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**UNITED STATES TARIFF COMMISSION**

**BROADWOVEN POLYESTER-COTTON FABRICS:  
WORKERS OF THE BIRMINGHAM PLANT OF  
AVONDALE MILLS**

**Report to the President on  
Investigation No. TEA-W-116  
Under Section 301(c)(2) of the Trade Expansion Act of 1962**



**TC Publication 434  
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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,  
November 15, 1971.

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(c)(2) of that act in response to a workers' petition.

On September 16, 1971, seven employees of the Birmingham (Ala.) plant of Avondale Mills filed a petition on behalf of the employees of the plant for a determination of their eligibility to apply for adjustment assistance. The Commission instituted an investigation (TEA-W-116) on October 1, 1971, to determine whether, as a result in major part of concessions granted under trade agreements, articles like or directly competitive with the broadwoven polyester-cotton fabrics of the type produced by the plant are being imported into the United States in such increased quantities as to cause, or threaten to cause, the unemployment or underemployment of a significant number or proportion of the workers of such plant.

Public notice of the receipt of the petition and the institution of the investigation was published in the Federal Register on October 8, 1971 (36 F.R. 19658). A public hearing was requested, but the request was later rescinded and no hearing was held.

The information in this report was obtained principally from officials of Avondale Mills and from the Commission's files.

## Finding of the Commission

On the basis of its investigation, the Commission 1/ finds (Commissioner Leonard dissenting) that articles like or directly competitive with the broadwoven polyester-cotton fabrics of the type produced by the Birmingham (Ala.) Plant of Avondale 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, the unemployment or underemployment of a significant number or proportion of the workers of such plant.

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1/ Vice Chairman Parker and Commissioner Young did not participate in the decision



Views of Chairman Bedell, Commissioner Sutton, and Commissioner Moore

This investigation was undertaken pursuant to section 301(c)(2) of the Trade Expansion Act of 1962 in response to a petition filed on September 16, 1971, by the workers of the Birmingham plant of Avondale Mills for a determination of their eligibility to apply for adjustment assistance under that Act.

The Birmingham plant, which ceased operations on October 24, 1971, was the sole plant in the Avondale Mills system producing fine-spun polyester-cotton fabrics, specifically chambrays, shirtings, and gingham. Most of the fabrics woven at the Birmingham plant were sold to a few large retail firms for manufacture into shirts, principally dress and sports shirts for men. The petitioners contend that imports of fabrics like or directly competitive with those produced at the Birmingham plant, as well as imports of finished shirts made from such fabrics, have increased in major part as a result of trade-agreement concessions and have been the major factor in causing their unemployment.

Imports of manmade and cotton fabrics, as well as imports of shirts manufactured from such fabrics, increased sharply in recent years. Applicable rates of duty for such articles were reduced substantially as a result of trade-agreement concessions. Although the growth in imports of these articles has been influenced by many factors, articles like or directly competitive with the fabrics produced at the Birmingham plant have been imported in increased quantities, as a result in major part of trade-agreement concessions, and were the major factor in causing unemployment at the Birmingham plant. The major changes in trade and rates of duty pertinent to this determination are summarized below.

As a result of trade-agreement concessions, the ad valorem equivalents of the compound rates of duty on polyester-cotton fabrics of the type produced at the Birmingham plant were reduced 66 percent between 1930 and 1971, or from 80.4 percent to 27.6 percent. Imports of fabrics of manmade fibers increased sharply following the most recent concessions under the GATT, effective in 1951 and in the years from 1968 through 1971, from 212 thousand pounds in 1951 to 39 million pounds in 1970. For the current year, such imports are entering at an estimated annual rate of 47 million pounds, a rate quadruple that for imports in 1959. Polyester-cotton fabrics of the type produced at the Birmingham plant figure prominently in these increases.

Similarly, the ad valorem equivalents of the compound rates of duty on men's and boys' shirts made from polyester-cotton fabrics of the type produced at the Birmingham plant were reduced 55 percent pursuant to trade-agreement concessions under the GATT, from 80.6 percent to 36.1 percent, the level at which the rate of duty has remained since 1958. Imports of men's and boys' dress shirts of manmade fibers (neither ornamented nor knit), which, in recent years, consist principally of polyester-cotton shirts similar to those produced from fabric woven at the Birmingham plant, increased sharply from 51 thousand dozen in 1962, the first year for which data are available, to 5.5 million dozen in 1970, and continued to increase into 1971. Imports of men's and boys' sports shirts of the same fabrics increased similarly from 34 thousand dozen in 1962 to 3.4 million dozen in 1970.

The impact of these increased imports, which resulted in major part from trade-agreement concessions, on the Birmingham plant of Avondale Mills has been devastating. In an effort to continue operating, the plant turned, most recently, to supplying fancy goods to the dress shirt trade, a specialty market for which the plant's equipment was not particularly well-suited. Faced with the prospect of continually increasing concession-generated imports, Avondale Mills decided to close the Birmingham facility in view of operating losses at this plant at a rate exceeding one million dollars annually. As a result, a significant number and proportion of employees, unable to relocate within the remaining plants of the firm, became unemployed.

The severe impact of concession-generated imports on the Birmingham plant has its parallel in the recent firm and worker investigations on the Arista Mills Co. <sup>1/</sup> For both firms, their major line of fabrics was adversely affected by imports of concession-generated shirtings and shirts. For both firms, at least one major customer shifted to purchasing imported shirts competitive with those manufactured from fabrics produced by the firm. And for both firms, reorientation of their production facilities into other lines proved ineffective.

In view of the foregoing, we believe the petitioners have met the criteria for eligibility to apply for adjustment assistance under the Trade Expansion Act of 1962.

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<sup>1/</sup> Arista Mills, TEA-F-12 (Nov. 1970) and TEA-W-47 (Mar. 1971). In these two investigations the majority found affirmatively with respect to the firm and the workers. Chairman Bedell was not then a member of the Commission.

## Dissenting Views of Commissioner Leonard

Section 301(c)(2) of the Trade Expansion Act of 1962 has imposed four conditions, each of which must be satisfied if an affirmative determination is to be made. The conditions are:

1. Articles like or directly competitive with the broad-woven polyester-cotton fabrics produced by the workers concerned are being imported in increased quantities.
2. The increased imports are in major part the result of concessions granted under trade agreements.
3. A significant number or proportion of the workers concerned are unemployed or underemployed, or threatened with unemployment or underemployment.
4. The increased imports resulting in major part from trade-agreement concessions are the major factor causing or threatening to cause the unemployment or underemployment.

A negative determination in the instant investigation is required because the second condition described above is not satisfied by the facts found. The facts do not show that any increase in imports is due in "major" part to trade-agreement concessions.

A very large percentage of the imports of the fabrics and shirts that have been regarded as being like or directly competitive with the fabrics produced by Birmingham were made in the Far East. The textile industries in that area, as in the United States, are labor-intensive--that is, labor accounts for a sizable portion of the costs of production. The wages paid to the textile workers in these countries are,

however, much lower than those paid to their counterparts in the United States. It has been estimated that in the latter part of 1969 the average hourly earnings in the textile industries of such countries ranged from a high of 54 cents in Japan to a low of 11 cents in Taiwan, as compared to \$2.34 in the United States. The earnings are undoubtedly higher today, but the relationship probably has not changed appreciably. Even if worker productivity in some or all of these countries is less than the worker productivity in the United States, and even if certain fringe benefits in these countries are added to their cost of labor, there still would appear to be a significant difference in labor costs.

In a statement regarding the decision to close the Birmingham Plant, Donald Comer, President of Avondale Mills, referred to the wage problem as follows:

Today our former dress customers, as they need colored yarn dress goods, buy the Japanese import made with labor paid at one-fifth the rate of ours.

There is no way we can pay ourselves wages at a rate many times that of people around the world, and at the same time afford the luxury of uncontrolled imports made with this cheap labor, without disastrous results.

Birmingham's customers have an ample amount of fabrics available to them, made with labor paid at a rate that is illegal in this country, to more than take care of their needs.

Our normal market was completely flooded with low wage imports of piece goods or garments last year, and with over all imports running at a rate 40% higher this year it is futile to hope for a better time tomorrow.

Mr. Comer did not refer to trade-agreement concessions as being responsible for increased imports.

In view of the apparent existence of significant price disparities, which appear to reflect not only duty reductions but also substantial differences in costs of production (including raw material, overhead, and labor), any increase in imports cannot be said to have resulted in "major" part from concessions granted under trade agreements. Especially is this so when it is considered that the bulk of the reductions in the rates of duty on the imported articles were made as far back as 1948, long before any significant increase in imports of such articles. The rate of duty on men's and boys' shirts, not ornamented and not knit, of manmade fibers has not been reduced since June 30, 1958, and the rate on such shirts, knit, not ornamented, of manmade fibers has not been reduced since June 6, 1951.

## INFORMATION OBTAINED IN THE INVESTIGATION

## Articles Under Investigation

The Birmingham Plant of Avondale Mills, which ceased operations on October 24, 1971, produced woven fabrics of spun (noncontinuous fiber) yarns which were composed of blends of polyester (manmade) fiber and combed cotton. Prior to September 1970, the spun yarns consisted of 50-percent polyester fibers and 50-percent combed cotton of yarn No. 33 1/ in both warp 2/ and filling. 3/ Subsequently they were 65-percent polyester and 35-percent combed cotton, of yarn numbers 40s for warp and 37s for filling. The filling counts ran from 50 to 60 picks 4/ per inch and the warp counts ran from 80 to 90 per inch.

The Birmingham Plant produced fine yarn-dyed plainwoven types, particularly chambrays, ginghams, and other shirtings, weighing approximately 4 to 5 yards per pound. The Birmingham Plant (hereinafter referred to as Birmingham) is the only plant of Avondale in which such fabrics are produced.

The petition stated that the competing imported fabrics entered under items 338.3065 and 338.3085 of the Tariff Schedules of the United States Annotated (TSUSA). Such fabrics are described in the TSUSA as being woven fabrics, of manmade fibers, wholly of spun yarn, and wholly or in chief value of polyester.

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

2/ Yarns running lengthwise of the fabric.

3/ Yarns running from edge to edge of the fabric, at right angles to the warp.

4/ A pick is one filling yarn.

Nearly all of the types of fabrics woven at Birmingham are sold for manufacture into shirts, principally dress shirts for men. The petition alleges that the "tremendous" increase in the imports of shirts, as well as of shirting fabrics, has been the result of drastic reductions in the duties covering these items and has contributed in major part to the closing of the Birmingham Plant and the resulting unemployment.

#### U.S. Tariff Treatment

The fabrics of the types woven at Birmingham are included in item 338.30 of the TSUSA. The rate history for this item is shown in the following table.

Certain woven fabrics of manmade fibers (item 338.30), including polyester and cotton blends in chief value of polyester: Changes in rate of duty pursuant to trade agreements, 1930 to 1971

Rate of duty	Effective date	Ad valorem equivalent of rate of duty, based on imports in 1970
<u>Cents per pound and percent ad valorem</u>		<u>Percent</u>
45¢ + 60% or 70%	June 18, 1930 <u>1/</u>	<u>2/</u> 80.4
45¢ + 45%	June 15, 1936 <u>3/</u>	60.4
27.5¢ + 45% or 22.5%	Jan. 1, 1948 <u>4/</u>	<u>2/</u> 38.4
25¢ + 22.5%	June 6, 1951 <u>4/</u>	31.1
22¢ + 22.5%	Jan. 1, 1968 <u>5/</u>	30.2
20¢ + 22.5%	Jan. 1, 1969 <u>5/</u>	29.4
17¢ + 22.5%	Jan. 1, 1970 <u>5/</u>	28.3
15¢ + 22.5%	Jan. 1, 1971 <u>5/</u>	27.6

1/ Tariff Act of 1930.

2/ Estimated; 1970 import classes not strictly comparable.

3/ Trade agreement with France.

4/ Pursuant to reductions under the General Agreement on Tariffs and Trade (GATT).

5/ Kennedy Round.



As illustrated above, the rate of duty applicable to the Birmingham-type fabrics has undergone several reductions pursuant to trade agreements. Table 1 in the statistical appendix shows the quantity and value of imports under the various duty rates and the ad valorem equivalents of the rates, based on imports in 1970. The ad valorem equivalent in 1971 was 66 percent lower than in 1930.

Pursuant to Presidential Proclamation No. 4074, effective August 16, 1971, the rates of duty on most imported products, including woven fabrics and shirts of manmade fibers, were increased by the temporary imposition of an additional duty of 10 percent ad valorem or less, as provided for in new subpart C of part 2 of the appendix to the TSUSA. There have been recent press reports that the surcharge on most wool and manmade-fiber textiles, except raw materials, will be removed in the near future after formal agreements have been signed between the United States and Japan, the Republic of Korea, Taiwan, and Hong Kong which will impose quantitative limitations on imports of specified wool and manmade-fiber textile categories.

Broadwoven fabrics of cotton, including types comparable to the polyester-cotton blended fabrics of Birmingham, are dutiable in the TSUSA under items 320.30 to 320.40, if not bleached and not colored; 321.30 to 321.40, if bleached but not colored; and 322.30 to 322.40, if colored, whether or not bleached. The rates of duty vary according to yarn number and are summarized in table 2. The

duty reductions effected between 1930 and 1971 amounted to a total reduction of about 40 percent.

Imports of cotton fabrics are subject to restraints in accordance with the provisions of the Long-Term Arrangement Regarding International Trade in Cotton Textiles (LTA). The LTA was designed to increase significantly access to markets where imports were subject to restriction; to maintain orderly access to markets where restrictions were not maintained; and to secure from exporting countries, where necessary, a measure of trade restraint in their export policy so as to avoid disruptive effects in import markets. Imports of cotton fabrics and all other articles subject to restraints under the LTA are exempt from the additional duty proclaimed by the President on August 16, 1971 (headnote 5(g) to subpart C of part 2 of the appendix to the TSUSA).

The U.S. rates of duty, in the Tariff Act of 1930 and pursuant to trade agreement concessions, applicable to men's and boys' shirts, not knit, which include the types made from fabrics similar to those produced by Birmingham, are shown in tables 3, 4, and 5. Most of the imports of men's and boys' shirts of cotton, not knit, are not ornamented and are entered under item 380.27. The rate of duty on such shirts was reduced from 45 percent ad valorem in the act of 1930 to 25 percent ad valorem, effective January 1, 1948, pursuant to a concession granted in the General Agreement on Tariffs and Trade (GATT). The rate was not reduced again until the Kennedy Round, when it was reduced by stages, effective January 1 of each

year, from the pre-Kennedy Round rate of 25 percent ad valorem to the present rate of 21.5 percent ad valorem. It is scheduled to be reduced to 21 percent ad valorem, effective January 1, 1972. The changes in duty between 1930 and 1971 resulted in a total rate reduction of 52 percent.

Men's and boys' shirts of manmade fibers, not knit and not ornamented (item 380.84), were dutiable at the rate of 45 cents per pound plus 65 percent ad valorem in the act of 1930. The rate was reduced to 27.5 cents per pound plus 35 percent ad valorem in the first round of GATT negotiations, effective January 1, 1948. Further reductions were negotiated under the GATT to 25 cents per pound plus 32.5 percent ad valorem, effective June 6, 1951, and to 25 cents per pound plus 27.5 percent ad valorem, effective June 30, 1958. No further reductions have been made in this rate of duty. The ad valorem equivalent of the rate, based on imports in 1970, for this item was 80.6 percent in 1930, 44.5 percent in 1948, 41.1 percent in 1951, and 36.1 percent in 1958-71.

The rate history since 1930 on men's and boys' shirts, knit, of cotton, is similar to that on such shirts, not knit. The rate history on knit shirts of manmade fibers is similar to that on such shirts, not knit, up to June 6, 1951, when the rate became 25 cents per pound plus 32.5 percent ad valorem. No further changes have been made in this rate (table 6).

## U.S. Consumption

Woven fabrics of manmade fibers

The consumption of all broadwoven fabrics of manmade fibers (except glass) increased from 2.9 billion square yards, valued at \$0.8 billion, in 1961 to 7.1 billion square yards, valued at \$1.8 billion, in 1969 (table 7). Consumption declined in 1970 to 6.6 billion square yards, valued at \$1.6 billion, and is believed to be continuing to decline in 1971. The major increases in the consumption during the 1961-69 period consisted of nylon filament fabrics, spun rayon and acetate fabrics, spun rayon and acetate blends with cotton, polyester and cotton blends, polyester and rayon blends, and filament/spun combinations of rayon and acetate. The declines in 1970 and 1971 are reflected in a reduction in demand in the United States of almost all the principal types of fabrics. It is estimated, however, that the output of nylon fabrics and spun acetate and rayon fabrics decreased to a larger extent than the polyester and cotton and polyester and rayon blends. During the 1961-70 period, the ratio of imports to consumption was less than 5 percent and reached its maximum of 4.9 percent in 1966.

Data on domestic consumption of fabrics of polyester and cotton blends similar to those produced by Birmingham are not available because import and export statistics do not report such fabrics separately. It is believed, however, that domestic consumption of polyester and cotton blends increased consistently from 1964 to 1970, but has declined in 1971.

Woven fabrics of cotton

The domestic consumption of cotton fabrics of the same range of yarn numbers as the fabrics produced by Birmingham declined drastically from about 1 billion square yards in 1964 and 1965 to approximately a quarter of a billion square yards in 1970 (table 8). The share of imports, however, increased greatly, from about 15 percent of consumption in 1964 to 67 percent in 1970. It is not known how many of these imports were shirting fabrics.

Men's and boys' shirts

Not knit.--U.S. consumption of men's and boys' shirts of woven fabrics increased from 36.5 million dozen in 1960 to 43.4 million dozen in 1966, declined to 40.9 million dozen in 1968, and then increased to 43.6 million dozen in 1970. Imports accounted for 6 percent of consumption in 1960, 10 percent in 1965, 28 percent in 1970, and 31 percent in the first half of 1971 (table 9).

U. S. consumption of men's and boys' dress shirts increased from 12.6 million dozen in 1965 to 19.6 million dozen in 1970 (table 10). U.S. imports accounted for 13 percent in 1965, 32 percent in 1970, and 40 percent in January-June 1971.

In the past 3 years, U.S. shirt manufacturers have become more style conscious, particularly with regard to men's dress shirts, incorporating innovations in collar design and in colors and patterns and promoting new ideas, such as the tapered look. This development was initiated by shirt manufacturers with nationally known brands.

As a result, U.S. consumption of dress shirts increased more rapidly between 1968 and 1970 than in previous years.

Consumption of men's and boys' sport shirts has followed a pattern different from that of dress shirts. Woven sport shirt consumption declined from 25.7 million dozen in 1965 to 18.9 million dozen in 1970. Some of this decline was caused by the increase in knit sport-shirt consumption. Another reason for the decline has been greater wearing of dress shirts as sport shirts. U.S. imports increased their share of consumption from 10 percent in 1965 to 29 percent in 1970 and in the first half of 1971.

Woven fabrics wholly of cotton were the principal ones used in dress and sport shirts from 1930 to about 1968. Wash-and-wear dress and sport shirts of polyester and cotton, usually in chief weight of polyester, increased their share of consumption in the 1955-65 period, but not until the advent of the permanent-press finish did their growth increase rapidly; they have exceeded cotton shirts in consumption in recent years.

Work shirt consumption increased from 4 million dozen in 1965 to 4.7 million dozen in 1968, then declined to 4.3 million in 1970 (table 10). The ratio of imports to consumption has been small, and was only 4 percent in 1970. Cotton fabrics are the principal ones used in work shirts, although fabrics of polyester and cotton have accounted for an increasing share of the total fabrics used.

Knit.—Domestic consumption of knit shirts increased from 13 million dozen in 1965 to 19 million dozen in 1968 and was 16 million dozen in 1970 (table 11). The production of knit sport shirts increased irregularly over the period whereas the production of knit dress shirts declined substantially. The ratio of imports to consumption was 13 percent in 1965 and 17 percent in 1970.

#### U.S. Production

##### Woven fabrics of manmade fibers

The U.S. production of all broadwoven fabrics of manmade fibers (except glass) increased from 3.0 billion square yards, valued at \$0.9 billion, in 1961 to 7.0 billion square yards, valued at \$1.8 billion, in 1969 (table 7). It declined to 6.5 billion square yards, valued at \$1.6 billion, in 1970, and is expected to decline further in 1971. The largest increases in production from 1961 to 1969 were in polyester and cotton blends, nylon fabrics, spun rayon and/or acetate and cotton blends, polyester and rayon blends, saran and olefin filament fabrics, and combination filament and spun polyester fabrics. In 1970, declines in the output of these same fabrics contributed to the overall decrease in production. The largest declines, however, were in those fabrics containing rayon and nylon fibers. The great bulk of the domestically produced broadwoven fabrics of manmade fibers are shipped to other domestic companies which use the fabrics for manufacture into apparel, household articles, and industrial applications.

Data on domestic production of the specific polyester and cotton blends made by Birmingham are not available. The production of broadwoven polyester and cotton fabrics, wholly of noncontinuous fibers and in chief weight of polyester, increased from 0.6 billion square yards in 1964 to 2.8 billion square yards in 1970 (table 12). Consistent increases in production were recorded in polyester and cotton bedsheeting, and except for 1966, also in polyester and cotton broadcloth. Production of yarn-dyed polyester and cotton blends, which would include types similar to the output of Birmingham, declined slightly from 215 million square yards in 1966, the first year for which separate statistics were available, to 211 million square yards in 1967, then increased to 281 million and 306 million square yards in 1968 and 1969, respectively; in 1970 it declined to 281 million square yards, about the same as in 1968.

#### Woven fabrics of cotton

The U.S. production of cotton fabrics of intermediate yarn numbers, which would include types similar to the blends woven by Birmingham, declined substantially, from 859 million square yards in 1964 to about 95 million square yards in 1970 (table 8). The increasing consumption of manmade fibers in fabrics which formerly were wholly of cotton was a large factor in causing this decline.



Men's and boys' shirts

Not knit.--U.S. production of men's dress shirts of woven fabrics increased from 6.5 million dozen in 1958 to 7.6 million dozen in 1961 and to 12.1 million dozen in 1970 (table 13). Production of men's dress shirts of woven cotton fabrics increased from 6.1 million dozen in 1958 to 8 million dozen in 1964, but then declined to 3.9 million dozen in 1970. Production of men's dress shirts of woven fabrics of manmade fibers, chiefly of polyester and cotton blends, increased from 391,000 dozen in 1958 to 8.2 million dozen in 1970 and accounted for nearly two-thirds of production in 1970 compared to only 6 percent in 1958 and 16 percent in 1964. Improvements in the technology of the permanent-press finish and its adaptability to polyester and cotton fabrics accounted in large part for the rapid rise in the production of dress shirts of these fabrics since 1964.

The big three dress-shirt manufacturers--Cluett, Peabody and Co. (Arrow Division), Manhattan Industries, and Phillips Van-Heusen Corp., account for at least 40 percent of total domestic dress-shirt production. Their dominance in the dress-shirt market enables them to lead in product style changes, such as collar styles, tapered body, and wide varieties of colors and patterns, and to be able to sell the shirts in volume.

Domestic production of men's and boys' sport shirts of woven fabrics increased steadily from 1945 to 1965, but has since declined steadily. Production amounted to 20.7 million dozen in 1958,

23 million dozen in 1965, and 13.6 million dozen in 1970. The reasons for the decline after 1965 were cited in the section on U.S. consumption. As in dress shirts, U.S. production of sport shirts of woven cotton fabrics has declined steadily, particularly since 1964, while production of sport shirts of polyester and cotton and of other man-made fibers has increased (table 13). In 1964, production of men's and boys' sport shirts of fabrics of manmade fibers accounted for 12 percent of the total fabrics used, and in 1970 had increased to 56 percent of the total. The improvement in the permanent-press finishing technique also contributed in large part to the increase in the output of sport shirts of woven fabrics of manmade fibers.

No single producer or small group of producers accounts for a large share of the production of sport shirts of woven fabrics. Consequently, there are no style leaders, as in dress-shirt production.

U.S. production of work shirts of woven yarns has ranged from about 3.7 million to 4.6 million dozen since 1958. Work shirts are made mainly of cotton fabrics, but the production of those of polyester and cotton fabrics has grown steadily, particularly since 1966.

Knit.--The production of knit men's and boys' shirts increased irregularly between 1965 and 1970. All of the increase was accounted for by sport shirts, as dress-shirt production decreased substantially over the period. The total production of knit men's and boys' shirts during 1965-70 ranged between 11.6 thousand dozen in 1965 and 16.6 thousand dozen in 1968; it was 13.4 thousand dozen in 1970 (table 11). Cotton is the major fiber used in knit sport shirts.

## U.S. Imports

Woven fabrics of manmade fibers

Imports of broadwoven fabrics of manmade fibers (except glass) increased from 40.2 million square yards, valued at \$12.8 million, in 1961 to 255.3 million square yards, valued at \$66.2 million, in 1966, then declined to 177.7 million square yards, valued at \$59.0 million, in 1967. Thereafter, they increased regularly to 234.9 million square yards, valued at \$129.0 million, in 1970 (table 7). The imports have been principally polyester fabrics, especially dyed and finished spun-yarn goods (chiefly blends with cotton), and dyed and finished filament-yarn goods (mostly blends with rayon); rayon fabrics, particularly dyed and finished filament-yarn goods; and nylon fabrics, notably grey filament-yarn goods. Polyester fabrics (including blends) accounted for 45 percent of the imports in 1970; rayon fabrics, 22 percent; nylon fabrics, 13 percent; acrylic fabrics, 8 percent; and acetate fabrics, 4 percent. Almost all of the imports are similar in type and quality to the like domestic fabrics; their prices, however, are usually lower.

Imports of the specific types of fabrics woven by Birmingham and imports of polyester and cotton blends are not separately reported in official statistics. Imports of woven polyester fabrics wholly of noncontinuous fibers, which would include polyester and cotton blends in chief value of polyester, are reported as to whether not bleached and not colored (grey goods) or other (finished goods). Imports of the finished goods, which would include

Birmingham types, rose from 2.4 million square yards, valued at \$0.9 million, in 1964 to 45.5 million square yards, valued at \$12.4 million, in 1966. From the high in 1966, imports declined irregularly to 13.6 million square yards, valued at \$7.0 million, in 1970 (table 14). The imports in the first 6 months of 1971, 8.6 million square yards, valued at \$3.8 million, indicate an increase for the year over 1970.

#### Woven fabrics of cotton

Imports of woven fabrics of cotton, including types similar to the polyester-cotton blends of Birmingham, fluctuated substantially during 1964-70. They ranged between 150 million square yards in 1964 and 227 million square yards in 1966, and were 170 million square yards in 1970 (table 8).

#### Men's and boys' shirts

Not knit.--U.S. imports of men's and boys' dress, sport, and work shirts of woven fabrics increased from 2.1 million dozen in 1960 to 12 million dozen in 1970 and were 6.4 million dozen in January-June 1971 (table 15). Imports of men's and boys' dress shirts increased from 475,000 dozen in 1960 to 6.4 million dozen in 1970 and were 3.9 million dozen in the first half of 1971. Imports of men's and boys' sport shirts increased from 1.6 million dozen in 1960 to 5.5 million dozen in 1970 and were 2.4 million dozen in January-June 1971. Imports of work shirts have been small and amounted to only 169,000 dozen in 1970.

Imports of men's and boys' dress shirts of woven cotton fabrics increased from 475,000 dozen in 1960 to 1.3 million dozen in 1965, then declined to 850,000 dozen in 1970 (table 15). Imports of dress shirts of manmade fibers, principally polyester and cotton, increased from 53,000 dozen in 1962 to 5.5 million dozen in 1970. Imports of men's and boys' sport shirts of cotton woven fabrics were 1.6 million dozen in 1960, increased to 2.5 million dozen in 1966, and then declined to 1.9 million dozen in 1970. Imports of sport shirts of woven fabrics of manmade fibers increased from 59,000 dozen in 1962 to 3.4 million dozen in 1970.

Dress shirts of woven fabrics have been imported mainly from Hong Kong, the Republic of Korea, Japan, and Taiwan. Imports of men's and boys' dress shirts from Hong Kong and the Republic of Korea accounted for 70 percent of the total quantity of imports in 1970, with the rise in imports from the Republic of Korea having been sharp since 1967. Average unit values on an f.o.b. basis indicate dress shirts from the Republic of Korea and Taiwan are lower-priced than those from Hong Kong and Japan (table 16).

Imports of men's and boys' sport shirts, not knit, have been mainly from Hong Kong, Japan, Taiwan, and the Republic of Korea. Based on average unit values on an f.o.b. basis, such imports from Taiwan are the lowest priced, Hong Kong next, and Japan, the highest priced, except in 1970, when those from the Republic of Korea were slightly higher in price than those from Japan.

Knit.--Imports of knit shirts increased from 1.2 million dozen in 1962 to 3 million dozen in 1969, then declined to 2.7 million dozen in 1970; they were 1.8 million dozen in the first half of 1971 (table 18). Imports of knit shirts of cotton during each year 1963-70 did not exceed the 1962 volume, but imports of knit shirts of manmade fibers increased from 2,000 dozen in 1962 to 1.9 million dozen in 1969, declined to 1.7 million dozen in 1970, and were 1.3 million dozen in January-June 1971. It is believed that most of the types imported in recent years were sport shirts.

#### U.S. Exports

##### Woven fabrics of manmade fibers

In 1961-70, U.S. exports of broadwoven fabrics of manmade fibers (except glass) ranged between 137 million square yards, valued at \$72 million, in 1961 and 181 million square yards, valued at \$101 million, in 1964 (table 7). They declined from the 1964 high to 147 million square yards, valued at \$95 million, in 1968, then increased to 174 million square yards, valued at \$108 million, in 1970. The largest exports have been polyester fabrics, especially dyed and finished filament goods; rayon and/or acetate filament yarn fabrics, particularly dyed and finished goods; and rayon and/or acetate spun yarn fabrics, mostly mixed and blended printed goods.

Exports of the polyester and cotton fabric types woven by Birmingham and of all polyester and cotton blends are not separately

reported in official statistics. Data on exports of broadwoven polyester fabrics wholly or chiefly by weight of noncontinuous fibers, however, are available. Such exports are reported according to whether the fabrics are unbleached (grey) or bleached, dyed, or colored (finished). The exports of the finished goods, which would include the Birmingham types woven after August 1970, increased from 5.8 million square yards, valued at \$3.9 million, in 1965 to 23.6 million square yards, valued at \$14.3 million, in 1970 (table 19).

#### Woven fabrics of cotton

Exports of certain woven cotton fabrics (Nos. 30s to 40s), which would include types similar to fabrics made at Birmingham, declined from 17.4 million square yards in 1964 to 12.1 million square yards in 1970 (table 8).

#### Men's and boys' shirts

Exports of men's and boys' shirts, both not knit and knit, have been very small compared to domestic production.

## Avondale Mills

Avondale Mills was incorporated March 24, 1897, in Alabama. It is engaged in spinning and weaving cotton and manmade-fiber yarns and fabrics, and in producing double knits, in 13 plants (11 in Alabama, 1 in Georgia, and 1 in North Carolina). Its products include tickings; denims; chambrays; seersuckers; corduroys; dress plaids; work-clothing fabrics; sportswear and children's wear fabrics; sateens, drills, twills and drapery and furniture fabrics; and carded and combed yarns for knitting, weaving, insulating, carpet, chenille, and webbing trades.

\* \* \* \* \*

According to Moody's Industrial Manual, the net profit of Avondale Mills for the fiscal year ending August 31, 1969, was \$4,058,099 and for the fiscal year ending August 31, 1970, was \$4,834,330.



The Birmingham Plant

The Birmingham Plant, the original plant of Avondale Mills, was in continuous operation from 1897 until it closed on October 24, 1971. It was the only plant in the company that produced polyester and cotton fine yarn-dyed fabrics, and such fabrics represented 100 percent of its output. Prior to September 1970, the plant's production consisted of two main types, chambrays and gingham; beginning in September 1970, another type, sport denim, was added. The chambrays and gingham were usually shipped directly to the cutting-up trade, but the denims were transferred to another Avondale plant for further processing.

\* \* \* \* \*

Company statement

Donald Comer, Jr., President of Avondale Mills, made a statement on August 10, 1971, concerning the closing of the Birmingham Plant. The statement is reproduced as appendix B to this report.



APPENDIX A  
Statistical Tables



Table 1.--Woven fabrics of manmade fibers covered by TSUS item 338.30: Changes in U.S. rates of duty, and U.S. dutiable imports for consumption, 1935-70 and January-June 1971

Period	Change in rates of duty	Ad valorem equivalent of rates of duty, based on imports in 1970	Dutiable imports	
			Quantity	Value
		Percent	1,000 pounds	1,000 dollars
1935-----	45¢ lb. + 60% or 70% ad val. <u>1/</u>	<u>2/</u> 80.4	234	467
1936-----	45¢ lb. + 45% ad val.	60.4	474	604
1937-----			1,041	993
1938-----			555	671
1939-----			420	470
1940-----				
1941-----			256	273
1942-----			116	112
1943-----			45	60
1944-----			66	131
1945-----			41	168
1946-----				
1947-----			299	1,285
1948-----	27.5¢ lb. + 45% or 22.5% ad val.	<u>2/</u> 38.4	597	2,730
1949-----			204	1,183
1950-----			416	1,137
1951-----			156	397
1952-----	25¢ lb. + 22.5% ad val.	31.1	237	575
1953-----			212	802
1954-----			394	1,160
1955-----			1,235	2,298
1956-----			1,111	2,336
1957-----				
1958-----			1,576	2,900
1959-----			2,700	4,897
1960-----			3,170	5,332
1961-----			4,782	5,795
1962-----			10,873	10,471
1963-----				
1964-----			10,097	12,182
1965-----			7,575	12,832
1966-----			10,062	18,247
1967-----			10,682	19,071
1968-----	22.5¢ lb. + 22.5% ad val.		11,910	25,408
1969-----	20¢ lb. + 22.5% ad val.	30.2		
1970-----	17¢ lb. + 22.5% ad val.	29.4	20,876	41,286
1971 (Jan.-June)---	15¢ lb. + 22.5% ad val.	<u>3/</u> 27.6	36,204	58,285
			25,596	51,832
			28,629	66,467
			32,975	80,641
			39,042	113,974
			<u>3/</u> 23,477	<u>3/</u> 65,976

1/ The 1930 rate.

2/ Estimated.

3/ Includes small amount of nondutiable imports.

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

Table 2.--Selected cotton fabrics: U.S. rates of duty in specified years 1930 to 1971

Description	(In percent ad valorem and cents per square yard)						
	1930	1948	1957	1968	1969	1970	1971
Fabrics, wholly of cotton:							
Not fancy or figured:							
Not bleached or colored.	10% + 0.35% for each yarn number.	7.5% + 0.25% for each yarn number. <sup>1/</sup>	7.5% + 0.25% for each yarn number.	7.15% + 0.23% for each yarn number. <sup>2/</sup>	6.79% + 0.22% for each yarn number. <sup>2/</sup>	6.43% + 0.21% for each yarn number. <sup>2/</sup>	6.07% + 0.20% for each yarn number. <sup>2/</sup>
Range for yarn Nos. 30-40:							
In percent ad valorem-----	20.50%-24.0%	15.0%-17.5%	15.0%-17.5%	14.28%-16.66%	13.56%-15.82%	12.84%-14.98%	12.12%-14.14%
In cents per square yard <sup>3/</sup> -----	10.25¢-12¢	7.5¢-8.75¢	7.5¢-8.75¢	7.14¢-8.33¢	6.78¢-7.91¢	6.42¢-7.49¢	6.06¢-7.07¢
Bleached, but not colored.	13% + 0.35% for each yarn number.	10% + 0.25% for each yarn number. <sup>1/</sup>	10.0% + 0.25% for each yarn number.	9.45% + 0.23% for each yarn number. <sup>2/</sup>	8.99% + 0.22% for each yarn number. <sup>2/</sup>	8.53% + 0.21% for each yarn number. <sup>2/</sup>	8.07% + 0.20% for each yarn number. <sup>2/</sup>
Range for yarn Nos. 30-40:							
In percent ad valorem-----	23.50%-27.0%	17.5%-20.0%	17.5%-20%	16.35%-18.65%	15.59%-17.79%	14.83%-16.93%	14.07%-16.07%
In cents per square yard <sup>3/</sup> -----	11.75¢-13.5¢	8.75¢-10¢	8.75¢-10¢	8.175¢-9.325¢	7.795¢-8.895¢	7.415¢-8.465¢	7.035¢-8.035¢
Colored	16.0% + 0.35% for each yarn number.	12.0% + 0.25% for each yarn number. <sup>1/</sup>	12.0% + 0.25% for each yarn number.	11.45% + 0.23% for each yarn number. <sup>2/</sup>	10.99% + 0.22% for each yarn number. <sup>2/</sup>	10.43% + 0.21% for each yarn number. <sup>2/</sup>	9.97% + 0.20% for each yarn number. <sup>2/</sup>
Range for yarn Nos. 30-40:							
In percent ad valorem-----	26.5%-30.0%	19.5%-22.0%	19.5%-22.0%	18.35%-20.65%	17.59%-19.79%	16.73%-18.83%	15.97%-17.97%
In cents per square yard <sup>3/</sup> -----	13.25¢-15¢	9.75¢-11¢	9.75¢-11¢	9.175¢-10.325¢	8.795¢-9.895¢	8.365¢-9.415¢	7.985¢-8.985¢

<sup>1/</sup> Rates reduced for certain fabrics above stated values (70 cents per pound for unbleached; 80 cents per pound for bleached; and 90 cents per pound for colored fabrics); all other fabrics were dutiable at the 1930 rate.

<sup>2/</sup> In some cases the yarn increment was slightly higher, due to rounding.

<sup>3/</sup> Based on an assumed price of 50 cents per square yard.

Table 3.—U.S. rates of duty applicable to men's and boys' shirts, not knit, of the types provided for in specified TSUS items, 1930 and GATT concessions to Jan. 1, 1972

TSUS item No.	Abbreviated description	1930 rate	GATT concession	
			Rate	Effective date
380.00 <u>1/</u>	Men's and boys' lace or net, and/or ornamented shirts, of cotton.	90% ad val.	60% ad val. 45% ad val. 42.5% ad val. 41% ad val. 39% ad val. 38% ad val. 36% ad val. 35% ad val.	Jan. 1, 1948 June 6, 1951 June 30, 1958 Jan. 1, 1968 Jan. 1, 1969 Jan. 1, 1970 Jan. 1, 1971 Jan. 1, 1972
382.00 <u>2/</u>	Infants' <u>3/</u> lace or net, and/or ornamented shirts, of cotton.	90% ad val.	Same as for item 380.00.	
380.04 <u>1/</u>	Men's and boys' lace or net, and/or ornamented shirts, of manmade fibers.	90% ad val.	60% ad val. 45% ad val. 42.5% ad val.	Jan. 1, 1948 June 6, 1951 June 30, 1958
382.04 <u>2/</u>	Infants' <u>3/</u> lace or net, and/or ornamented shirts, of manmade fibers.	90% ad val.	Same as for item 380.04.	
380.27	Men's and boys' shirts, not ornamented, of cotton.	45% ad val.	25% ad val. 24% ad val. 23% ad val. 22.5% ad val. 21.5% ad val. 21% ad val.	Jan. 1, 1948 Jan. 1, 1968 Jan. 1, 1969 Jan. 1, 1970 Jan. 1, 1971 Jan. 1, 1972
380.84	Men's and boys' shirts, not ornamented, of manmade fibers.	45¢ per lb. + 65% ad val.	27.5¢ per lb. + + 35% ad val. 25¢ per lb. + 32.5% ad val. 25¢ per lb. + 27.5% ad val.	Jan. 1, 1948 June 6, 1951 June 30, 1958
382.81	Infants' <u>3/</u> shirts, not ornamented, of manmade fibers.	45¢ per lb. + 65% ad val.	Same as for item 380.84.	
382.33	Infants' <u>3/</u> shirts, not ornamented, of cotton.	37.5% ad val.	20% ad val. 19% ad val. 18.5% ad val. 17.5% ad val. 17% ad val. 16.5% ad val.	Jan. 1, 1948 Jan. 1, 1968 Jan. 1, 1969 Jan. 1, 1970 Jan. 1, 1971 Jan. 1, 1972

1/ Prior to Jan. 1, 1968, this item was part of item 380.03.

2/ Prior to Jan. 1, 1968, this item was part of item 382.03.

3/ Infants are defined in the TSUSA as children, regardless of their sex, up to and including 6 years of age.

Note.—Items of cotton are exempt from the 10-percent surcharge effective Aug. 16, 1971, but items of manmade fibers are not exempt.

Table 4.--Men's and boys' shirts, 1/ not ornamented, not knit, of cotton: Rates of duty and U.S. imports for consumption, 1930, 1947-70, January-June 1970, and January-June 1971

Year	Rate of duty <u>1/</u>	Imports			
		Dress shirts	Sport shirts	Work shirts	Total
		<u>1,000</u> dozen	<u>1,000</u> dozen	<u>1,000</u> dozen	<u>1,000</u> dozen
1930-----	45	<u>2/</u>	<u>2/</u>	<u>2/</u>	<u>3/</u> 1
1947-----	45	<u>2/</u>	<u>2/</u>	<u>2/</u>	1
1948-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	1
1949-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	1
1950-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	1
1951-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	<u>3/</u> 1
1952-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	2
1953-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	1
1954-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	11
1955-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	211
1956-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	552
1957-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	1,225
1958-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	1,390
1959-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	1,500
1960-----	25	<u>2/</u>	<u>2/</u>	<u>2/</u>	2,215
1961-----	25	174	1,560	34	2,068
1962-----	25	565	1,374	9	1,948
1963-----	25	854	1,871	43	2,768
1964-----	25	901	1,988	93	2,982
1965-----	25	1,261	2,140	71	3,472
1966-----	25	1,314	2,184	30	3,528
1967-----	25	1,274	2,485	36	3,795
1968-----	24	799	2,194	65	3,058
1969-----	23	1,066	2,141	62	3,269
1970-----	22.5	1,037	2,166	104	3,307
Jan.-June--		841	1,893	153	2,887
1970-----	22.5	428	831	72	1,331
1971-----	21.5	464	621	69	1,154

1/ Includes small amounts of infants' shirts. Infants are defined in the TSUSA as children, regardless of their sex, up to and including 6 years of age. The rates of duty for these shirts were 37.5 percent ad valorem for 1930-47, 20 percent for 1948-67, 19 percent for 1968, 18.5 percent for 1969, 17.5 percent for 1970, and 17 percent for 1971.

2/ Not available.

3/ Estimated.

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



Table 5.--Men's and boys' shirts, 1/ not ornamented, not knit, of man-made fibers: Ad valorem equivalents of rates of duty and U.S. imports for consumption, 1930, 1947-70, January-June 1970, and January-June 1971

Year	: Ad valorem : : equivalent :	Imports				: Total
		: of rate of : : duty <u>2/</u> :	: Dress : : shirts :	: Sport : : shirts :	: Work : : shirts :	
	: Percent :	: <u>1,000</u> : : dozen :	: <u>1,000</u> : : dozen :	: <u>1,000</u> : : dozen :	: <u>1,000</u> : : dozen :	
1930-----	80.6	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1947-----	80.6	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1948-----	44.5	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1949-----	44.5	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1950-----	44.5	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1951-----	41.1	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1952-----	41.1	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1953-----	41.1	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1954-----	41.1	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1955-----	41.1	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1956-----	39.1	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1957-----	37.6	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1958-----	36.1	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1959-----	36.1	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1960-----	36.1	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1961-----	36.1	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	
1962-----	36.1	51	34	-	85	
1963-----	36.1	48	30	-	78	
1964-----	36.1	117	61	-	178	
1965-----	36.1	279	73	-	352	
1966-----	36.1	972	459	2	1,433	
1967-----	36.1	2,259	1,208	4	3,471	
1968-----	36.1	2,500	1,995	8	4,503	
1969-----	36.1	4,104	2,664	5	6,773	
1970-----	36.1	5,465	3,358	14	8,837	
Jan.-June--						
1970-----	36.1	2,726	1,831	11	4,568	
1971-----	36.1	3,420	1,834	19	5,273	

1/ Includes small quantities of infants' shirts. Infants are defined in the TSUSA as children, regardless of their sex, up to and including 6 years of age.

2/ Based on imports in 1970.

3/ Not available.

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

Table 6.--U.S. rates of duty applicable to men's and boys' shirts, knit, of the types provided for in specified TSUS items, 1930 and GAITT concessions to Jan. 1, 1972

TSUS item No.	Abbreviated description	1930 rate	GAITT concession	
			Rate	Effective date
380.00 <u>1/</u>	Men's and boys' knit shirts: Lace or net, and/or ornamented, of cotton.	90% ad val.	60% ad val. 45% ad val. 42.5% ad val. 41% ad val. 39% ad val. 38% ad val. 36% ad val. 35% ad val.	Jan. 1, 1948 June 6, 1951 June 30, 1958 Jan. 1, 1968 Jan. 1, 1969 Jan. 1, 1970 Jan. 1, 1971 Jan. 1, 1972
380.04 <u>1/</u>	Lace or net, and/or ornamented, of manmade fibers.	90% ad val.	60% ad val. 45% ad val. 42.5% ad val.	Jan. 1, 1948 June 6, 1951 June 30, 1958
380.06	Not ornamented, of cotton--	45% ad val.	35% ad val. 25% ad val. 24% ad val. 23% ad val. 22.5% ad val. 21.5% ad val. 21% ad val.	Jan. 1, 1948 Sept. 10, 1955 Jan. 1, 1968 Jan. 1, 1969 Jan. 1, 1970 Jan. 1, 1971 Jan. 1, 1972
380.81	Not ornamented, of man- made fibers.	45¢ per lb. + 65% ad val.	27.5¢ per lb. + 35% ad val. 25¢ per lb. + 32.5% ad val.	Jan. 1, 1948 June 6, 1951
<u>1/</u> Prior to Jan. 1, 1968, this item was part of item 380.03.				

Note.--Items of cotton are exempt from the 10-percent surcharge effective Aug. 16, 1971, but items of manmade fibers are not exempt.

Table 7.--Woven fabrics of manmade fibers (except glass): U.S. production, imports for consumption, exports of domestic merchandise, and apparent consumption, 1961-70

(Quantity in thousands of square yards; value in thousands of dollars)

Year	Production <sup>1/</sup>	Imports	Exports	Apparent consumption	Ratio (percent) of imports to consumption
Quantity					
1961-----	3,006,802	40,177	136,851	2,910,128	1.4
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-----	6,506,753	234,938	173,806	6,567,885	3.6
Value					
1961-----	861,200	12,832	71,951	802,081	2/
1962-----	1,028,747	19,443	74,057	974,133	
1963-----	1,203,653	25,507	84,369	1,144,791	
1964-----	1,125,374	31,619	100,971	1,056,022	
1965-----	1,302,054	48,966	97,075	1,253,945	
1966-----	1,299,813	66,241	100,859	1,265,195	
1967-----	1,225,213	59,038	101,342	1,182,909	
1968-----	1,869,121	75,889	95,030	1,849,980	
1969-----	1,774,138	95,426	104,281	1,765,283	
1970-----	1,581,141	129,016	108,062	1,602,095	

<sup>1/</sup> 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; value partially estimated from manmade fiber grey goods prices listed in Daily News Record, a Fairchild publication, and official statistics of the U.S. Department of Commerce.

<sup>2/</sup> Ratio of value of imports to value of consumption is not relevant because value of imports excludes duty, transportation, and insurance costs, and importer's markup which are a part of wholesale value of imports.

Source: Compiled from official statistics of the U.S. Department of Commerce, unless otherwise noted.

Table 8.—Certain woven cotton fabrics of intermediate yarn numbers (approximately 30s to 40s): U.S. production, imports for consumption, exports of domestic merchandise, and apparent consumption, 1964-70

Year	Production <u>1/</u>	Imports <u>2/</u>	Exports <u>2/</u>	Apparent consumption	Ratio of imports to consumption
	<u>1,000</u> <u>sq. yds.</u>	<u>1,000</u> <u>sq. yds.</u>	<u>1,000</u> <u>sq. yds.</u>	<u>1,000</u> <u>sq. yds.</u>	<u>Percent</u>
1964-----	858,942	150,035	17,358	991,619	15.1
1965-----	845,326	206,725	16,109	1,035,942	20.0
1966-----	556,824	226,862	14,952	768,734	29.5
1967-----	356,532	153,541	14,217	495,856	31.0
1968-----	226,447	191,503	14,749	403,201	47.5
1969-----	139,597	209,228	11,876	336,949	62.1
1970-----	94,886	170,157	12,126	252,917	67.3

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.

2/ Includes carded fabrics.

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

Table 9.—Men's and boys' shirts, 1/ not knit: U.S. production, imports for consumption, exports of domestic merchandise, and apparent consumption, 1960-70, January-June 1970, and January-June 1971

(Quantity in thousands of dozens; value in millions of dollars)						
Year	Production <u>2/</u>	Imports <u>3/</u>	Exports <u>4/</u>	Apparent consumption	Ratio (percent) of imports to consumption	
Quantity						
1960-----	34,641	2,085	225	36,501	6	
1961-----	33,544	<u>5/</u> 1,961	236	35,269	6	
1962-----	37,126	2,936	218	39,844	7	
1963-----	37,014	3,198	213	39,999	8	
1964-----	38,935	3,796	216	42,515	9	
1965-----	39,592	4,132	486	43,237	10	
1966-----	38,420	5,521	501	43,440	13	
1967-----	35,632	6,764	511	41,885	16	
1968-----	33,209	8,099	429	40,879	20	
1969-----	31,630	10,337	380	41,587	25	
1970-----	31,924	12,005	305	43,624	28	
Jan.-June--						
1970-----	15,320	5,838	161	20,997	28	
1971-----	14,480	6,393	159	20,714	31	
Value						
1960-----	781	14	6	789		
1961-----	753	<u>5/</u> 14	6	761		
1962-----	851	22	5	868		
1963-----	861	25	6	880		
1964-----	924	33	5	952		
1965-----	962	37	9	990		
1966-----	985	52	10	1,027		
1967-----	1,008	61	10	1,059	<u>6/</u>	
1968-----	1,000	77	8	1,069		
1969-----	1,022	103	8	1,117		
1970-----	<u>7/</u>	129	8	<u>7/</u>		
Jan.-June--						
1970-----	<u>7/</u>	60	4	<u>7/</u>		
1971-----	<u>7/</u>	70	4	<u>7/</u>		

1/ Includes dress, sport, work and uniform shirts.

2/ Quantity data from National Cotton Council and U.S. Department of Commerce.

3/ Excludes shirts of vegetable fibers except cotton and of silk.

4/ Includes cotton shirts only in 1960-64, estimated in 1960-61.

5/ Includes cotton shirts only, which probably accounted for 90 percent or more of total imports.

6/ Ratio of value of imports to value of consumption is not relevant because value of imports excludes duty, transportation, and insurance costs, and importer's markup which are a part of wholesale value of imports.

7/ Not available.

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

Table 10.--Men's and boys' shirts, not knit: U.S. production, imports for consumption, exports of domestic merchandise, and apparent consumption, total and by shirt type, 1965-70, January-June 1970, and January-June 1971

Type and year	Production	Imports <sup>1/</sup>	Exports	Apparent consumption	Ratio of imports to consumption
	<u>1,000</u> <u>dozen</u>	<u>1,000</u> <u>dozen</u>	<u>1,000</u> <u>dozen</u>	<u>1,000</u> <u>dozen</u>	<u>Percent</u>
All shirts: <sup>2/</sup>					
1965-----	39,592	4,132	487	43,237	10
1966-----	38,420	5,521	501	43,440	13
1967-----	35,632	6,764	511	41,885	16
1968-----	33,209	8,099	429	40,879	20
1969-----	31,630	10,337	380	41,587	25
1970-----	<sup>3/</sup> 31,924	12,005	305	43,624	28
Jan.-June--					
1970-----	<sup>3/</sup> 15,320	5,838	161	20,997	28
1971-----	<sup>3/</sup> 14,480	6,393	159	20,714	31
Dress shirts:					
1965-----	11,178	1,610	199	12,589	13
1966-----	11,097	2,276	214	13,159	17
1967-----	11,316	3,083	199	14,200	22
1968-----	11,597	3,524	156	14,965	24
1969-----	12,125	5,164	175	17,114	30
1970-----	<sup>3/</sup> 13,409	6,355	118	19,646	32
Jan.-June--					
1970-----	<sup>3/</sup> 6,130	3,141	70	9,201	34
1971-----	<sup>3/</sup> 6,000	3,893	63	9,830	40
Sport shirts:					
1965-----	23,446	2,492	208	25,730	10
1966-----	21,987	3,206	253	24,940	13
1967-----	18,813	3,610	274	22,149	16
1968-----	16,128	4,445	248	20,325	22
1969-----	14,191	5,059	182	19,068	27
1970-----	<sup>3/</sup> 13,568	5,481	175	18,874	29
Jan.-June--					
1970-----	<sup>3/</sup> 6,851	2,613	85	9,379	28
1971-----	<sup>3/</sup> 6,052	2,412	90	8,374	29
Work shirts:					
1965-----	4,029	30	80	3,979	1
1966-----	4,190	39	34	4,195	1
1967-----	4,161	70	38	4,193	2
1968-----	4,568	130	25	4,673	3
1969-----	3,919	114	23	4,010	3
1970-----	<sup>3/</sup> 4,110	169	12	4,267	4
Jan.-June--					
1970-----	<sup>3/</sup> 1,941	84	<sup>3/</sup> 6	2,019	4
1971-----	<sup>3/</sup> 2,053	88	<sup>3/</sup> 6	2,135	4

<sup>1/</sup> Excludes shirts of vegetable fibers except cotton and of silk, not separately reported.

<sup>2/</sup> Includes dress, sport, work, and uniform shirts.

<sup>3/</sup> Estimated.

Source: Compiled from official statistics of the U.S. Department of Commerce and from statistics of the National Cotton Council.

Table 11.--Men's and boys' shirts, knit: 1/ U.S. production, imports for consumption, exports of domestic merchandise, and apparent consumption, 1965-70

Year	Production			Imports	Exports	Apparent consumption	Ratio of imports to consumption
	Dress	Sport	Total				
	<u>1,000</u> <u>dozen</u>	<u>1,000</u> <u>dozen</u>	<u>1,000</u> <u>dozen</u>	<u>1,000</u> <u>dozen</u>	<u>1,000</u> <u>dozen</u>	<u>1,000</u> <u>dozen</u>	<u>Percent</u>
1965--	1,083	10,522	11,605	1,755	<u>2/</u> 109	13,251	13
1966--	694	12,488	13,182	2,386	93	15,475	15
1967--	530	12,521	13,051	2,123	83	15,091	14
1968--	543	16,031	16,574	2,727	116	19,185	14
1969--	348	12,507	12,855	2,996	122	15,729	19
1970--	260	13,180	13,440	2,675	74	16,041	17

1/ Includes dress and sport shirts; data are not reported separately on U.S. imports and U.S. exports.

2/ Estimated.

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

Table 12.--Broadwoven polyester-cotton fabrics, wholly of noncontinuous fibers:  
U.S. production, by types, 1964-70

Type of fabric	1964	1965	1966	1967	1968	1969	1970
Batiste	112,991	156,208	212,371	236,451	415,566	377,854	398,798
Bedsheeting	2/	2/	49,194	93,182	270,298	479,402	633,999
Broadcloth	124,877	170,522	231,183	201,059	310,269	401,212	526,018
Twills	28,336	39,672	63,535	81,029	441,183	348,555	306,238
Oxfords	16,302	32,047	108,100	177,769	167,532	164,837	83,626
Poplins	146,753	191,667	213,772	208,466	283,039	211,298	209,433
Sateens	2/	2/	2/	2/	9,075	9,672	6,577
Voiles	12,539	14,503	46,541	33,539	110,488	114,584	60,061
Yarn-dyed fabrics	2/	2/	214,655	210,684	281,078	306,047	280,700
Other polyester-							
cotton blends	168,252	352,893	289,144	358,929	263,985	270,922	337,015
Total	610,050	957,512	1,419,495	1,601,108	2,552,513	2,684,383	2,842,465

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 MQ-22T.2 Supplement dated Dec. 5, 1968.

2/ Not separately classified; included with "other polyester-cotton blends."

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



Table 13.--Men's and boys' shirts, not knit: U.S. production, <sup>1/</sup> by types and fibers, specified years, 1958 to 1970

(In thousands of dozens)							
Type and fiber	1958	1961	1964	1967	1968	1969	1970
Dress shirts:							
Men's-----	6,513	7,553	9,559	9,768	10,004	10,834	12,054
Cotton-----	6,122	7,100	8,030	5,470	4,402	3,481	3,857
Manmade fibers-----	391	453	1,529	4,298	5,602	7,353	8,197
Boys'-----	844	1,075	1,734	1,548	1,593	1,291	1,355
Cotton-----	819	1,043	1,682	929	710	568	596
Manmade fibers-----	25	32	52	619	883	723	759
Total-----	7,357	8,628	11,293	11,316	11,597	12,125	13,409
Cotton-----	6,941	8,143	9,712	6,399	5,112	4,049	4,453
Manmade fibers-----	416	485	1,581	4,917	6,485	8,076	8,956
Sport shirts:							
Men's-----	14,791	14,703	16,777	12,553	11,240	9,956	9,756
Cotton-----	11,981	11,909	13,589	7,030	5,018	3,684	3,610
Wool <sup>2/</sup> -----	592	588	671	502	450	597	585
Manmade fibers-----	2,218	2,206	2,517	5,021	5,732	5,675	5,561
Boys'-----	5,874	5,595	6,048	6,260	4,888	4,235	3,812
Cotton-----	5,580	5,315	5,746	3,413	2,151	1,652	1,487
Wool-----	117	112	120	438	195	296	267
Manmade fibers-----	177	168	182	2,379	2,542	2,287	2,058
Total-----	20,665	20,298	22,825	18,813	16,128	14,191	13,568
Cotton-----	17,561	17,224	19,335	10,473	7,209	5,336	5,097
Wool-----	709	700	791	940	645	893	852
Manmade fibers-----	2,395	2,374	2,699	7,400	8,274	7,962	7,619
Work shirts:							
Cotton-----	4,064	3,576	3,592	3,329	3,289	2,547	2,548
Manmade fibers-----	83	111	270	832	1,279	1,372	1,562
Total-----	4,147	3,687	3,862	4,161	4,568	3,919	4,110

<sup>1/</sup> Partly estimated.<sup>2/</sup> Includes small quantities of fibers other than cotton, wool or manmade fibers.

Source: Compiled from official statistics of the U.S. Department of Commerce and statistics of the National Cotton Council.

Table 14.--Broadwoven polyester fabrics, wholly of noncontinuous fibers: U.S. imports for consumption, by types, 1964-70 and January-June 1971

Year	: Not bleached : and not : colored	:	: Other	:	: Total
			Quantity (square yards)		
1964-----	357,339	:	2,409,267	:	2,766,606
1965-----	12,503,019	:	17,401,842	:	29,904,861
1966-----	34,647,156	:	45,477,843	:	80,124,999
1967-----	6,404,719	:	14,651,081	:	21,055,800
1968-----	3,083,116	:	29,298,890	:	32,382,006
1969-----	2,187,116	:	17,708,118	:	19,895,234
1970-----	728,518	:	13,630,016	:	14,358,534
1971 (January-June)-----	60,951	:	8,661,903	:	8,722,854
			Value		
1964-----	\$73,730	:	\$911,008	:	\$984,748
1965-----	2,364,947	:	5,086,592	:	7,451,539
1966-----	6,177,430	:	12,438,775	:	18,616,205
1967-----	1,549,698	:	4,215,586	:	5,765,284
1968-----	670,225	:	9,114,197	:	9,784,422
1969-----	451,132	:	7,383,489	:	7,834,621
1970-----	164,232	:	7,040,233	:	7,204,465
1971 (January-June)-----	23,250	:	3,768,173	:	3,791,423

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

Table 15.--Men's and boys' shirts, not knit: U.S. imports for consumption, by types and fibers, 1960-70, January-June 1970, and January-June 1971

Shirt type and fiber	1960	1961	1962	1963	1964	1965	1966	1967	1968	1969	1970	Jan.-June 1970	Jan.-June 1971
	Quantity (1,000 dozen)												
All shirts, total--	2,085	1,961	2,937	3,199	3,796	4,132	5,521	6,763	8,099	10,337	12,005	5,838	6,393
Dress, total--	1/ 475	1/ 567	909	954	1,389	1,610	2,276	3,083	3,524	5,164	6,355	3,141	3,893
Cotton	475	567	856	905	1,270	1,317	1,278	814	1,011	1,042	850	399	440
Manmade fibers	2/	2/	53	49	119	293	998	2,269	2,513	4,122	5,505	2,742	3,453
Sport, total--	1/ 1,576	1/ 1,386	1,978	2,152	2,336	2,492	3,206	3,610	4,445	5,059	5,481	2,613	2,412
Cotton	1,576	1,386	1,876	1,993	2,157	2,188	2,516	2,199	2,143	2,169	1,900	727	549
Wool	2/	2/	43	97	98	145	175	122	131	136	167	33	13
Manmade fibers	2/	2/	59	62	81	159	515	1,289	2,171	2,754	3,414	1,853	1,850
Work, total--	1/ 34	1/ 8	50	93	71	30	39	70	130	114	169	84	88
Cotton	34	8	43	93	71	30	36	66	122	104	153	72	69
Manmade fibers	2/	2/	7	3/	3/	3/	3	4	8	10	16	12	19
Value (1,000 dollars)													
All shirts, total--	14,035	14,192	21,898	25,358	32,682	37,423	51,514	60,557	76,964	102,646	129,030	60,185	70,375
Dress, total--	1/ 4,340	1/ 5,642	8,872	9,253	13,739	15,397	22,326	28,621	34,787	51,337	68,120	32,343	42,698
Cotton	4,340	5,642	8,227	8,538	12,114	12,313	11,597	7,021	9,377	11,020	10,200	4,685	5,636
Manmade fibers	2/	2/	645	615	1,626	3,084	10,729	21,600	25,410	40,317	57,919	27,658	37,062
Sport, total--	1/ 9,479	1/ 8,485	12,662	15,301	18,271	21,657	28,845	31,343	41,015	50,261	59,664	27,257	26,895
Cotton	9,479	8,485	11,158	12,406	15,094	17,163	19,218	16,025	16,826	19,278	18,447	7,236	5,995
Wool	2/	2/	1,067	2,393	2,467	3,531	4,266	3,309	3,329	3,628	4,364	865	367
Manmade fibers	2/	2/	437	502	710	963	5,361	12,009	20,859	27,355	36,853	19,156	20,533
Work, total--	1/ 216	1/ 65	364	804	672	368	343	593	1,163	1,048	1,246	585	782
Cotton	216	65	339	804	668	364	319	553	1,082	975	1,098	486	614
Manmade fibers	2/	2/	25	4/	4/	4	24	40	81	73	148	99	168

1/ Includes imports of shirts of cotton only; imports of shirts of other fibers not reported separately.  
 2/ Not separately reported.  
 3/ Less than 500 dozen.  
 4/ Less than \$500.

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

Table 16.--Men's and boys' dress shirts, not knit: U.S. imports  
for consumption, by principal sources, 1965-70

Source	1965	1966	1967	1968	1969	1970
Quantity (1,000 dozen)						
Hong Kong-----	763	1,052	1,600	1,635	2,069	2,172
Republic of Korea--	113	151	358	830	1,559	2,313
Japan-----	578	793	809	796	830	834
Taiwan-----	21	36	145	190	518	829
Malaysia-----	55	112	92	19	126	126
All other-----	79	132	79	54	62	81
Total-----	1,609	2,276	3,083	3,524	5,164	6,355
Value (1,000 dollars)						
Hong Kong-----	7,709	10,698	15,336	17,110	21,616	25,686
Republic of Korea--	888	1,288	2,975	6,746	13,119	20,783
Japan-----	5,371	7,974	7,511	8,299	8,513	9,241
Taiwan-----	199	252	1,268	1,796	5,129	9,022
Malaysia-----	433	959	757	157	1,196	1,250
All other-----	797	1,154	774	679	1,764	2,138
Total-----	15,397	22,325	28,621	34,787	51,337	68,120
Unit value (per dozen)						
Hong Kong-----	\$10.10	\$10.17	\$9.59	\$10.46	\$10.45	\$11.82
Republic of Korea--	7.86	8.53	8.31	8.13	8.42	8.99
Japan-----	9.29	10.06	9.28	10.43	10.26	11.09
Taiwan-----	9.48	6.99	8.74	9.45	9.90	10.88
Malaysia-----	7.87	8.56	8.23	8.26	9.51	9.94
All other-----	10.09	8.74	9.80	12.57	28.65	26.28
Average-----	9.57	9.81	9.28	9.87	9.94	10.72

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

Table 17.--Men's and boys' sport shirts, not knit: U.S. imports for consumption, by principal sources, 1965-70

Source	1965	1966	1967	1968	1969	1970
Quantity (1,000 dozen)						
Hong Kong-----	546	800	1,028	1,405	1,457	1,451
Japan-----	870	1,109	1,146	1,335	1,190	1,179
Taiwan-----	311	292	432	680	972	1,273
Republic of Korea--	87	130	213	533	786	1,048
Malaysia-----	33	27	53	7	93	57
All other-----	645	848	739	485	561	473
Total-----	2,492	3,206	3,611	4,445	5,059	5,481
Value (1,000 dollars)						
Hong Kong-----	4,620	7,066	8,675	11,928	13,783	15,769
Japan-----	9,684	13,274	12,489	13,915	13,616	13,151
Taiwan-----	1,688	1,724	2,853	5,272	8,545	12,195
Republic of Korea--	556	1,242	1,984	5,367	8,004	11,824
Malaysia-----	158	164	382	60	865	557
All other-----	4,952	5,376	4,959	4,472	5,448	6,168
Total-----	21,658	28,846	31,342	41,014	50,261	59,664
Unit value (per dozen)						
Hong Kong-----	\$8.46	\$8.84	\$8.44	\$8.49	\$9.46	\$10.87
Japan-----	11.13	11.97	10.90	10.43	11.44	11.16
Taiwan-----	5.43	5.91	6.60	7.75	8.79	9.58
Republic of Korea--	6.33	9.55	9.33	10.07	10.18	11.28
Malaysia-----	4.86	5.95	7.19	8.34	9.31	9.75
All other-----	7.68	6.34	6.71	9.24	9.73	13.03
Average-----	8.69	9.00	8.68	9.23	9.94	10.89

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

Table 18.--Men's and boys' knit shirts, except T- and sweat: 1/ U.S. imports for consumption, by fibers, 1962-70, January-June 1970, and January-June 1971

Fiber	1962	1963	1964	1965	1966	1967	1968	1969	1970	Jan.-June 1970	Jan.-June 1971
	Quantity (1,000 dozen)										
Cotton	1,223	701	647	645	1,167	681	866	985	864	511	540
Wool	2/	2/	28	31	29	50	111	115	71	25	20
Manmade fibers 3/	2	91	148	879	1,190	1,392	1,750	1,896	1,740	898	1,274
Total	1,225	792	823	1,755	2,386	2,123	2,727	2,996	2,675	1,434	1,834
	Value (1,000 dollars)										
Cotton	4,961	3,813	4,066	7,768	15,632	6,556	8,808	9,888	9,498	5,373	6,046
Wool	2/	2/	1,709	1,817	1,754	2,877	5,818	6,102	3,848	1,314	1,164
Manmade fibers 3/	15	395	1,596	10,725	11,452	11,448	16,820	19,464	17,769	8,583	12,246
Total	4,976	4,208	7,371	20,310	28,838	20,881	31,446	35,454	31,115	15,270	19,456
	Average unit value (per dozen)										
Cotton	\$4.05	\$5.44	\$6.29	\$9.20	\$13.39	\$9.63	\$10.17	\$10.04	\$10.99	\$10.51	\$11.20
Wool	2/	2/	61.04	58.61	60.48	57.54	52.41	53.06	53.86	52.77	57.37
Manmade fibers 3/	6.74	4.35	10.72	12.20	9.62	8.23	9.61	10.27	10.21	9.56	9.61
Average	4.06	5.31	8.96	11.57	12.09	9.84	11.53	11.83	11.63	10.65	10.61

1/ Includes knit dress and sport shirts, not separately reported.

2/ Not available.

3/ Includes sweat shirts not separately reported.

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

Table 19.--Broadwoven polyester fabrics, wholly or chiefly by weight of noncontinuous fibers: U.S. exports of domestic merchandise, by kinds, 1965-70

Year	Unbleached	Bleached,		Total
		dyed,	colored, etc.	
Quantity (square yards)				
1965	1,264,346	5,844,399		7,108,745
1966	900,349	8,695,424		9,595,773
1967	804,433	10,879,345		11,683,778
1968	724,284	12,271,519		12,995,803
1969	1,172,638	19,444,584		20,617,222
1970	3,106,611	23,633,201		26,739,812
Value				
1965	\$897,018	\$3,939,224		\$4,836,242
1966	529,632	5,593,177		6,122,809
1967	367,897	7,486,506		7,854,403
1968	485,872	8,278,750		8,764,622
1969	576,771	13,217,201		13,793,972
1970	1,057,472	14,330,873		15,388,345

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

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APPENDIX B

Statement of Donald Comer, Jr., President of Avondale Mills,  
on closing the Birmingham Plant

August 10, 1971

BIRMINGHAM PLANT TO CLOSE  
Donald Comer, Jr.

After lengthy and careful analysis, the decision to close the Birmingham Plant of the Avondale Mills has been made. We plan to complete existing contracts and the plant will close approximately October 15. This plant has been in continuous operations since 1897. It is the original plant of the Avondale Mills which was founded by Governor B. B. Comer. In its early years a major part of the production of this plant went into the export market in the form of narrow print cloths. During the 1920's the product line was changed to dress chambray which bore the Arkwright and Manchester labels. They were known around the world, but particularly in the Philippine and Chinese markets.

In the late 1930's our foreign markets were taken over by the Japanese who, with a lower price resulting from a much lower wage rate, produced a fabric they called "Marchester." Their fabric and patterns were exact copies. The label they used was identical to our Manchester label in color and layout. The only difference being an "R" in place of the "N." By necessity, the production of the Birmingham Plant was diverted 100% to the domestic market. Inasmuch as the plant was designed to make fine yarn, the product was made for the dress and sport shirt market. As the Japanese began to



invade the United States market after World War II, they concentrated on the markets supplied by our Birmingham Plant because the major part of their productive facilities are designed for light weight goods. Today our former dress customers, as they need colored yarn dress goods, buy the Japanese import made with labor paid at one-fifth the rate of ours. Our former sport shirt customers, in order to protect themselves from shirt imports, are building plants in the Asian countries. This market we have to regard as lost forever. The sport shirt people are not alone in this approach.

I quote Robert C. Sprague, chairman and chief executive officer of Sprague Electric Company, North Adams, Massachusetts; "Imports are a threat to our business. Relief must be provided by specific legislation rather than offered through the time consuming procedure of the escape clause, because of the rate at which United States producers of electronic products are shifting their plants abroad. It must be provided by either the statutory imposition of import quotas or by an increase in the import duty to the statutory rate of 35 per cent ad valorem. The transfer of these plants to offshore sites is destroying the jobs of American workers in the electronic industries. Once the plants are established abroad, the jobs in the U. S. are lost forever."

I quote Joseph S. Wright, chairman and chief executive officer of the Zenith Radio Corporation: "The question of imports is a tremendously complicated subject. Our industry - I mean consumer electronics finished products - produced last year a \$1 billion

negative trading balance on an understated basis. American industry, facing dumping prices, has had to establish factories on Taiwan and elsewhere, though Zenith was among the last to do so.

"The difficult thing is that, if this were fair competition, that would be one thing, but it isn't, and it's pretty upsetting to American industry. As an example, three years ago, there were five color TV tube plants in the Chicago area; today there is only one."

This is one among several industries trying to solve their problem in a similar fashion. For the good of America, I don't believe that establishing offshore bases for manufacture is any answer to the problem. As we continue to liquidate American jobs it is obvious that in a short time we will become a nation of paupers with no one to pick up the welfare check. There is no way we can pay ourselves wages at a rate many times that of people around the world, and at the same time afford the luxury of uncontrolled imports made with this cheap labor, without disastrous results. We are extremely reluctant to sacrifice an American job because we feel every one of them is vital to the continued success of this country. We will fight every way we know how to protect an Avondale job, and certainly as long as I am president of Avondale we will not bring into this country anything Avondale has the facilities to make.

Birmingham's customers have an ample amount of fabrics available to them, made with labor paid at a rate that is illegal in this country, to more than take care of their needs. In our efforts to continue operating, we have most recently been trying to supply fancy

goods to the dress shirt trade. Unfortunately, our equipment does not lend itself to this specialty market and we are currently losing money in Birmingham at a rate in excess of a million dollars annually. Of course, we cannot continue this. Our normal market was completely flooded with low wage imports of piece goods or garments last year, and with overall imports running at a rate 40% higher this year it is futile to hope for a better time tomorrow. Therefore, we reluctantly reached what we feel is the only wise decision - namely, to close the plant. Fortunately, up until the present time the products of our other plants have not been attacked so devastatingly by imports. Although with our present so called free trade policy it is only a matter of time until the low wage countries tool up to invade other fields. When you are the only free trade country in the world, unfortunately you have dumped into your market all the excess capacity that all the other countries can't use in their own market or supply under trade agreements with other nations. We do have faith in this country and we have faith that the Congress will soon take a realistic approach to our trade problems. For the good of the world we believe in trade among the nations, but we further believe for the good of all it should be done on an orderly basis. It is a shame that so many American jobs have been and continue to be sacrificed while we continue to do everything but take the firm, necessary legislative stand.

Some people call controlling imports protectionism. I call it playing the game as it is played everywhere in the world but here.

The matter must be dealt with right away. In the meantime, although it is a shrinking market, the textile market in this country is still a large one. Our capital expenditures have been made to keep our plants as modern as any in the world and wherever possible to direct our product line into areas that we feel will be least susceptible to low wage imports. Our overall operation continues at a profitable level.

Our Trust member employees are our most valuable asset. This particularly applies to the 414 in Birmingham who have tried so hard to save this plant. Although we realize it is not the ideal solution, and maybe in some cases is not a solution at all, we will be able to offer a job to every Trust member who is willing to relocate and if necessary to train for a new job.

This is the unhappiest task I have had in my 39 years with Avondale. Although they are too late coming for some of us, I still have faith in our legislative processes. I don't believe it will happen again.



