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**UNITED STATES TARIFF COMMISSION**

**UMBRELLAS AND METAL PARTS THEREOF**

**Report to the President on Investigation No. TEA-I-17 Under  
Section 301 (b) of the Trade Expansion Act of 1962**



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Note.--The whole of the Commission's report to the President, including the statistical appendix, may not be made public since it contains certain information that would result in the disclosure of the operations of individual concerns. 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  
August 26, 1970

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 an investigation made under section 301(b)(1) of that Act.

Following receipt of a petition filed by the Umbrella Frame Association of America, which represents the two domestic producers of umbrella frames, the United States Tariff Commission, on March 11, 1970, instituted an investigation under section 301(b)(1) of the Trade Expansion Act of 1962 to determine whether--

Umbrellas and metal parts thereof, provided for in items 751.05 and 751.20 of the Tariff Schedules of the United States (TSUS)

are, as a result in major part of concessions granted thereon under trade agreements, being imported into the United States in such increased quantities as to cause, or threaten to cause, serious injury to the domestic industry or industries producing like or directly competitive products.

Public notice of the institution of the investigation and of a public hearing to be held in connection therewith was given in the Federal Register of March 17, 1970 (35 F.R. 4682) and in the April 1, 1970 issue of Customs Decisions. The hearing was held on June 2, 1970, and all interested parties were afforded opportunity to be present, to produce evidence, and to be heard.

Since the late 1950's, the Commission has completed three investigations on umbrella frames and/or umbrellas under provisions of U.S.

trade agreements legislation. The first investigation was conducted under the "escape clause" provisions of section 7 of the Trade Agreements Extension Act of 1951. On January 14, 1958, a majority of the Commissioners found that the domestic industry producing umbrella frames was being seriously injured within the terms of the escape-clause provision, and recommended that the rate of duty applicable to umbrella frames valued at not over \$4.00 per dozen be increased from 30 percent to 60 percent ad valorem. On August 11, 1958, the Commission transmitted a supplemental report in response to a request from the President for further information. On September 30, 1958, the President announced his decision not to approve the Commission's recommendation. 1/

The second investigation (TEA-225(b)-18) was conducted under section 225(b) of the Trade Expansion Act of 1962, at the request of the President in preparation for the Kennedy Round. On April 22, 1964, the Commission found that economic conditions in the domestic umbrella frame industry had not substantially improved since 1958. As a result of that finding, umbrella frames were reserved from the Kennedy Round of tariff negotiations.

The third investigation (TEA-I-6), conducted under section 301(b)(1) of the Trade Expansion Act of 1962, covered umbrellas and parts of umbrellas (except handles). On September 1, 1964, the

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1/ In response to petitions, the Commission instituted separate escape-clause investigations of umbrella frames and umbrellas on June 7, 1961. At the request of the applicants, both investigations were discontinued and dismissed, without prejudice, on September 21, 1961.

Commission found that those articles were not, as a result in major part of trade-agreement concessions, being imported into the United States in such increased quantities as to cause, or threaten to cause, serious injury to the domestic industry or industries producing like or directly competitive products.

#### Findings of the Commission

On the basis of its investigation, the Commission finds (Commissioner Leonard dissenting) that umbrellas and metal parts thereof, provided for in items 751.05 and 751.20 of the Tariff Schedules of the United States, are not, as a result in major part of concessions granted under trade agreements, being imported into the United States in such increased quantities as to cause, or threaten to cause, serious injury to the domestic industry producing like or directly competitive articles.

### Considerations Supporting the Commission's Findings

In the Commission's judgment, the criteria established by section 301(b) of the Trade Expansion Act of 1962 respecting petitions by domestic producers for increased import restrictions have not been met in the case at hand. We have, therefore, made a negative determination.

This investigation was instituted on petition of an association representing the two remaining producers of umbrella frames in the United States. The economic condition of the domestic industry producing umbrella frames has unquestionably deteriorated severely. Five domestic concerns were producing umbrella frames in the mid-1950's, while only two currently do so. U.S. output of umbrella frames has declined sharply in recent years; it amounted to less than \* \* \* dozen frames in 1969, while it had exceeded \* \* \* dozen frames in 1967 and most earlier years. Meanwhile, the financial condition of the two remaining domestic manufacturers of umbrella frames has in recent years worsened. \* \* \*

\* \* \* \* \*

By any measure, the domestic industry has been seriously injured, and the injury has occurred during a period of increasing imports of umbrellas and umbrella frames. After careful consideration of all the circumstances relating to imports of umbrellas and umbrella frames, however, we must conclude that the increased imports have not been caused in major part by trade-agreement concessions. The Commissioners making up the majority in this investigation have historically applied different tests to reach their determination on this issue. Commissioners Clubb and Moore, on the one hand, have applied the "but for"



test under which increased imports are judged to result in major part from trade-agreement concessions if such imports would not have been at substantially their present level in the absence of trade-agreement concessions; Commissioner Sutton, on the other hand, tried to weigh the possible causes of increased imports in a particular case and reached his conclusions in the light of historical developments respecting them. In this investigation, each Commissioner applied the test he traditionally has used, and all have concluded that the concessions have not been the major factor causing the increased imports.

Commissioner Sutton found in the 1964 escape-clause investigation of umbrellas and umbrella frames that such increased imports as had occurred to that time were not the result in major part of trade-agreement concessions; he and the other Commissioners then in office concluded that the concessions which had been placed in effect in 1950 and 1951 could not have been a significant cause of any increased imports in the early 1960's. No further trade-agreement concessions having been granted since the 1964 investigation, Commissioner Sutton has reached the same conclusion in the case at hand.

Commissioners Clubb and Moore have concluded that because of the wide disparity in prices between the imported umbrellas and those domestically produced, even the imposition of the 1930 rates of duty would not have substantially affected U.S. imports of umbrellas (which have provided the bulk of the import competition to the domestic frame producers). Based on data for imports in 1969, the average wholesale price for imported umbrellas at the current

trade-agreement rates of duty was approximately \$17 per dozen; it would have been about \$21 per dozen had the 1930 rates of duty applied. In comparison, the average wholesale price of domestically produced umbrellas was about \$38 per dozen. The difference in average prices between the imported and domestic product, of course, may reflect substantial differences in quality. It is apparent, nonetheless, that the elimination of all trade-agreement concessions on umbrellas would do little to permit the domestic producers to compete in price with the imported article. This view was concurred in by domestic producers of umbrellas at the hearing before the Commission; they testified that only quotas that would directly limit the quantity imported would benefit them. 1/ Commissioners Clubb and Moore have concluded that imports would be at substantially their present level in the absence of trade-agreement concessions and, consequently, that the "but for" test has not been met. They have decided, therefore, that the increased imports have not resulted in major part from trade-agreement concessions.

Since the criteria established by the Trade Expansion Act have not fully been satisfied, we must determine in the negative.

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1/ Transcript of hearing, pp. 43, 107.

## Dissenting Statement of Commissioner Leonard

The Commission instituted the instant investigation on request of the two existing domestic producers of umbrella frames. In my view, the industry in the United States here under consideration is the umbrella frame industry, and the imports of primary concern are the imports of umbrellas.

U.S. imports of both umbrellas and umbrella frames are much larger today than in the period before trade-agreement concessions were granted on them. Annual U.S. imports of umbrellas, however, have increased far more than imports of umbrella frames, and today annual imports of umbrellas are more than 10 times greater than those of frames.

Section 405(4) of the Trade Expansion Act of 1962 is relevant to the circumstances here. The section provides:

An imported article is "directly competitive with" a domestic article at an earlier or later stage of processing, and a domestic article is "directly competitive with" an imported article at an earlier or later stage of processing, if the importation of the imported article has an economic effect on producers of the domestic article comparable to the effect of importation of articles in the same stage of processing as the domestic article.

U.S. imports of umbrellas have an economic effect on producers of umbrella frames comparable to the effect of imports of the frames. Entries of umbrellas have limited U.S. production of the finished article and, in turn, affected the domestic demand for umbrella frames. In so doing, the domestic producers of the frames have been adversely affected, as though umbrella frames rather than umbrellas had been imported. Section 405(4) was intended specifically to permit the

assessment of injury caused by imports of a finished product (umbrellas) on the producers of the product at an earlier stage (umbrella frames). As provided by that section, I have considered in this investigation the effect of imports of umbrellas on the domestic umbrella frame industry.

Under section 301(b) of the Trade Expansion Act of 1962, the Commission must determine in this investigation whether:

1. Imports are increasing;
2. the increased imports are in major part the result of concessions granted under trade agreements;
3. the domestic industry producing an article which is like or directly competitive with the imported article is being seriously injured or threatened with serious injury; and
4. the increased imports have been the major factor in causing or threatening to cause the serious injury.

If all four of these criteria are met, then the Commission is to find the amount of the duty or other import restriction on the article necessary to prevent or remedy the injury.

I find that each of the criteria listed above has been met in this investigation.

#### Imports are increasing

The trend of U.S. imports of umbrellas has been upward for two decades. Average annual imports have increased as follows:

1950-54-----	114,000 dozen
1955-59-----	419,000 dozen
1960-64-----	480,000 dozen
1965-69-----	1,302,000 dozen

In recent years, moreover, imports of umbrellas have continued to rise, averaging 1.6 million dozen in 1968-69 compared with 1 million dozen in 1966. Entries in the period January-June 1970 were nearly 20 percent larger than imports in the corresponding period of 1969. Thus the first criterion is clearly met.

Imports are in major part the result of trade-agreement concessions

The statutory rate of duty provided in the Tariff Act of 1930 on imported umbrellas was 40 percent ad valorem. Pursuant to a trade-agreement concession granted thereon, the rate was reduced to 20 percent ad valorem, effective May 30, 1950. U.S. imports of umbrellas immediately began their long-term rise. Imports were negligible in the postwar years immediately preceding the reduction of the duty, 1946-49; they ranged from 1,000 dozen to 9,000 dozen annually in those years. With a 50-percent reduction in the rate of duty in effect, entries of umbrellas in 1950 jumped to 59,000 dozen; correspondingly steep increases in the importation of umbrellas occurred in subsequent years, with entries exceeding 100,000 dozen and eventually rising to many times that amount.

As I indicated in an earlier case, 1/ trade-agreement concessions need not be the sole cause of the increased imports, but the increased imports must result in major part from the concessions. The duty reduction must be an important consideration--as important as or more important than other considerations--in bringing about the increase in

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1/ Pianos and Parts thereof, TEA-I-14, Dec. 1969, p.10.

imports. In the instant case, the halving of the duty brought an immediate and considerable increase in imports and the realization on the part of foreign producers that the duty cut would make the United States a fertile long-term export market. The concession on umbrellas was an important consideration in creating a dramatic upturn in umbrella imports followed by a sustained growth of same. I am satisfied that the increased imports of umbrellas which have continued unabated since the trade-agreement concession are in major part the result of that trade-agreement concession.

The domestic industry is being seriously injured

The domestic industry producing umbrella frames is in serious economic straits. Production is down, firms have closed, productive facilities are idled, profit levels are low, employment has declined. U.S. production of umbrella frames, which amounted to 894,000 dozen in 1950, amounted to only \* \* \* dozen in 1969--a decline of nearly \* \* \* . The number of concerns comprising the industry declined from 5 in 1956 to 4 in 1957, 3 in 1964, and 2 in 1966. \* \* \*

\* \* \* \* \*

The ratio of net operating profits to net sales of frames for the two remaining domestic establishments declined from \* \* \* in 1965 to \* \* \* in 1969. \* \* \*

\* \* \* \* \*

The number of production and related workers engaged in making frames declined from an annual average of 433 during 1960-63 to \* \* \* in 1969.

If the import trend continues, it seems clear that umbrella frame production in the United States will virtually disappear.

In the light of the foregoing, only one conclusion is possible--the industry is being seriously injured.

Increased imports have been the major factor in causing serious injury

Finally, to find affirmatively under section 301(b) of the Trade Expansion Act of 1962, the increased imports must be the major factor in causing or threatening to cause serious injury. The increased imports must be an important consideration--as important as or more important than other considerations--in causing or threatening to cause serious injury to a domestic industry. 1/

During the recent period of severe import competition, the domestic industry has made extensive efforts to increase efficiency and reduce costs. Both existing plants utilize modern labor-saving machinery wherever possible. Despite these efforts, conditions in the industry deteriorated, although the market for umbrellas in the United States has greatly expanded. During 1965-69 average annual production of domestic umbrellas declined \* \* \* from that in the period 1960-64, while average annual consumption increased \* \* \*. Between the same two periods, imports increased by 171 percent, and the ratio of imports of umbrellas to consumption increased from \* \* \* in 1960-64 to \* \* \* in 1965-69.

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1/ Pianos and Parts Thereof, TEA-I-114, Dec. 1969, p.13.

Under these circumstances, it is evident that increased imports of umbrellas are the major factor causing serious injury to the domestic industry.

Remedy

The majority of the Commission has found in the negative and that determination is controlling. Since it would serve no purpose for me to find a remedy, I have not done so.



INFORMATION OBTAINED IN THE INVESTIGATION

Description and Uses

Umbrellas

Umbrellas are canopies of cloth, paper, or other material supported on a radiating frame which is collapsible around a supporting central shaft. The term "umbrella" refers not only to the common article used primarily for protection against the rain, but also to articles of the same description used as sun shades (e.g. parasols, beach or patio umbrellas, and tent umbrellas) or for decorative purposes. Rain umbrellas generally have canopies of cloth--cotton, silk, rayon, or nylon--and frames and rods of metal. They are made in a wide range of sizes, including--besides the usual men's, women's and children's sizes--large umbrellas for special uses, as by doormen or golfers. 1/

In the United States, umbrellas are manufactured predominately in plants using purchased parts and materials. In such plants, the principal operations performed by the manufacturer involve cutting and sewing the cloth and attaching it and the handle to the umbrella frame.

\* \* \* \* \*

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1/ Imports of miniature umbrellas (which usually contain ribs under 12 inches in length), such as those used as party favors or toys, are dutiable as toys and are not the subject of this investigation. However, some children's small and very inexpensive umbrellas and parasols with ribs exceeding 12 inches in length may have entered under TSUS item 751.05 and been sold for use as toys, etc. Such imports are negligible.

Most of the domestic producers of rain umbrellas also import such umbrellas as well as umbrella bases.

The manufacture of finished umbrellas is conducted partly by machine and partly by hand. Generally the cloth is cut and sewn by machine, and attached to the frame by hand. In some of the larger plants using modern equipment, however, the cloth cover is attached by machine; such machinery has little, if any, adaptability to the manufacture of other products.

Frequently, both the domestically produced and the imported umbrella bases are sold as such, without handles, after which the buyer may make separate arrangements concerning the type of handles to be attached. Generally the handle represents only a small portion of the cost of producing the finished umbrella, although for some women's umbrellas having expensive handles it may represent a substantial portion of the cost.

#### Metal parts of umbrellas

The metal umbrella parts to which this investigation relates consist of umbrella and parasol ribs and stretchers, whether or not in assembled frames, and rods (tubes) for umbrellas. Virtually all of these parts--whether domestic or imported--enter commerce in the form of assembled frames; hereinafter, therefore, they are referred to either as "umbrella frames" or simply as "frames".

The umbrella frame is the framework on which the cover, the rib tips, the ferrule, and the handle are assembled. An umbrella frame consists of the following parts: a central shaft, usually of steel or wood; from 7 to 16 ribs; an equal number of stretchers; a locking device on the shaft to hold the ribs in place when opened; and a runner (slide) attached to the stretchers but free to move along the shaft to open or close the umbrella. Central shafts made of steel are called "rods", those of wood are called "shanks". The aforementioned ribs are the long metal pieces to which the umbrella covering is attached. They are made of narrow steel strips and are usually fluted (forming a U-shaped cross section) and tempered to impart strength to the frame. Several types of umbrella frames incorporate special features, such as those for self-opening, self-closing, folding, and "windproof" umbrellas.

The component parts of an umbrella frame are produced largely by automatic or semiautomatic machinery. Such machinery consists primarily of specialized, single-purpose machines that cannot easily be adapted to the manufacture of other products. In the assembly of an umbrella frame, each rib is fitted with a stretcher by machine.

Umbrella frames, both domestic and imported, are made in many different sizes, and a number of colors or finishes; those for the more expensive types are plated while the less expensive models are painted. An umbrella frame is generally designated by the length and number of ribs. For example, one common size frame is designated as "19 x 16"; the first number refers to the combined length (in inches)

of the ribs and the rib tip of the finished umbrella; the second number refers to the number of ribs. Hence, a 19 x 16 frame is one having 16 ribs, each of which is somewhat less than 19 inches long.

Frames for women's umbrellas usually contain 8, 10, or 16 ribs ranging in finished length from 17 to 20 inches. Frames for men's umbrellas usually contain 7 to 10 ribs, 23 or more inches in length. The length of the ribs in other umbrellas ranges from 13 inches for children's umbrellas to 31 inches for golfers' umbrellas.

Domestic umbrella manufacturers have generally found the imported frames, most of which come from Japan, to be satisfactorily interchangeable with domestic umbrella frames. Collectively, therefore, imported umbrella frames are deemed to be like and directly competitive with those produced domestically.

#### U.S. Tariff Treatment

Imported umbrellas (and umbrella bases) are provided for under item 751.05 of the TSUS and are currently dutiable at 20 percent ad valorem. Under the Tariff Act of 1930, umbrellas were provided for in paragraph 1554 and were originally dutiable at 40 percent ad valorem. Pursuant to a concession initially negotiated with Italy under the General Agreement on Tariffs and Trade (GATT), the rate of duty was reduced, effective May 30, 1950, to the current rate.

Metal parts (including frames) of umbrellas are provided for under item 751.20 of the TSUS and are currently dutiable at 30 percent ad valorem. Under the Tariff Act of 1930, such parts were provided

for in paragraph 342 and were originally dutiable at 60 percent ad valorem. Pursuant to a concession initially negotiated under the GATT with Austria and West Germany, the rate of duty was reduced, effective October 1, 1951, to the current rate.

## U.S. Consumption

Umbrellas

U.S. apparent annual consumption 1/ of umbrellas more than \* \* \* between 1964 and 1968--from \* \* \* to \* \* \* --but declined by about \* \* \* in 1969 to \* \* \* (table 1). In contrast to the rapid increase in apparent annual consumption since 1964--\* \* \*--such consumption had been relatively stable during the 1955-63 period, ranging only from 1.0 to 1.4 million dozen and averaging 1.2 million dozen.

Consumer purchases of umbrellas are affected by various factors, one of the principal of which is the amount and frequency of rainfall.

\* \* \* \* \*

2/. Actual consumer purchases of umbrellas may also depend upon when the rain comes--i.e., day or night, on week days or weekends, during winter or summer--and the accuracy of weather forecasters in warning those going outdoors. Other major factors influencing the consumption of umbrellas include changes in rainwear fashions, the introduction of models with special new features in design (e.g. telescopic or folding frames), and regular demand to replace lost or worn umbrellas. The increased availability of lower priced umbrellas from Far Eastern countries has also probably stimulated consumption, particularly those purchases made on impulse by consumers caught in

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1/ Production plus imports; official statistics on U.S. exports of umbrellas since 1964 and data concerning year-end inventories held by producers and importers are not available. Although data on U.S. production of umbrellas are not available, the production of umbrellas may be approximated by using apparent U.S. consumption of umbrella frames.

2/ \* \* \* \* \*

a sudden shower.

Umbrellas are used more by women than by men; the following tabulation shows the types of rain umbrellas produced domestically and imported in 1969:

<u>Type of rain umbrellas</u>	<u>Production (percent)</u>	<u>Imports (percent)</u>
Women's-----	70	71
Men's-----	21	18
Children's-----	4	10
All other-----	<u>5</u>	<u>1</u>
Total-----	100	100

The consumption of parasols (umbrellas for protection from the sun) is very small relative to that of rain umbrellas.

#### Umbrella frames

The combined consumption of domestic and imported umbrella frames in the manufacture of umbrellas in the United States averaged \* \* \* \* \* annually during the period 1964-69, compared with an annual average of 707,000 dozen during 1960-63 and 767,000 dozen during 1954-59--a decline of \* \* \* \* \* from the annual average in the 1960-63 period and \* \* \* \* \* from that in 1954-59. Consumption of frames increased from \* \* \* \* \* in 1964 to \* \* \* \* \* in 1967 but declined thereafter to \* \* \* \* \* in 1968 and to \* \* \* \* \* --the lowest quantity consumed in many years--in 1969 (table 2 \* \* \* \* \* ).

## U.S. Producers

Umbrellas

There are currently between 30 and 35 companies manufacturing umbrellas in the United States. About 25 of these concerns are located in the New York City area, 2 in Philadelphia, and 1 each in Baltimore, Toledo, Detroit, and Portland, Oregon. Data are not available on the number of concerns that in recent years have entered or left the umbrella business. Very little capital is required to initiate umbrella production. Since 1954 a few small concerns have entered this business while considerably more have gone out of business. 1/

Most domestic umbrella manufacturers produce no other products. They do, however, sell umbrellas which they import directly (principally from Hong Kong and Japan) or buy from general importers and trading companies. An increasing share of their sales reportedly is accounted for by imports (table 3).

Umbrella frames

In 1954-56 five domestic concerns produced umbrella frames, and in 1957 four did so. At the time of the Commission's most recent previous investigation (TEA-I-6--Sept. 1, 1964), there were three concerns producing frames. Currently there are two frame producing concerns in operation, one with a plant located in New York City (Finkel Umbrella Frame Co., Inc.) and the other in Philadelphia (S.W. Evans

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1/ The U.S. Bureau of the Census reports that 138 concerns produced umbrellas, umbrella frames, and canes in 1954; in 1958 there were 120 and in 1963 (the latest year for which official data are available) there were 109 companies, operating 112 establishments of which 77 had less than 20 employees (table 12).



and Sons). Both concerns, although chiefly engaged in the manufacture of umbrella frames, also manufacture other products as well, including lawn furniture and metal stampings. 1/

## U.S. Production and Sales

Umbrellas

Data on the aggregate domestic production of umbrellas are not available. Estimated production of umbrellas (based on consumption of frames) increased from \* \* \* in 1964 to \* \* \* in 1967, declined to \* \* \* in 1968 and to \* \* \* in 1969 (table 1). 1/ Production of umbrellas averaged 707,000 dozen annually during 1960-63, the period covered by the most recent previous investigation.

Approximately 70 percent of the umbrellas produced in 1965-69 by firms reporting data to the Commission consisted of women's umbrellas; about 22 percent of the total were men's; and 5 percent were children's. The remainder consisted of clamp-on and of golf and door-men's umbrellas or sunshades. About two-fifths of the men's umbrellas produced had self-opening frames; less than one-tenth of the women's umbrellas had folding or telescopic frames

As noted previously, most producers sell both domestically produced and imported umbrellas; the latter may be imported either as bases or as finished umbrellas. The following tabulation, compiled from the data in table 3, shows that producers' sales in 1964-69 of umbrellas manufactured in domestic establishments declined substantially relative to their sales of imported umbrellas:

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1/ Production data for 1964-66 are understated to the extent they do not include the output of one frame producer that discontinued operations in 1966. Production by that company, however, is believed to have been small during 1964-66.

(Percent of producers' sales)

Year	Produced in domestic establish- ments	Imported bases to which handles were added	Imported wholly finished	Total
1964-----	92.7	3.4	3.9	100.0
1965-----	84.9	6.3	8.8	100.0
1966-----	82.3	10.0	7.7	100.0
1967-----	77.0	15.0	8.0	100.0
1968-----	63.5	20.2	16.3	100.0
1969-----	60.7	24.6	14.7	100.0

About 3 percent of the men's domestically produced umbrellas were sold in 1969 for \$25 or less per dozen; 22 percent were sold at prices ranging from \$25 to \$32 per dozen; 26 percent from \$32 to \$43; and the remaining 49 percent at more than \$43 (table 4). About 1 percent of women's domestic umbrellas were sold at prices ranging from \$9 to \$17 per dozen; 10 percent from \$17 to \$23 per dozen; 31 percent from \$23 to \$30 per dozen and 58 percent at over \$30.

Department stores constituted a market for about 52 percent of producers' sales of domestic umbrellas in 1969. Other important outlets were chain stores other than chain department stores (23 percent), and specialty shops (15 percent) (table 5).

#### Umbrella frames

U.S. production of umbrella frames increased annually from \* \* \* \* \* in 1964 to \* \* \* \* \* in 1967 but declined thereafter and amounted to \* \* \* \* \* in 1969. Such production averaged about 650,000 dozen annually during 1960-63. (As previously stated, the data for 1964-66

are slightly understated as data for one company which discontinued operations in 1966 were not available.)

Data on the sales of umbrella frames, as obtained from the two remaining producers by the questionnaires, are believed to be sufficiently comprehensive to be representative of the industry's experience during the period 1965-69. [ \* \* \* \* \* ]

Sales of frames by these producers increased from \* \* \* in 1965 to \* \* \* in 1966, then declined annually to \* \* \* in 1969. The value of sales of frames increased from \* \* \* in 1965 to \* \* \* in 1967, declined to \* \* \* in 1968, and to \* \* \* in 1969. The average annual value of sales of frames during 1960-63 was about \$3.5 million (nearly \* \* \* greater than the 1965-69 annual average). The aggregate value of sales of parts of umbrella frames (which averaged \* \* \* annually during the period 1965-69) increased from \* \* \* in 1965 to \* \* \* in 1966 but declined each year thereafter; in 1969 the value of such sales was \* \* \*.

\* \* \* \* \*

## U.S. Imports

Importers

In 1969 more than 100 concerns imported umbrellas and/or umbrella frames; almost all of these importers, including producer-importers, are located in the New York City area. Partial returns to the Commission's questionnaires indicate that about 19 percent of the umbrellas imported in 1969 were entered directly by domestic producers of umbrellas; in 1967 about 12 percent were imported directly by producers.

1/ The bulk of the imports, however, were entered by general importers or import trading companies that deal in a variety of goods. Umbrella frames are, of course, imported by umbrella producers or for their account.

Umbrellas

Trend of imports.--U.S. imports of umbrellas (including umbrella bases) increased steadily from 498,000 dozen in 1964 to 1,695,000 dozen in 1968, but declined to 1,578,000 dozen in 1969 (table 6). In 1950, imports of umbrellas were equivalent to 7 percent of domestic consumption; the ratio had increased to 55 percent by 1959, and to \* \* \* by 1969.

Imports of umbrellas were valued at \$3.8 million in 1964 and increased each subsequent year through 1969, when they were valued at \$14.0 million. Imports of umbrellas increased during the first 6 months of 1970--19 percent, in terms of quantity, and 37 percent, in

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1/ Inasmuch as importers reported that umbrella manufacturers constituted the largest single outlet for their sale of finished umbrellas in 1969, it is estimated that 35 to 40 percent of the umbrellas imported (including umbrella bases) went either directly or indirectly to domestic producers of umbrellas for resale.

terms of value, over the corresponding period in 1969. Umbrellas are imported in all types and sizes and in a wide range of quality and price, and compete directly with those produced in the United States.

Imported umbrellas and bases have consisted predominately of women's umbrellas. According to data submitted by importers, approximately 71 percent of the imports in 1969 were women's umbrellas, about 18 percent consisted of men's umbrellas, and less than 10 percent were children's umbrellas. By comparison, in 1969 about 70 percent of the domestic production consisted of women's umbrellas, 21 percent of men's, 4 percent of children's, and the remainder of clamp-on and other types of umbrellas. Somewhat more than half of the imports consisted of umbrella bases, the remainder of finished umbrellas. Over three-fourths of the imported men's umbrellas and umbrella bases had self-opening frames; about one-seventh of the women's umbrellas and bases had folding or telescopic frames (the corresponding figures for domestic production in 1969 were two-fifths and one-fourteenth). (Table 8).

Supplying countries.--Since the late 1940's Japan has been the principal supplier of umbrellas, and in every year from 1950 through 1961, it was the source of over 90 percent of U.S. imports. In 1962 and 1963, however, the share of imported umbrellas supplied by Japan declined to 83 and 68 percent respectively; Hong Kong supplied 30 percent of the umbrellas imported in 1963. For the period 1964-69 Japan supplied 50 percent of the quantity and 63 percent of the value, while Hong Kong supplied 42 percent of the quantity and 25 percent of the value.

In 1969 the umbrellas imported from Japan and Hong Kong had an average unit value of \$11.82 and \$4.84 per dozen, respectively, while corresponding unit values for imports from the United Kingdom and Canada were \$48.61 and \$42.90 per dozen, respectively. Although the average unit value of imports from the Republic of China and the Republic of Korea, are even less than those entered from Japan, combined imports from these two countries in 1969 amounted to less than one-fourth the volume entered from Japan. (Table 6).

Sales by importers.--Importers reported selling about 38 percent of their umbrellas in 1969 to domestic umbrella manufacturers and 26 percent to chain stores (other than chain department stores). Other major outlets included wholesalers, jobbers, and distributors--14 percent, department stores--12 percent, and specialty shops (including men's and women's clothing stores)--7 percent. (Table 5).

In 1969, sales of men's imported finished umbrellas by non-producers were concentrated in the wholesale price range of \$25.00 or less per dozen (table 4). About four-fifths of such imports fell within this range. Most of the remainder were sold at prices ranging between \$25 and \$32 per dozen. By comparison, only about one-fourth of the men's domestically produced umbrellas were sold within the wholesale price range of \$32 or less per dozen.

The women's imported umbrellas were generally sold at wholesale prices lower than those for men's umbrellas. In 1969 almost one-third were sold (by non-producers) at \$9 or less per dozen; over two-fifths were sold at prices ranging between \$9 and \$17 per dozen, and about

one-fourth at prices between \$17 and \$30 per dozen. By comparison, producers reported no sales of women's domestically produced umbrellas for \$9 or less per dozen; over one-half of domestic production sold at a wholesale price of over \$30 per dozen.

Umbrella frames and metal parts

Imports of umbrella frames increased from 116,000 dozen in 1964 to 150,000 dozen in 1968, but declined to 126,000 dozen in 1969. Imports of umbrella frames were valued at \$404,000 in 1964; the value declined in 1965 but increased during the next 3 years to \$621,000 in 1968. Imports of frames in 1969 were valued at \$523,000. For the first 6 months of 1970, imports of frames were 63 percent less, in terms of quantity, and 56 percent less, in terms of value, than for the corresponding period in 1969 (table 9 & 10). 1/

Imports of umbrella frames, which supplied 1 percent of apparent consumption of such articles in 1950, supplied from \* \* \* to \* \* \* of consumption in each year during the period 1957-67, but the share of consumption supplied by imports increased in 1968 and 1969 to \* \* \* and \* \* \* respectively. (Table 2).

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1/ In addition to metal umbrella frames, imports of (other) metal parts for umbrellas, canes, walking sticks, seat sticks, whips, and riding crops are also dutiable under TSUS 751.20. Imports other than umbrella frames entering under this provision ranged in value from \$122,000 to \$158,000 in 1965-69, with an annual average of \$145,000 during the period. It is believed that the bulk of such imports has consisted of umbrella handles in chief value of metal, which were supplied by Italy.



Japan has been by far the principal supplier of umbrella frames, supplying 74 percent of the quantity and 61 percent of the value for the years 1964-69. Austria and West Germany have supplied the greater part of the remainder.

#### Japanese export quotas

Effective February 1, 1959, a voluntary quota was established by the Japan General Merchandise Exporters Association for exports to the United States of umbrellas and umbrella frames. On October 1, 1959, the Japanese Government assumed control of these quotas. The following tabulation, based on official U.S. statistics and information furnished by the Japanese Exporters' Association, shows the quotas in effect, and actual U.S. imports from Japan (in thousands of dozens) for the period 1960-69:

Year	Umbrellas		Umbrella frames	
	Quota	Imports	Quota	Imports
1960-----	500	462	120	76
1961-----	500	359	120	89
1962-----	420	458	120	110
1963-----	420	314	120	74
1964-----	420	309	120	82
1965-----	420	504	120	59
1966-----	500	556	120	79
1967-----	600	692	120	108
1968-----	720	784	140	128
1969-----	720	654	140	89

It should be noted that the above data are not fully comparable inasmuch as the Japanese quota-year begins on September 1 while import statistics cover calendar years. There is also considerable time lag between exportation from Japan and entry into the United States.

## Employment

Umbrellas

The Commission does not have comprehensive data on domestic employment in the production of umbrellas. Data supplied by firms accounting for about \* \* \* of the estimated U.S. production of umbrellas during 1965-69, however, indicate trends in such employment. 1/

Data obtained by the Commission from the producers indicate that between 1965 and 1969 the number of all employees and man-hours worked by production and related workers declined by about \* \* \* and \* \* \*, respectively. Virtually all of the decline in employment occurred after 1967, roughly corresponding with the trend of umbrella production reported by these producers. Over 98 percent of the total hours worked by production and related workers during each of the years 1965-69 was devoted to the production of umbrellas (table 13). The following

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1/ Official data on the industry producing umbrellas (SIC Code No. 3995) also include employment in the manufacture of walking-sticks, canes, riding crops, and umbrella handles and miscellaneous parts. Tables 11 and 12 in the appendix contain the limited official data as reported by the Bureau of Census for specified years between 1947 and 1966.

tabulation shows, in index form, the changes in employment and productivity during 1965-69:

(1965=100)

Year	Average number of workers employed		Man-hours worked by production and related workers		Production of umbrellas	
	All persons	Production and related workers	All products	Umbrellas	Total	Per man-hour
1965---	100	100	100	100	100	100
1966---	104	104	103	103	104	101
1967---	100	100	99	99	103	104
1968---	96	93	91	91	96	106
1969---	85	83	80	79	82	103

Umbrella frames

During 1965-69 an average of \* \* \* production and related workers were employed in establishments making umbrella frames; the average during 1960-63 was 433 (table 14). 1/ \* \* \*

\* \* \* \* \*

The number of production and related workers and the number of man-hours worked by such employees declined by about \* \* \* percent and \* \* \* percent, respectively, between 1965 and 1969. Similar to employment in the production of umbrellas, the decline took place entirely after 1967.

\* \* \* \* \*

1/ As noted previously, one frame producer discontinued operations in 1966; employment data for 1965-66 are somewhat understated as data were not obtained from that concern.

## Prices

Umbrellas

The average unit value of producers' sales of finished rain umbrellas increased by about 10 percent during the 5-year period 1965-69; virtually all of the increase, however, occurred in 1969 (table 3). Most domestic producers sell both domestically produced and imported umbrellas. The following tabulation shows that although the average unit value of producers' sales of finished rain umbrellas manufactured in domestic establishments increased substantially during 1965-69, the average unit value of sales by such producers of imported umbrellas declined during the period (1965=100):

Year	Relative price		
	Domestic umbrellas	Imported umbrellas	Total
1965-----	100	100	100
1966-----	104	89	101
1967-----	108	84	102
1968-----	113	85	101
1969-----	127	92	110

It should be noted that many changes occur from year to year in the types, fabrics, and handles of umbrellas sold. Because of these many changes the above series may not accurately reflect changes in the actual prices received by producers for umbrellas sold

Table 4 in the appendix shows, by wholesale price ranges, the percentage distribution of sales by producers and importers of men's and women's finished rain umbrellas in 1963 and 1969. The principal conclusions revealed by an analysis of the data contained in that table

are that: (a) sales of domestically produced umbrellas are concentrated in higher price ranges than are sales of imported umbrellas, (b) umbrellas imported and resold by domestic producers are sold at generally higher prices than are umbrellas imported and resold by non-producers, (c) all prices moved upward from 1963 to 1969, and (d) the prices of imported women's umbrellas sold by non-producers appear to have increased less than prices of other categories between 1963 and 1969.

#### Umbrella frames

In this and in previous investigations, data on producers' prices (f.o.b. factory) for the most popular models of umbrella frames were obtained from the producers' responses to the Commission's questionnaire. <sup>1/</sup> From the information furnished the following index was constructed to illustrate the movement of umbrella frame prices during the 1964-69 period (1964=100):

\* \* \* \* \*

The tabulation shows that producers' prices for umbrella frames increased by about \* \* \* in the 4 year period 1966-69 (the average unit value of aggregate producers' sales of frames also increased by \* \* \* from 1966 to 1969). The investigation by the Commission in

1964 found that umbrella frame prices had declined appreciably between 1952 and 1959, but had remained almost constant during the 1959-63 period. In 1964, the price (per dozen) of domestically produced umbrella frames (excluding the more expensive self-opening types) ranged from \* \* \* to \* \* \*; by 1969 prices had increased to a range of \* \* \* to \* \* \*. The price of frames for self-opening umbrellas increased from about \* \* \* per dozen in 1964 to an average of \* \* \* per dozen in 1969.

Information on the prices of imported umbrella frames was obtained from both importers and producers of umbrellas. 1/ Importers and umbrella producers responding to the Commission's questionnaire accounted for about \* \* \* percent of U.S. imports of umbrella frames during the period 1965-69. The following tabulation, which shows the average unit value of sales of both imported and domestic frames, indicates that no clear difference between the price of domestic and that of imported articles was discernible during the period covered (per dozen):

\* \* \* \* \*

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1/ Importers reported their sales of frames (f.o.b. U.S. shipping point) and umbrella producers reported their imports (duty paid value) of frames.

Profit-and-Loss Experience of Domestic Producers

Umbrellas

The Commission was unable to obtain adequate information on the profit-and-loss experience of domestic umbrella producers.

Umbrella frames

Two companies have accounted for virtually all of the domestic output of umbrella frames in recent years. Sales of umbrella frames by S.W. Evans and Son comprised \* \* \* of all sales by this firm in 1965, \* \* \* in 1966, \* \* \* in 1967, \* \* \* in 1968 and \* \* \* in 1969 (table 15). Sales of umbrella frames by Finkel Umbrella Frame Co., Inc. comprised \* \* \* of all sales by this firm in 1965, \* \* \* in 1966, \* \* \* in 1967, \* \* \* in 1968, and \* \* \* in 1969.

Table 16 shows the profit-and-loss experience of all operations of the establishments in which umbrella frames were produced and the profit-and-loss experience on umbrella frames alone. \* \* \*

\* \* \* \* \*

The aggregate net sales from all operations of the establishments in which the two domestic firms produce umbrella frames were \* \* \* in 1965, increased to \* \* \* in 1966, and decreased to \* \* \* in 1969. The aggregate net operating profit from all operations of these two establishments was \* \* \* in 1965, increased to \* \* \* in 1966 and decreased to \* \* \* in 1969. The net operating profit was equivalent to \* \* \* percent of net sales in 1965, \* \* \* percent in 1966, \* \* \* percent in 1967, \* \* \* percent in 1968 and \* \* \* percent in 1969.

\* \* \* \* \*

Statistical Appendix



Table 1.--Umbrellas: U.S. production, imports for consumption, exports of domestic merchandise, and apparent consumption, 1950-69

(Quantity in thousands of dozens)

Year	Estimated U.S. production <u>1/</u>	Im-ports <u>2/</u>	Ex-ports	Apparent con-sumption	Ratio (percent) of imports to--	
					Produc-tion	Consump-tion
1950-----	834	59	27	866	7	7
1951-----	<u>3/</u>	115	20	<u>3/</u>	<u>3/</u>	<u>3/</u>
1952-----	<u>3/</u>	116	23	<u>3/</u>	<u>3/</u>	<u>3/</u>
1953-----	<u>3/</u>	138	28	<u>3/</u>	<u>3/</u>	<u>3/</u>
1954-----	735	140	25	850	19	16
1955-----	868	190	18	1,040	22	18
1956-----	923	299	16	1,206	32	25
1957-----	769	333	16	1,086	43	31
1958-----	703	551	13	1,241	78	44
1959-----	606	723	8	1,321	119	55
1960-----	609	504	8	1,105	83	46
1961-----	701	385	12	1,074	55	36
1962-----	814	551	8	1,357	68	41
1963-----	704	461	6	1,159	65	40
1964-----	<u>4/</u>	498	<u>3/</u>	<u>4/</u>	<u>4/</u>	<u>4/</u>
1965-----	<u>4/</u>	743	<u>3/</u>	<u>4/</u>	<u>4/</u>	<u>4/</u>
1966-----	<u>4/</u>	1,017	<u>3/</u>	<u>4/</u>	<u>4/</u>	<u>4/</u>
1967-----	<u>4/</u>	1,479	<u>3/</u>	<u>4/</u>	<u>4/</u>	<u>4/</u>
1968-----	<u>4/</u>	1,695	<u>3/</u>	<u>4/</u>	<u>4/</u>	<u>4/</u>
1969-----	<u>4/</u>	1,578	<u>3/</u>	<u>4/</u>	<u>4/</u>	<u>4/</u>

1/ Data on production are not available. The data shown were derived by deducting exports of umbrella frames from total imports and sales of frames by domestic producers. The data thus obtained represent the approximate U.S. consumption of umbrella frames and hence the approximate U.S. production of umbrellas.

2/ Pursuant to concessions under the GATT, the duty on umbrellas was reduced to 20 percent ad valorem on May 30, 1950. Imports of umbrellas amounted to 1,000 dozen in 1948 and 4,000 dozen in 1949.

3/ Not available.

4/ Data may not be published because it would disclose the operations of individual concerns.

Source: Sales of domestic frames obtained from the industry; imports and exports were compiled from official statistics of the U.S. Department of Commerce.

Table 2.--Umbrella frames: U.S. production, sales, imports for consumption, exports of domestic merchandise, and apparent consumption, 1950-69

Year	Production	Sales	Imports <sup>1/</sup>	Exports	Apparent consumption <sup>2/</sup>	Ratio of imports to--	
	1,000 dozen	1,000 dozen	1,000 dozen	1,000 dozen	1,000 dozen	Production	Consumption
						Percent	Percent
1950--	894	866	8	41	833	1	1
1951--	<u>3/</u>	<u>3/</u>	10	35	<u>3/</u>	<u>3/</u>	<u>3/</u>
1952--	<u>3/</u>	<u>3/</u>	16	36	<u>3/</u>	<u>3/</u>	<u>3/</u>
1953--	<u>3/</u>	<u>3/</u>	39	52	<u>3/</u>	<u>3/</u>	<u>3/</u>
1954--	746	763	35	63	735	5	5
1955--	846	865	60	57	868	7	7
1956--	715	629	344	50	923	48	37
1957--	652	680	134	45	769	21	17
1958--	629	<u>4/</u> 629	122	<u>5/</u> 48	703	19	17
1959--	558	<u>4/</u> 558	96	<u>5/</u> 48	606	17	16
1960--	553	543	114	<u>5/</u> 48	609	21	19
1961--	615	629	120	<u>5/</u> 48	701	20	17
1962--	739	719	143	<u>5/</u> 48	814	19	18
1963--	694	643	109	<u>5/</u> 48	704	16	15
1964--	<u>6/</u>	<u>6/</u>	116	<u>6/</u>	<u>6/</u>	<u>6/</u>	<u>6/</u>
1965--	<u>6/</u>	<u>6/</u>	105	<u>6/</u>	<u>6/</u>	<u>6/</u>	<u>6/</u>
1966--	<u>6/</u>	<u>6/</u>	103	<u>6/</u>	<u>6/</u>	<u>6/</u>	<u>6/</u>
1967--	<u>6/</u>	<u>6/</u>	128	<u>6/</u>	<u>6/</u>	<u>6/</u>	<u>6/</u>
1968--	<u>6/</u>	<u>6/</u>	150	<u>6/</u>	<u>6/</u>	<u>6/</u>	<u>6/</u>
1969--	<u>6/</u>	<u>6/</u>	126	<u>6/</u>	<u>6/</u>	<u>6/</u>	<u>6/</u>

<sup>1/</sup> Pursuant to concessions under GATT, the duty on umbrella frames was reduced to 30 percent ad valorem on October 1, 1951. Imports of frames amounted to 1,000 dozen in 1948 and 4,000 dozen in 1949.

<sup>2/</sup> Domestic sales plus imports less exports.

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

<sup>4/</sup> Data on sales not available, sales assumed to be the same as production.

<sup>5/</sup> Estimated.

<sup>6/</sup> Data may not be published because it would disclose the operations of individual concerns.

Source: Production and sales reported by producers; imports and exports compiled from official statistics of the U.S. Department of Commerce, except as noted.

Table 3.--Sales of umbrellas and other products by U.S.  
establishments in which umbrellas were manufactured,  
1964-69 1/

\* \* \* \* \*

Table 4 .--Umbrellas: Percentage distribution of sales of men's and women's domestic and imported rain umbrellas in the United States, by wholesale price ranges, 1963 and 1969

	(Percent of total quantity)			
	1963		1969	
Wholesale price range per dozen	Imported umbrellas sold by-- <sup>1/</sup>	Domestic umbrellas	Imported umbrellas sold by-- <sup>2/</sup>	Domestic umbrellas
	Producer- importers	Producer- importers	Producer- importers	Producer- importers
Men's umbrellas:				
\$14 and under	8.9			14.5
\$14.01 to \$18	76.1	23.2		34.8
\$18.01 to \$25	41.3		29.1	30.3
\$25.01 to \$32	4.9	21.6	35.3	13.1
\$32.01 to \$43	2.7	37.2	21.9	22.0
Over \$43	1.0	18.0	13.7	25.9
Total	100.0	100.0	100.0	100.0
Women's umbrellas:				
\$9 and under	48.0	4.9		30.7
\$9.01 to \$13	56.6	10.0		13.4
\$13.01 to \$17	13.7		18.0	29.2
\$17.01 to \$23	23.0	33.8	23.6	17.7
\$23.01 to \$30	7.7	23.4	40.6	10.4
Over \$30	3.5	27.9	17.8	30.8
Total	100.0	100.0	100.0	100.0

<sup>1/</sup> Data are for seventy-five importers (including 14 producers) who accounted for approximately 63 percent of the U.S. imports of umbrellas in 1963.

<sup>2/</sup> Data are for sixty-one importers (including 19 producers) who accounted for approximately 45 percent of U.S. imports of umbrellas in 1969.

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

Table 5.--Umbrellas: Percentage distribution of sales of domestic and imported finished rain umbrellas, by type of sales outlet, 1969

(Percent of quantity)			
Type of sales outlet	Domestic umbrellas <sup>1/</sup>	Imported umbrellas <sup>2/</sup> sold by--	
		Producer- importers	Other importers
Retail outlets:			
Department stores-----	52.0	36.1	11.5
Chain stores (other than chain department stores)-----	23.2	42.7	26.3
Specialty shops (including men's and women's clothing stores)-----	14.9	11.9	6.5
Other-----	1.5	8.3	1.8
Total retail-----	91.6	99.0	46.1
Wholesalers, jobbers, and distributors-----	4.3	1.0	14.0
Manufacturers-----	-	-	38.3
Other-----	4.1	-	1.6
Total-----	100.0	100.0	100.0

<sup>1/</sup> The 18 producers accounted for \* \* \* of the domestic production of umbrellas in 1969

<sup>2/</sup> The 61 importers (including 18 producers) accounted for approximately 45 percent of U.S. imports of umbrellas (including bases) in 1969.

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

Table 6.--Umbrellas: U.S. imports for consumption,  
by principal sources, 1964-69

Country	1964	1965	1966	1967	1968	1969
Quantity (dozens)						
Japan-----	309,062	503,823	555,714	691,611	783,998	654,249
Hong Kong-----	171,509	224,926	443,872	678,518	717,930	726,692
Republic of China <sup>1/</sup> ----	180	44	4,207	90,790	147,477	136,213
Canada-----	564	1,383	1,502	4,187	13,808	23,465
Italy-----	5,537	7,005	6,382	6,269	5,469	9,318
Republic of Korea-----	2,402	5,335	3,208	6,044	22,337	19,588
West Germany-----	161	369	256	308	314	1,990
United Kingdom-----	502	159	938	198	1,974	623
All other-----	<sup>2/</sup> 8,233	304	649	1,305	1,693	6,048
Total-----	498,150	743,348	1,016,728	1,479,230	1,695,000	1,578,186
Value						
Japan-----	\$2,742,314	\$4,541,238	\$5,172,840	\$7,016,416	\$8,594,629	\$7,733,234
Hong Kong-----	773,006	1,104,770	2,022,255	3,250,422	3,339,564	3,520,798
Republic of China <sup>1/</sup> ----	453	497	24,974	580,745	1,035,236	1,061,040
Canada-----	30,252	53,256	76,689	200,660	532,322	1,006,584
Italy-----	197,778	239,157	249,365	214,516	214,020	273,543
Republic of Korea-----	13,451	40,543	23,891	32,292	85,769	178,300
West Germany-----	11,192	18,300	10,869	15,423	20,757	82,776
United Kingdom-----	13,514	11,434	19,557	15,863	72,344	30,281
All other-----	<sup>2/</sup> 27,660	21,979	28,662	77,661	83,257	111,909
Total-----	3,809,620	6,031,174	7,629,102	11,403,998	13,977,898	13,998,465
Unit value (per dozen)						
Japan-----	\$8.87	\$9.01	\$9.31	\$10.14	\$10.96	\$11.82
Hong Kong-----	4.51	4.91	4.56	4.79	4.65	4.84
Republic of China <sup>1/</sup> ----	2.52	11.30	5.94	6.40	7.02	7.79
Canada-----	53.64	38.51	51.06	47.92	38.55	42.90
Italy-----	35.72	34.14	39.07	34.22	39.13	29.36
Republic of Korea-----	5.60	7.60	7.45	5.34	3.84	9.10
West Germany-----	69.52	49.59	42.46	50.07	66.11	41.60
United Kingdom-----	26.92	71.91	20.85	80.12	36.65	48.61
All other-----	<sup>2/</sup> 3.36	72.30	44.16	59.51	49.18	18.50
Average-----	7.65	8.11	7.50	7.71	8.25	8.87

<sup>1/</sup> Country designation changed from Taiwan to Republic of China, effective January 1, 1968.

<sup>2/</sup> Includes 7,860 dozen umbrellas, valued at \$17,859, with a unit value of \$2.27, from France.

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

Table 7.--Umbrellas: U.S. imports for consumption, by principal sources, January-June 1969 and January-June 1970

Country	January - June--					
	1969			1970		
	Quantity	Value	Unit value	Quantity	Value	Unit value
<u>Dozens</u>		<u>Per dozen</u>	<u>Dozens</u>		<u>Per dozen</u>	
Japan-----	282,529	\$3,233,671	\$11.45	366,415	\$4,413,733	\$12.05
Hong Kong-----	372,193	1,667,378	4.48	392,221	2,218,030	5.66
Republic of China-----	66,065	476,161	7.21	101,147	841,115	8.32
Canada-----	4,797	203,474	42.42	5,177	221,953	42.87
Republic of Korea-----	8,806	78,831	8.95	13,783	125,090	9.08
All other-----	4,622	153,489	33.21	4,017	134,815	33.56
Total (or average)-:	739,012	5,813,004	7.87	882,760	7,954,736	9.01

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

Table 8.--Umbrellas: Percentage distribution by types of imported rain umbrellas (including bases) entered into the United States by 61 importers, 1965, 1967, and 1969 <sup>1/</sup>

Type of rain umbrellas	1965	1967	1969
Imports entered by producer-importers			
Men's:			
Self-opening-----	17.4	16.8	16.5
Other-----	1.9	2.9	2.9
Women's:			
Folding or telescopic frames-----	7.6	21.1	26.4
Other-----	72.2	54.0	49.2
Childrens-----	.9	5.2	5.0
Clamp-on-----	-	-	-
Other (including golf and doorman)-----	-	-	-
Total-----	100.0	100.0	100.0
Imports entered by other importers			
Men's:			
Self-opening-----	12.5	12.2	13.1
Other-----	8.5	4.8	4.1
Women's:			
Folding or telescopic frames-----	7.6	8.0	8.2
Other-----	63.5	62.6	62.5
Childrens-----	7.3	10.6	11.1
Clamp-on-----	.1	.3	.1
Other (including golf and doorman)-----	.5	1.5	.9
Total-----	100.0	100.0	100.0

<sup>1/</sup> The 61 importers (including 16 producers) accounted for approximately 50 percent of the U.S. imports of umbrellas in 1965 and 45 percent in 1967 and 1969.

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



Table 9.--Umbrella frames: U.S. imports for consumption, by principal sources, 1964-69

Country	1964	1965	1966	1967	1968	1969
Quantity (dozens)						
Japan-----	82,135	57,941	78,675	108,351	127,625	87,734
West Germany-----	2,866	2,841	5,594	3,200	4,749	5,674
Austria-----	18,939	34,151	14,019	13,186	8,864	7,566
United Kingdom-----	299	492	460	493	1,525	350
All other-----	12,135	9,929	4,360	2,380	7,564	24,210
Total-----	116,374	105,354	103,108	127,610	150,327	125,534
Value						
Japan-----	\$219,771	\$158,803	\$217,923	\$356,122	\$453,723	\$308,511
West Germany-----	43,172	46,703	58,679	57,465	69,555	83,601
Austria-----	113,145	106,689	88,529	81,773	71,454	70,144
United Kingdom-----	3,216	4,918	4,053	5,814	5,754	3,723
All other-----	25,038	21,759	16,320	26,744	20,228	57,078
Total-----	404,342	338,872	385,504	527,918	620,714	523,057
Unit value (per dozen)						
Japan-----	\$2.68	\$2.74	\$2.77	\$3.29	\$3.56	\$3.52
West Germany-----	15.06	16.44	10.49	17.96	14.65	14.73
Austria-----	5.98	3.12	6.31	6.20	8.06	9.27
United Kingdom-----	10.76	10.00	8.81	11.79	3.77	10.64
All other-----	2.06	2.19	3.74	11.24	2.67	2.36
Average-----	3.47	3.22	3.74	4.14	4.13	4.17

1/ Includes 23,240 dozen frames, valued at \$46,869, with a unit value of \$2.02, imported from the Republic of China (formerly Taiwan).

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

Table 10.--Umbrella frames: U.S. imports for consumption, by principal sources,  
January-June 1969 and January-June 1970

Country	January - June--					
	1969			1970		
	Quantity	Value	Unit	Quantity	Value	Unit
	<u>Dozens</u>		<u>Per</u> <u>dozen</u>	<u>Dozens</u>		<u>Per</u> <u>dozen</u>
Japan-----	52,895	\$175,061	\$3.31	15,828	\$65,433	\$4.13
West Germany-----	2,508	36,077	14.38	1,156	17,416	15.07
Republic of China-----	9,280	18,731	2.02	5,700	12,263	2.15
Austria-----	2,575	21,526	8.36	910	7,775	8.54
All other-----	700	5,965	8.52	1,383	9,760	7.06
Total (or average)-----	67,958	257,360	3.79	24,977	112,647	4.51

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

Table 11.--Number of U.S. companies producing umbrellas, parasols, and canes (SIC Code No. 3995), total value of their shipments, and percent of total accounted for by selected groups of companies, specified years 1947 to 1966

Year	Number of companies	Total value	Shipments <sup>1/</sup>			
			largest companies	largest companies	largest companies	largest companies
			4	8	20	50
			largest companies	largest companies	largest companies	largest companies
			percent of total accounted for by	percent of total accounted for by	percent of total accounted for by	percent of total accounted for by
1966	2/	40,272	2/	2/	2/	2/
1963	109	36,630	31	43	67	92
1958	120	34,862	26	39	63	90
1954	138	31,613	22	38	60	2/
1947	162	34,348	22	37	58	2/

<sup>1/</sup> Value of shipment figures are not completely comparable between the years 1963 and 1966 and prior years. In 1958 and prior years, the value of resales was excluded from the total value of shipments.

<sup>2/</sup> Not available.

Source: U.S. Bureau of the Census, Annual Survey of Manufactures 1966.

Table 12.--Number of U.S. companies and establishments producing umbrellas, parasols, and canes (SIC Code No. 3995), number of employees, hours worked by and wages paid to production workers, and value added by manufacture, specified years 1954 to 1966

Item	1954	1958	1963	1966
Companies-----	138	120	109	<u>1/</u>
Establishments:				
Total-----	140	123	112	<u>1/</u>
With 20 or more employees-----	45	43	35	<u>1/</u>
All employees:				
Total (number)-----	3,210	2,932	2,604	2,088
Payroll---1,000 dollars-----	9,364	10,129	10,151	9,936
Production workers:				
Total (number)-----	2,873	2,591	2,261	1,779
Man-hours---1,000-----	5,150	4,929	4,325	3,202
Wages---1,000 dollars-----	6,965	7,548	7,416	7,125
Value added by manufacture---				
1,000 dollars-----	14,589	16,602	16,101	19,625
Cost of materials---1,000 dollars---	16,965	19,221	20,983	22,562
Value of shipments---1,000 dollars---	32,014	35,161	36,630	40,272
Capital expenditures, new---				
1,000 dollars-----	<u>1/</u>	<u>1/</u>	190	85

1/ Not available.

Source: U.S. Bureau of the Census, Census of Manufactures 1963 and Annual Survey of Manufactures 1966.

Table 13.--Umbrellas: Number of employees, man-hours worked, and output by responding domestic producers, 4-year average 1960-63, annual 1965-69 1/

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Table 14.--Umbrella frames: Number of employees, man-hours worked,  
and total output by domestic producers, 4-year average  
1960-63, annual 1965-69 1/

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Table 15.--Umbrella frames: Net sales of domestic producers  
of umbrella frames, 1965-1969

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Table 16.--Umbrella frames: Profit-and-loss experience of domestic producers of umbrella frames, 1965-1969

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