financial burden on Javanese peasants. In the longer run, however, the system also induced monetization of the economy and the creation of an infrastructure that stimulated local and regional trade – not in the least place of locally produced cloth.⁵⁷ Rising income probably enhanced the demand for textiles in the late nineteenth century, which according to Van der Eng increased in this period to an annual average of 0.9 kilograms per capita (around two sarongs).⁵⁸ As several authors have suggested, this probably did not result from higher real wages, but from the increased time the different members of the Javanese household spent on (modestly paid) labour due to the Cultivation System.⁵⁹

Local and global materials

Alongside structurally low labor costs for many handicraft manufacturers, Global South artisans also often enjoyed comparatively low prices for material inputs, a cost-reducing advantage afforded by multiple access points – both local and global – to industrial raw and

⁵³ Quoted in Rouffaer (1904, 12).

⁵⁴ Fülleborn (1906, 512); Boileau and Wallace (1899, 613); Lechaptois (1913, 255); Wyckaert (1927, 368).

⁵⁵ Iliffe (2007, 221); see also Austin (2013, 209-210).

⁵⁶ Kriger (2006, 45-47).

⁵⁷ Van Nederveen Meerkerk (2017, 1223, 1237).

⁵⁸ Van der Eng (2013, 1024).

⁵⁹ White (2011, 485); Booth (1998, 96).

semi-finished materials. These included: household-based cotton cultivation, local raw cotton and yarn markets, and global sources of machine-produced yarn and semi-finished cloth.

Weaver-farmers in climates suited to cotton growing not only had the capacity to produce their own raw materials (which involved only the opportunity cost associated with alternative cultivation or foregoing income generated from exporting raw cotton), but could also buy from local suppliers. In Northern Nigeria, for example, large plantations produced raw cotton and indigo for the region's textile industry.⁶⁰ Likewise, nineteenth-century cotton plantations established in fertile inland areas adjacent to East Africa's Benadir Coast provided low-cost supplies of raw cotton to textile producers in Mogadishu.⁶¹ In 1891, an Italian observer pointed to the "extremely low price of the cotton which is cultivated in the neighboring regions and [...] the limited cost of labor" as key variables in the region's competitive advantage.⁶²

In Java, peasants also traditionally grew their own cotton, which was spun by (usually female) household members. Surpluses of yarn were incidentally sold on local markets. However, hand spinning was highly time consuming, and profits for handwoven cloth were higher than for handspun yarns. When factory-made cotton yarns became increasingly available through imports, many Javanese women shifted to buying these in local markets and devote more of their time to weaving (see Table 1). Nevertheless, local cotton yields also continued to increase in Java until at least the First World War,⁶³ so we may assume that hand spinning was not entirely eradicated either, especially in more peripheral regions where yarn markets were less developed. This all implies that the low opportunity cost of rural women was extensively employed in hand weaving and spinning and that, at least in absolute terms, their numbers swelled up until the mid-1910s, not suggesting outright deindustrialization, but rather persisting industrial activity.⁶⁴

Table 1 – Estimated woman years of weaving labour needed to process imported yarn (own calculations), Java, 1830-1920

	<i>imported yarn (x 1,000 kg)</i>	<i>index (1870=100)</i>	<i>woman years</i>	<i>index (1870=100)</i>
1830	22.5	4	2,515	4
1840	149.0	24	12,000	21
1850	284.9	45	15,147	26
1860	375.6	60	30,102	53
1870	627.8	100	57,213	100
1880	2424.5	386	125,507	219
1890	1619.0	258	75,412	132
1900	2392.0	381	178,098	311
1910	4256.0	678	340,000	594
1920	1831.8	292	152,129	266

Sources: Muller Szoon (1857); Statistisch Instituut (1887); Korthals Altes (1991, 107-112); Dalenoord (1926, 172).

⁶⁰ For plantations, see Candotti (2010, 196-197); Lovejoy (1978).

⁶¹ Alpers (2009, 83-85); Sheriff (1987, 72)

⁶² Robecchi-Bricchetti cited by Alpers (2009, 84).

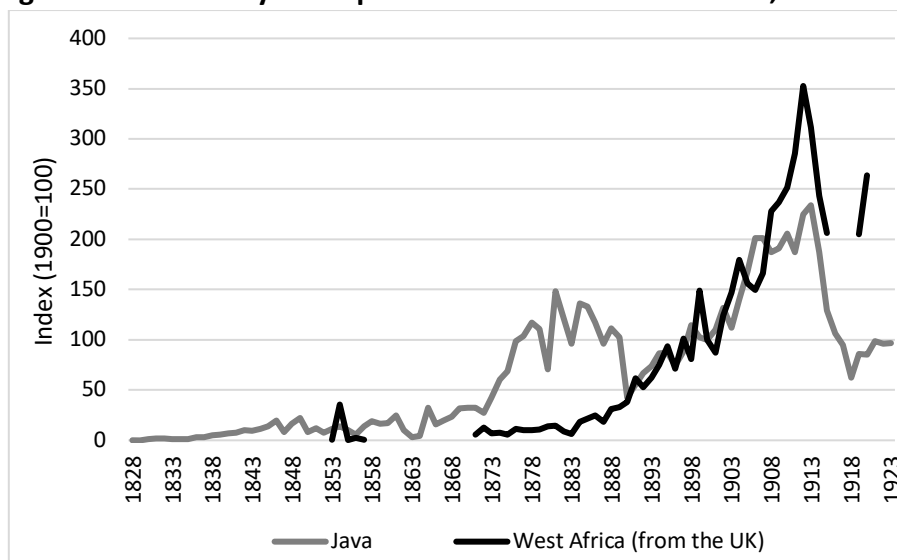
⁶³ Matsuo (1970, 12).

⁶⁴ Van Nederveen Meerkerk (2018).

In Africa too, handicraft producers who were well connected to global markets could purchase imported industrial inputs. Already in the Early Modern Period, Portuguese colonists in southern East Africa had noted that artisans often unraveled colored imported cloth to obtain yarn for domestic weaving.⁶⁵ By the nineteenth century, factory-made yarns were increasingly adopted, diminished spinning labor and offering weavers a wider range of colors, thus simultaneously increasing quantitative and qualitative output possibilities. Benadir weavers, for example, began employing colorful imported yarns alongside locally made yarn by the late-nineteenth century in the production of their colorful *futa benadir*.⁶⁶ Weavers in much of West Africa also began incorporating machine-made yarn by the later part of the nineteenth century, as did weavers in Java (Fig. 5).

The advantages of yarn were strongest for weavers serving higher-end consumers who were willing to pay high prices, thus offsetting the additional production costs associated with the incorporation of yarn. Akwete weavers in southern Nigeria, for example, were almost exclusively using imported yarn by the second half of the twentieth century.⁶⁷ However, as in Java, domestic cotton cultivation and spinning did not disappear altogether. Locally made yarn remained popular among weavers located far from global trading hubs – which increased the transportation and transaction costs of imported materials – and among artisans serving lower-income segments who made a greater profit by producing on a “zero marginal cost basis.” In fact, although yarn imports into West Africa increased substantially from the late-nineteenth century onward, a 1961 survey of the domestic industry revealed that an estimated two-thirds of Nigeria’s handwoven cloth was still manufactured using domestic yarn.⁶⁸

Figure 5 – Index of yarn imports into Java and West Africa, 1828-1923



Sources: Java: 1828-1854: (Muller Szoon 1857); 1855-1873: Statistisch Instituut (1887, 415); 1874-1940: Korthals Altes (1991, 107-112); West Africa: United Kingdom annual trade reports: Great Britain (1858-1921).

⁶⁵ Clarence-Smith (2014, 268).

⁶⁶ Alpers (2009, 87-90).

⁶⁷ Afigbo and Okeke (1985, 33); Aronson (1980, 65).

⁶⁸ Johnson (1978, 268).

5. Industrialist dependency and colonial agency

The considerable variation in choice of industrial inputs available to Global South artisans helped minimize overall production costs and partly shielded domestic producers (and their consumers) from the potential industrial consequences of global market shocks. Factory producers in the Global North, in contrast, relied exclusively on external raw material sources – with the exception of American producers – and were thus vulnerable to both the bargaining power of foreign suppliers and the vagaries of the global markets upon which manufacturers depended to feed their machines. This was a grave concern for nineteenth-century mass-manufacturers, who widely pursued “cost leadership” strategies, since any “inflation in costs” could threaten their ability to maintain enough of a price differential to compete with producers offering more differentiated products.⁶⁹

The global cotton famine of the 1860s, precipitated by the American Civil War (1861-1865) is a key example. Between 1860 and 1863, global cotton prices shot up by 340 percent as global supplies of American-grown cotton dried up, which simultaneously pushed up global textile prices and dampened consumer demand.⁷⁰ In the same period, cloth imports into East Africa from the United States, United Kingdom and Bombay fell by over 60 percent, as prices for imported cloth rose rapidly, stalling the momentum of import growth into the region until prices began to approach pre-Civil War levels in the 1870s.⁷¹ Likewise, British cloth exports to West Africa fell off dramatically in the midst of the cotton famine – dropping from over 42 million yards in 1860 to just under 12 million in 1864 before recovering in the early 1870s.⁷²

Though far more modest than the price hike of the 1860s, an upturn in global cotton prices at the end of the nineteenth century bolstered European concerns about dependence on foreign sources – specifically that “the European textile industry would fall under the tyranny” of America – helped stimulate colonial powers to ramp up their efforts to secure dependable sources of raw cotton from their colonies.⁷³ Colonial powers went to great lengths to secure raw materials from and inject metropolitan manufactures into colonial markets. However, as we illustrate in this final section, unforeseen challenges arose throughout the colonial era as local consumers and producers reacted to metropolitan efforts to manipulate local markets, which helps further illustrate the adaptability of local producers and the centrality of consumer demand in buttressing domestic textile industries.

For decades, the links between industrialization, economic development and colonialism have been subject to considerable debate. Neoclassical economists have generally contended that the “backwardness” of indigenous economies ought to be attributed to endogenous factors, such as the primitive conditions of societies in the non-West, or the lack of dynamism of indigenous elites.⁷⁴ “Dependency-school” theorists have argued that former imperialist powers were to blame for underdevelopment in the Global South since colonial economies had been coerced into focusing on cultivating primary

⁶⁹ Porter (1980, 45).

⁷⁰ Sauerbeck (1886, 639).

⁷¹ Prices and quantities are derived from numerous trade and shipping reports from the United States, the United Kingdom and Bombay. See Frederick (2020, Chapter 3-Appendix 1).

⁷² See import figures in Great Britain (1866-1876).

⁷³ Brode (1911, 107).

⁷⁴ E.g.: Bauer (1976, 148); Kerr et al. (1962).

products in lieu of industrial development.⁷⁵ Although deriving from different ideologies, both schools share two key perspectives: first, that the “western” model of modernization was the road to development, and second, that the ability of colonized regions to achieve economic growth was determined by actors and policies from the “Global North,” thus discounting indigenous economic agency. Crucially, however, regardless of the particular intentions of colonial policies – whether envisioned to “develop” or to “exploit” the global periphery – the responses of local actors could produce unanticipated outcomes.

Dutch interventions in Javanese markets

The ongoing development of the Javanese textile industry amid Dutch colonial efforts to capture the local colonial market provides an excellent example. Around 1700, the Dutch East India Company (VOC) had introduced a tax to be paid in yarn instead of cash in some regions of the archipelago in an effort to satisfy the increasing demand for cotton in Europe.⁷⁶ Large volumes of cotton yarns were exported from the Dutch East Indies to the Netherlands, where handloom weavers used the cotton yarns for their mixed cotton-linen fustians.⁷⁷ At the same time, however, this initiative resulted in widespread stimulation of cotton hand spinning among rural indigenous women, helping to bolster the domestic industry that would so effectively compete with Dutch imports during the nineteenth century.

By the first decades of the nineteenth century, Dutch colonial economic policies had been engineered to simultaneously stimulate the cultivation and extraction of raw materials – by implementing a system of forced cultivation, the *Kultuurstelsel* (Cultivation System, 1830-ca. 1870) – and create new markets for the emerging metropolitan textile industry.⁷⁸ The Dutch actively sought to ensure a position for their textiles among the large population of Java by, for example, introducing discriminatory tariffs of twenty-five to thirty-five per cent for non-Dutch textile imports to the East Indies, whereas the Dutch paid just six per cent in import tax.⁷⁹ In spite of these colonial schemes, consumers were unmoved to ramp up their consumption of foreign-made textiles. As Fig. 6 strikingly illustrates, although cloth imports increased somewhat from the mid-1830s, a massive increase in Javanese consumption of imported cloth would only occur *after* the intrusive cultivation system was disbanded.

⁷⁵ E.g.: Frank (1966); Rodney (1972); Wallerstein (1989).

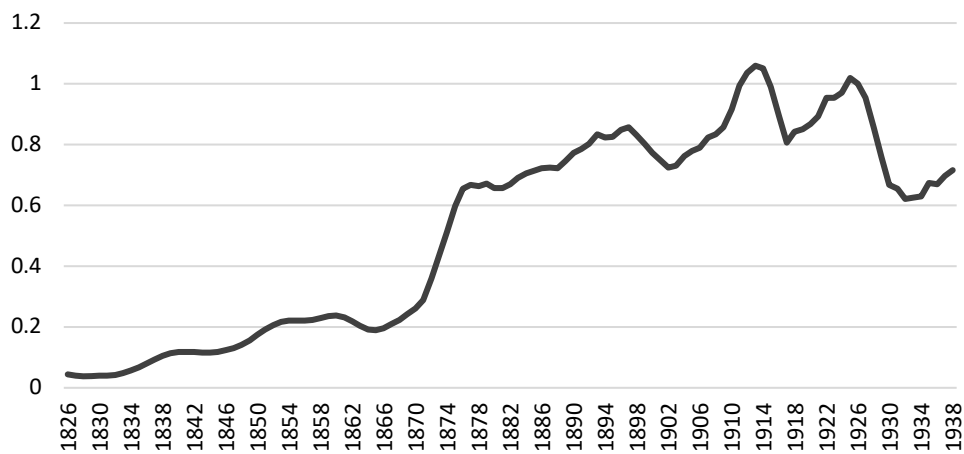
⁷⁶ Rouffaer (1904, 12-13).

⁷⁷ Clarence-Smith (2009, 131).

⁷⁸ Fasseur (1975); Elson (1994).

⁷⁹ Van der Eng (2013, 1025-1026) Van der Eng 2013, 1025-1026.

Figure 6 – Imports of cotton cloth (in kg), Java, 1822-1940 (5-year moving average)



Based on: Database Indonesian Textiles (Creator: Pierre van der Eng), version 2015.

Note: These import figures exclude yarn.

Local pride in traditional production, sometimes even stirred by anticolonial sentiments, helped further stimulate consumer preferences for locally produced goods in Java.⁸⁰ As we have seen, metropolitan efforts to replace Javanese *batik* cloth with Dutch variants failed miserably due to the inability of Dutch versions to effectively substitute for the high-quality local product. Although Dutch factory owners “saved effort nor expenses”, traveling to the East Indies to inform themselves about the consumer preferences of the Javanese,⁸¹ they often did not succeed. Some contemporaries attributed this to “the love of the Javan for monstrous and impossible shapes”,⁸² which were not easily replicated by machines. Others reported that an experiment with factory-made blue headscarves containing Quran texts, failed miserably, due to the “unwillingness of Mohamedan priests” to recommend these imported pieces of cloth to their religious community.⁸³ The fact that Dutch merchants had to seek out markets elsewhere in the Global South, where they held no colonial sway, demonstrates both the primacy of local demand and the futility of colonial force in driving consumer habits.

British cotton schemes in colonial Nigeria

Similarly, upon securing the Protectorate of Northern Nigeria in 1900, the British eyed their new territory’s vast production of domestic raw cotton for local looms as an obvious answer to the Lancashire industrialists’ demands for low-cost materials and markets for British textiles.⁸⁴ The British Cotton Growing Association (BCGA) took a number of calculated steps to effect this shift in the first decades of the twentieth century, but their best-laid plans were quickly foiled – they had woefully underestimated Nigerian producers and consumers.

First, while the BCGA set an artificial purchase-price ceiling for raw cotton, Northern Nigerian manufacturers willingly paid the much higher natural local market price, effectively

⁸⁰ Van Nederveen Meerkerk (2019, 146).

⁸¹ National Archives The Hague, Archives NHM, inv. no. 5271, Annual report 1858.

⁸² Rovers (1873, 420).

⁸³ National Archives The Hague, Archives NHM, inv. no. 5273, Annual report 1873.

⁸⁴ Johnson (1974, 182).

outbidding would-be British buyers. Moreover, when the British built a railway connecting inland Northern Nigeria with coastal markets to facilitate the export of the region's raw cotton, local producers instead used the transportation boon primarily to export more profitable cash crops, like groundnuts. The resulting increase in local incomes produced a rise in demand for locally made cloth, providing stimulus for the local industry. British manufactures, in contrast, were largely ignored. British officials, who assumed that the introduction of increasing quantities of British cloth to Northern Nigeria would quickly diminish demand for the region's popular indigo-dyed domestic cloth, were proved resoundingly wrong.⁸⁵ Colonial officials noted that "no native [...] will take the English material if he can possibly get the latter."⁸⁶ Raw cotton exported to Britain from the region – which hopeful reports in 1904 estimated could alone almost entirely "supply the wants of Lancashire"⁸⁷ – reached only 363,500 pounds just before the outbreak of the First World War and averaged at only 25,000 bales per year thereafter, a far cry from the 7 million bales that had been projected by proponents of the scheme.⁸⁸

Missteps were likewise made in the Southern Nigeria Protectorate. In Tivland, for example, colonial officials sought to disrupt domestic cloth currency traditions, partly in the hopes of ousting the local weaving industry and securing the region's raw cotton for British looms. They rapidly removed large quantities of the domestic woven material by collecting colonial taxes in the form of locally made cloth strips before subsequently demanding that taxes be paid thereafter exclusively in cash, which officials assumed would be accrued by selling locally grown raw cotton. While this indeed disrupted currency traditions, the scheme only served to bolster the local textile industry as demand for now scarce local cloth surged.⁸⁹ Throughout Nigeria, colonial initiatives continued to struggle to "divert the supply of cotton from the Nigerian hand-loom to the power-loom of Lancashire."⁹⁰ Indeed, Tivland remained a major supplier of textiles to local and regional consumers deep into the twentieth century and continues to produce distinctive black and white striped cloth today.⁹¹ As in colonial Java, British officials have misjudged the power of unique, high-quality local products to effectively compete with cheaper, lower-quality mass-produced substitutes: even when it was more expensive, consumers favored the genuine local product "in preference to the cheaper but less durable Lancashire cloth."⁹²

6. Conclusion

As we have argued, the ability of textile producers in Java and sub-Saharan Africa to continue to thrive amid colonial interventions and globalization – which saw newly industrializing countries secure a technology-driven comparative advantage in manufacturing – was due in large part to certain comparative advantages exercised by domestic handicraft manufacturers. Specifically, strategies of product differentiation, responsiveness to shifting

⁸⁵ Hogendorn (1995, 60-66).

⁸⁶ Northern Nigeria Report for 1906-07 quoted in Johnson (1974, 184).

⁸⁷ *The Times*, April 4, 1904 quoted in Hogendorn (1995, 51).

⁸⁸ Great Britain (1915, 358); Hogendorn (1995, 52, 70).

⁸⁹ Dorward (1975, 438-439, 443; 1976, 589-590).

⁹⁰ McPhee (1926, 44 cited in Johnson 1974, 184).

⁹¹ Bohannon and Bohannon (1969, 53).

⁹² Director of Northern Nigeria's Department of Agriculture, July 1913, quoted by Hogendorn (1978, 110).

consumer needs, and flexibility in manufacturing methods enabled local producers to remain competitive in confrontation with mounting imports from early factory producers, who typically offered cheap, but lower quality and less unique products. Moreover, some local manufacturers could even compete on the basis of price given the very low labor costs involved in seasonally oriented handicraft production.

The differing production and marketing strategies pursued by handicraft and factory producers provided competitive protection for many artisans during the increasingly global nineteenth century. In fact, rather than condemning domestic industry – as purported by deindustrialization theorists – access to global trade could provide *stimulus* for local manufacturing. Industries located far from global trading nodes may have been protected from imports of machine-manufactured cloth, but as we have illustrated, such imports often served a complementary rather than substitutive function. Rather than aiding industry, geographic isolation excluded regional textile industries from benefitting from income-generating – and thus demand-stimulating – global trading opportunities, as well as access to a wider array of input supplies. Indeed, while largescale factory producers, particularly in Europe, were wholly dependent on external cotton supplies, globally connected handicraft textile manufactures could turn to numerous possible sources of input supplies – including household, local, and global sources. Finally, we have illustrated that the capacity of domestic textile producers to remain competitive amid colonial policies aimed at capturing local markets – and raw cotton sources – highlights not only the importance of product differentiation and the specificity of local demand, but also the agency exercised by both producers and consumers even under colonial rule.

This paper has highlighted the specific characteristics of handicraft industries in Java and sub-Saharan Africa that provided manufacturers with a competitive edge during the nineteenth and early twentieth centuries. We do not intend to suggest, however, that handloom weaving indefinitely retained its particular advantages relative to mass-manufacturers. As Porter notes, “[successful] imitation narrows perceived differentiation, a common occurrence as industries mature.”⁹³ Moreover, as the success of Dutch wax prints in East and West Africa helps illustrate, a strategy of narrowing in on particular consumer demands within a target market could help foreign manufacturers successfully gain a foothold in domestic markets. Thus, developments in factory manufacturing that enhanced product qualities, coupled with production and marketing strategies geared more directly toward specific consumer groups, could lead to an erosion of handicraft-specific competitive advantages. Such a shift may help account for an eventual decline in handicraft production in parts of the Global South as the twentieth century progressed. While the products of early mechanized manufacturers struggled to compete with domestic varieties, the rise of Japanese factory production in the first half of the twentieth century seems to have presented a greater competitive challenge. Indeed, it was only with the entrance of Japanese textiles into Javanese markets that handicraft weaving would finally show serious signs of decline.⁹⁴

⁹³ Porter (1980, 46).

⁹⁴ Van Nederveen Meerkerk (2017).

Japanese textiles also penetrated markets across sub-Saharan Africa.⁹⁵ In West Africa, for example, Japanese textiles, along with Indian manufactures, had driven more than half of the earlier share of British-made cloth off the market by the 1930s, although here handicraft producers continued to fare well in much of the region.⁹⁶ Pinpointing the unique competitive advantages of twentieth-century Japanese producers relative to both nineteenth-century factory-based producers in the West *and* twentieth-century handicraft manufacturers in the Global South offers an intriguing avenue for further research.

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⁹⁵ In fact, the Japanese began successfully exporting popular Japanese-made *kangas* to East African markets, effectively competing with European printers (Suzuki 2018).

⁹⁶ Johnson (1978, 268).

- Cave. 1899. No. 2351. *Annual series. Diplomatic and consular reports. Report of the year 1898 on the trade and commerce of Zanzibar*. London: Harrison and Sons.
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