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UNITED STATES TARIFF COMMISSION

CERAMIC WALL TILE:  
WORKERS OF THE CAMBRIDGE TILE MFG. CO.,  
CINCINNATI, OHIO

Report to the President on  
Worker Investigation No. TEA-W-134  
Under Section 301(c)(2) of the Trade Expansion Act of 1962



TC Publication 481  
Washington, D. C.  
May 1972

UNITED STATES TARIFF COMMISSION

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Note.--The whole of the Commission's report to the President may not be made public since it contains certain information that would result in the disclosure of the operations of an individual concern. This published report is the same as the report to the President, except that the above-mentioned information has been omitted. Such omissions are indicated by asterisks.

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REPORT TO THE PRESIDENT

U.S. Tariff Commission,  
May 1, 1972.

To the President:

In accordance with section 301(f)(1) of the Trade Expansion Act (TEA) of 1962 (76 Stat. 885), the U.S. Tariff Commission herein reports the findings of an investigation made under section 301(c)(2) of the act in response to a petition filed on behalf of a group of workers.

On March 2, 1972, the Commission received a petition for determination of eligibility to apply for adjustment assistance filed by the United Glass and Ceramic Workers of North America (AFL-CIO-CLC) on behalf of the production and maintenance workers at the Cambridge Tile Mfg. Co., Cincinnati, Ohio. The investigation was undertaken to determine whether, as a result in major part of concessions granted under trade agreements, articles like or directly competitive with glazed ceramic tile (of the type provided for in item 532.24 of the Tariff Schedules of the United States (TSUS) ) produced by the Cambridge Tile Mfg. Co. at Cincinnati, Ohio, are being imported into the United States in such increased quantities as to cause or threaten to cause, unemployment or underemployment of a significant number or proportion of the workers of such firm.

Public notice of this investigation was given in the Federal Register of March 15, 1972 (37 F.R. 5415). No public hearing was requested, and none was held.

In the course of its investigation, the Commission obtained information from the petitioning union, from officials of Cambridge Tile Mfg. Co., from other domestic producers and importers of glazed ceramic tile of the type provided for in item 532.24 of the TSUS, and from its files.

The Commission conducted an earlier investigation (TEA-W-11) on petition of workers at the same firm filed on January 19, 1970. On March 20, 1970, in its report to the President,<sup>1/</sup> the Commission, by a vote of 4 to 2, announced a finding that articles like or directly competitive with ceramic floor and wall tile produced by the Cambridge Tile Mfg. Co. were not, as a result in major part of concessions granted under trade agreements, being imported into the United States in such increased quantities as to cause, or threaten to cause, unemployment or underemployment of a significant number or proportion of the workers of the Cambridge Tile Mfg. Co.

#### Finding of the Commission

On the basis of its investigation, the Commission finds <sup>2/</sup> (Commissioner Moore dissenting) that articles like or directly competitive with glazed ceramic tile (of the type provided for in item 522.24 of the Tariff Schedules of the United States) produced by the Cambridge Tile Mfg. Co., Cincinnati, Ohio, are not, as a result in major part of concessions granted under trade agreements, being imported into

<sup>1/</sup> Ceramic Floor and Wall Tile: Certain Workers of the Cambridge Tile Mfg. Co., Cincinnati, Ohio: Report to the President on Investigation No. TEA-W-11 Under Section 301(c)(2) of the Trade Expansion Act of 1962, TC Publication 318, 1970.

<sup>2/</sup> Chairman Bedell and Commissioner Young did not participate in the decision.

the United States in such increased quantities as to cause, or threaten to cause, unemployment or underemployment of a significant number or proportion of the workers of such firm.

## Considerations Supporting the Commission's Finding

This investigation concerns a petition for adjustment assistance filed on behalf of former workers of the Cambridge Tile Mfg. Co., Cincinnati, Ohio. The Commission conducted an earlier worker investigation (TEA-W-11) of conditions relating to the aforementioned company, in response to a petition filed on January 19, 1970. On March 20, 1970, the Commission, by majority vote, made a negative finding. 1/ Our determination in the instant investigation relates to developments that have occurred since the earlier finding.

In contrast to the earlier investigation which encompassed ceramic floor (mosaic) and wall tile, the current investigation involves wall tile only; Cambridge Tile Mfg. Co. ceased producing floor (mosaic) tile in late 1969. The petition in the instant investigation alleges that the current unemployment, and threat of further unemployment, is due in major part to concession-generated increased imports.

### Statutory requirements

The Tariff Commission has frequently stated that the Trade Expansion Act of 1962 establishes four criteria, each of which has to be met for the Commission to make an affirmative determination in a worker case. Those criteria are as follows:

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1/ Ceramic Floor and Wall Tile: Certain Workers of the Cambridge Tile Mfg. Co., Cincinnati, Ohio, Report to the President on Investigation No. TEA-W-11, under Section 301(c)(2) of the Trade Expansion Act of 1962, (TC Publication 318) March 1970.



- (1) An article like or directly competitive with an article produced by the workers' firm is being imported in increased quantities;
- (2) The increased imports are a result in major part of concessions granted under trade agreements;
- (3) The workers concerned are unemployed or underemployed, or are threatened with unemployment or underemployment; and
- (4) The increased imports resulting in major part from trade-agreement concessions are the major factor causing or threatening to cause the unemployment or underemployment.

In the instant investigation, we acknowledge that ceramic glazed wall tile was being imported in increased quantities during 1964-71, when compared with earlier years. We find, however, that such increase in imports has not been the result in major part of concessions granted in trade agreements. The reasons for our determination are set forth below.

Increased imports not the result in major part of trade-agreement concessions

The most recent tariff concessions on glazed wall tile were granted in 1956, and the largest concessions under the trade-agreements program were made before 1950. By June 1951, duty rates on wall tile had been halved from the rates established in the Tariff Act of 1930. Pursuant to the fourth round of GATT negotiations, there was a 15 percent reduction which was phased in three steps of 5 percent over the period 1956-58. Beginning with the establishment of the Tariff Schedules of the United States (TSUS), the rate on glazed wall tile has remained 22.5 percent ad valorem to the present.

While the rate of duty remained constant since 1964, imports of wall tile declined erratically from about 65 million square feet in 1964 to 56 million square feet in 1967 and rose to 86 million square feet in 1968. After 1968, such imports declined, again irregularly, to 66 million square feet in 1970 and rose to 77 million square feet in 1971. Moreover, during the last 3 years, the ratio of imports to consumption was lower than in 1968 (the year of highest import penetration on record). The substantial fluctuation in the volume of imports during a period when the rate of duty remained constant indicates that factors other than the duty had significant effect on the volume of imports.

In most years since 1960, changes in the volume of imports paralleled those in domestic shipments, and both imports and shipments responded to the changes in the rate of nonindustrial building activity in the United States. However, the relative changes in imports were more pronounced because of the smaller base (shipments ranged from 192 million square feet to 226 million square feet while imports ranged from 56 million square feet to 86 million square feet during 1964-71).

It is clear to us that factors other than the small duty reductions that occurred more than a decade ago, influenced the large variations in the volume of imports during 1964-71. These other factors, we conclude, were more important than the duty reductions.

Conclusion

Having concluded that increased imports of an article like or directly competitive with that produced by the petitioning workers' firm are not the result in major part of concessions granted under trade agreements, we are compelled, under the statute, to make a negative determination in the instant investigation.

## Dissenting Opinion of Commissioner Moore

This investigation relates to a group of workers at the Cambridge Tile Mfg. Co., who have petitioned for adjustment assistance under the provisions of the Trade Expansion Act of 1962. I find that the criteria set forth in section 301(c)(2) of that act have been met: (1) the relevant imports have increased; (2) the increase is attributable in major part to trade-agreement concessions; (3) the workers concerned are unemployed or underemployed; and (4) the increased imports were the major factor causing such unemployment.

Increased imports

The first statutory requirement is that imports must have increased. Imports of ceramic wall tile--the product like or directly competitive with the articles produced by the petitioning workers--were at a record level in 1968 and at very nearly the same level in 1969, amounting to 86 million square feet in 1968 and 84 million square feet in 1969, compared with 21 million square feet in 1959 (table 3). Although lower in 1970 than in 1969, imports increased sharply in 1971. Imports during the period 1969-72 apparently will follow the pattern of the 1965-68 imports--imports dropped two consecutive years following a record high in 1965 only to rebound to a new high in 1968. Imports in 1972, based on imports in the first two months of this year which were 58 percent greater in quantity than imports in the corresponding months of 1971, are expected to exceed the 1968 record level of 86 million square feet. The long-term trend in annual imports

of ceramic wall tile has been clearly upward in the period since World War II, despite some setbacks arising from reduced U.S. demand. The first of the requirements has been met.

In major part

The second statutory requirement is that the increased imports must result in major part from concessions granted under trade agreements. As I have stated in previous decisions, <sup>1/</sup> in order to determine whether this requirement has been met, we need only ask whether imports of the product concerned would be at substantially their present level had it not been for the aggregate trade-agreement concessions granted thereon since 1934. <sup>2/</sup> If they would not, then the increased imports have been a result in major part of the concessions.

The pre-trade-agreement (statutory) rates of duty on ceramic wall tile were 10 cents per square foot, but not less than 50 percent nor more than 70 percent ad valorem for tile valued at not more than 40 cents per square foot, and 60 percent ad valorem for tile valued at more than 40 cents per square foot. When the Tariff Schedules of the United States (TSUS) was adopted in 1963, the column 2 rate was set at 55 percent ad valorem; that rate thus became the statutory rate for purposes of action under the Trade Expansion Act. The current rate of duty applicable to U.S. imports of ceramic wall tile is 22.5 percent.

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<sup>1/</sup> Buttweld Pipe, Inv. No. TEA-W-8 (1969) at 8-11, and Transmission Towers and Parts, Inv. No. TEA-W-9 and TEA-W-10 (1969) at 10-11.

<sup>2/</sup> An earlier finding by Commissioners Fenn and Talbot relies on the same reason National Tile & Mfg. Co., Inv. No. TEA-F-5 (1964) at 21.

Based on information obtained in this investigation, the difference between the present duty and the 55-percent rate at current market prices amounted to about 8 cents per square foot for the typical wall tile imported into the United States.

In the major metropolitan areas of the United States, where the great bulk of the imported tile is marketed, the price competition between imported and domestic tile has been severe. In 1971 the prices of wall tile quoted by domestic manufacturers to distributors in the New York City area were from 3 to 6 cents per square foot higher than the delivered cost of imported wall tile, although frequently the domestic manufacturers negotiated reductions in prices to approximately the delivered cost of the imported tile in order to make sales. Although price is not the only factor influencing sales of wall tile, it is clear that the volume of imports would not have been at the high level they reached if the duty had been about 8 cents per square foot higher than it was. I find that the second statutory requirement has been satisfied.

#### Unemployment or underemployment

The third requirement is that the petitioners must be unemployed or underemployed, or both. The Cambridge Tile Mfg. Co. operates one manufacturing plant. Prior to 1970, the bulk of its output consisted of mosaic and wall tile (principally the former); since 1970--the period at issue in the present investigation--wall tile has been the principal product. The firm laid off approximately 270 production and related workers in calendar 1969, and began 1970 with 114 production

and related workers (table 13). Through 1970-71 there was continuous erosion in the number of such workers; 36 fewer were employed in December 1970 than in January of that year, and in 1971 there was an additional loss of 9. Furthermore, additional workers have been underemployed because it has been management's practice in the last two years to put workers on "short time", such as 4-day weeks, whenever possible, rather than discharge them. I find that the third statutory requirement has been met.

#### Major factor

As the final requirement, the concession-generated imports must be the major factor in causing the underemployment or unemployment of the workers concerned. As the majority (5-1) explained in the affirmative findings in the Buttweld Pipe and Transmission Towers and Parts decisions, this requirement is met if the unemployment would not have occurred had it not been for the increased imports.

The recent problems afflicting the Cambridge Tile Mfg. Co. have been closely associated with the increased imports of tile sold in the United States at highly competitive prices. The sharp price competition affected Cambridge's wall tile output which represented 54 and 63 percent of the company's total business in 1970 and 1971, respectively. In an effort to compete more effectively with low-priced imported tile, the company (in addition to producing a line of economy tile) made a substantial investment in 1969 seeking to reduce the cost of producing its prestige wall tile. These efforts proved unsuccessful because of the contemporaneous growth of imports. Employment in the

manufacture of the economy wall tile has continued to decline, as has the production of such tile. I conclude that, had imported wall tile not been available in increased quantities at low prices, the company would not continue to reduce employment.

The circumstances affecting the workers at the Cambridge Tile Mfg. Co. are the type envisaged by the adjustment assistance provision of the Trade Expansion Act. <sup>1/</sup> I find that the petitioners have met the criteria of that act, and I believe they are eligible to apply for adjustment assistance under the provisions of that act.

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<sup>1/</sup> I held that the circumstances that affected the workers at the Cambridge Tile Mfg. Co. during the period covered by the Tariff Commission's prior investigation were also the type envisaged by the adjustment assistance provisions of the Trade Expansion Act, Ceramic Floor and Wall Tile: Certain Workers of the Cambridge Tile Mfg. Co., Inv. No. TEA-W-11 (1970) at 16.



## INFORMATION OBTAINED IN THE INVESTIGATION

## Description and Uses

Prior to late 1969, Cambridge Tile Mfg. Co. produced glazed ceramic wall tile and both glazed and unglazed ceramic mosaic tile. Since about November 1969 the only type of tile made by the company has been the glazed wall tile.

Ceramic floor and wall tile is defined in the TSUS as flat pieces of ceramic construction articles that are less than 1.25 inches in thickness. Ceramic floor and wall tile having a facial area of less than 6 square inches is called mosaic tile; it is usually produced in rectangular shapes which are fitted together to form various designs. It is generally about 1/4-inch in thickness. The colors of glazed mosaic tile are put into the glaze coating, whereas the colors of unglazed mosaic tile are mixed throughout the body of the tile. In recent years the demand for many colors and textures of mosaic tile has increased, and, since glazed tile lends itself to more pleasing variations in colors and textures than does unglazed tile, the demand for glazed tile has increased. Nearly all mosaic tile is sold mounted in patterns on sheets usually 1 by 2 feet. It is either "face-mounted"--mounted on paper cemented to the face of the tile with a water-soluble adhesive--or "back-mounted"--mounted permanently on material cemented to the back of the tile. The greater part of mosaic tile consumed is back-mounted tile, which is usually sold at higher prices than face-mounted tile because its production requires costlier

mounting materials and more labor. Nevertheless, the cost saving which back-mounted tile affords the contractor when installing the tile generally exceeds the additional charge for back-mounting.

Glazed ceramic floor and wall tile having a facial area of 6 square inches or more is called wall tile. Currently most wall tile is produced by the one-fire process, in which the pressed tile body is sprayed with glazing materials and fired. In the older two-fire process, the pressed tile is fired and then sprayed with glazing materials that are refired at a lower temperature. Wall tile, which is nearly always installed singly, is usually about 5/16 inch thick and 4-1/4 inches square.

Nearly all mosaic tile and wall tile consumed in the United States is installed as a surfacing material on floors, interior or exterior walls, counter tops, columns, and the like. Mosaic tile is used primarily as a floor-surfacing material where resistance to wear and/or moisture are important. In recent years, however, the use of such tile on bathroom walls as a replacement for wall tile and on interior and exterior walls as a medium of architectural expression has increased. Wall tile is limited to interior use--mainly on walls; recently, however, crystalline-glazed wall tile <sup>1/</sup> has been used in substantial amounts on residential bathroom floors.

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<sup>1/</sup> Wall tile is made with three distinct surfaces: (1) bright-glazed, a smooth and glossy surface; (2) matte-glazed, a non-reflective surface that is not as slippery (smooth) as bright-glazed; and (3) crystalline-glazed, a textured surface that does not show scratches and is not as slippery as the other types.

Unglazed ceramic tile having a facial area of 6 square inches or more is usually two to three times as thick as glazed ceramic tile. Such tile is used primarily on floors which are not subjected to severe conditions of use and where appearance is not important; therefore, it competes with mosaic tile to only a limited extent and with wall tile virtually not at all.

Ceramic mosaic tile and wall tile compete with one another and with nonceramic materials. The nonceramic materials which are most competitive with mosaic tile are homogeneous vinyl and vinyl asbestos. Other competing materials include steel, aluminum, and hardboard sheets enameled with simulated tile designs. The chief alternatives to wall tile are waterproof fabric and paper. Although all of these products are less expensive than ceramic tile, ceramic tile is the more durable. The introduction of new patterns and glaze effects, moreover, has contributed materially to making ceramic tile competitive with alternative materials.

#### U.S. Tariff Treatment

Ceramic floor and wall tile are provided for in items 532.21 and 532.24 of the TSUS. Glazed ceramic floor and wall tile other than mosaic, currently classified under item 532.24, is dutiable at 22.5 percent ad valorem. Ceramic mosaic tile, currently classified under item 532.21, is dutiable at 24.5 percent ad valorem. These rates were established by the TSUS, effective August 31, 1963 (table 1),

and represented the average ad valorem equivalents of the four different rates that had been applicable to such tile prior to the TSUS.

Before the TSUS entered into force, ceramic floor and wall tile had been classified under paragraph 202(a) of the Tariff Act of 1930 (table 2). Such tile valued not over 40 cents per square foot had been dutiable at 4-1/4 cents per square foot but not less than 21 percent nor more than 30 percent ad valorem; such tile valued over 40 cents per square foot had been dutiable at 25-1/2 percent ad valorem. These rates resulted from duty reductions, granted under trade agreements, from the statutory rates of 10 cents per square foot but not less than 50 percent nor more than 70 percent ad valorem on tile valued not over 40 cents, and 60 percent ad valorem on tile valued over 40 cents per square foot.

The initial major tariff concession applicable to ceramic floor and wall tile, amounting to a reduction of 50 percent in the rates applicable to glazed ceramic floor and wall tile other than mosaic was granted in the Mexican trade agreement, effective January 30, 1943; this concession was terminated effective January 1, 1951. The minimum rate of 50 percent ad valorem applicable to glazed floor and wall tile other than mosaic and to mosaic tile was reduced under the provisions of the General Agreement on Tariffs and Trade (GATT) to 30 percent ad valorem effective January 1, 1948. Effective June 6, 1951, additional concessions under the GATT resulted in rates applicable to glazed floor and wall tile other than mosaic and mosaic tile of one-half the statutory rates. Further concessions were granted in 1956, resulting

in a reduction of 15 percent in three annual stages, the final stage becoming effective June 30, 1958. No concessions have been granted on ceramic mosaic and wall tile since that date.

The ad valorem equivalents of the former compound rates of duty on ceramic tile valued at not over 40 cents and that valued over 40 cents per square foot are shown in the tables for wall tile (table 3) and mosaic tile (table 4). These calculations indicate that duty reductions have been small since 1948 on the tile valued at not over 40 cents per square foot, and only moderately larger on the higher-value tile. The 1949 average ad valorem equivalent (AVE) for the low-value wall tile was 25.0 percent, the pre-TSUS AVE was 22.8 percent, and the TSUS rate is 22.5 percent ad valorem. Similarly, the 1949 AVE for the low-value mosaic tile was 27.2 percent, the pre-TSUS AVE was 22.2 percent, and the TSUS rate is 24.5 percent ad valorem. For the higher value tile, rates on both wall tile and mosaic tile declined from 30 percent ad valorem in 1949 to the current rates of 22.5 percent and 24.5 percent, respectively.

#### U.S. Consumption

Apparent annual U.S. consumption of ceramic mosaic and wall tile combined fluctuated during the 7-year period 1965-71. Such consumption declined from 397 million square feet in 1965 to 341 million square feet in 1967 and increased to 395 million and 413 million square feet in 1968 and 1969, respectively. It then declined sharply in 1970 to 336 million square feet and partially recovered in

1971 by increasing to 363 million square feet. In 1971, 33 percent of U.S. consumption of ceramic mosaic and wall tile combined was supplied by imports, compared with a record high of 38 percent in 1969 (table 5).

Annual consumption of wall tile alone in the United States also fluctuated in 1965-71 (table 6). Apparent U.S. consumption of such tile in 1965 (297 million square feet) was 6 percent larger than in 1966 and 15 percent larger than in 1967. U.S. consumption of wall tile increased to 302 million square feet in 1969 and declined 15 percent in 1970 (to 257 million square feet) before increasing 12 percent to 289 million square feet in 1971.

There is some statistical evidence that consumption of wall tile in the United States is related to housing starts. Therefore, the irregular movements in consumption figures from year to year reflect, in part, the variations that occur in housing construction (table 7).

Apparent U.S. consumption of mosaic tile alone dropped from 100 million square feet in 1965 to 74 million square feet in 1971 (table 8). It amounted to 111 million square feet in 1969, the only year in the period 1965-71 in which apparent consumption was higher than in 1965. In 1970, apparent consumption declined to 79 million square feet and in 1971, to 74 million square feet. This decline (principally in glazed tile) is probably attributable in part to (1) substitution of other decorative materials, such as crystalline-glazed wall tile, for mosaic tile and (2) the relegation of mosaic tile to being used mainly on bathroom floors.

## U.S. Imports

The wall tile and mosaic tile markets in the United States are affected differently by imports. During the period 1965-71, imports of wall tile, expressed as a percent of apparent consumption, ranged from a low of 21 percent in 1967 to a high of 29 percent in 1968 (table 6). In the same period, imports of mosaic tile ranged from 58 to 68 percent of consumption (table 9).

During 1965-71, annual U.S. imports of wall tile fluctuated widely, but on the average they were substantially higher than during the previous 7-year period, peaking at 86 million square feet in 1968--a 53-percent increase over 1967 (56 million square feet). In 1969, imports declined slightly from the 1968 level, and then dropped sharply to 66 million square feet in 1970; they rose to 77 million square feet in 1971 (table 10).

Japan supplies more wall tile to the U.S. market than any other country in the world, yet its share of the quantity of U.S. imports of wall tile during 1965-71 decreased from 71 percent in 1965 to 49 percent in 1971. During this period the United Kingdom increased its share of U.S. imports of wall tile from 10 percent in 1965 to 20 percent in 1971 and Italy's share rose from 5 to 7 percent.

Annual U.S. imports of mosaic tile declined from 64 million square feet in each of the years 1965 and 1966 to 48 million square feet in 1967, and then rose to 61 million square feet in 1968 and to 75 million square feet in 1969. Imports dropped 38 percent to 47 million square feet in 1970, and a further 9 percent, to 43 million

square feet, in 1971 (table 11). In 1971, U.S. imports of mosaic tile supplied 58 percent of apparent domestic consumption (table 9). Japan is virtually the sole foreign supplier of ceramic mosaic tile to the U.S. market, supplying 98 percent of total imports in 1971.

#### U.S. Shipments

Since 1965, as indicated in the following tabulation, annual shipments of both wall and mosaic tile have shown an irregular downward trend:

#### U.S. Shipments of wall and mosaic tile, 1965-71

(In millions of square feet)

Year	Wall tile	Mosaic tile
1965-----	226	37
1966-----	217	35
1967-----	204	35
1968-----	215	34
1969-----	219	36
1970-----	192	32
1971-----	213	31

Source: Compiled from official statistics of the U.S. Department of Commerce.

The trend in wall tile in recent years is in contrast to previous years; between 1955 and 1964, annual shipments of domestically produced wall tile increased irregularly. In 1955-64, annual shipments of mosaic tile ranged from about 34 to 39 million square feet.



Prices <sup>1/</sup>General

In April 1972 the actual prices being received for domestic standard grade, white and colored, wall tile in most U.S. markets were moderately higher than in 1969; furthermore, new price increases were widely projected for late spring and early summer months. There is a very active trade in "project" and "second" grades of wall tile; in these grades, prices commonly range from 5 to 12 cents per square foot less than for the standard grade, even though their quality often approximates that of standard grade. <sup>2/</sup>

Because of limitations on available data, the following discussion on prices relates mainly to standard grade, white and colored, bright glazed, flat tile; <sup>3/</sup> such tile has through the years constituted a progressively smaller proportion of the total trade (probably less than 50 percent at the present time). It is doubtful if realized prices of project grade and second grade tile have been increased in recent years.

In early 1972, net prices quoted to distributors in the New York City area for domestic standard grade wall tile were in the range of

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<sup>1/</sup> For background information on prices of ceramic wall and mosaic tile up to the end of 1969, reference may be made to the earlier report of the Commission on Cambridge Tile Mfg. Co. (TC Publication 318).

<sup>2/</sup> For grades of domestic wall tile other than standard, prices are highly variable from company to company, area to area, and even job to job.

<sup>3/</sup> Trim tile, i.e., the odd pieces needed for finishing edges and corners, sell at 2 to 2-1/2 times the price per square foot of flat tile; such sales cause calculated average values for overall sales to be 10 to 15 cents per square foot higher than the average value of the flat tile alone.

37 to 40 cents per square foot, compared with about 38 cents in 1969. The net price to distributors for imported British or Japanese tile was reportedly 34-1/2 cents; this price was in reality the going price for both imported and domestic tile. It represents a firming of the price structure and a moderate increase compared with the variable price range of 29 to 33 cents prevailing in 1969. At present, large contractors in the New York City area are said to be paying from 34-1/2 to 37-1/2 cents. Both contractors and distributors in the New York City area are reported to be generally very slow in payment, some commonly taking up to 6 months; this lengthy credit line reduces the effective net return to the sellers by about a cent per square foot.

In other cities along the east coast, the price level is somewhat higher than in New York City (and the payment time shorter), but it is still appreciably lower than in other sections of the country. In the Washington, D.C., area, prices to distributors for domestic wall tile are understood to range from 36 cents to 42 cents, \* \* \*  
\* \* \*

Available information indicates that, outside of New York City and other east coast metropolitan areas, the average domestic price to distributors for standard flat wall tile was usually about 44 cents per square foot early in 1972; this is slightly higher than the price for comparable tile in 1969. Contractors generally pay from 3 to 10 cents per square foot more than distributors, depending on their size and payment practices.

Prices to contractors are exceedingly variable, depending on such factors as season, geographic area, supply-demand ratio, and most of all the size of the contractor. Prices to distributors are more stable than those to contractors, although, not infrequently, domestic producers will make a concession to a distributor in excess of the maximum published distributor discount so as to enable that distributor to make an especially desirable sale.

\* \* \* \* \*



The Cambridge Tile Mfg. Company

Operations, production, and sales

The Cambridge Tile Mfg. Co. currently operates one manufacturing establishment located in an industrial suburb of Cincinnati, Ohio. The company has no other holdings or interests in other companies. Until late 1969, operations were divided into the following four product divisions: (1) One-fire wall tile (Camtile); (2) two-fire wall tile (Suntile); (3) ceramic mosaic tile; and (4) miscellaneous nontile products (adhesives used for ceramic-tile installation, and plastic floor-covering materials).

Cambridge shut down its production of two-fire wall tile in early 1969 to convert those facilities to a lower cost, one-fire operation. However, production at the newly commenced one-fire operation was terminated in November 1969. Production of mosaic tile was discontinued at about the same time. \* \* \*

Production of a one-fire wall tile in a limited range of colors, along with miscellaneous nontile products, continues \* \* \*

\* \* \*



Statistical Appendix





Table 1.--U.S. rates of duty in the TSUS for ceramic floor and wall tile, effective August 31, 1963 1/

(Percent ad valorem)

TSUS No.	Description	Rate of duty <u>2/</u>	
		1	2
	Ceramic tiles:		
	Floor and wall tiles:		
532.21	Mosaic tiles-----	24.5	55
	Other:		
532.24	Glazed-----	22.5	55

1/ The TSUS simplified the tariff treatment for ceramic floor and wall tile by eliminating the proliferation of rate provisions under par. 202(a) of the Tariff Act of 1930, as amended.

2/ The rates in col. 1 apply to all products except (a) Philippine articles, which receive preferential treatment, (b) products of most Communist controlled countries, which are dutiable at the rates shown in col. 2, and (c) certain products of insular possessions.



Table 2.--Ceramic floor and wall tiles: U.S. rates of duty under the Tariff Act of 1930, as modified prior to August 31, 1963

(Cents per square foot; percent ad valorem)			
Tariff paragraph and description	Tariff Act of 1930		
	Statutory rate <sup>1/</sup>	Trade-agreement modification	
		Date	Effective date and basis of change <sup>2/</sup>
Par. 202(a):			
Tiles, unglazed, glazed, ornamented, hand painted, enameled, vitrified, semivitrified, decorated, encaustic, ceramic mosaic, flint, spar, embossed, gold decorated, grooved or corrugated, and all other earthen tiles and tiling by whatever name known (except pill tiles and tiles wholly or in part of cement):			
Floor and wall tiles:			
Quarries or quarry tiles:			
Valued at not more than 40¢ per sq. ft.:			
5/8 inch or more thick-----	10¢; 50% min., 70% max.	5¢; 25% min., 70% max. 5¢; 15% min., 70% max.	1-1-39; U.K. 1-1-48; GATT.
Under 5/8 inch thick-----	10¢; 50% min., 70% max.	10¢; 30% min., 70% max.	1-1-48; GATT.
Valued at more than 40¢ per sq. ft.:			
5/8 inch or more thick-----	60%	30% 15% 13-1/2% 12%	1-1-39; U.K. 1-1-48; GATT. 7-1-62; GATT. 7-1-63; GATT.
Under 5/8 inch thick-----	60%	30% 27% 24%	1-1-48; GATT. 7-1-62; GATT. 7-1-63; GATT.
Other:			
Valued at not more than 40¢ per sq. ft.-----	10¢; 50% min., 70% max.	5¢; 25% min., 35% max. <sup>3/4/</sup> 10¢; 30% min., 70% max. <sup>5/</sup> 5¢; 25% min., 35% max. 4-3/4¢; 23-1/2% min., 33% max.: 4-1/2¢; 22-1/2% min., 31-1/2% max.: 4-1/4¢; 21% min., 30% max.:	1-30-43; Mex. 1-1-48; GATT. 6-6-51; GATT. 6-30-56; GATT. 6-30-57; GATT. 6-30-58; GATT.
Valued at more than 40¢ per sq. ft.-----	60%	26¢; 25% min., 35% max. <sup>3/6/</sup> 30% <sup>3/4/</sup> 30% 28-1/2% 27% 25-1/2%	1-1-39; U.K. 1-30-43; Mex. 1-1-48; GATT. 6-30-56; GATT. 6-30-57; GATT. 6-30-58; GATT.

<sup>1/</sup> Originally provided for in the Tariff Act of 1930. This rate applied to products of Communist dominated countries or areas designated by the President in accordance with sec. 5 of the Trade Agreements Extension Act of 1951, as amended.

<sup>2/</sup> The date shown represents that of the trade agreement in which the modified rate was effected.

<sup>3/</sup> Not applicable to mosaic tile. <sup>4/</sup> Terminated effective Jan. 1, 1951. <sup>5/</sup> The rate of duty on ceramic mosaic tiles valued at not more than 28-4/7 cents per square foot was 7 cents per square foot but not less than 35 percent or more than 49 percent ad valorem from Jan. 1, 1948 to June 6, 1951. This rate was established to avoid increasing the Cuban margin of preference. <sup>6/</sup> Applicable to glazed clay tile.

Table 3.--Glazed ceramic wall tile (other than mosaic): U.S. rates of duty, imports for consumption, and ad valorem equivalents, 1939 and 1947-71

Period	Valued not over 40¢ per square foot			Valued over 40¢ per square foot		
	Rate of duty	Imports	Ad valorem	Rate of duty	Imports	Ad valorem
	Cents per sq. ft. and percent ad valorem	1,000 sq. ft.	Percent	Cents per sq. ft. and percent ad valorem	1,000 sq. ft.	Percent
1939-----	10¢; 50% min., 70% max.	42	55.4	26¢; 30% min., 60% max.	12	45.1
1947-----	do	153	1/ 25.1	30%	51	30.0
1948-----	5¢; 25% min., 50% max.	69	1/ 20.8	30%	44	30.0
1949-----	do	100	25.0	30%	147	30.0
1950-----	do	1,313	1/ 24.4	30%	71	30.0
1951:						
Jan. 1-June 5----	10¢; 30% min., 70% max.	3,921	39.2	)		
June 6-Dec. 31----	5¢; 25% min., 35% max.	462	1/ 24.3	) 30%	419	30.0
1952-----	do	2,440	25.2	30%		
1953-----	do	2,201	25.3	30%	229	30.0
1954-----	do	3,051	25.3	30%	145	30.0
1955-----	do	10,533	25.3	30%	299	30.0
1956:					555	30.0
Jan. 1-June 29----	do	8,513	25.2	30%		
June 30-Dec. 31--	4.75¢; 23.5% min., 33% max.	4,936	23.7	28.5%	355	30.0
1957:					252	28.5
Jan. 1-June 29----	do	3,995	24.1	28.5%		
June 30-Dec. 31--	4.5¢; 22.5% min., 31.5% max.	4,694	23.2	27%	266	28.5
1958:					250	27.0
Jan. 1-June 29----	do	4,752	23.5	27%		
June 30-Dec. 31--	4.25¢; 21% min., 30% max.	6,274	22.0	25.5%	405	27.0
1959-----	do	20,678	22.3	25.5%	438	25.5
1960-----	do	32,555	22.0	25.5%		
1961-----	do	37,300	22.1	25.5%	1,297	25.5
1962-----	do	42,940	22.3	25.5%	2,248	25.5
1963:					2,191	25.5
Jan. 1-Aug. 30----	do	34,506	22.8	25.5%	2,560	25.5
Aug. 31-Dec. 31--		2/ 18,108	22.5	-	1,729	25.5
1964-----	22.5%	2/ 64,981	22.5	-	2/	22.5
1965-----	22.5%	2/ 71,538	22.5	-	2/	22.5
1966-----	22.5%	2/ 63,696	22.5	-	2/	22.5
1967-----	22.5%	2/ 55,944	22.5	-	2/	22.5
1968-----	22.5%	2/ 85,863	22.5	-	2/	22.5
1969-----	22.5%	2/ 84,292	22.5	-	2/	22.5
1970-----	22.5%	2/ 65,816	22.5	-	2/	22.5
1971-----	22.5%	2/ 77,356	22.5	-	2/	22.5

1/ The computed ad valorem equivalent is below the minimum ad valorem rate because of misclassifications of some imports in official statistics.

2/ Beginning Aug. 31, 1963, data for glazed ceramic wall tile valued over 40 cents per square foot are combined with those for glazed ceramic wall tile valued not over 40 cents per square foot.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 4.--Ceramic mosaic tile: U.S. rates of duty, imports for consumption, and ad valorem equivalents, 1939 and 1947-71

Period	Valued not over 40¢ per square foot			Valued over 40¢ per square foot		
	Rate of duty	Imports	Ad valorem	Rate of duty	Imports	Ad valorem
	Cents per sq. ft. and percent ad valorem	1,000 sq. ft.	Percent	Cents per sq. ft. and percent ad valorem	1,000 sq. ft.	Percent
1939-----	10¢; 50% min., 70% max.	4	67.3	26¢; 30% min., 60% max.	-	-
1947-----	do-----	76	36.6	60%	2	60.0
1948-----	10¢; 30% min., 70% max. 1/	96	26.8	30%	5	30.0
1949-----	do 1/-----	118	27.2	30%	28	30.0
1950-----	do 1/-----	408	28.5	30%	16	30.0
1951:						
Jan. 1-June 5-----	do 1/-----	400	39.7	)		
June 6-Dec. 31----	5¢; 25% min., 35% max.	1,104	27.9	) 30%	119	30.0
1952-----	do-----	1,343	28.8	30%	23	30.0
1953-----	do-----	1,595	28.3	30%	15	30.0
1954-----	do-----	1,951	29.0	30%	31	30.0
1955-----	do-----	5,007	27.1	30%	85	30.0
1956:						
Jan. 1-June 29-----	do-----	5,317	26.8	30%	100	30.0
June 30-Dec. 31----	4.75¢; 23.5% min., 33% max.	3,747	25.7	28.5%	103	28.5
1957:						
Jan. 1-June 29-----	do-----	2,890	24.4	28.5%	114	28.5
June 30-Dec. 31----	4.5¢; 22.5% min., 31.5% max.	4,502	25.3	27%	195	27.0
1958:						
Jan. 1-June 29-----	do-----	4,871	25.8	27%	342	27.0
June 30-Dec. 31----	4.25¢; 21% min., 30% max.	6,952	24.5	25.5%	236	25.5
1959-----	do-----	23,600	24.3	25.5%	1,020	25.5
1960-----	do-----	27,417	24.3	25.5%	923	25.5
1961-----	do-----	24,553	23.6	25.5%	737	25.5
1962-----	do-----	36,551	22.8	25.5%	826	25.5
1963:						
Jan. 1-Aug. 30-----	do-----	29,774	22.2	25.5%	441	25.5
Aug. 31-Dec. 31----	24.5%	2/ 19,453	24.5	-	2/	24.5
1964-----	24.5%	2/ 66,254	24.5	-	2/	24.5
1965-----	24.5%	2/ 63,664	24.5	-	2/	24.5
1966-----	24.5%	2/ 63,642	24.5	-	2/	24.5
1967-----	24.5%	2/ 48,299	24.5	-	2/	24.5
1968-----	24.5%	2/ 60,841	24.5	-	2/	24.5
1969-----	24.5%	2/ 75,245	24.5	-	2/	24.5
1970-----	24.5%	2/ 46,854	24.5	-	2/	24.5
1971-----	24.5%	2/ 43,158	24.5	-	2/	24.5

1/ From Jan. 1, 1948 to June 5, 1951, the rate of duty on ceramic mosaic tile valued at not more than 28-4/7 cents per square foot was 7 cents per square foot; 35 percent minimum, 49 percent maximum. This rate was established to avoid increasing the margin of preference on Cuban products. The rate on such tile valued at more than 28-4/7 cents but not more than 40 cents per square foot was 10 cents per square foot; 30 percent minimum, 70 percent maximum.

2/ Beginning August 31, 1963, data for ceramic mosaic tile valued over 40 cents per square foot are combined with those for ceramic mosaic tile valued not over 40 cents per square foot.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Prior to Jan. 1, 1962, imports of unglazed ceramic mosaic tile were reported statistically in Schedule A class numbers 5380.710 (if valued not over 40 cents per square foot) and 5380.720 (if valued over 40 cents per square foot); other types of ceramic tile also entered under those numbers in small quantities. From time to time in the years 1947-61, invoice analyses indicated that imports in those classes consisted predominantly of unglazed ceramic mosaic tile. Therefore, data for those classes have been added to data for the regular classes (5380.530 and 5380.540) for purposes of this table.

Table 5.--Ceramic mosaic and glazed wall tile: U.S. producers' shipments, imports for consumption, exports of domestic merchandise, and apparent consumption, 1965-71

Year	Shipments <u>1/</u>	Imports	Exports	Apparent consumption	Ratio of imports to consumption
	<u>Million sq. ft.</u>	<u>Million sq. ft.</u>	<u>Million sq. ft.</u>	<u>Million sq. ft.</u>	<u>Percent</u>
1965-----	263	135	1	397	34
1966-----	252	128	1	379	34
1967-----	239	<u>2/</u> 103	1	341	30
1968-----	249	<u>2/</u> 147	1	395	37
1969-----	255	159	1	413	38
1970-----	224	113	1	336	34
1971-----	244	120	1	363	33

1/ For 1965-67, shipments compiled from data reported to the Tariff Commission by the domestic producers.

2/ Data adjusted to compensate for incorrect quantities reported for the imports from Italy.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

Table 6.--Ceramic wall tile, glazed: U.S. producers' shipments, imports for consumption, exports of domestic merchandise, and apparent consumption, 1965-71

Year	Shipments <sup>1/</sup>	Imports	Exports	Apparent consumption	Ratio of imports to consumption
	Million sq. ft.	Million sq. ft.	Million sq. ft.	Million sq. ft.	Percent
1965-----	226	72	1	297	24
1966-----	217	64	1	280	23
1967-----	204	<sup>2/</sup> 56	1	258	21
1968-----	215	<sup>2/</sup> 86	1	300	29
1969-----	219	84	1	302	28
1970-----	192	66	1	257	26
1971-----	213	77	1	289	27

<sup>1/</sup> For 1965-67, shipments compiled from data reported to the Tariff Commission by the domestic producers.

<sup>2/</sup> Data adjusted to compensate for incorrect quantities reported for the imports from Italy.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

Table 7.--Indexes of domestic shipments, imports for consumption, and apparent consumption of ceramic wall tile, and of certain domestic construction activity, 1965-71

(1957-59=100)

Year	Ceramic wall tile			Domestic construction activity	
	Domestic shipments <u>1/</u>	Imports <u>1/</u>	Apparent consumption <u>1/</u>	Housing starts <u>2/</u>	Bathroom sanitary ware <u>3/</u>
1965-----	133	502	164	122	122
1966-----	128	447	155	97	116
1967-----	120	391	143	107	114
1968-----	126	600	166	125	135
1969-----	129	586	167	121	146
1970-----	113	460	142	119	132
1971-----	125	537	160	168	150

1/ Based on quantity data.

2/ Based on the number of all public and private housing starts, including farm housing.

3/ Based on the quantity of shipments of vitreous-china flush tanks.

Source: Compiled from official statistics of the U.S. Department of Commerce and from data supplied to the Tariff Commission by the domestic producers of glazed ceramic wall tile.



Table 8.--Ceramic mosaic and glazed wall tile: Apparent U.S. consumption, by types, 1965-71

Year	Mosaic tile			Glazed wall tile	Total tile
	Unglazed	Glazed	Total		
	Quantity (million square feet)				
1965-----	50	50	100	297	397
1966-----	47	51	99	280	379
1967-----	44	39	83	258	341
1968-----	43	52	95	300	395
1969-----	46	65	111	302	413
1970-----	<u>1/</u>	<u>1/</u>	79	257	336
1971-----	<u>1/</u>	<u>1/</u>	74	289	363
	Percent of total tile				
1965-----	12	13	25	75	100
1966-----	12	14	26	74	100
1967-----	13	11	24	76	100
1968-----	11	13	24	76	100
1969-----	11	16	27	73	100
1970-----	<u>1/</u>	<u>1/</u>	23	77	100
1971-----	<u>1/</u>	<u>1/</u>	20	80	100

1/ Not available.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.

Table 9. --Ceramic mosaic tile (unglazed and glazed): U.S. producers' shipments, imports for consumption, and apparent consumption, 1965-71

(In millions of square feet)				
Year	Shipments <sup>1/</sup>	Imports	Apparent consumption	Ratio :(percent) of imports to consumption
Unglazed				
1965-----	33	17	50	34
1966-----	32	16	47	33
1967-----	32	12	44	26
1968-----	32	11	43	26
1969-----	33	13	46	28
1970-----	<u>2/</u>	7	<u>3/</u>	<u>3/</u>
1971-----	<u>2/</u>	7	<u>3/</u>	<u>3/</u>
Glazed				
1965-----	4	47	50	93
1966-----	3	48	51	94
1967-----	2	37	39	94
1968-----	2	50	52	96
1969-----	2	62	65	97
1970-----	<u>2/</u>	40	<u>3/</u>	<u>3/</u>
1971-----	<u>2/</u>	36	<u>3/</u>	<u>3/</u>
Total, unglazed and glazed				
1965-----	37	64	100	63
1966-----	35	64	99	65
1967-----	35	48	83	58
1968-----	34	61	95	64
1969-----	36	75	111	68
1970-----	32	47	79	59
1971-----	31	43	74	58

<sup>1/</sup> For 1965-67, shipments compiled from data reported to the Tariff Commission by the domestic producers.

<sup>2/</sup> Data on unglazed and glazed were combined in official statistics in order to avoid disclosing figures of individual companies.

<sup>3/</sup> Not available.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

Note.--Because of rounding, figures may not add to the totals shown. Exports, not shown in this table, were very small during 1965-71.

Table 10.--Ceramic wall tile, glazed: U.S. imports for consumption, by principal sources, 1965-71

Year	Japan	United Kingdom	Mexico	Italy	All other	Total
Quantity (1,000 square feet)						
1965-----	50,702	7,050	9,811	3,316	659	71,538
1966-----	43,555	8,414	9,211	2,076	440	63,696
1967-----	35,062	8,520	9,021	<u>1/</u> 2,803	538	<u>1/</u> 55,944
1968-----	48,251	18,535	12,244	<u>1/</u> 3,963	2,870	<u>1/</u> 85,863
1969-----	41,151	20,287	11,315	<u>1/</u> 4,776	6,763	<u>1/</u> 84,292
1970-----	32,840	13,654	6,876	6,302	<u>1/</u> 6,144	<u>1/</u> 65,816
1971-----	37,916	15,655	10,084	5,517	8,184	77,356
Value (1,000 dollars)						
1965-----	9,460	1,904	2,743	735	227	15,069
1966-----	8,358	2,293	2,634	667	208	14,160
1967-----	6,982	2,218	2,519	786	273	12,778
1968-----	10,357	4,399	3,527	972	537	19,792
1969-----	9,494	5,138	3,655	1,250	1,237	20,774
1970-----	7,774	3,428	2,299	1,644	1,269	16,414
1971-----	8,979	3,902	3,416	1,784	1,696	19,777
Unit value (cents per square foot)						
1965-----	18.7	27.0	28.0	22.2	34.4	21.1
1966-----	19.2	27.3	28.6	32.1	47.3	22.2
1967-----	19.9	26.0	27.9	28.0	50.7	22.8
1968-----	21.5	23.7	28.8	24.5	18.7	23.1
1969-----	23.1	25.3	32.3	26.2	18.3	24.6
1970-----	23.7	25.1	33.4	26.1	20.7	24.9
1971-----	23.7	24.9	33.9	32.3	20.7	25.6

1/ Data adjusted to compensate for incorrect quantities reported.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

Table 11.--Ceramic mosaic tile: U.S. imports for consumption, by principal sources, 1965-71

Year	Japan	Mexico	United Kingdom	Italy	All other	Total
Quantity (1,000 square feet)						
1965-----	63,352	1	13	217	81	63,664
1966-----	63,236	3	19	214	170	63,642
1967-----	47,679	43	48	130	399	48,299
1968-----	60,330	2	114	154	241	60,841
1969-----	74,144	18	254	392	437	75,245
1970-----	46,102	16	33	360	343	46,854
1971-----	42,288	39	238	269	324	43,158
Value (1,000 dollars)						
1965-----	12,800	<u>1</u>	3	68	27	12,898
1966-----	12,617	2	9	50	30	12,708
1967-----	9,339	3	17	46	63	9,468
1968-----	12,201	2	33	36	42	12,314
1969-----	16,972	15	67	70	94	17,218
1970-----	10,273	9	7	71	85	10,445
1971-----	8,844	10	63	50	71	9,038
Unit value (cents per square foot)						
1965-----	20.2	-	23.1	31.3	33.3	20.3
1966-----	20.0	66.7	47.4	23.4	17.6	20.0
1967-----	19.6	6.6	35.1	35.7	15.6	19.6
1968-----	20.2	78.8	28.6	23.5	17.4	20.2
1969-----	22.9	84.4	26.3	17.9	21.6	22.9
1970-----	22.3	56.2	21.2	19.7	24.8	22.3
1971-----	20.9	25.6	26.5	18.6	21.9	20.9

1/ Less than \$500.

Source: Compiled from official statistics of the U.S. Department of Commerce.



