

UNITED STATES TARIFF COMMISSION

COTTON TYPEWRITER-RIBBON CLOTH

Report to the President (No. TEA-IR-6-64)
Under Section 351(d)(1) of the
Trade Expansion Act of 1962



TC Publication 139

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Note.--Certain portions of the report to the President may not be made public since they contain information that would reveal the operations of individual firms. This published report is the same as the report to the President except that those portions have been omitted. The omissions are indicated by asterisks.

(TC29374)

REPORT TO THE PRESIDENT

U.S. Tariff Commission,
September 23, 1964.

To the President:

Introduction

Following an escape-clause investigation by the Tariff Commission and report to the President under section 7 of the Trade Agreements Extension Act of 1951, as amended, the President, by proclamation dated August 23, 1960, 1/ increased the duties applicable to broadwoven cotton typewriter-ribbon cloth, effective after the close of business on September 22, 1960.

Section 351 (d)(1) of the Trade Expansion Act of 1962 (76 Stat. 900) provides that--

So long as any increase in, or imposition of, any duty or other import restriction pursuant to this section or pursuant to section 7 of the Trade Agreements Extension Act of 1951 remains in effect, the Tariff Commission shall keep under review developments with respect to the industry concerned, and shall make annual reports to the President concerning such developments.

This is the second report to the President on broadwoven cotton typewriter-ribbon cloth under section 351 (d)(1). This report is concerned principally with developments that have occurred since those

1/ Proclamation No. 3365; 3CFR, 1960 Supp., p. 35.

described in the Commission's report of September 23, 1963. ^{1/} Trends apparent during years covered by our earlier reports generally continued during the period under review. The dominant role in the domestic industry of one producer has been enhanced materially since 1963. Notwithstanding substantial variations in the level of U.S. production from year to year, aggregate annual sales of typewriter-ribbon cloth by U.S. producers have been considerably larger in recent years than they were before 1961. Prices received by domestic producers declined slightly during the first half of 1964 as they had during the preceding two years. Imports of typewriter-ribbon cloth were markedly lower during the year under review than they had been in other recent years. Nevertheless, importers' sales, after having declined somewhat irregularly during 1959-63, rose moderately in the first half of 1964. Sales of imported cloth during January-June 1964 were principally from accumulated inventories. Meanwhile, inventories held by domestic producers were also reduced, continuing a trend manifest since 1962.

U.S. Tariff Treatment

The broadwoven cotton typewriter-ribbon cloth covered by this report is described in items 922.01-922.05 of the appendix to the Tariff Schedules of the United States (TSUS) as follows:

^{1/} More detailed information with respect to broadwoven cotton typewriter-ribbon cloth is contained in the following reports:

U.S. Tariff Commission, Cotton Typewriter-Ribbon Cloth: Report to the President on Escape-Clause Investigation No. 7-85 . . ., 1960, Cotton Typewriter-Ribbon Cloth: Report to the President (1962) Under Executive Order 10401, TC Publication 70, 1962; and Cotton Typewriter-Ribbon Cloth: Report to the President (No. TEA-IR-6-63) Under Section 351(d)(1) of the Trade Expansion Act of 1962, TC Publication 108, 1963.

Woven fabrics, wholly of cotton, suitable for making typewriter ribbon, containing yarns the average number of which exceeds No. 50 but not No. 140, the total thread count (treating ply yarns as single threads) of which per square inch, counting warp and filling, is not less than 240 and not more than 340, and in which the thread count of either the warp or filling does not exceed 60 percent of the total thread count of the warp and filling.

Imported fabrics falling within this description are currently dutiable at various ad valorem rates that range from 27.85 to 47.5 percent, depending on the average yarn number and whether unbleached, bleached, or colored. In addition, a specific rate of 5 cents per pound is applied to all fabrics containing yarns the average number of which is 60 or higher (table 1).

Based on imports in the first 6 months of 1964, the average ad valorem equivalent of the duties applicable to unbleached broadwoven cotton typewriter-ribbon cloth was 35.5 percent. ^{1/} The average specific equivalent of the duties was approximately 12 cents per square yard. The following tabulation shows, by groups of average yarn numbers of the fabric, the percentage distribution of the imports of unbleached broadwoven cotton typewriter-ribbon cloth in January-June 1964 and the average ad valorem equivalents of the applicable duties:

Average yarn number	Percent of total quantity imported	Average ad valorem equivalent Percent
51 to 59-----	39.8	29.3
60 to 89-----	40.7	36.4
90 to 140-----	19.5	43.5
:	:	:

^{1/} All of the imports during the first 6 months of 1964 consisted of unbleached cloth.

U.S. Consumption

Cotton typewriter-ribbon cloth is the principal material used in ribbons for cash registers, addressographs, adding machines, printing calculators, billing machines, and similar equipment, as well as for nonelectric typewriters. The apparent annual consumption of cotton fabrics for these uses has been fairly stable in recent years, ranging between 7 million and 8 million square yards annually since 1956 (table 2).

Ribbons of materials other than cotton, such as nylon and carbon-type ribbons, are utilized in recently developed markets in which cotton ribbons have never been important. Such uses include ribbons for electric typewriters, data-processing equipment, and photographic-reproduction equipment. Information on the domestic consumption of these other ribbon materials is not available; however, data supplied to the Tariff Commission indicate that U.S. production has risen sharply in recent years. For example, the annual domestic output of broadwoven nylon typewriter-ribbon cloth increased from 6.0 million square yards in 1962 to 6.5 million in 1963; in the first 6 months of 1964 it was 3.8 million square yards, compared with about 3.4 million in the first 6 months of 1963 (table 3). The U.S. output of carbon-type ribbons has also increased sharply in recent years, rising from 14.2 billion linear feet in 1962, to 15.8 billion linear feet in 1963; in the first 6 months of 1964, production of such ribbons amounted to 9.6 billion linear feet, compared with 7.7 billion in the like period of 1963.

The annual output of broadwoven silk typewriter-ribbon fabric declined from about 1.7 million square yards in 1961 to 1.5 million in 1962, and to approximately 1.0 million square yards in 1963. The sharp decline in production in 1962 and 1963 was attributable chiefly to the rising prices of raw silk. After prices of raw silk turned downward in late 1963, production increased, amounting to about 1.0 million square yards in the first 6 months of 1964, compared with 0.4 million square yards in the like period of 1963.

U.S. Producers

Five firms in the United States manufactured broadwoven cotton typewriter-ribbon cloth in the first 6 months of 1964; however, two of them produced only negligible quantities. 1/ One of the principal producers operates numerous plants, but it produces broadwoven cotton typewriter-ribbon cloth in only one of them. None of the five plants are engaged solely in the production of this cloth; all of them derive the major part of their income from the production and sale of other fine-woven cotton fabrics.

The modifications of the trade-agreement concessions in 1960 were followed by a pronounced change in the structure of the industry.

1/ The five firms were Joanna Cotton Mills, Joanna, S.C.; J.P. Stevens & Co., Inc., Whitmire Plant, Whitmire, S.C.; Baltic Mills, Baltic, Conn.; Ponemah Mills, Division of The Aberfoyle Manufacturing Co., Taftville, Conn.; and Warwick Mills, West Warwick, R.I. * * *

The portion of total domestic production supplied by the three New England mills declined sharply from 1960 to 1963, while that of the Southern mills increased. This trend continued in the first 6 months of 1964; currently the Southern mills account for the bulk of domestic output.

* * * * *

U.S. Production, Sales, Inventories, and Exports

Following the increase in 1960 in the rates of duty applicable to broadwoven cotton typewriter-ribbon cloth, U.S. production increased sharply from 2.6 million square yards in 1960 to 7.0 million square yards in 1962 (table 3). In 1963, production dropped to 4.5 million square yards, 36 percent below the 1962 level. In the first 6 months of 1964, output was 1.9 million square yards, which was about 27 percent below the 2.6 million square yards produced in the like period of 1963.

Notwithstanding the drop in output that began in 1963, sales of domestically produced fabric have remained stable, since producers have drawn on large inventories accumulated in 1961 and 1962. Such sales totaled 5.2 million square yards, valued at \$3.0 million, in 1962 and about the same amount, valued at \$2.5 million, in 1963 (table 4). In the first 6 months of 1964 they amounted to 2.8 million square yards, valued at \$1.3 million, compared with 2.9 million square yards, valued at \$1.4 million, in the first 6 months of 1963.

* * * * *

Producers' inventories of typewriter-ribbon cloth declined from 2.6 million square yards at the end of 1962 to 1.9 million square yards at the end of 1963 (table 5). At the end of June 1964 they were 1.1 million square yards, the smallest since the end of 1961.

Data concerning exports of domestically produced broadwoven cotton typewriter-ribbon cloth are not available; however, such exports are believed to have been of minor significance. A small quantity of imported cloth is exported with benefit of drawback of customs duties, chiefly to countries in the Western Hemisphere.

U.S. Imports

U.S. imports of broadwoven cotton typewriter-ribbon cloth declined from 3.3 million square yards in 1962 to 2.1 million in 1963; they amounted to 0.3 million square yards in the first 6 months of 1964, marking a sharp drop from the 1.2 million square yards imported in the comparable period of 1963 (table 6). In January-June 1964 all such imports were from Japan and the Netherlands. The ratio of imports to domestic consumption declined from 42 percent in 1962 to 29 percent in 1963, and to 8 percent in the first 6 months of 1964 (table 2).

In 1962, imports of typewriter-ribbon cloth exceeded domestic sales of imported fabric by almost 800,000 square yards (table 2). Both imports and sales of imported cloth were smaller in 1963 than

in 1962, and the inventories accumulated in 1962 were not liquidated in 1963. In the first 6 months of 1964, however, imports of broad-woven cotton typewriter-ribbon cloth were much smaller than sales of imported cloth, and inventories in the hands of importers were reduced sharply. Domestic sales of imported cotton typewriter-ribbon cloth amounted to about 2.5 million square yards in 1962, 2.0 million in 1963, and 1.3 million in the first 6 months of 1964. Sales by importers as a percent of apparent domestic consumption declined from 32 percent in 1962 to 27 percent in 1963. They rose to 31 percent of consumption in the first half of 1964 notwithstanding that imports were much lower in the first half of 1964 than in either half of 1963.

The average foreign unit value of imports declined from 38.2 cents per square yard in 1962 to 36.8 cents in 1963 and to 33.7 cents in the first 6 months of 1964 (table 6).

The Japanese Government controls exports of cotton typewriter-ribbon cloth to the United States--along with other cotton products--under the provisions of article 4 of the Geneva Long-Term Arrangements Regarding International Trade in Cotton Textiles. The limitation on exports of Japanese typewriter-ribbon cloth was 987,000 square yards in 1963, and is 1,016,610 square yards in 1964. * * * Although restrictions have not been placed on exports of cotton typewriter-ribbon cloth from other supplying countries, the United

* * * * *

States may take action to restrain trade under article 3 of the agreement--if imports from these countries disrupt the U.S. market. 1/

Employment

The average number of production and related workers employed (on all products) in mills producing cotton typewriter-ribbon cloth was approximately 3,000 in 1962, and remained at about that level in 1963 and the first 6 months of 1964. Data pertaining to the man-hours worked in the production of cotton typewriter-ribbon cloth are not available for all producers; however, reports by three firms which account for the great bulk of domestic production show that man-hours worked by production and related workers in the manufacture of cotton typewriter-ribbon cloth declined by 26 percent from 1962 to 1963, and was 38 percent lower in the first 6 months of 1964 than in the like period of 1963. The percentage decline in man-hours worked was greater than the percentage decline in production during this period, indicating an increase in output per man-hour. The man-hours worked by production and related workers in the manufacture of cotton typewriter-ribbon cloth was 13 percent of the total man-hours worked by production and related workers in these mills in 1962, 10 percent in 1963, and 9 percent in the first 6 months of 1964.

1/ Jamaica, Israel, the Philippine Republic, Portugal, Egypt, the Nansei-Nanpo Islands, Taiwan, Greece, and Turkey, although not historically exporters of typewriter-ribbon cloth, are already subject to ceilings, pursuant to bilateral agreements under the long-term arrangements.

Prices and Value of Sales

The liquidation of inventories of domestically produced broad-woven cotton typewriter-ribbon cloth beginning in 1962 was accompanied by a general decline in the selling prices of such fabric. The reduction in prices is indicated by a decline in the average unit value of sales by domestic producers from 56.6 cents per square yard in 1962 to 47.4 cents in 1963, and to 45.6 cents in the first 6 months of 1964 (table 4).

* * * * *

Prices of imported fabric also declined in 1963 from those of 1962 as importers attempted to liquidate inventories. Changes in the prices of both domestic and imported cloth, however, were much smaller from August 1963 to June 1964 than in the year August 1962 to August 1963.

Composite indexes of prices received for major constructions of domestic and imported cotton typewriter-ribbon fabric in the period August 1, 1962, to June 15, 1964, are shown in the following tabulation (August 1962 = 100):

Year and month	Domestic fabric	Imported fabric
1962: August-----	100.0	100.0
1963:		
February-----	95.5	93.6
August-----	93.0	92.2
1964:		
February-----	91.6	92.0
June-----	90.8	92.4

Appendix

Table 1.--Broadwoven cotton typewriter-ribbon cloth: U.S. rates of duty provided for in the Tariff Schedules of the United States (TSUS), ^{1/} effective Aug. 31, 1963

TSUS item	TSUS appendix item	Articles	Statutory rate ^{2/}	Trade-agreement rate ^{3/}	Escape-action rate ^{4/}
320.51-		Woven fabrics, wholly of cotton, suitable for making typewriter ribbon, containing yarns the average number of which exceeds No. 50 but not No. 140, the total thread count (treating: ply yarns as single threads) of which: per square inch, counting warp and filling, is not less than 240 and not more than 340, and in which the thread count of either the warp or filling does not exceed 60 percent of the total thread count of the warp and filling:			
320.92	922.01		10% ad val. + 0.35% ad val. for each number. ^{5/}	7.5% ad val. + 0.25% ad val. for each number. ^{5/}	10% ad val. + 0.35% ad val. for each number. ^{5/}
	922.02 (pt.)	Of numbers 60 to 79-----	10% per lb. + 10% ad val. + 0.35% ad val. for each number. ^{5/}	5¢ per lb. + 7.5% ad val. + 0.25% ad val. for each number. ^{5/}	5¢ per lb. + 10% ad val. + 0.35% ad val. for each number. ^{5/}
	922.02 (pt.)	Of numbers 80 to 89-----	10¢ per lb. + 41.5% ad val. ^{5/}	5¢ per lb. + 27.5% ad val. ^{5/}	5¢ per lb. + 10% ad val. + 0.35% ad val. for each number. ^{5/}
	922.03	Of numbers 90 to 140-----	10¢ per lb. + 41.5% ad val. ^{5/}	5¢ per lb. + 27.5% ad val. ^{5/}	5¢ per lb. + 10% ad val. + 0.35% ad val. for each number. ^{5/}
321.51-	922.04	Bleached, but not colored-----	Base rate (see rates for items 922.01-922.03 above) + 3% ad val.	Base rate (see rates for items 922.01-922.03 above) + 2.5% ad val.	Base rate (see rates for items 922.01-922.03 above) + 3% ad val.
321.92					
322.51-	922.05	Colored, whether or not bleached-----	Base rate (see rates for items 922.01-922.03 above) + 6% ad val.	Base rate (see rates for items 922.01-922.03 above) + 4.5% ad val.	Base rate (see rates for items 922.01-922.03 above) + 6% ad val.
322.92					

^{1/} Prior to Aug. 31, 1963, broadwoven cotton typewriter-ribbon cloth was dutiable under par. 904 of the Tariff Act of 1930.

^{2/} Statutory rates apply to products of Cuba, which has been declared by the Congress to be Communist dominated or controlled, and to products of countries or areas which have been designated by the President as being under Communist domination or control. See sec. 401 of the Tariff Classification Act of 1962 and secs. 231 and 257(e) of the Trade Expansion Act of 1962.

^{3/} The trade-agreement rates which would apply, if it were not for the escape-clause action, to products of all countries except those products subject to statutory rates and except Philippine products which receive preferential treatment.

^{4/} These rates were established by Presidential proclamation pursuant to the escape-clause procedure. For some fabrics these rates are the same as the statutory rates, whereas for others they are lower.

^{5/} None of the aggregate ad valorem rates of duty or the aggregate ad valorem parts of a compound rate of duty shall be less than the equivalent of 0.55 cent per number per pound.

^{6/} None of the aggregate ad valorem rates of duty or the aggregate ad valorem parts of a compound rate of duty shall be less than the equivalent of 0.3 cent per number per pound.

Table 2. Broadwoven cotton typewriter-ribbon cloth: U.S. production and sales of domestic cloth, imports and sales of imported cloth, and apparent domestic consumption, 1955-63 and January-June 1964

Period	Domestic cloth			Imported cloth			Ratio to domestic consumption of--		
	Production	Sales	Imports	Domestic sales 1/	Apparent domestic consumption 2/	Imports	Imports	Sales of imported cloth	
	1,000 square yards	1,000 square yards	1,000 square yards	1,000 square yards	1,000 square yards	Percent	Percent	Percent	
1955	5,018	4,717	4,363	3/ 4,324	9,041	48	48	48	
1956	3,829	3,845	4,938	4,742	8,587	58	58	55	
1957	3,835	3,258	3,151	3,711	6,969	45	45	53	
1958	3,796	3,391	3,739	3,856	7,247	52	52	53	
1959	2,911	3,365	4,931	4,458	7,823	63	63	57	
1960	2,567	3,257	4/	4/	4/	4/	4/	4/	
1961	4,847	4,482	3,309	7/ 3,040	7,522	44	44	40	
1962	5/ 6,998	5/ 5,220	6/ 3,260	7/ 2,472	5/ 7,692	42	42	32	
1963	4,496	5,245	6/ 2,118	7/ 1,980	7,225	29	29	27	
1964 (January-June)	1,944	2,778	6/ 325	7/ 1,267	4,045	8	8	31	

1/ Excludes sales of cloth imported for consumption and subsequently exported with benefit of drawback.

2/ Sales of domestically produced fabric plus domestic sales of imported fabric.

3/ Estimated.

4/ Not available.

5/ Revised.

6/ Preliminary.

7/ Estimated, based on domestic sales reported by U.S. importers accounting for the bulk of total imports.

Source: Domestic production and sales compiled from information supplied the U.S. Tariff Commission by producers; quantity of imports for 1961-64 compiled from official statistics of the U.S. Department of Commerce; quantity of imports for 1955-59 and sales of imported cloth for all years compiled from information supplied by U.S. importers.

Table 3.--Typewriter-ribbon materials: U.S. production, by kinds, 1955-63 and January-June of 1962, 1963, and 1964

Period	Broadwoven typewriter-ribbon fabric of--			Carbon-type ribbons
	Cotton	Nylon	Silk	
	<u>1,000 square yards</u>	<u>1,000 square yards</u>	<u>1,000 square yards</u>	<u>Millions of linear feet</u>
1955-----	5,018	726	989	3,453
1956-----	3,829	920	1,114	4,998
1957-----	3,835	1,497	1,356	5,510
1958-----	3,796	1,541	1,209	6,457
1959-----	2,911	1,835	1,529	7,347
1960-----	2,567	2,265	1,673	8,868
1961-----	4,847	<u>1/</u> 5,198	<u>1/</u> 1,707	12,391
1962-----	<u>1/</u> 6,998	<u>1/</u> 6,032	<u>1/</u> 1,515	14,247
1963-----	4,496	6,516	982	15,813
January-June--				
1962-----	3,755	2,979	859	6,665
1963-----	2,575	3,423	426	7,710
1964-----	1,944	3,794	1,028	9,553

1/ Revised.

Source: Compiled from data supplied the U.S. Tariff Commission by domestic producers.

Table 4.--Broadwoven cotton typewriter-ribbon cloth: Sales by U.S. producers, 1955-63 and January-June of 1962, 1963, and 1964

Period	Quantity	Value ^{1/}	Average
	<u>1,000</u>	<u>1,000</u>	<u>Cents</u>
	<u>square</u>	<u>dollars</u>	<u>per square</u>
	<u>yards</u>	<u>yard</u>	
1955-----	4,717	2,865	60.7
1956-----	3,845	2,338	60.8
1957-----	3,258	1,906	58.5
1958-----	3,391	1,939	57.2
1959-----	3,365	1,917	57.0
1960-----	3,257	1,799	55.2
1961-----	4,482	2,572	57.4
1962-----	^{2/} 5,220	^{2/} 2,953	^{2/} 56.6
1963-----	5,245	2,488	47.4
January-June--			
1962-----	2,914	1,620	55.6
1963-----	2,936	1,435	48.9
1964-----	2,778	1,267	45.6

^{1/} Net sales value, f.o.b. point of shipment.

^{2/} Revised.

Source: Compiled from data supplied the U.S. Tariff Commission by domestic producers.

Table 5.--Broadwoven cotton typewriter-ribbon cloth: U.S. producers' inventories, production, and sales, 1955-63 and January-June of 1962, 1963, and 1964

Period	Inventories at end of period <u>1/</u>	Produc- tion	Sales	Ratio of inventories to--	
				Production	Sales
	<u>1,000</u> <u>square</u> <u>yards</u>	<u>1,000</u> <u>square</u> <u>yards</u>	<u>1,000</u> <u>square</u> <u>yards</u>	<u>Percent</u>	<u>Percent</u>
1955-----	896	5,018	4,717	18	19
1956-----	880	3,829	3,845	23	23
1957-----	1,457	3,835	3,258	38	45
1958-----	1,862	3,796	3,391	49	55
1959-----	1,408	2,911	3,365	48	42
1960-----	718	2,567	3,257	28	22
1961-----	962	4,847	4,482	20	21
1962-----	<u>2/</u> 2,567	<u>2/</u> 6,998	<u>2/</u> 5,220	37	<u>2/</u> 49
1963-----	1,913	4,496	5,245	43	36
January--					
June-----					
1962-----	<u>3/</u> 1,808	3,755	2,914	<u>4/</u>	<u>4/</u>
1963-----	<u>3/</u> 2,186	2,575	2,936	<u>4/</u>	<u>4/</u>
1964-----	<u>3/</u> 1,083	1,944	2,778	<u>4/</u>	<u>4/</u>

1/ The reported inventory may vary slightly from the inventory derived by adding beginning inventories and production, and deducting sales.

2/ Revised.

3/ Inventories reported by manufacturers as of June 30.

4/ Ratios are not meaningful based on data for 6 months.

Source: Compiled from data supplied the U.S. Tariff Commission by domestic producers.

Table 6.--Broadwoven cotton typewriter-ribbon cloth: U.S. imports for consumption, 1955-63 1/ and January-June of 1962, 1963, and 1964

Period	Quantity	Foreign value	Average unit value
	<u>1,000</u> <u>square</u> <u>yards</u>	<u>1,000</u> <u>dollars</u>	<u>Cents per</u> <u>square</u> <u>yard</u>
1955-----	4,363	1,934	44.3
1956-----	4,938	2,176	44.1
1957-----	3,151	1,396	44.3
1958-----	3,739	1,588	42.5
1959-----	4,931	1,907	38.7
1961-----	3,309	1,300	39.3
1962 <u>2/</u> -----	3,260	1,245	38.2
1963 <u>2/</u> -----	2,118	779	36.8
January-June--			
1962 <u>2/</u> -----	1,492	575	38.5
1963 <u>2/</u> -----	1,229	461	37.5
1964 <u>2/</u> -----	325	110	33.7

1/ Data for 1960 are not available.

2/ Preliminary.

Source: Data for the period 1955 to 1959, compiled from information supplied the U.S. Tariff Commission by importers during the escape-clause investigation under sec. 7 of the Trade Agreements Extension Act of 1951, as amended, in 1960; imports of cotton typewriter-ribbon cloth were not separately classified before September 1960. Data for 1961-63 and January-June of 1962, 1963, and 1964, compiled from official statistics of the U.S. Department of Commerce.

Note.--Several entries included in the official statistics for 1962 were found by invoice analysis to be misclassified as cotton typewriter-ribbon cloth. The small quantities involved were deducted from the 1962 official statistics.

