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UNITED STATES TARIFF COMMISSION

**CERTAIN WOVEN FABRICS OF COTTON AND OF MANMADE FIBERS:
ARKWRIGHT MILLS, INC.
SPARTANBURG, S. C.**

**Report to the President
Firm Investigation No. TEA-F-45
and
Worker Investigation No. TEA-W-160
Under Sections 301(c)(1) and 301(c)(2) of the Trade Expansion Act of 1962**



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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.

REPORT TO THE PRESIDENT

U.S. Tariff Commission,
December 22, 1972

To the President:

In accordance with section 301(f)(1) of the Trade Expansion Act of 1962 (76 Stat. 885), the U.S. Tariff Commission herein reports the results of investigations made under sections 301(c)(1) and 301(c)(2) of that act in response to a petition filed by a firm and its former workers.

On October 24, 1972, a petition was filed on behalf of Arkwright Mills, Spartanburg, S.C., and its former workers, for a determination of their eligibility to apply for adjustment assistance. On October 27, 1972, the Commission instituted investigations (TEA-F-45 and TEA-W-160) to determine whether, as a result in major part of concessions granted under trade agreements, articles like or directly competitive with woven fabrics of cotton and of manmade fibers (of the types provided for in items 320.11-320.17, 321.11-321.17, 322.11-322.17, 327.11-327.17, 328.11-328.17, and 338.30 of the Tariff Schedules of the United States (TSUS)) produced by the said firm are being imported into the United States in such increased quantities as to cause, or threaten to cause, serious injury to such firm, and/or the unemployment or underemployment of a significant number or proportion of the workers of the firm or an appropriate subdivision thereof.

Public notice of the receipt of the petition and the institution of the investigations was published in the Federal Register on November 3, 1972 (37 F.R. 23474). A public hearing was held on December 1, 1972. All interested parties were offered the opportunity to be present, to produce evidence, and to be heard.

The information in this report was obtained principally from officials of the petitioning firm, its customers, importers, the public hearing, the Commission's files, and other government agencies.

Findings of the Commission

On the basis of its investigations, the Commission, being equally divided, 1/ makes no finding under section 301(c)(1) or section 301(c)(2) of the Trade Expansion Act of 1962 with respect to whether articles like or directly competitive with the woven fabrics of cotton and of manmade fibers (of the types provided for in items 320.11-320.17, 321.11-321.17, 322.11-322.17, 327.11-327.17, 328.11-328.17, and 338.30 of the TSUS) produced by Arkwright Mills are, 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, serious injury to such firm, or the unemployment or underemployment of a significant number or proportion of the workers of such firm, or an appropriate subdivision thereof.

1/ Chairman Bedell, Vice Chairman Parker, and Commissioner Moore found in the affirmative; Commissioners Leonard, Young, and Ablondi found in the negative.

Views of Chairman Bedell, Vice Chairman Parker, and
Commissioner Moore

This investigation was undertaken in response to petitions filed by Arkwright Mills, Inc., Spartanburg, S.C., and its workers for determinations of eligibility to apply for adjustment assistance.

The petitioning firm is a producer primarily of coarse cotton fabrics--mainly cotton drills, class A sheeting, denim, and flannels. It also has produced similar fabrics of cotton and polyester blends, but the output of these fabrics has not been large. The firm had three plants until June 1, 1971, when plant No. 2, which produced mainly cotton drills and class A sheeting, was closed.

In its petition the firm listed drills and class A sheeting of cotton and polyester-cotton fibers as the articles subject to injurious competition from imports. Cotton flannels produced by Arkwright are specially made-to-order types; officials of the firm informed the Commission that no imports are considered to be like or directly competitive with these fabrics. Imports of denims have had little effect on Arkwright's operations. Largely in response to rising demand, U.S. imports of cotton denims jumped sharply in 1970 and 1971, but still supplied only a very small part of domestic consumption of these fabrics; exports increased in volume many times more than imports. In light of the factors relating to flannels and denims, we have concerned ourselves in this investigation with the effects of imports on drills and class A sheeting in Arkwright's operations and employment.

Under the Trade Expansion Act of 1962, the Commission, in order to make an affirmative decision respecting the petitions, must find that each of the following four criteria have been met.

- (1) The imports of articles like or directly competitive with those produced by the firm are increasing;
- (2) The increased imports are a result in major part of concessions granted under trade agreements;
- (3) The petitioning firm is being seriously injured or threatened therewith, and its workers unemployed or underemployed or threatened therewith; and
- (4) The increased imports, resulting in major part from trade-agreement concessions, are the major factor causing or threatening to cause serious injury to the firm and the unemployment or underemployment of its workers.

In the instant case, each of these conditions have been met with respect to imports of cotton drills and class A sheeting.

Increased imports

As to the first criterion, there is no question that imports have been increasing. U.S. imports of cotton class A and B sheeting more than quadrupled between 1964 and 1971, increasing from 32 million square yards in 1964 to 136 million square yards in 1971. Similarly, U.S. imports of cotton drills and twills more than doubled between 1964 and 1971, increasing from 26 million square yards in 1964 to 62 million square yards in 1971.

In major part

Next, we must consider whether the increased imports of cotton sheeting and drills are a result in major part of concessions granted under trade agreements. The rates of duty on unbleached fabrics wholly of cotton of average yarn numbers 10 to 19, which include drills and sheeting of the types produced by Arkwright, have been subject to trade-agreement concessions

on two occasions--in 1955 and in the Kennedy Round. In 1972, after the last stage of the Kennedy Round concessions were placed in effect, the U.S. duties applicable to such fabrics were, on the average, about 43 percent lower than in 1930. The current rates range from 7.6 percent to 9.3 percent ad valorem, while the 1930 rates ranged from 13.5 percent to 16.65 percent ad valorem. Such concessions have given a considerable cost advantage to foreign producers. Sales in the U.S. market of fabrics of these types often are decided because of differences of a fraction of a cent per square yard. In such markets, duty reductions of only 6 to 7 percentage points can have a major impact on trade. Moreover, the recent increases in imports of the cotton drills and sheetings comparable to those produced by Arkwright were closely correlated with the Kennedy Round concessions; imports of such drills and class A and B sheetings in 1971--after four of the five stages of the Kennedy Round concessions had been placed in effect--were nearly 50 percent greater than in 1967--the year before the first stage was placed in effect. In our opinion, the trade-agreement concessions have been the major reason for the increase in imports of the cotton fabrics of concern here. 1/

Serious injury and unemployment

The third criterion--the petitioning firm is being, or is threatened with serious injury and a significant number or proportion of the workers

1/ In this connection it is to be observed that a majority of the Commission in recent cases involving class A sheeting and drills and twills has held that the imports have increased in major part as a result of trade-agreement concessions; notably: Cotton Osnaburgs and Sheetings: Whittier Mills Company . . . , Investigations Nos. TEA-F-29 and TEA-W-103, T.C. Publication No. 426, October 1971; and Certain Yarns, Fabrics, and Other Textile Products: Bibb Manufacturing Company . . . , Investigations Nos. TEA-F-31 and TEA-W-112, T.C. Publication No. 432, November 1971.

of the firm are unemployed or underemployed, or threatened with unemployment of underemployment--has been met. The earning record of Arkwright Mills has deteriorated markedly over the past 5 years. Arkwright operated profitably in 1967; thereafter the company sustained losses--small in 1968 and 1970 but substantial in 1969 and 1971. The record needs to be examined no further--the firm is seriously injured. The existence of unemployment of the petitioning workers is equally clear. * * *

The major factor

The fourth criterion--increased imports resulting from trade-agreement concessions must be the major factor causing or threatening to cause serious injury to the firm and unemployment or underemployment of its workers--also is met.

The recent history of Arkwright Mills exemplifies that of a small-to medium-sized textile firm producing a limited line of products whose main markets are increasingly taken over by lower priced imported fabrics. As indicated above, U.S. imports of cotton drills and sheeting have increased materially in recent years. That increase has taken place despite declining consumption of those fabrics. Hence, the imports have supplied a sharply increasing share of the U.S. market--the share of the market for class A and B sheeting rising from less than 10

percent in 1964 to nearly 40 percent in 1971, and that for drills and twills, from 3 percent in 1964 to 11 percent in 1971.

Because of the impact of imports on Arkwright's sales of sheeting and drills, the firm tried in recent years to develop other fabrics that they believed would be more salable. However, because Arkwright's mills were designed to be most efficient and competitive in producing fabrics from yarns in the range of 12s to 17s, many of more salable fabrics, which required yarns outside the 12s and 17s range, would have resulted in higher production costs for Arkwright. This development work during 1967-71--made necessary by the loss of its markets to imports--added to Arkwright's costs. While a highly diversified, large textile firm might have absorbed such costs, they were a heavy financial burden for Arkwright. The continued pressure of imports placed Arkwright in an untenable position where its financial condition was weakened and it was difficult to negotiate bank loans.

In the 1960's Arkwright invested substantial sums for the modernization of the plant and equipment in plants Nos. 1 and 2. According to an independent cost consultant, plant No. 2 could produce coarse cotton fabrics at one of the lowest costs of comparable plants in the industry. Even so, Arkwright was unable to realize a profitable level of sales in the face of increasing imports. As the search for alternative fabrics which would yield a profit appeared fruitless, Arkwright officials finally decided to close and liquidate plant No. 2. In an attempt to stay in the black, Arkwright completed a new plant No. 3 in February 1967, mainly for the production of Canton flannels for the work glove market.

This operation has been successful. * * * However, the losses resulting from sales of fabrics produced in plants No. 1 and 2, where imports of cotton drills and class A sheeting were having their impact, resulted in overall company losses.

Conclusion

In our view, each of the conditions set forth by the Trade Expansion Act have been met. We have found that imports of articles like or directly competitive with those produced by the petitioning firm and workers are, as a result in major part of trade-agreement concessions, being imported in such increased quantities as to cause serious injury to the firm and unemployment of its workers.

Views of Commissioners Leonard and Young 1/

This investigation related to a petition for a determination of eligibility to apply for adjustment assistance filed on behalf of Arkwright Mills, Inc., and its former workers. Prior to the closing of its Camp Croft Division (Plant No. 2), as of June 1, 1971, Arkwright operated three plants. The principal items of output were class A and B sheeting, drills and twills, denims, and Canton flannels. The great bulk of the fabrics produced were wholly of cotton; a relatively small volume was of cotton and polyester blends. Most of the fabrics were sold in the grey (unbleached) state.

Section 301(c)(2) of the Trade Expansion Act of 1962 establishes certain conditions that must be met if an affirmative determination is to be reached, namely, that an article like or directly competitive with an article produced by a petitioning firm and its workers is, as a result in major part of trade-agreement concessions, being imported in such increased quantities as to be the major factor in causing or threatening to cause serious injury to the firm and the unemployment or underemployment of a significant number or proportion of the workers of the firm or an appropriate subdivision thereof. We have concluded that these requirements have not been met and therefore a negative determination is necessary.

The facts forming the basis for our determination are set forth below.

1/ Commissioner Ablondi concurs in the result.

Increased imports are not in major part the result of concessions

Coarse cotton fabrics: Effect of Pre-Kennedy Round concessions.--The recent increase in overall textile imports into the United States has been caused by many factors. It is not possible to measure quantitatively and to compare the impact of some of these factors, such as the widespread construction of new and modern textile plants abroad after World War II, the programs of certain foreign governments to encourage exports of textiles, the financial and technical aid offered to developing countries through international agencies, and the inability of the American industry to supply certain segments of the domestic market from time to time. It is possible, however, to compare for the period 1955-64 two stimulants to U.S. imports of cotton textiles--duty reductions and the U.S. export program for raw cotton.

In 1955 the U.S. Government began a program that had the effect of making the same kind of U.S. cotton available for export to foreign mills at a substantially lower price than it was available to domestic mills (often referred to as the two-price cotton system). Coincidentally, this cotton-export program took effect at about the same time that the first significant duty reductions resulting from trade-agreement concessions became effective with respect to coarse cotton fabrics. The duty reduction on unbleached coarse cotton fabrics of yarn Nos. 1 to 19, which was applicable to most of the types of cotton fabrics produced by Arkwright Mills, and which became effective in September 1955, amounted to 3 to 4 percentage points, but the competitive advantage gained by foreign textile

mills over U.S. textile mills as a result of two-price cotton was substantially more for coarse cotton fabrics than the advantage gained by the foreign mills from the reduction in the rates of duty.

From 1930 through 1954, there was no significant upward trend in U.S. imports of coarse cotton fabrics. Beginning in 1955, but to a more pronounced degree in 1959, after the full impact of the duty reduction and the two-price cotton system took effect, imports increased significantly. Most of these increases came from the Asian countries. The textile industries in some of these countries were either rebuilt, fully modernized, or initially constructed (many with U.S. assistance) following the war.

It is not necessary to evaluate all of the changes that occurred in textile industries abroad in order to determine whether the increase in imports was a result in major part of trade-agreement concessions. Suffice it to say that the competitive advantage of two-price cotton was far more significant than duty reductions as a stimulant to increased imports of coarse cotton fabrics during 1955-64.

From the mid-1950's to 1967, the year before the concessions granted under the Kennedy Round took effect, there were no significant duty reductions pursuant to trade-agreement concessions with respect to the types of fabrics similar to those produced by Arkwright.

Coarse cotton fabrics: Effect of Kennedy Round concessions.--The trade-agreement concessions applicable to unbleached coarse cotton fabrics granted by the United States at the Kennedy Round resulted in reductions

in rates of duty by about 2 to 3 percentage points. The rates, which formerly ranged from 7.75 percent to 12.25 percent ad valorem, were reduced in five annual stages to a range of 5.90 percent to 9.32 percent ad valorem; the final stage became effective on January 1, 1972. The effect of these duty reductions, however, has been minor compared with that of other factors affecting the trade in these products (discussed below).

We turn now to a discussion of the effects of the Kennedy Round concessions on the types of fabrics produced by Arkwright. We could not discuss these specific fabrics in the earlier section on pre-Kennedy Round concessions because import data by fabric are not available.

U.S. imports of cotton class A and B sheeting, the types of sheeting produced by Arkwright, increased substantially in recent years. Such increased imports, however, resulted far more from nontariff factors than from the reductions in rates of duty made to carry out trade-agreement concessions.

An examination of the sources of the imports of class A and B sheeting reveals that a substantial portion of the increase in imports is attributable primarily to two or three countries. For example, imports of class A and B sheeting from Brazil in 1969 were only 0.7 million square yards. They increased to 11.9 million square yards in 1970, and were 7.6 million square yards in 1971. The decrease in 1971 is attributable to some extent to limitations imposed by a bilateral agreement between the United States and Brazil under the Long-Term Arrangement Regarding International Trade in Cotton Textiles (LTA). The limitations were necessary because the Government of Brazil adopted and publicly announced a comprehensive program

designed to encourage the exportation of cotton textiles to the United States. 1/ This program includes substantial tax credits, short-term financing at special low interest rates for exports of cotton textiles to the United States, exemption from certain taxes applicable to industrial products in Brazil, and preferred loans for modernization of textile machinery.

Pakistan is another country which substantially expanded its shipments of cotton class A and B sheeting to the United States. For example, such shipments in 1971 were more than double those in 1969. The Government of Pakistan also embarked on a program to build up its textile industry and to increase its production in order to supply home needs and to make significant additional quantities available for export. The Government export incentives included tax moratoriums, rebates of import duties on machinery and other production prerequisites, import protection against foreign competition, credit arrangements for purchase of machinery, and a bonus arrangement for export. Clearly, such actions by two leading exporting countries represented a more important factor than the duty cuts of a few percentage points in the increase in imports of coarse cotton fabrics, including those of types produced by Arkwright.

Imports of cotton drills and twills were fairly stable during 1968-70, ranging between 41 and 46 million square yards. Imports during 1968-70 were not as large as in 1967, the year prior to the implementation of the Kennedy Round reductions. Obviously, such reductions had little or no effect on imports even though there was an increase in imports in 1971.

1/ Federative Republic of Brazil, Decree Law No. 491, March 5, 1969.

U.S. imports of cotton denims were insignificant prior to 1970. In 1970 and 1971 denim wearing apparel became popular in the United States (and even in other countries), especially among young people. As a consequence U.S. consumption, production, imports, and exports rose sharply. Although the rise in imports constituted a large relative increase, the imports supplied only about 1 percent of U.S. consumption. Under these circumstances, it is clear that the imports resulted largely from the expanded demand rather than from reductions in duty to carry out trade-agreement concessions.

Cotton flannel imports ranged between 21 and 23 million square yards during 1964-66, but were only 7 to 10 million square yards in 1967-69. Although they subsequently increased to 20 million square yards in 1971, they were lower than in any year 1964-66. Thus, even though the Kennedy Round concessions may have had some effect on the recent imports, the volume of annual imports in 1968-71 when the Kennedy Round concessions were placed in effect was smaller than in 1964-66.

Woven fabrics of manmade fibers

Although imports of woven fabrics of manmade fibers have increased greatly in the past **decade**, imports of woven fabrics of spun polyester yarns, which include polyester-cotton blends similar to the types produced by Arkwright, have decreased markedly in recent years, from 80 million square yards in 1966 to 17 million square yards in 1971. Obviously, the concessions granted in the Kennedy Round had no effect on this situation.

Imports are not the major factor in causing
injury or unemployment

U.S. producers of coarse cotton fabrics have encountered a sharply declining domestic market for their products, along with all cotton textiles, for many years. Sharp increases in cotton textile imports in the first half of the 1960's created severe problems for many cotton manufacturing companies. But the import problems were overshadowed to a substantial degree by other difficulties during the 1960's, particularly in the last half of the 1960's.

Cotton has not benefited as have other fibers from the enlarged and expanding market for textiles that has resulted from increased population and income since World War II. While consumption of all fibers during 1971 was nearly two-thirds above the level of 1960, consumption of cotton was less in 1971 than in 1960. In addition to the displacement of cotton by manmade fibers in many end uses, cotton has also lost markets to non-textile materials such as paper and plastics.

Profits of many producers of coarse cotton fabrics began to decline in the late 1960's. In Arkwright's case, * * *. Losses began in 1968. Although they were modest in that year, they were substantial in 1969. The loss position continued in 1970-71.

With regard to cotton class A and B sheeting, such fabrics have been subject to replacement in important end uses by manmade-fiber fabrics and by nonwoven and fusible fabrics. In the last five years (1967-71), for example, U.S. consumption of such sheeting declined by almost 100 million

square yards--a drop of more than a fifth. While imports increased during that period by about 30 million square yards, the market factors causing the sharply declining consumption were of more importance in causing decreased production. The largest increases in imports occurred in 1970 and 1971, 3 and 4 years after Arkwright's profits began to decline.

U.S. consumption of cotton drills and twills, the largest single type of fabric produced by Arkwright, also decreased during 1967-71, from 803 million square yards to 548 million square yards, a decline of 255 million square yards. Imports generally decreased from 46 million square yards in 1967 to a range of 41 million square yards in 1968 to just under 46 million square yards in 1970. It was not until 1971--the fourth consecutive year of losses experienced by Arkwright--that imports increased substantially during this period, and then only by 16 million square yards. Again, it is obvious that the tremendous decline in U.S. consumption was more responsible than increased imports for Arkwright's financial difficulties.

In the case of denims, imports were virtually nonexistent during the first two years the company experienced losses (1968, 1969). In 1970 and 1971, when imports were less than 1-1/2 percent of consumption, U.S. production increased from one-third to one-half in response to a sharp increase in demand. In the case of flannels, imports during the first two years of losses were less than half of the level of 1964-66. At no time during 1968-71, the years of Arkwright's losses, did imports reach the level of 1964-66.

The evidence is clear that while Arkwright may have lost some sales of cotton sheeting and drills and twills to imports, its principal difficulties in so far as these fabrics were concerned were caused by domestic competition from other materials. Moreover, Arkwright's sales of cotton denims and flannels, * * * are not considered by company officials to have been affected by imports of such fabrics.

In general, importers' prices on the coarse cotton fabrics here considered have been substantially lower than those of Arkwright. Even if the 1930 rates of duty were fully reflected in the price of the imported product instead of the 1971 rate, imports would still have undersold Arkwright on most of these fabrics. In this regard, an official of the American Textile Manufacturers Institute, Inc., in a recent letter to the Commission on another matter, stated: ". . . [a] modest increase in tariffs, however, would have no restraining effect on imports from low-wage countries. It could in no way reduce the need to maintain and expand our textile import quota system, the first elements of which had to be put into place more than a decade ago when duties were quite substantially higher. As a matter of fact, duties would have to go back to 1930 levels and higher to be effective against disruption of U.S. textile markets by the developing countries."

Conclusion

In view of the foregoing, it is clear that trade-agreement concessions have not been the major factor in generating increased imports and that increased imports have not been the major factor causing, or threatening

to cause, serious injury to the firm and the unemployment or under-employment of a significant number or proportion of the workers involved. Under these circumstances, we have had to make a negative determination.

INFORMATION OBTAINED IN THE INVESTIGATION

Scope of the Investigation

Arkwright Mills, Inc., Spartanburg, S.C., is a producer of coarse cotton fabrics and similar fabrics of cotton and polyester blends. In recent years, the company has had three plants. The so-called Main Plant (Plant No. 1) and the Camp Croft Division (Plant No. 2) were integrated grey cotton fabric mills. The principal products manufactured at those plants have been drills (twills) and sheetings, mainly class A, in the grey (unbleached and undyed) of carded (not combed) yarns of numbers 1/ ranging between 8s and 19s. In recent years, cotton enameling ducks, cotton denims, fabrics of cotton and polyester blends, and cotton osnaburgs were also produced, principally at Plant No. 1. The Cateswood Division (Plant No. 3), built in 1967, produces mainly cotton Canton flannels for work gloves.

Arkwright currently has two plants in operation. Plant No. 2 was closed as of June 1, 1971.

The principal fabrics produced by Arkwright are class A sheetings, drills, denims, and flannels; class B sheeting and fabrics of polyester and cotton blends are of lesser importance. Class A and class B cotton sheeting are carded (not combed), plainwoven (not fancy or figured) fabrics. The average yarn number 2/ of class A sheeting does not exceed 15 whereas that of class B sheeting is over 15 but not over 21. All of

1/ Cotton yarn is numbered according to the number of 840-yard hanks that weigh 1 pound. No. 1 cotton yarn measures 840 yards (1 hank) to the pound; No. 100 cotton yarn measures 84,000 yards (100 hanks) to the pound; the higher the yarn number, the finer the yarn.

2/ The term "number," as applied to woven fabrics of cotton, means the average yarn number of the yarns contained therein.

Arkwright's sheeting is sold in the grey mostly to producers of rental uniforms.

Cotton twills, of which drills are a type, are defined in the Tariff Schedules of the United States Annotated (TSUSA) as fabrics woven with a twill weave, not napped, having a more or less pronounced diagonal effect on the face of the cloth. They include fabrics known as jeans, gabardines, chinos, and tickings. A minor portion of Arkwright's sales of drills are bleached, although the bleaching is done by outside firms. The drills, of average yarn numbers 10s to 19s, are used primarily in pocketing, in tents, and in the shoe trade.

Cotton denims are described in the TSUSA as being three-harness or four-harness twill fabrics, not fancy or figured, and not piece-colored, but the warp yarns of which are colored, made of singles yarn, and having an average yarn number over 3 but not over 16. Arkwright's denims are used in apparel manufacture, mainly for sport and work pants.

Cotton flannels are napped fabrics, with a fuzzy, fibrous surface produced by scratching or pricking the surface so that some of the fibers are raised from the body of the fabric. Arkwright produces mostly Canton flannels, which, as stated previously, are composed of very coarse filling yarns and finer warp yarns. These are mostly napped in the grey and any finishing operations (bleaching, dyeing, printing) are usually performed to customer specifications by outside firms. The Canton flannels are sold mainly to the work glove trade.

Fabrics similar to those described above, but of cotton and polyester blends, have been a minor proportion of Arkwright's total fabric production.

In its petition the firm listed drills and class A sheeting of cotton or of polyester and cotton, yarn numbers 10s to 19s, as being the articles which are being subjected to injurious competition from imports. The cotton flannels, of yarn numbers 1s to 19s, produced by Arkwright are specialty made-to-order types, and officials of the firm have informed the Commission that no imports are considered to be directly competitive with these fabrics.

U.S. Tariff Treatment

Cotton drills and twills (including denims), and class A and B sheeting

The U.S. rates of duty in the TSUSA on unbleached fabrics wholly of cotton, of average yarn numbers 10 to 19, which include the drills, twills, denims, and sheeting of the types produced by Arkwright, were essentially unchanged from 1930 until the granting of concessions, originally negotiated with Japan under the General Agreement on Tariffs and Trade (GATT), effective September 10, 1955 (table 1). ^{1/} The rates applicable in 1930 to most unbleached fabrics, such as coarse cotton drills, twills, and sheeting of average yarn numbers 10 to 19 (including the types produced by Arkwright) ranged from 13.50 to 16.65 percent ad valorem. The lower rates resulting from the Japanese agreement, which ranged between 10.00 percent and 12.25 percent ad valorem, represented an average reduction of about 25 percent. The latter rates were reduced in the Kennedy Round in five annual stages, with the final stage becoming effective January 1, 1972. The present rates, ranging from 7.61

^{1/} Changes in U.S. rates of duty and U.S. imports for consumption of coarse cotton fabrics, unbleached, of yarn Nos. 1 to 19, including class A and B sheeting, and drills and twills, are shown in table 1(a).

percent to 9.32 percent ad valorem, are about 43 percent lower than the 1930 rates. In absolute amounts, the reductions since 1930 were 5.89 to 7.33 percentage points.

The changes in the rates of duty for plainwoven bleached and/or colored, and for fancy or figured bleached and/or colored all-cotton fabrics, as well as for all of the above-mentioned fabrics in chief value of cotton but containing other fibers, are also shown in table 1. These rates vary considerably, depending on the kind of weave, the finish and the average yarn number.

Cotton napped fabrics (including flannels)

The rates of duty applicable in 1930 to unbleached all-cotton flannels, of average yarn numbers 1 to 19, which include the Arkwright types, ranged from 10.35 percent to 16.65 percent ad valorem (table 2). These rates were reduced by about 25 percent in the Japanese agreement, effective September 1955, ranging from 7.75 percent to 12.25 percent ad valorem. The rates were further reduced by about 24 percent in the Kennedy Round in five annual stages, with the final stage becoming effective January 1, 1972. The present rates, ranging from 5.90 percent to 9.32 percent ad valorem, are about 43 percent lower than the 1930 rates. In absolute amounts, the reductions since 1930 were 4.45 to 7.33 percentage points.

The changes in the rates of duty applicable to plainwoven bleached and/or colored and to fancy or figured bleached and/or colored all-cotton flannels are also shown in table 2.

Shipments to the United States of the cotton fabrics herein considered are currently subject to restraints pursuant to the provisions of the Long-Term Arrangement Regarding International Trade in Cotton Textiles (LTA).

Woven manmade-fiber fabrics

Trade-agreement concessions on certain woven fabrics of manmade fibers (including blends) were granted in 1936, 1948, 1951, and 1968-72 (table 3). The rates of duty shown in table 3 for the years prior to 1951 were applied only to certain woven fabrics of rayon and acetate although the tariff nomenclature provided for "rayon or other synthetic textile." Imports of woven fabrics of manmade fibers other than rayon or acetate (including types similar to those of Arkwright) were classified by similitude to the articles they most resembled, under the provisions of paragraph 1559(a) of the Tariff Act of 1930. In 1951 a U.S. Customs Court decision (C.D. 1366) held that textile articles of nylon were classifiable as articles of rayon or other synthetic textile. In 1958, legislation (Public Law 85-645) was enacted defining the words "rayon or other synthetic textile" as including noncellulosic textile materials. From 1930 to 1972, as a result of concessions granted under trade agreements, the ad valorem equivalent of the compound rates of duty on woven fabrics of manmade fibers declined from 80.8 percent to 27.1 percent, representing a decrease of 67 percent.

Shipments to the United States of most manmade-fiber textiles, including woven fabrics, are subject to quantitative limitations pursuant to bilateral agreements between the United States and Japan, Taiwan, the Republic of Korea, Hong Kong, and Malaysia.

U.S. Consumption

Woven fabrics of cotton

U.S. apparent consumption of the four major types (class A and B sheeting, drills and twills, denims, and flannels) of cotton fabrics herein considered increased from 1.7 billion square yards in 1964 to 1.8 billion square yards in 1966, decreased to 1.3 billion square yards in 1969, and then increased slightly in 1970 and 1971 (table 4). Consumption in 1971 was 26 percent less than in 1966. These fabrics serve a myriad of end uses. Some of the major uses, and the estimated consumption of coarse cotton fabrics in them, are shown in table 5. Consumption of competing materials, such as manmade fibers, plastics and paper, are shown in the table.

Cotton class A and B sheeting.--U.S. consumption of class A and B sheeting rose from 418 million square yards in 1964 to 467 million square yards in 1967, and then decreased steadily to 362 million square yards in 1971. The decrease from 1967 to 1971 was 22 percent.

Cotton drills and twills.--Drills and twills, the most important of the four types, accounted for about 50 percent of the total U.S. consumption of the four during 1964-67 and for from 41 percent to 49 percent during 1968-71. Such consumption increased from 854 million square yards in 1964 to 894 million square yards in 1966, declined to 539 million square yards in 1970, and then increased slightly to 548 million square yards in 1971.

Cotton denims.--Consumption of denims rose erratically from 289 million square yards in 1964 to 304 million square yards in 1971, or by about 5 percent.

Cotton flannels.--U.S. consumption of cotton flannels increased from 153 million square yards in 1964 to 161 million square yards in 1965, decreased to 114 million square yards in 1969, and then increased to 118 million square yards in 1971. Consumption in the latter year was 23 percent less than in 1964 and 27 percent less than in 1965.

Woven fabrics of manmade fibers

Data are not available on the U.S. consumption of the specific types of polyester-cotton blended fabrics produced by Arkwright. Data are available on consumption of woven fabrics of all manmade fibers (table 6) and on consumption of woven fabrics of polyester spun (non-continuous) yarns, which would include the fabrics most nearly comparable with those produced by Arkwright (table 7). Consumption of the

latter types increased in each year during 1965-71, from 1.2 billion square yards in 1965 to 3.5 billion square yards in 1971

U.S. Production

Woven fabrics of cotton

U.S. production of the four principal cotton fabrics (class A and B sheeting, drills and twills, denims, and flannels) considered herein decreased from 1.7 billion square yards in 1966 to 1.2 billion square yards in 1971, a decline of 0.5 billion square yards, or 31 percent (table 4).

Cotton class A and B sheeting.--U.S. production of class A and B sheeting, during 1964-71, decreased from 399 million square yards in 1966 to 229 million square yards in 1971, a decline of 170 million square yards, or 43 percent.

Cotton drills and twills.--Cotton drills and twills were the most important fabric type of the four. The U.S. production of these fabrics accounted for about 50 percent of the total for the four types in 1964-67 and 41 percent in 1971. Production of drills and twills decreased from 863 million square yards in 1965 to 489 million square yards in 1971, a decline of 374 million square yards, or 43 percent.

Cotton denims.--The production of cotton denims increased erratically from 311 million square yards in 1964 to 371 million square yards in 1971, ranging between 244 million square yards in 1968 and 371 million square yards in 1971. The increase from 1964 to 1971 was 60 million square yards, or 19 percent.

Cotton flannels.--Data in table 4 for U.S. production of flannels include outing, Canton, and interlining flannels of all yarn numbers. U.S. output of such cotton flannels increased from 131 million square yards in 1964 to 137 million square yards in 1965, and then declined in each subsequent year to 98 million square yards in 1971. The decrease from 1965 to 1971 was 39 million square yards, or 29 percent.

About * * * of the flannel production of Arkwright over the period 1967-71 was of Canton flannel. The U.S. output of this type decreased from 49 million square yards in 1967 to 40 million square yards in 1971, of which Arkwright produced about * * * in the latter year.

Woven fabrics of manmade fibers

U.S. production of woven manmade-fiber fabrics, as a whole, increased steadily from 3.4 billion square yards in 1962 to 7.0 billion square yards in 1969, then declined to 6.6 billion square yards in 1971 (table 6). Production of woven polyester and cotton blended fabrics, including the types most comparable to those of Arkwright, increased from 1.2 billion square yards in 1965 to 3.5 billion square yards in 1971, an increase of 2.3 billion (table 7).

U.S. Imports

Woven fabrics of cotton

Annual U.S. imports of the principal cotton fabrics considered herein (predominantly of average yarn numbers 10 to 19) increased steadily, except for 1968, from 79 million square yards in 1964 to 222 million square yards in 1971, an increase of 143 million square yards, or 183 percent. The ratio of imports to consumption increased in each year, from 4.6 percent in 1964 to 16.7 in 1971 (table 4). Table 12 shows the large increase in total imports of cotton yarn and fabric from 1930 to 1971.

Cotton class A and B sheeting.--During 1964-71, imports of cotton class A and B sheeting were far greater in volume than any of the other three types here considered and also showed the greatest rate of growth. Such imports increased from 32 million square yards in 1964 to 136 million square yards in 1971, a growth of 104 million square yards, or 331 percent. The ratio of imports to consumption rose from 7.6 percent to 37.7 percent over the period. In 1971, Pakistan, Hong Kong, India, and Egypt were the principal sources of cotton sheeting imports (average yarn numbers 10 to 19), accounting for 72 percent of the total (table 8).

Cotton drills and twills.--U.S. imports of cotton drills and twills during 1964-71 fluctuated, but showed a decided upward trend, increasing from 26 million square yards in 1964 to 62 million square yards in 1971, or by about 140 percent. The ratio of imports to consumption increased in each year during the period, from 3.0 percent in 1964 to 11.2 percent

in 1971. Hong Kong has been the most important supplier of cotton drills and twills (of average yarn numbers 10 to 19) in recent years, accounting for 39 percent of the total yardage in 1971 (table 9). India, Brazil, and Pakistan provided 34 percent in 1971.

Cotton denims.--U.S. imports of cotton denims increased from 15 thousand square yards in 1964 to 4.3 million square yards in 1971; most of the increase occurred in 1970 and 1971. The great bulk of the increased imports was in fabrics of average yarn numbers 1 to 9, coarser types than those produced by Arkwright. Even at their peak in 1971, imports were only a little over 1 percent of consumption. Nicaragua and Brazil supplied 67 percent of the imports of cotton denims (of average yarn numbers 10 to 19) (table 10).

Cotton flannels.--Cotton flannels, of average yarn numbers 1 to 19, are imported under TSUSA items that include all napped fabrics. It is believed, however, that these imports consist mainly of flannels. In 1964-71, U.S. imports of such fabric, mostly of average yarn numbers 10s to 19s, ranged from a low of 7 million square yards in 1967 to a high of 23 million square yards in 1965; they were 20 million square yards in 1971. The ratio of imports to consumption ranged between 5.8 percent in 1967 and 17.0 percent in 1971. West Germany and Taiwan were the principal suppliers of cotton flannels in 1971, accounting for 48 percent of the total yardage (table 11). Portugal, Hong Kong, Brazil, and the Netherlands accounted for most of the remainder.

Woven fabrics of manmade fibers

U.S. imports of all woven fabrics of manmade fibers increased steadily from 64 million square yards in 1962 to 255 million square yards in 1966, decreased to 178 million square yards in 1967, and then increased to 253 million square yards in 1971 (table 6). The increase between 1962 and 1971 amounted to 189 million square yards, or 295 percent. In 1971, imports were 3.8 percent of consumption.

Imports of woven fabrics of spun polyester yarns, which include polyester-cotton blends of the types produced by Arkwright, increased from 30 million square yards in 1965 to 80 million square yards in 1966, then decreased substantially but irregularly to 17 million square yards in 1971 (table 7). Such imports were 4.5 percent of consumption in 1966, when polyester fabrics first gained in popularity, but were less than 1 percent in each year 1969-71, when domestic producers geared up to meet the increasing demand for these fabrics.

U.S. Exports

Woven fabrics of cotton

U.S. exports of the cotton fabrics considered herein amounted to about 50 million square yards in 1964, declined to 31 million square yards in 1965, then increased irregularly to 76 million square yards in 1971, equivalent to 6 percent of U.S. production in that year (table 4). U.S. exports of cotton drills and twills and class A and B sheeting were small in each year, 1965-71, and amounted to 1 percent or less of production in each of these years. Exports were larger in 1964 because of the subsidy granted on U.S. exports under the U.S. Department of

Agriculture's two-price cotton program. Exports of cotton flannels are not separately classified but are believed to have been small. In contrast, cotton denim exports have been much larger, increasing from about 22 million square yards in 1964 to 71 million square yards in 1971. Exports of denims were 7 percent of U.S. production in 1964 and increased to 19 percent in 1971, far exceeding imports. Denim exports have increased because of the popularity of denims in jeans and western wear in foreign countries, particularly European countries and Japan, and the superiority of the denims made in the U.S. over those produced abroad.

Woven fabrics of manmade fibers

U.S. exports of woven fabrics of manmade fibers fluctuated substantially during 1962-71, ranging from a low of 137 million square yards in 1962 to a high of 181 million square yards in 1964; they were 163 million square yards in 1971 (table 6). Exports of woven fabrics of polyester and cotton blends rose in each year 1965-71, from 7 million square yards to 32 million square yards. They were less than 1 percent of production in each year (table 7).

* * * * *

Arkwright Mills, Inc.

The company

Arkwright Mills is a family owned company and was incorporated in 1896. Operations began in 1898, in what is referred to as the No. 1 or Main Plant. The production of this plant from its inception has basically been in the yarn range of 8s to 19s, and the principal product has been grey drills and sheetings made from these yarns.

In 1948 the Camp Croft Division, or No. 2 Plant, started operation as a weaving unit utilizing bought yarns. In 1952 carding and spinning operations were added to make this an integrated grey cloth mill. Drills and sheetings of the same yarn numbers as the No. 1 Plant became the basic styles.

In 1962 Canton flannels for the work glove trade and related fabrics were introduced into the No. 1 Plant in an attempt to diversify the product line. These fabrics are made from very coarse fillings, 3s to 8s, which proved to be incompatible with the machinery and operation of the No. 1 Plant. After extensive study, in the summer of 1965, plans were formulated for a new plant with machinery designed especially for this flannel operation. This plant, known as the No. 3 Plant, or the Cateswood Division, was completed in February 1967, and 1968 was the first fiscal year of full operations. Thus Arkwright Mills had come from a one plant operation at the turn of the century to a three plant operation by 1967. * * *

Both the No. 1 and No. 2 plants, which have received the most pressure from imports, are basically sheeting and drill operations. By this it is meant that the machinery in these plants is most efficient and in balance when producing either drills or sheetings and any combination thereof from yarns in the range of 12s and 17s. It is in this yarn range that the lowest costs are obtained. Some typical drills in this yarn range are 40 inches - 72X60 - 1.96; 40 inches - 72X48 - 2.19; 40 inches - 72X48 - 2.05; and 45 inches - 72X60 - 1.70; and some typical sheetings are 40 inches - 48X52 - 2.65; 40 inches - 48X48 - 2.85; and 40 inches - 48X56 - 2.50. There is no basic difference between the yarns or the cotton used in the drill and sheeting styles and they are interchangeable. During the five years ending 1971, these fabrics amounted to better than 75 percent of the production of the No. 1 and No. 2 Plants.

Although going to several end uses, the basic volume of the drills went to pocketing, tents (recreational or non-military), and the shoe trade, while the basic volume of the sheetings went to apparels such as for use in the rental uniform trade. Although the company over the years has from time to time converted goods for its own account, the largest volume of these fabrics has been sold in the grey state.

It was realized during the mid 1960's that new products for both the No. 1 and No. 2 Plants would be needed. Although product development was done at both plants, a majority of this work was performed at

the No. 1 Plant, with 120 different samples made during the period from 1967 through 1971 at the No. 1 Plant and 31 samples made during the same period at the No. 2 Plant. Over this period 66 new styles were introduced in the No. 1 Plant and 10 new styles into the No. 2 Plant. Typical styles of this sort were enameling ducks, osnaburgs, denims, as well as many synthetic blends. With the exception of osnaburg, these styles were directed primarily at the apparel trade, which required a higher level of quality than was readily obtainable from a drill and sheeting operation. Many of these new styles proved to be incompatible with a drill and sheeting operation because the yarn numbers were either finer or coarser than 14s and 17s, or the fabrics themselves, by the nature of their construction, were incompatible with the operation.

As losses continued from 1968 on, and as the search for alternative styles seemed unsuccessful, it was finally decided to close and liquidate the No. 2 Plant. * * *

* * * * *

STATISTICAL APPENDIX

Table 1.--Selected woven fabrics, wholly or in chief value of cotton 1/ yarn
Nos. 10-19: U.S. rates of duty for specified years 1930 to 1972

Description	1930	1956 <u>2</u> /	1968 <u>3</u> /	1969 <u>3</u> /	1970 <u>3</u> /	1971 <u>3</u> /	1972 <u>3</u> /
Fabrics, wholly of cotton: Not fancy or figured: Not bleached or colored.							
Range for yarn Nos. 10-19: In per cent ad valorem-----	13.50% - 16.65%	10.0% - 12.25%	9.58% - 11.66%	9.04% - 11.07%	8.56% - 10.49%	8.08% - 9.9%	7.61% - 9.32%
Bleached but not colored:							
Range for yarn Nos. 10-19: In percent ad valorem-----	16.50% - 19.65%	12.5% - 14.75%	11.82% - 13.96%	11.24% - 13.27%	10.66% - 12.59%	10.08% - 11.90%	9.51% - 11.22%
Colored:							
Range for yarn Nos. 10-19: In percent ad valorem-----	19.50% - 22.65%	14.50% - 16.75%	13.82% - 15.96%	13.24% - 15.27%	12.56% - 14.49%	11.98% - 13.80%	11.41% - 13.12%
Fancy or figured: Colored.							
Range for yarn Nos. 10-19: In percent ad valorem-----	29.50% - 32.65%	17.0% - 19.25%	16.12% - 18.26%	15.34% - 17.37%	14.46% - 16.39%	13.68% - 15.50%	12.91% - 14.62%
Fabrics, in chief value of cotton: Not fancy or figured: Not bleached or colored.							
Range for yarn Nos. 10-19: In percent ad valorem-----	18.50% - 21.65%	12.50% - 14.75%	11.82% - 13.96%	11.24% - 13.27%	10.66% - 12.59%	10.08% - 11.90%	9.51% - 11.22%
Bleached but not colored:							
Range for yarn Nos. 10-19: In percent ad valorem-----	21.50% - 24.65%	15.0% - 17.25%	14.22% - 16.36%	13.54% - 15.57%	12.76% - 14.69%	12.08% - 13.90%	11.41% - 13.12%
Colored.							
Range for yarn Nos. 10-19: In percent ad valorem-----	24.50% - 27.65%	17.0% - 19.25%	16.12% - 18.26%	15.34% - 17.37%	14.46% - 16.31%	13.68% - 15.50%	12.91% - 14.62%
Fancy or figured: Colored.							
Range for yarn Nos. 10-19: In percent ad valorem-----	34.50% - 37.65%	19.50% - 21.75%	18.62% - 20.76%	17.74% - 19.77%	16.86% - 18.79%	15.98% - 17.80%	15.11% - 16.82%

1/ Includes drills, twills, denims and sheetings of the types produced by Arvright. 2/ Japanese agreement, effective Sept. 10, 1955. 3/ Kennedy Round

Table 1(a).--Class A and B sheeting and drills and twills, wholly of cotton, unbleached, yarn Nos. 1-19: Changes in U.S. rates of duty and U.S. imports for consumption, specified years 1930 to 1972

(Imports in thousands of pounds)					
Year	Rate of duty	Imports			
		Total <u>2/</u>	Class A and B sheeting	Drills and twills	
	<u>Percent ad valorem</u>				
1930-----	10.35 - 16.65	92))	
1939-----		97))	
1948-----		352))	
1949-----		<u>3/</u>))	
1950-----		1,447))	
1951-----		5,685))	
1952-----		193))	
1953-----		1,606))	
1954-----		713))	
1955-----		3,099) <u>2/</u>) <u>2/</u>	
1956-----	<u>4/</u> 7.75 - 12.25	3,682))	
1957-----		5,547))	
1958-----		8,106))	
1959-----		24,555))	
1960-----		66,307))	
1961-----		47,456))	
1962-----		43,439))	
1963-----		48,313))	
1964-----		20,305))	
1965-----		30,073))	
1966-----		37,484))	
1967-----		48,164))	
1968-----	<u>5/</u> 7.38 - 11.66	42,906))	
1969-----	<u>5/</u> 7.01 - 11.07	49,280))	
1970-----	<u>5/</u> 6.64 - 10.49	53,451))	
1971-----	<u>5/</u> 6.27 - 9.90	64,377))	
1972-----	<u>5/</u> 5.90 - 9.32	<u>3/</u>))	

1/ Cotton fabrics, not fancy or figured, not bleached and not colored (TSUSA Nos. 320.01 to 320.19). Most of the coarse cotton fabrics produced by Arkwright were sold in the unbleached state.

2/ Data by specific fabric type are not available for the years 1930-63. Annual totals for the specified years 1930 to 1963 include imports of unbleached coarse cotton fabrics of yarn Nos. 1 to 20.

3/ Not available. 4/ Japanese agreement, effective September 10, 1955.

5/ Kennedy Round reductions.

Source: Import data are compiled from official statistics of the U.S. Department of Commerce.

Table 2.--Selected woven fabrics, wholly or in chief value of cotton 1/ yarn Nos. 1-19:
U.S. rates of duty for specified years, 1930-72

Description	1930	1956 <u>2</u> /	1968 <u>3</u> /	1969 <u>3</u> /	1970 <u>3</u> /	1971 <u>3</u> /	1972 <u>3</u> /
Fabrics, wholly of cotton: Not fancy or figured: Not bleached or colored.							
Range for yarn Nos. 1-19:							
In percent ad valorem-----	10.35% - 16.65%	7.75% - 12.25%	7-38% - 11.66%	7.01% - 11.07%	6.64% - 10.49%	6.27% - 9.90%	5.90% - 9.32%
Bleached but not colored.							
Range for yarn Nos. 1-19:							
In per cent ad valorem-----	13.35% - 19.65%	10.25% - 14.75%	9.68% - 13.96%	9.21% - 13.27%	8.74% - 12.59%	8.27% - 11.90%	7.80% - 11.22%
Colored.							
Range for yarn Nos. 1-19:							
In percent ad valorem-----	16.35% - 22.65%	12.25% - 16.75%	11.68% - 15.96%	11.21% - 15.27%	10.64% - 14.49%	10.17% - 13.80%	9.70% - 13.12%
Fancy or figured: Not bleached or colored.							
Range for yarn Nos. 1-19:							
In percent ad valorem-----	23.50% - 26.65%	10.25% - 14.75%	9.68% - 13.96%	9.21% - 13.27%	8.74% - 12.59%	8.27% - 11.90%	7.80% - 11.22%
Bleached but not colored.							
Range for yarn Nos. 1-19:							
In percent ad valorem-----	26.50% - 29.65%	12.75% - 17.25%	12.08% - 16.36%	11.51% - 15.57%	10.84% - 14.69%	10.27% - 13.90%	9.70% - 13.12%
Colored.							
Range for yarn Nos. 1-19:							
In percent ad valorem-----	29.50% - 32.65%	17.0% - 19.25%	16.12% - 18.26%	15.34% - 17.37%	14.46% - 16.39%	13.68% - 15.50%	12.91% - 14.62%

1/ Includes flannel fabrics of the types produced by Arkwright. 2/ Japanese agreement, effective, Sept. 10, 1955. 3/ Kennedy Round reductions.

... ..
 specified years 1935 to 1971, and January-June 1972

Year	Change in rate of duty <u>1/</u>	Ad valorem		Dutiable imports	
		equivalent of:	the rate of:	Quantity	Value
		duty, based	on imports		
		in 1971	in 1971	1,000	1,000
		Percent	Percent	pounds	dollars
1935					
1936	45¢ + 60% or 70% <u>2/</u>	3/ 80.8		234	467
1948	45¢ + 45% <u>4/</u>	60.8		474	604
1951	27.5¢ + 45% or 22.5% <u>5/</u>	3/ 38.6		416	1,137
1952	25¢ + 22.5% <u>6/</u>	31.3		212	802
1953				394	1,160
1954				1,235	2,298
1955				1,111	2,336
1956				1,576	2,900
1957				2,700	4,897
1958				3,170	5,332
1959				4,782	5,795
1960				10,873	10,471
1961				10,097	12,182
1962				7,575	12,832
1963				10,062	18,247
1964				10,682	19,071
1965				11,910	25,408
1966				20,876	41,286
1967				36,204	58,285
1968	22.5¢ + 22.5% <u>7/</u>	30.4		25,596	51,832
1969	20¢ + 22.5% <u>1/</u>	29.5		28,629	66,467
1970	17¢ + 22.5% <u>1/</u>	28.5		32,975	80,641
1971	15¢ + 22.5% <u>1/</u>	27.8		39,042	113,974
1972 (January-June)	13¢ + 22.5% <u>1/</u>	27.1	8/	47,748	136,207
				25,920	8/ 80,374

1/ Prior to 1951, imports of woven fabrics of manmade fibers other than rayon or acetate were classified by similitude to the articles they most resembled, under the provisions of paragraph 1559(a) of the Tariff Act of 1930. In 1951 a U.S. Customs Court decision (C.D. 1366) held that textile articles of nylon were classifiable as articles of rayon or other synthetic textile. In 1958 legislation (Public Law 85-645) was enacted defining the words "rayon or other synthetic textile" as including noncellulosic textile materials.

2/ The 1930 rate. 3/ Estimated. 4/ Trade agreement with France, effective June 15, 1936.

5/ GATT, effective Jan. 1, 1948. 6/ GATT, effective June 6, 1951. 7/ Kennedy Round.

8/ Includes a small quantity of nondutiable imports.

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

Table 4.--Certain cotton and cotton-blend fabrics, chiefly cotton: U.S. production, imports for consumption, exports of domestic merchandise, and apparent consumption, by types, 1964-71

Type of fabric and year	Pro-duction <u>1/</u>	Imports <u>2/</u>			Ex-ports <u>3/</u>	Apparent consumption	Ratio of imports to consumption
		Yarn Nos. 1-9	Yarn Nos. 10-19	Total			
	<u>1,000</u> sq. yd.	<u>1,000</u> sq. yd.	<u>1,000</u> sq. yd.	<u>1,000</u> sq. yd.	<u>1,000</u> sq. yd.	<u>1,000</u> sq. yd.	Percent
Class A and B sheeting:							
1964-----	398,908	784	30,857	31,641	12,599	417,950	7.6
1965-----	394,201	660	54,831	55,491	3,509	446,183	12.4
1966-----	398,681	2,670	60,971	63,641	2,989	459,333	13.9
1967-----	380,268	4,220	83,603	87,823	1,604	466,487	18.8
1968-----	358,587	1,064	86,250	87,314	1,700	444,201	19.7
1969-----	307,345	2,615	96,601	99,216	1,022	405,539	24.5
1970-----	263,216	2,415	113,637	116,052	1,418	377,850	30.7
1971-----	<u>4/</u> 228,834	1,717	134,708	136,425	3,067	362,192	37.7
Drills and twills:							
1964-----	<u>5/</u> 843,955	160	25,432	25,592	15,170	854,377	3.0
1965-----	<u>5/</u> 862,935	405	33,337	33,742	4,472	892,205	3.8
1966-----	859,082	314	37,908	38,222	3,233	894,071	4.3
1967-----	760,203	955	45,338	46,293	3,727	802,769	5.8
1968-----	596,519	2,535	38,419	40,954	4,654	632,819	6.5
1969-----	522,095	3,805	40,510	44,315	4,906	561,504	7.9
1970-----	499,591	7,394	38,469	45,863	6,472	538,982	8.5
1971-----	<u>4/</u> 488,644	8,732	52,890	61,622	2,006	548,260	11.2
Denim:							
1964-----	311,032	-	15	15	21,940	289,107	<u>6/</u>
1965-----	294,634	-	-	-	23,159	271,475	-
1966-----	339,342	51	-	51	31,009	308,384	<u>6/</u>
1967-----	299,352	64	16	80	28,710	270,722	<u>6/</u>
1968-----	244,312	137	-	137	27,074	217,375	.1
1969-----	248,734	18	-	18	33,388	215,364	<u>6/</u>
1970-----	332,590	2,748	195	2,943	44,369	291,164	1.0
1971-----	<u>4/</u> 371,156	3,514	791	4,305	71,294	304,167	1.4
Cotton flannels:							
1964-----	131,303	102	21,239	21,341	<u>7/</u>	152,644	14.0
1965-----	137,659	175	23,054	23,229	<u>7/</u>	160,888	14.4
1966-----	115,907	456	20,247	20,703	<u>7/</u>	136,610	15.2
1967-----	114,282	332	6,754	7,086	<u>7/</u>	121,368	5.8
1968-----	111,006	227	8,227	8,454	<u>7/</u>	119,460	7.1
1969-----	104,414	311	9,576	9,887	<u>7/</u>	114,301	8.7
1970-----	100,418	128	15,806	15,934	<u>7/</u>	116,352	13.7
1971-----	<u>4/</u> 98,094	2,249	17,782	20,031	<u>7/</u>	118,125	17.0
Total:							
1964-----	1,685,198	1,046	77,543	78,589	49,709	1,714,078	4.6
1965-----	1,689,429	1,240	111,222	112,462	31,140	1,770,751	6.4
1966-----	1,713,012	3,491	119,126	122,617	37,231	1,798,398	6.8
1967-----	1,554,105	5,571	135,711	141,282	34,041	1,661,346	8.5
1968-----	1,310,424	3,963	132,896	136,859	33,428	1,413,855	9.7
1969-----	1,182,588	6,749	146,687	153,436	39,316	1,296,708	11.8
1970-----	1,195,815	12,685	168,107	180,792	52,259	1,324,348	13.7
1971-----	<u>4/</u> 1,186,728	16,212	206,171	222,383	76,367	1,332,744	16.7

1/ Data converted from linear yards to square yards by the use of factors shown by the U.S. Bureau of Census in Current Industrial Reports, series MQ-22T.1 Supplement, dated Nov. 29, 1968. Data includes only all cotton or chiefly cotton fabrics and for sheeting includes fabrics of yarn Nos. 1 to 21; drills and twills, denim, and cotton, or chiefly cotton, flannels include fabrics of all yarn numbers. Cotton, or chiefly cotton, flannels includes outing, canton, and interlining flannels.

2/ Data on imports includes certain fabrics of cotton and small portions of cotton blends for sheeting, twills and drills, and denim. Data on flannels includes imports of all wholly cotton napped fabrics. Most of the fabrics produced by Arkwright Mills were made from yarn Nos. 10-19; however, imports of fabrics of yarn Nos. 1-9 must be included to obtain data more comparable to U.S. production and U.S. exports, for which statistics on fabrics of yarn Nos. 10-19 are not available.

3/ Data on exports includes fabrics of cotton and of cotton blends of all yarn numbers. Sheet- ing includes sheeting, osanaburges, and allied fabrics, and drills and twills include drills, twills, and bateens. Denim includes only finished fabrics.

4/ Preliminary. 5/ Figures partly withheld. 6/ Less than 0.05 percent. 7/ Not separately classified.

Table 5.--U.S. consumption of certain cotton and other woven fabrics, by specified end uses, 1964 and 1967-70

(In thousands of square yards)					
End use	1964	1967	1968	1969	1970 ^{1/}
<u>Cotton</u>					
Industrial tape-----	33,392	62,182	57,889	62,618	57,379
Drapery and upholstery fabrics-----	345,361	389,754	403,445	374,604	350,751
Auto uses-----	145,218	139,303	156,692	126,822	116,030
Wiping cloths-----	35,808	46,926	49,272	43,803	41,613
Luggage fabrics-----	42,378	42,070	45,604	43,320	39,996
Tents and camper trailers-----	46,805	85,175	85,509	66,516	75,447
Shoe fabrics-----	159,435	147,054	153,911	136,077	132,900
Book bindings-----	58,668	68,735	61,094	60,289	56,530
Men's and boys' pajamas, etc-----	206,650	169,095	163,377	145,811	104,533
Men's and boys' overalls, cover- alls, and jackets-----	69,341	84,144	72,900	71,301	72,882
Men's and boys' rainwear-----	19,181	15,293	19,958	16,125	15,017
Men's and boys' uniform and work shirts-----	149,449	145,931	132,752	114,644	103,042
Men's washable uniforms-----	62,167	33,434	30,642	28,592	27,322
Women's washable uniforms-----	101,023	32,769	24,983	21,984	20,757
Men's and boys' casual and work dungarees and jeans-----	292,299	298,064	260,348	299,962	351,374
Men's and boys' work and uniform trousers-----	221,787	192,283	157,069	139,008	117,446
Work gloves of canton flannel-----	37,362	44,759	48,920	49,823	47,640
<u>Other</u>					
Industrial tape-----	555,151	667,554	733,322	307,478	740,252
Drapery and upholstery fabrics-----	551,113	528,656	648,141	725,839	692,700
Auto uses-----	132,507	116,232	128,765	118,189	88,801
Wiping cloths-----	4,883	2,995	3,145	2,796	2,656
Luggage fabrics-----	110,648	111,331	118,831	114,838	113,418
Tents and camper trailers-----	1,950	9,328	2,481	11,140	11,931
Shoe fabrics-----	268,720	251,381	271,200	245,451	238,423
Book bindings-----	60,833	77,419	84,297	89,057	89,317
Men's and boys' pajamas, etc-----	13,716	15,829	18,623	32,047	53,496
Men's and boys' overalls, cover- alls, and jackets-----	2,929	5,134	10,358	13,657	16,351
Men's and boys' rainwear-----	22,452	26,415	35,992	31,511	29,102
Men's and boys' uniform and work shirts-----	11,813	37,974	51,392	62,914	62,986
Men's washable uniforms-----	1,923	2,134	2,664	4,272	5,204
Women's washable uniforms-----	26,730	20,639	19,510	18,342	19,721
Men's and boys' casual and work dungarees and jeans-----	10,367	69,651	85,186	98,702	89,513
Men's and boys' work and uniform trousers-----	29,433	86,741	81,725	91,262	87,433
Work gloves of canton flannel-----	181	239	202	504	481
<u>Total</u>					
Industrial tape-----	588,543	729,736	791,211	370,096	797,631
Drapery and upholstery fabrics-----	896,474	918,410	1,051,586	1,100,443	1,043,451
Auto uses-----	277,725	255,535	285,457	245,011	204,831
Wiping cloths-----	40,691	49,921	52,417	46,599	44,269
Luggage fabrics-----	153,026	153,401	164,435	158,158	153,414
Tents and camper trailers-----	48,755	94,503	87,990	77,656	87,378
Shoe fabrics-----	428,155	398,435	425,111	381,528	371,323
Book bindings-----	119,501	146,154	145,391	149,346	145,847
Men's and boys' pajamas, etc-----	220,366	184,924	182,000	177,858	158,029
Men's and boys' overalls, cover- alls, and jackets-----	72,270	89,278	83,258	84,958	89,233
Men's and boys' rainwear-----	41,633	41,708	55,950	47,636	44,119
Men's and boys' uniform and work shirts-----	161,262	183,905	184,144	177,558	166,028
Men's washable uniforms-----	64,090	35,568	33,306	32,864	32,526
Women's washable uniforms-----	127,753	53,408	44,493	40,326	40,478
Men's and boys' casual and work dungarees and jeans-----	302,666	367,715	345,534	398,664	440,887
Men's and boys' work and uniform trousers-----	251,220	269,024	238,794	230,270	204,879
Work gloves of canton flannel-----	37,543	44,998	49,172	50,327	48,121

^{1/} Preliminary.

Source: Compiled from statistics of the National Cotton Council of America.

Table 6.--Woven fabrics of manmade fibers: U.S. production, imports for consumption, exports of domestic merchandise, and apparent consumption, 1962-71

Year	Production ^{1/}	Imports	Exports	Apparent consumption	Ratio of imports to consumption
	<u>1,000</u> <u>sq. yd.</u>	<u>1,000</u> <u>sq. yd.</u>	<u>1,000</u> <u>sq. yd.</u>	<u>1,000</u> <u>sq. yd.</u>	<u>Percent</u>
1962-----	3,423,550	64,049	137,468	3,350,131	1.9
1963-----	3,886,456	75,909	153,205	3,809,160	2.0
1964-----	4,375,123	87,261	181,454	4,280,930	2.0
1965-----	4,892,109	161,069	145,514	4,907,664	3.3
1966-----	5,092,945	255,279	150,277	5,197,947	4.9
1967-----	5,416,657	177,724	152,771	5,441,610	3.3
1968-----	6,925,176	195,935	146,618	6,974,493	2.8
1969-----	7,026,995	218,702	163,299	7,082,398	3.1
1970-----	6,729,105	234,938	173,806	6,790,237	3.5
1971-----	6,630,360	253,275	162,904	6,720,731	3.8

^{1/} Square yards estimated from official statistics reported in linear yards by use of conversion factors shown by the U.S. Bureau of the Census in Current Industrial Reports, series MC-22T.2 Supplement, dated Dec. 5, 1968.

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

Table 7.--Woven fabrics chiefly of noncontinuous polyester fibers:
U.S. production, imports for consumption, exports of domestic merchandise, and apparent consumption, 1965-71

Year	Production <u>1/</u> <u>2/</u>	Imports <u>3/</u>	Exports <u>1/</u>	Apparent consumption	Ratio of imports to consumption
	<u>million sq. yds.</u>	<u>million sq. yds.</u>	<u>million sq. yds.</u>	<u>million sq. yds.</u>	<u>Percent</u>
1965-----	1,171	30	7	1,194	2.5
1966-----	1,716	80	10	1,786	4.5
1967-----	1,866	21	12	1,875	1.1
1968-----	2,959	32	13	2,979	1.1
1969-----	3,248	20	21	3,247	0.6
1970-----	3,499	14	27	3,486	0.4
1971-----	3,531	17	32	3,517	0.5

1/ Wholly or in chief weight of noncontinuous polyester fibers.

2/ Square yards estimated from official statistics reported in linear yards by use of conversion factors shown by the U.S. Bureau of the Census in Current Industrial Reports, series MQ-22T.2 Supplement dated Dec. 5, 1968.

3/ Wholly or in chief value of noncontinuous polyester fibers.

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

Table 8.--Class A and B sheeting, in chief value of cotton, yarn Nos. 10-19: U.S. imports for consumption, by principal sources, 1969-71

Source	1969	1970	1971
	Quantity (1,000 pounds)		
Pakistan-----	4,320	5,667	9,503
Hong Kong-----	6,519	7,939	7,362
India-----	5,558	3,990	5,518
Egypt-----	3,150	3,589	4,406
Taiwan-----	2,848	3,678	3,094
Brazil-----	164	3,366	2,174
Yugoslavia-----	2,132	1,766	1,804
All other-----	4,190	3,033	4,830
Total-----	28,881	33,028	38,691
	Quantity (1,000 square yards)		
Pakistan-----	16,332	23,363	38,166
Hong Kong-----	20,565	25,352	24,380
India-----	18,171	13,519	18,801
Egypt-----	10,195	12,302	15,284
Taiwan-----	9,727	12,642	10,698
Brazil-----	658	11,931	7,579
Yugoslavia-----	6,228	5,080	5,550
All other-----	14,725	9,448	14,250
Total-----	96,601	113,637	134,708
	Value (1,000 dollars)		
Pakistan-----	1,857	2,555	4,518
Hong Kong-----	3,192	4,025	3,974
India-----	2,437	1,864	2,749
Egypt-----	1,310	1,569	1,921
Taiwan-----	1,294	1,756	1,610
Brazil-----	73	1,390	1,006
Yugoslavia-----	1,012	895	985
All other-----	2,055	1,471	2,278
Total-----	13,230	15,525	19,041

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

Table 9.--Drills and twills other than denim, in chief value of cotton, yarn Nos. 10-19: U.S. imports for consumption, by principal sources, 1969-71

Source	1969	1970	1971
Quantity (1,000 pounds)			
Hong Kong	6,823	5,139	8,257
India	2,904	2,829	3,278
Pakistan	1,134	321	1,775
Brazil	72	3,053	1,945
Mexico	1,606	796	1,313
Spain	1,185	631	1,221
Colombia	779	850	706
Taiwan	284	130	538
Yugoslavia	711	331	540
All other	1,274	1,875	1,529
Total	16,772	15,955	21,102
Quantity (1,000 square yards)			
Hong Kong	14,959	11,503	20,461
India	7,315	7,151	8,643
Pakistan	2,912	842	4,510
Brazil	168	7,485	4,846
Mexico	3,773	1,783	2,976
Spain	2,676	1,447	2,857
Colombia	2,468	2,166	1,890
Taiwan	926	366	1,380
Yugoslavia	1,958	773	1,278
All other	3,355	4,953	4,049
Total	40,510	38,469	52,890
Value (1,000 dollars)			
Hong Kong	3,182	2,460	4,279
India	1,258	1,302	1,548
Pakistan	486	143	853
Brazil	26	1,197	832
Mexico	750	371	632
Spain	505	288	605
Colombia	420	446	378
Taiwan	147	72	291
Yugoslavia	349	155	270
All other	598	945	813
Total	7,721	7,379	10,501

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

Table 10.--Cotton or chiefly cotton denim fabrics, yarn Nos. 10-19:
U.S. imports for consumption, by principal sources, 1970-71

Source	1970	1971
	Quantity (1,000 pounds)	
Nicaragua-----	-	173
Brazil-----	6	141
Colombia-----	46	76
Hong Kong-----	-	60
Italy-----	-	25
Japan-----	-	3
All other-----	<u>1/</u> 70	3
Total-----	122	481
	Quantity (1,000 square yards)	
Nicaragua-----	-	287
Brazil-----	20	240
Colombia-----	63	118
Hong Kong-----	-	90
Italy-----	-	37
Japan-----	-	11
All other-----	112	8
Total-----	<u>1/</u> 195	791
	Value (1,000 dollars)	
Nicaragua-----	-	121
Brazil-----	4	73
Colombia-----	25	51
Hong Kong-----	-	34
Italy-----	-	19
Japan-----	-	5
All other-----	65	3
Total-----	<u>1/</u> 94	306

1/ Includes imports from Canada of 63,000 pounds, 102,000 square yards, valued at \$61,000.

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

Note.--There were no U.S. imports of cotton or chiefly cotton denim of yarn Nos. 10-19 in 1969.

Table 11.--Cotton napped fabrics, 1/ yarn Nos. 1-19: U.S. imports for consumption, by principal sources, 1969-71

Source	1969	1970	1971
	Quantity (1,000 pounds)		
West Germany-----	936	1,936	2,754
Netherlands-----	523	580	701
Portugal-----	599	849	774
Taiwan-----	408	704	885
Spain-----	278	276	388
Hong Kong-----	343	557	525
Brazil-----	-	-	530
France-----	110	75	85
Singapore-----	-	316	183
Italy-----	51	35	75
All other-----	258	248	111
Total-----	3,506	5,576	7,011
	Quantity (1,000 square yards)		
West Germany-----	1,766	3,821	5,496
Netherlands-----	1,054	1,089	1,322
Portugal-----	2,305	3,030	2,811
Taiwan-----	1,752	2,983	4,059
Spain-----	374	386	563
Hong Kong-----	1,616	2,432	2,168
Brazil-----	-	-	2,095
France-----	58	45	73
Singapore-----	-	1,405	821
Italy-----	105	73	162
All other-----	857	670	460
Total-----	9,887	15,934	20,030
	Value (1,000 dollars)		
West Germany-----	1,626	3,730	5,824
Netherlands-----	788	870	1,171
Portugal-----	722	965	909
Taiwan-----	338	584	824
Spain-----	314	316	470
Hong Kong-----	285	479	463
Brazil-----	-	-	209
France-----	215	146	185
Singapore-----	-	272	169
Italy-----	82	59	143
All other-----	284	272	145
Total-----	4,654	7,693	10,512

1/ Includes flannels.

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

Table 12.--Cotton yarn and fabrics: U.S. imports for consumption, 1930-71

(In thousands of pounds) ^{1/}

Year	Yarn	Fabric	Year	Yarn	Fabric
1930	2,002	9,059	1950	1,377	10,882
1931	1,615	8,018	1951	1,656	12,142
1932	1,473	6,233	1952	282	5,263
1933	1,815	7,472	1953	224	15,109
1934	1,981	7,523	1954	270	18,287
1935	2,444	12,747	1955	161	32,049
1936	2,416	23,649	1956	213	44,393
1937	2,295	32,134	1957	183	30,465
1938	1,199	12,459	1958	953	34,674
1939	1,846	21,376	1959	1,569	62,411
1940	932	15,982	1960	17,206	123,310
1941	1,385	13,310	1961	15,801	76,476
1942	805	5,142	1962	32,550	138,327
1943	2,342	4,707	1963	26,364	143,767
1944	1,678	2,480	1964	18,473	131,724
1945	2,231	20,450	1965	24,414	173,359
1946	657	10,645	1966	101,919	218,210
1947	793	3,396	1967	43,620	201,531
1948	1,040	6,551	1968	57,217	194,143
1949	299	4,019	1969	31,049	220,245
			1970	24,338	211,792
			1971	31,744	226,967

^{1/} Figures are in pounds of raw cotton required to produce the quantity of yarn or fabric imported.

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

