UNITED STATES INTERNATIONAL TRADE COMMISSION

FOOTWEAR

Report to the President
on Investigation No. TA-201-7
Under Section 201 of the Trade Act of 1974

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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 individual concerns. This published report is the same as the report to the President, except that the abovementioned information has been omitted. Such omissions are indicated by asterisks.

REPORT TO THE PRESIDENT

U.S. International Trade Commission
February 20, 1976

To the President:

In accordance with section 201(d)(1) of the Trade Act of 1974 (88 Stat. 1978), the United States International Trade Commission herein resports the results of an investigation made under section 201(b)(1) of that act, relating to footwear.

The investigation was undertaken to determine whether--

> footwear, provided for in items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60), of the Tariff Schedules of the United States (TSUS), 1/

is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

The investigation was instituted on September 17, 1975, upon receipt of a petition filed on August 20, 1975, by the American Footwear Industries Association, the Boot and Shoe Workers' Union, and the United Shoe Workers of America.

Notice of the investigation and hearings was published in the Federal Register of September 22, 1975 (40 F.R. 43561). A public hearing in connection with the investigation was conducted from December 2 through

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1/ Included in the investigation is footwear provided for in TSUS item 700.55. This item has been subdivided by Executive Order 11888 into two items, viz, item 700.54, covering zoris and item 700.58, covering other footwear formerly in item 700.55. This change in item numbers is reflected in the Determinations, Findings, and Recommendations of the Commission, but not in the remainder of this report.

December 4, and on December 8, 1975, in the Commission's hearing room in Washington, D.C. All interested parties were afforded an opportunity to be present, to produce evidence, and to be heard. A transcript of the hearing and copies of briefs submitted by interested parties in connection with the investigation are attached. 1/

The information for this report was obtained from fieldwork, questionnaires sent to domestic manufacturers and importers, the Commission's files, other Government agencies, evidence presented at the hearings, briefs filed by interested parties, and from other sources.

There were no significant imports of footwear from countries whose imports are presently subject to the rates of duty set forth in column 2 of the TSUS. The import relief recommended herein, therefore, is not addressed to imports from such countries. Certain recommended relief measures would involve the imposition of rates of duty on imports from countries whose imports are currently subject to rates of duties in column 1 which are higher than the rates set forth in column 2. Should such recommended, or any other, rates of duty higher than the column 2 rates be proclaimed by the President, it would be necessary for him to conform column 2 by proclaiming rates therefor that are the same as those proclaimed for column 1.

1/ Attached to the original report sent to the President, and available for inspection at the U.S. International Trade Commission, except for material submitted in confidence.

DETERMINATIONS, FINDINGS, AND RECOMMENDATIONS OF THE COMMISSION

On the basis of its investigation, the Commission determines that footwear, provided for in TSUS items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53 and 700.60 1/), is being imported in such increased quantities as to be a substantial cause of serious injury 2/ to the domestic industry or certain industries producing articles like or directly competitive with the imported articles.

1/ Commissioners Leonard, Minchew, Moore, Bedell and Parker also except disposable footwear designed for one-time use, provided for in item 700.85.

Commissioners Minchew, Moore, Bedell and Parker also except zoris, provided for in item 700.54.

Commissioners Moore and Bedell would also except athletic footwear as as defined in Schedule 7, Part 1A, statistical headnote 1(a), in whatever item provided for.

Commissioner Moore would also except work footwear and footwear for children and infants, as defined in Schedule 7, Part 1A, statistical headnotes 1(b), (1), and (m), respectively, in whatever item provided for.

2/ Commissioner Moore finds both serious injury and the threat thereof with regard to the two industries consisting of the respective facilities in the United States devoted to the production of men's, youth's, and boy's footwear and women's and misses' footwear. Commissioner Bedell finds both serious injury and the threat thereof with respect to the domestic industry consisting of the facilities in the United States devoted to the production of nonrubber footwear.

Findings and recommendations

Commissioners Leonard, Moore and Bedell find and recommend that, in lieu of the existing rates of duty, the imposition of rates of duty as follows is necessary to prevent or remedy such injury:

Footwear, provided for in items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60, and disposable footwear, designed for one-time use, provided for in item 700.85), 1/ of the TSUS:

	1st Year	2nd Year	3rd Year	4th Year	5th Year
Valued not over $2.50 per pair	35	32	29	26	23
Valued over $2.50 but not over $6 per pair	30	27	24	21	18
Valued over $6 per pair	25	22	19	16	13

Commissioners Minchew and Parker find and recommend that it is necessary to impose a tariff-rate quota system for the ensuing five-year period applying to all footwear covered by the Commission's notice of investigation (except zoris provided for in item 700.54 of the TSUS and disposable footwear, designed for one-time use, provided for in item 700.85) with the existing rates of duty applying to footwear within the quotas and rates of duty hereinafter specified applying to footwear imports outside the quotas, and with the quotas established and allocated to countries subject to rates of duty provided for in rate of duty column numbered 1 of the TSUS on the basis of their respective aggregated quantities of footwear imports during calendar year 1974.

1/ Commissioners Moore and Bedell would except athletic footwear as defined in Schedule 7, Part 1A, statistical headnote 1(a), in whatever item provided for, and zoris, provided for in item 700.54.

Commissioner Moore would also except from the higher duties recommended work footwear and footwear for children and infants, as defined in Scheuled 7, Part 1A, statistical headnotes 1(b), (1), and (m), respectively, in whatever itemprovided for.

Country	Quota Quantity (1,000 prs.)
Republic of China (Taiwan)	88,284
Italy	62,603
Spain	35,033
Brazil	21,324
Republic of Korea	9,202
Japan	5,855
Hong Kong	5,580
Argentina	5,328
Mexico	4,145
Greece	3,238
France	2,965
India	2,924
Romania	2,817
Austria	2,746
Canada	2,534
Yugoslavia	1,784
Poland	1,677
West Germany	1,668
Columbia	1,164
United Kingdom	896
Ireland	785
Switzerland	363
All other	2,667
Total	265,582

All imports outside the specified quota quantities should be assessed with rates of duty as follows:

For the first year	40%
For the second year	35%
For the third year	30%
For the fourth year	25%
For the fifth year	20%

If our recommended, or a similar, tariff-rate quota system should be proclaimed, we suggest that the Commission should, where appropriate, initiate an investigation under section 203(i) of the Trade Act of 1974 to determine whether the country allocations should be relaxed to provide equitable allocations for new entrants to the U.S. market.

Commissioner Ablondi finds and recommends that adjustment assistance under Chapters 2, 3, and 4 of the Trade Act of 1974 can effectively remedy the serious injury suffered by the domestic footwear industry.

Views of Vice Chairman Minchew
and Commissioner Parker

Following receipt of a petition filed on August 20, 1975, by the American Footwear Industries Association, the Boot and Shoe Workers' Union, and the United Shoe Workers of America, the U.S. International Trade Commission (Commission), on September 17, 1975, instituted an investigation under section 201(b) of the Trade Act of 1974 (Trade Act) to determine whether footwear, provided for in items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60), of the Tariff Schedules of the United States, is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Before making an affirmative determination under section 201(b)(1), the Commission must find that all three of the following criteria are met:

(1) That an article is being imported into the United States in increased quantities (the increased imports may be actual or relative to domestic production);

(2) That a domestic industry producing an article like or directly competitive with the imported article is being seriously injured or threatened with serious injury; and

(3) That such increased imports of an article are a substantial cause of the serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Determination

From the information obtained in the present investigation we have concluded that footwear, provided for in items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60), of the Tariff Schedules of the United States, is being imported into the United States in such increased quantities as to be a substantial cause of serious injury to the domestic industry producing an article like or directly competitive with the imported article.

The domestic industry

The domestic industry consists of those domestic producers of articles "like or directly competitive" with the imported articles. 1/ The Senate Finance Committee Report states:

> The term "like or directly competitive" used in the bill to describe the products of domestic producers that may be adversely affected by imports was used in the same context ir section 7 of the 1951 Extension Act and in section 301 of the Trade Expansion Act. The term was derived from the escape-clause provisions in trade agreements, such as article XIX of the GATT. The words "like" and "directly competitive," as used previously and in this bill, are not to be regarded as synonymous or explanatory of each other, but rather to distinguish between "like" articles and

1/ Comm. Parker feels the domestic industry consists of the domestic producers of nonrubber footwear.

> articles which, although not "like", are nevertheless "directly competitive." In such context, "like" articles are those which are substantially identical in inherent or intrinsic characteristics (i.e., materials from which made, appearance, quality, texture, etc.), and "directly competitive" articles are those which, although not substantially identical in their inherent or intrinsic characteristics, are substantially equivalent for commercial purposes, that is, are adapted to the same uses and are essentially interchangeable therefor. 1/

While the Trade Act does not expressly define the "domestic industry" with regard to production of articles "like or directly competitive" with the imported articles, it does provide guidelines. Section 201(b)(3) provides that--

> For purposes of paragraph (1), in determining the domestic industry producing an article like or directly competitive with an imported article, the Commission--
>
> (A) may, in the case of the domestic producer which also imports, treat as part of such domestic industry only its domestic production
>
> (B) may, in the case of the domestic producer which produces more than one article, treat as part of such domestic industry only that portion or subdivision of the producer which produces the like or directly competitive article, and
>
> (C) may, in the case of one or more domestic producers, who produce a like or directly competitive article in a major geographic area of the United States and whose production facilities in such area for such article constitute a substantial portion of the domestic industry in the United States and primarily serve the market in such area, and where the imports are concentrated in such area, treat as such domestic industry only that segment of the production located in such area.

1/ U.S. Senate, Trade Reform Act of 1974; Report of the Committee on Finance . . ., S. Rept. No. 93-1298 (93d Cong., 2d sess.), 1974, pp. 121-122.

Commissioner Minchew states: In applying the above guidelines, I have at times divided the domestic industry. In cases in which I have decided to divide the industry there have been clear indications of different production methods and/or equipment or a clear differentiation at end-use.

In the present case it is possible to divide the industries in a number of ways, but I feel that the only choices which adequately reflect my criteria for division of the industry are (1) to use the single-industry concept, or (2) to divide the industry into mens', youths', and boys' shoes, and women's and misses' shoes.

I have concluded that of the two possibilities, the first approach, i.e., that of the single industry, is the soundest. This is due mainly to the labor-intensiveness of the industry, which allows the domestic producer to shift from one type of shoe to another with relatively low capital costs.

Therefore, I define the domestic industry as producers of all footwear, both rubber and nonrubber. 1/

Commissioner Parker states: I regard the domestic industry which is being seriously injured by imports as consisting of the

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1/ Comm. Minchew states that although he has defined the domestic industry to include rubber and nonrubber footwear, his discussion of serious injury and substantial cause will focus on the nonrubber footwear industry. The experience of the rubber and nonrubber footwear industries appears to be the same, and the data obtained on the rubber footwear industry are less than adequate. It is not necessary to discuss rubber footwear in terms of increased imports as the question of rubber footwear imports has not been brought before the Commission.

facilities in the United States devoted to the production of nonrubber footwear which is marketed in competition with the imported footwear covered by this investigation. I have treated the domestic industry as a single industry because the data as compiled in this investigation and contained in the report are organized in a manner which permits better analysis on such a basis. In my judgment, however, it makes no difference whether the industry is treated as a single industry or whether it is segmented, as the requisite serious injury is present in any event.

Increased imports

An increase in imports occurs when the increase is "either actual or relative to domestic production" (sec. 201(b)(2)(C)). Therefore, the Commission can find "increased imports" when the increase is in "actual" or absolute terms or when the level is declining in actual terms, but is increasing relative to domestic production. It is our view that, in the absence of extraordinary circumstances, the Commission should look at the increase in imports resulting from only the most recent trade concessions, so that the injury considered would be a new and continuing injury from increased imports as opposed to an "old" injury. The Senate Finance Committee Report at page 120 states:

> The increase in imports referred to would generally be such increases as have occurred since the effectiveness of the most recent trade agreement concessions proclaimed by the President, i.e., as of now, the effectiveness of the Kennedy Round concessions beginning in 1968.

To look back beyond the last trade-agreement concessions would require extraordinary circumstances. In the present case, we do not see such extraordinary circumstances to necessitate using a longer time frame. In determining the question of increased imports in the nonrubber footwear industry, we will look at the trend of imports since the Kennedy Round trade concessions in 1968. 1/

In 1968, imports of nonrubber footwear were 181.5 million pairs, and the ratio of imports to production was 28 percent. Imports increased steadily both in quantity and as a ratio of imports to production, peaking in 1973, as is seen in the following tabulation:

Year	Imports Million pairs	Ratio of imports to production (percent)
1968	181.5	28
1969	202.2	35
1970	241.7	43
1971	268.6	50
1972	296.7	56
1973	307.5	63
1974	266.4	59
Jan.-Sept.		
1974	212.8	62
1975	202.8	68

It should be noted from the above table that the quantity of imports decreased in 1974, as did the ratio of imports to production. However,

1/ Both zoris and paper slippers have been omitted from the discussion of increased imports, despite the fact that they fall under the scope of the investigation, because they are low in per unit cost and because they generally are not "like or directly competitive" with articles produced in this country.

while the quantity of imports decreased in January-September 1975, compared with what it was in the corresponding period of 1974, the ratio of imports to production increased.

From the information we have been able to gather in this investigation, it would appear that there is no doubt that imports since the Kennedy Round concessions have been increasing. We, therefore, find that the first criterion for an affirmative determination, i. e., that of increased imports, is met.

Serious injury

Although the Trade Act provides no precise definition of the term "serious injury," some economic factors which the Commission may take into account are listed in section 201(b)(2) of the Trade Act as follows:

> with respect to serious injury, the significant idling of productive facilities in the industry, the inability of a significant number of firms to operate at a reasonable level of profit, and significant unemployment or underemployment within the industry; . . .

and, with regard to the question of a threat of serious injury, section 201(b)(2)(B) provides:

> with respect to threat of serious injury, a decline in sales, a higher and growing inventory, and a downward trend in production, profits, wages, or employment (or increasing underemployment) in the domestic industry concerned. . . .

These factors are not to be considered all inclusive, nor does the existence of any one of them necessarily require an affirmative finding of injury or the threat of injury, since they are discretionary factors for the use and judgment of the Commission.

Significant idling of productive facilities.--The following table which shows the number of U.S. producing companies by type of output, indicates a decline from 1967 to 1974 in the number of firms producing each type of footwear listed. The total number of companies producing shoes declined by 49 percent. There were large declines in the number of firms producing misses' shoes (47 percent) and men's shoes (43 percent). The number of companies producing youths' and boys, women's, children's, and infants' and babies' shoes all declined approximately 35 percent.

Nonrubber footwear: Number of U.S. producing companies, by SIC product classes, 1967, 1969 and 1974

SIC product class	Companies producing in-- 1967	1969	1974	Net decrease 1974 from 1967
Shoes and slippers, except rubber------	675	597	409	266
Shoe, total---------	569	503	358	211
Athletic 1/--------	91	81	67	24
Men's work---------	94	79	54	40
Men's (except work)-------------	135	122	119	16
Youths' and boys'--	101	80	63	38
Women's------------	324	283	214	110
Misses'------------	110	86	58	52
Children-----------	126	109	81	45
Infants' and babies------------	113	98	75	38
Slippers-----------	169	147	86	85

1/ Includes miscellaneous footwear reported under SIC class 3141798 in 1967 and 1969 and under SIC 3149400 in 1974.

While it is true that there was a certain amount of consolidation of footwear firms, which would reduce the number of firms producing footwear, it should also be noted that U.S. production has declined every year since 1968.

Profit-and-loss experience.--The profit and loss experience of domestic producers of footwear varies widely, with a number of firms (usually the larger firms) operating at a reasonable level of profit. However, significant number of firms were not able to operate at a reasonable level of profit, and a number of firms showed losses at an increasing rate. These losses tended to accelerate the idling of production facilities discussed above.

Employment.--While it is not possible to measure unemployment figures in the nonrubber footwear industry precisely, a reasonable guide for determining unemployment can be found by measuring unemployment in the production of leather and leather products. In recent years, unemployment in the leather and leather products industries, of which footwear is estimated to consist of two-thirds, has been consistently more than twice as high as the average for all manufacturing. The total number of insured unemployed in the leather and leather products industry rose from a low of 14,600 in 1968, to 21,800 in 1969, to 25,080 in 1970, and to 27,630 in 1971. The number decreased to 22,980 in 1972 and to 18,840 in 1973, but then increased sharply to 22,870 in 1974 and 45,550 in the first 4 months of 1975.

During 1970-74 the rate of unemployment in leather and leather products ranged between 4.7 and 11.2 percent, averaging 7.14 percent, while the corresponding rate in all manufacturing was considerably lower, ranging between 2.5 and 6.8 percent and averaging 4.15 percent.

It would appear from the evidence that the footwear industry, rubber and nonrubber, 1/ has been seriously injured. We therefore

1/ Comm. Parker considers the domestic industry to be only nonrubber footwear.

conclude that the second criterion for an affirmative determination, i. e., that of "serious injury," has been met.

Having concluded that the criterion of "serious injury" has been met, we do not think it necessary to address the question of threat of serious injury.

Substantial cause

Section 201(b)(4) of the Trade Act defines "substantial cause" as a "cause which is important and not less than any other cause." In addressing the question of substantial cause, the House Ways and Means Committee Report stated:

> The Committee intends that a dual test be met--imports must constitute an important cause and be not less important than any other single cause. For example, if imports were just one of many factors of equal weight, imports would meet the test of being "not less than any other cause" but it would be unlikely that any of the causes would be deemed an "important" cause. If there were any other cause more important than imports, then the second test of being "not less than any other cause" would not be met. On the other hand, if imports were one of two factors of equal weight and there were no other factors, both tests would be met. 1/

The Senate Finance Committee Report addressed the question by stating:

> The Committee recognizes that "weighing" causes in a dynamic economy is not always possible. It is not intended that a mathematical test be applied by the Commission. The

1/ U.S. House of Representatives, Trade Reform Act of 1973: Report of Committee on Ways and Means . . ., H. Rept. No. 93-571 (93d Cong., 1st sess.), 1973, pp. 46-47.

> Commissioners will have to assure themselves that imports represent a substantial cause or threat of injury, and not just one of a multitude of equal causes or threats of injury. It is not intended that the escape clause criteria go from one extreme of excessive rigidity to complete laxity. An industry must be seriously injured or threatened by an absolute increase in imports, and the imports must be deemed to be a substantial cause of the injury before an affirmative determination should be made. 1/

In determining "substantial cause" it is necessary, therefore, to consider two tests. First, a cause must be important; and, second, a cause must be not less than any other cause.

We have concluded that a number of causes have contributed to the "serious injury" suffered by the industry. These include, among other causes:

(a) A sharp drop in consumption of nonrubber footwear because of lowered consumer confidence during recession periods;

(b) An inability of domestic producers to compete with regard to style; and

(c) The increased imports.

We have concluded that increased imports are the most important cause.

The share of the market taken by U.S. imports of footwear for women and misses increased from 30 percent in 1968 to 44 percent in 1971 and to 50 percent in 1974. Such imports accounted for 51 percent

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1/ U.S. Senate, Trade Reform Act of 1974; Report of the Committee on Finance . . ., S. Rept. No. 93-1298 (93d Cong., 2d sess.), 1974, pp. 121-122.

of the market in the first 9 months of 1975 and 52 percent in the corresponding period of 1974. Imports of nonrubber footwear for men, youths, and boys supplied 21 percent of apparent domestic consumption in 1968 and 36 percent in 1971; during the period 1972-74 and the first 9 months of 1974 and 1975, imports of such footwear supplied about a third of the market.

U.S. imports of footwear for children and infants rose from 10 percent of apparent consumption in 1968 to 35 percent in 1973. The ratio dropped to 30 percent in 1974, but then increased to 33 percent in the first 9 months of 1975. U.S. imports of work shoes supplied about 5 percent of the market in the period 1968-72 and 10 percent in 1974.

In addition, the ratio of U.S. imports of athletic footwear to apparent domestic consumption of such footwear has been on an upward trend in recent years. Imports of athletic footwear supplied 20 percent of the market in 1968, 38 percent in 1971, and 44 percent in 1974.

Overall, this is a very high level of import penetration. It must be noted that imports were increasing at a constant rate in those years in which the U.S. economy was healthy. But, despite the apparent healthy economy, many U.S. footwear manufacturers were experiencing great difficulty.

We are convinced that the labor intensiveness of the industry has given foreign producers an advantage in producing short runs of stylish shoes with which domestic manufacturers have difficulty in competing.

For these reasons, we have concluded that the third criterion, i.e., that of "substantial cause," has been met.

Conclusion

We have determined that footwear, provided for in items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60), of the Tariff Schedules of the United States, is being imported into the United States in such increased quantities as to be a substantial cause of serious injury to the domestic industry producing an article like or directly competitive with the imported article. We have not found it necessary to determine the question of the threat of serious injury.

<u>Additional views of Vice Chairman Minchew and Commissioner Parker with regard to recommendation of remedy</u>

When the Congress included an "escape clause" in the Trade Act of 1974 it did so for a specific purpose. This purpose is stated in the report of the Senate Committee on Finance:

> The "escape clause" is aimed at providing temporary relief for an industry suffering from serious injury, or the threat thereof, <u>so that the industry will have sufficient time to adjust to freer international competition</u>. (emphasis added) 1/

This purpose is also referred to in the Trade Act. Section 201(a)(1) states--

> A petition for eligibility for import relief <u>for the purpose of facilitating orderly adjustment to import competition</u> may be filed with the International Trade Commission. . . . The petition shall include a statement describing the specific purpose for which import relief is being sought, which may include such objectives as facilitating the orderly transfer of resources to alternative uses and <u>other means of adjustment to new conditions of competition</u>.' (emphasis added)

Thus, any recommendation of relief made by the Commission should, to the maximum extent possible, be tailored to permit the domestic industry to adjust to freer international competition. Such a remedy must take into account both the nature and make-up of the domestic industry, and the competition which it faces from imports.

1/ U.S. Senate, Report of the Committee on Finance, <u>Trade Reform Act of 1974</u>, S. Rept. No. 93-1298, 93d Cong., 2d Sess. (1974) p. 119.

The domestic industry is made up of a diversity of firms, over 400 in number, although 21 firms account for over 50 percent of production. While the larger firms are generally more profitable than the smaller firms in the industry, there are exceptions. The industry, as a whole, can be characterized as labor intensive.

As stated in the report of the Committee on Finance set forth above, "escape clause" relief is only temporary. Under the Trade Act such relief can last only 5 years, with the possibility of one 3 year extension. It would not serve the expressly stated statutory purpose of the Trade Act to provide over-protective tariff or non-tariff barriers to imports which do not expose the domestic industry to the realities of competition, only to expose the domestic industry to the full brunt of import competition after the temporary relief has ended. Nor do we believe that adjustment assistance, by itself, is appropriate. The domestic industry has had the opportunity to take advantage of adjustment assistance under provisions in Chapters 2, 3 and 4 of the Trade Act. Thus far, adjustment assistance has not been as effective as one might have hoped, but with the stability against excessive import penetration provided by the tariff-rate quota recommended herein, adjustment assistance could be used, particularly by those firms which need added capital to make the adjustment necessary for efficient operation.

The tariff-rate quota system we have fashioned is designed to allow the forces of competition to maintain market discipline and thereby encourage the making of the shifts needed to facilitate orderly adjustment to the free-market. The remedy is also designed to provide a period of stability for the domestic industry which will tend to hold imports near the 1974 level or eliminate the competitive edge of any imports above that level. In addition, we believe that the tariff-rate quota will enable the domestic firms to make the adjustments necessary to make them competitive with the imported articles, if these firms have the potential for competition. Those firms which cannot compete as the rate of tariff decreases will, at least, have had the time to apply for adjustment assistance and to shift to areas in which they may be more competitive.

We have carefully considered the effect of such a tariff-rate quota on possible new entrants into the United States market, and if it appears that conditions exist that may require a relaxation of the quota allocation, we believe the Commission should promptly initiate an investigation and hearings. The report of this investigation and any hearings would be reported to the President in accordance with the review procedures established by section 203(i) of the Trade Act.

Views of Chairman Will E. Leonard

"The time has come," the Walrus said,
"To talk of many things:
Of shoes--and ships--and sealing-wax--
Of cabbages--and kings--
And why the sea is boiling hot--
And whether pigs have wings." *Lewis Carroll.*

The petition which prompted the investigation to which these views pertain was filed with the Commission on August 20, 1975, by the American Footwear Industries Association, the Boot and Shoe Workers Union, and the United Shoe Workers of America. The petition requested an investigation, alleging that increased imports of certain types of footwear 1/ (which I shall call shoes hereafter) 2/ are a substantial cause of serious injury or the threat thereof to the domestic footwear industry within the meaning of section 201(b)(1) of the Trade Act of 1974 (Trade Act), and asserting that import quotas should be imposed to remedy this injury. On September 17, 1975, the Commission instituted this investigation.

This seventh investigation conducted by the Commission under the new escape clause provision of the Trade Act is by far the largest in terms of the dollar value of the subject imports. Imports of the types of shoes covered in this investigation have approached $1 billion annually in recent years. U.S. shipments of shoes, which nearly equaled production, were valued at about $3.6 billion. At the same time sales of shoes at retail came to about $10 billion.

1/ These types of footwear are listed at p. 1, supra.
2/ Shoes as used herein refer to all types of footwear, including boots, slippers, or any other type.

Boots and shoes are the greatest trouble of my life.

George Eliot.

This is the latest and most complete study of the shoe industry undertaken by this Commission. An investigation somewhat similar in scope and purpose was conducted in late 1970 and early 1971 under the provisions of section 301(b) of the Trade Expansion Act of 1962 (TEA), the legislative predecessor to section 201 of the Trade Act. 1/ The Commission conducted several other investigations on the shoe industry under the provisions of other statutes, 2/ including 155 "firm" and "worker" investigations involving various types of shoes under the adjustment assistance provisions (section 301(c)) of the TEA during the period 1968-75. Complaints of shoe workers and firms have continued under provisions of the Trade Act of 1974 administered by the Departments of Labor and Commerce, respectively.

The problems facing the domestic shoe industry, especially from imports, have also been the subject of much concern in Congress and in

1/ Nonrubber Footwear: Report to the President on Investigation No. TEA-I-18 . . ., TC Publication 359, January 1971. That investigation was conducted at the request of the President. The Commission was equally divided (2-2) in making its determination under section 301(b)(1) of the TEA (19 U.S.C. 1901(b)(1)) with respect to whether "as a result in major part of concessions granted under trade agreements, an article [certain nonrubber shoes] is being imported into the United States in such increased quantities as to cause, or threaten to cause, serious injury to the domestic industry producing an article which is like or directly competitive with the imported article." Following receipt of the Commission's determination and report the President took no action.

2/ The Commission conducted several investigations under section 332 of the Tariff Act of 1930: Nonrubber Footwear: Report to the President on Investigation No. 332-56 . . ., TC Publication 276, January 1969; Nonrubber Footwear: Report on Investigation No. 332-62 . . ., TC Publication 307, December 1969. The Commission conducted several investigations under the Antidumping Act, 1921, as amended: Leather Work Shoes From Czechoslovakia . . ., TC Publication 185, August 1966; Welt Work Shoes From Romania . . ., USITC Publication 731, June 1975.

other Government agencies in recent years. Several trade bills introduced in Congress in the late 1960's and early 1970's contained provisions proposing the establishment of quotas on shoe imports. 1/ The Trade Act of 1974 also affords special treatment for shoes in certain of its provisions. 2/ An interagency task force studied the industry at the request of the President in 1970 and reported its findings to the President in June 1970. 3/ The Department of the Treasury has also investigated allegations that the importation of certain foreign shoes was "subsidized" by a foreign government in violation of U.S. countervailing duty laws (specifically, section 303 of the Tariff Act of 1930 (19 U.S.C. 1303)); the Department of the Treasury has imposed countervailing duties on certain nonrubber shoes imported from Spain, Brazil, Taiwan, and South Korea. 4/ The General Accounting Office has most recently (March 1975) completed a study on assistance to the nonrubber shoe industry. 5/

It is often said that government has a tendency to study a topic almost to death, and this must truly be conceded with respect to the shoe industry. With the unanimous determination of the Commission in this investigation, maybe, just maybe, action will take the place of study and something will be done about the U.S. shoe industry and shoe imports.

1/ See, for example, the so-called Burke-Hartke Bill, introduced in 1971 (H.R. 10914).

2/ See, for example, section 121(a)(12) (88 Stat. 1987), section 331(a) (88 Stat. 2051), and section 503(c)(1) (E) (88 Stat. 2070).

3/ Report of the Task Force on Nonrubber Footwear, June 1, 1970; Task Force members included representatives of the Departments of Commerce, Labor, Treasury, and State under the chairmanship of the Office of the Special Representative for Trade Negotiations.

4/ See T.D. 74-235 (39 F.R. 32904; September 12, 1974)(Spanish shoes); T.D. 74-233 (39 F.R. 32903; September 12, 1974)(Brazilian shoes);(41 F.R. 1298; January 7, 1976) (Taiwanese shoes); and T.D. 76-13 (41 F.R. 1588; (January 9,1976)(South Korean shoes).

5/ Assistance to the Nonrubber Footwear Industry, Multiagency, by the Comptroller General of the United States, ID-75-36, March 1975.

Calceus major subvertit - A shoe too large trips one up. *Latin proverb.*

The old statutory criteria and my determination in the 1971 investigation

Congress made several important changes in the statutory requirements for eligibility for import relief when it wrote and passed the Trade Act. The predecessor provision, section 301(b)(1) of the TEA, had required that the Commission, in order to make an affirmative determination, find that--

> . . . as a result in major part of concessions granted under trade agreements, an article is being imported into the United States in such increased quantities as to cause, or threaten to cause, serious injury to the domestic industry producing an article which is like or directly competitive with the imported article.

Section 201(b)(1) of the Trade Act modified these requirements so as to provide that the Commission would make an affirmative determination where it finds that--

> an article is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Thus, in modifying the requirements, Congress inter alia eliminated the requirement that there be a causal connection between increased imports and trade agreement concessions.

The Commission's earlier escape clause investigation, referred to above, was conducted under the old statutory criteria and concluded in January 1971; I made a negative determination therein. Specifically, even though I found shoe imports to be increasing, I found that such increased imports were "not the result in major part of concessions granted under trade agreements."1/ I found that the increase in imports was attributable in greater part to factors other than tariff reductions, including far lower wage rates in other shoe producing countries. Further, I noted that the major reductions in rates of duty on shoes had taken place many years before the recent upsurge in imports. 2/

As noted above, the new import relief provisions in the Trade Act have eliminated the requirement that increased imports be "the result in major part of concessions granted under trade agreements", which was the basis of my 1971 determination. Thus, my opinion in the earlier case is not controlling in this case in any fashion, and my affirmative determination herein is not inconsistent with that earlier case. Indeed, I must say that I have always felt from the evidence available to me at the time of deciding the earlier shoe case that increased imports were definitely causing serious injury to the domestic shoe industry. However, I was then, as I am now, bound to make my determination on the basis of the law, not upon any personal predelictions.

Wynken, Blynken, and Nod one night
Sailed off in a wooden shoe--
Sailed on a river of crystal light
Into a sea of dew. *Eugene Field.*

Determination and finding

Having reviewed the evidence gathered by the Commission in the course of this investigation on shoes (Investigation No. TA-201-7), I determine that the criteria as set forth in section 201(b)(1) of the Trade Act for an industry to be eligible for relief from imports have

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1/ Nonrubber Footwear . . ., supra note 1, p. 24, at p. 34.

2/ In virtually all the cases involving shoes that I was called upon to decide under the adjustment assistance provisions of the TEA, my decision was negative based on a failure to satisfy the same criterion not satisfied in the "industry" case under discussion.

been met with respect to the imports that are the subject of this investigation. Specifically, I determine that shoes, the subject of this investigation, are being imported into the United States in such increased quantities as to be a substantial cause of serious injury to the domestic shoe industry producing shoes like or directly competitive with such imported shoes. Further, I find, pursuant to section 201(d)(1) of the Trade Act, that import restrictions as set forth later in these views are necessary to remedy this injury.

> *Men hang out their signs indicative of their respective trades: shoemakers hang out a gigantic shoe. . . .* *Daniel Webster.*

Domestic industry

It is first appropriate to determine the scope of the domestic industry which may be suffering or threatened with serious injury before considering whether increased imports are a substantial cause of serious injury or the threat thereof to such industry. The Trade Act does not expressly define the term "domestic industry" but provides guidelines and permits the Commission to use its best judgment in light of those guidelines and the relevant economic factors present in a given case. 1/

Economic factors in the present investigation strongly support the conclusion that there is one domestic shoe industry producing not only shoes like the imported shoes described in the notice of investigation but, in addition, rubber shoes, including canvas upper shoes and protective-type shoes, which--although not described in the notice of

1/ For a further discussion of the meaning of the phrase "domestic industry" as used in section 201(b)(1) of the Trade Act, see Bolts, Nuts, and Screws of Iron or Steel: Report to the President on Investigation No. TA-201-2 . . ., USITC Publication 747, November 1975, pp. 4-7 (Views of Chairman Will E. Leonard).

investigation and, to some extent, not "like" such shoes--I consider to be directly competitive with such shoes. 1/

In previous investigations, the Commission has repeatedly held rubber-soled shoes with fabric uppers, or "sneakers," to be directly competitive with other types of shoes, whether or not athletic. 2/ Sneakers, which account for the bulk of rubber shoes produced in the United States, like most other types of low priced shoes, are frequently worn for casual, nonathletic use. The principal other type of rubber shoe consists of protective-type shoes, which includes galoshes, rubber boots, and other types of shoes designed for protection against inclement weather. Because many of the protective-type shoes produced in the United States are of the type normally worn in lieu of other shoes, they must be considered directly competitive with other types of shoes.

Domestic facilities engaged in the production of all types and styles of footwear are part of one industry. Consumers purchase shoes for essentially one reason--to cover and protect their feet. They can and do use an infinite number of types and styles of shoes to accomplish the same purpose. The multitude of shoe styles produced, their varying

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1/ The terms "like" and "directly competitive" are disjunctive in nature. Like articles are those which are substantially identical in inherent or intrinsic characteristics, while directly competitive articles are those which, although not substantially identical in their inherent or intrinsic characteristics, are substantially equivalent for commercial purposes, that is, are adapted to the same uses and are essentially interchangeable therefor. See U.S. Senate, Committee on Finance, Trade Reform Act of 1974, S. Report No. 93-1298 (93d Cong., 2d Sess.) 1974, p. 122, (hereinafter, Finance Report).

2/ See, for example, Protective Footwear of Rubber or Plastics and Rubber- or Plastic-Soled Footwear with Fabric Uppers: Certain Workers at the Mishawaka, Ind., Plant of Uniroyal, Inc. . . ., Report to the President on Investigation Nos. TEA-W-23-26 . . ., TC Publication 330, July 1970.

degrees of similarity, and their high degree of commercial interchangeability necessitate a single industry concept. Even within the shoe industry the Commission's experience has indicated that it is difficult to establish categories of shoes which are subject to uniform interpretation and reporting. For example, the industry has not been able to agree on differences between what some people would consider to be a dress shoe, and others a casual. One man's casual shoe is another man's dress shoe. Furthermore, it is noted that one can shift from production of one type or style of shoe to another with relatively little investment. The primary difference in manufacturing many of the various types of shoes lies not in the machinery used, but in the lasts, dies, and patterns.

You cannot put the same shoe on every foot.
Publilius Syrus.

While there is some basis for carving out separate men's and women's shoe industries, since men and women generally do not wear the same shoes, it is not possible to do so in the present case because many domestic producers do not maintain complete data along such lines. For example, many producers, particularly the larger ones producing several types of shoes and accounting for a very substantial part of total domestic shoe production, are unable to even accurately estimate employment and financial data with respect to individual product lines. In these circumstances, sufficient reliable data are not available to permit such division of production, even if it were appropriate, and the legislative history of section 201 of the Trade Act indicates that the Commission is not expected to do so. 1/

1/ See U.S. House of Representatives, Committee on Ways and Means, Trade Reform Act of 1973, H. Rept. No. 93-571 (93d Cong., 2d Sess.) 1973, p. 46, (hereinafter, Ways and Means Report).

Thus, the domestic industry includes all domestic facilities engaged in the production of men's, women's, misses', youths', boys', children's and infants' shoes of all types, including shoes of leather and other natural materials and of manmade materials, dress and casual shoes, moccasins, athletic shoes, work boots, sneakers, slippers, knee-high vinyl boots, rubbers and galoshes, and paper hospital slippers. In short, the domestic industry includes facilities devoted to the production of all types of coverings to be worn over the foot and/or stockings or socks.

Criteria satisfied

Essentially, section 201(b)(1) of the Trade Act requires that three conditions be met if the Commission is to make an affirmative determination:

(1) Imports of the articles concerned must be entering in increased quantities;

(2) the domestic industry producing articles like or directly competitive with the imported articles must be experiencing serious injury, or the threat thereof; and

(3) such increased imports referred to in 1 above must be a substantial cause of the injury, or the threat thereof, referred to in 2 above. 1/

Some kick'd until they can feel whether
A shoe be Spanish or neat's leather. Samuel Butler.

Increased imports

Imports have increased within the meaning of the statute where the increase is either actual or relative to domestic production or consumption. In determining whether imports have increased, it is necessary to find the trend in import levels over a period of years which presents a realistic picture of activity in importation and of increasing or decreasing trends. 2/

I found in the 1971 escape-clause investigation that:

> "... it is clear that the imports of most of the major categories of nonrubber footwear are being entered in increased quantities within the meaning of the statute. Whatever recent years or period of years is selected as a basis for comparison, the upward trend has been pronounced both in absolute amounts and in relation to consumption." 3/

1/ For a comparison of the new Trade Act criteria with the predecessor criteria of sec. 301(b)(1) of the TEA, see the Statement of Reasons of Chairman Leonard in Birch Plywood Doorskins: Report to the President on Investigation No. TA-201-1..., USITC Publication 743, October 1975, at pp. 9-12.

2/ For a more detailed discussion of the concept "increased imports", see id., at pp. 13-19.

3/ Nonrubber Footwear ..., supra note 1, p. 24, at p.36.

Again in 1976, I find it clear that, except for the recent unusual period during the 1974 and 1975 recession years, which period I do not find to be representative of the trend in imports of shoes, I can look at any years or period of years and find increased imports of all the shoes listed in the Commission's notice of investigation in both absolute amounts and relative to domestic production. As the economy has recovered from the recession in 1975, imports of shoes have increased in both absolute and relative terms compared to comparable periods of 1974.

During the period 1970-74, U.S. imports of shoes of the types described in the Commission's notice of investigation increased in "actual" terms from 268 million pairs in 1970 to 318 million pairs in 1974, an increase of 19 percent. During the period January-September 1975, imports totaled 256 million pairs, up from 249 million pairs in the comparable period of 1974. The ratio of U.S. imports of the shoes described in the notice of investigation to estimated U.S. production of all shoes increased from 37 percent in 1970 to 51 percent in 1974. The ratio of such imports to domestic production of all shoes 1/ increased from 54 percent in the period January-September 1974 to 62 percent in the period January-September 1975.

Serious injury

The second criterion, "serious injury, or the threat thereof," is expressed in the disjunctive. The criterion is satisfied if a finding of either "serious injury" or a "threat" of serious injury is made. Because I

1/ Data on domestic production for partial-year periods do not include data on protective-type shoes, as they are unavailable.

have found "serious injury" to exist, I shall limit my discussion to this aspect of the criterion.

The Trade Act does not define the term "serious injury". Instead, it sets forth certain guidelines in the form of "economic factors" which the Commission should take into account. Thus, section 201(b)(2) states that the Commission should take into account "all economic factors which it considers relevant, including (but not limited to)... the significant idling of productive facilities in the industry, the inability of a significant number of firms to operate at a reasonable level of profit, and significant unemployment or underemployment within the industry . . . ." The modifier "significant" indicates that the idling of productive facilities, and so forth, must be of an important degree, and the presence of some or all of these factors does not automatically make an industry eligible for import relief. 1/ The Commission is to consider all of the factors it believes relevant and make its decision thereon. 2/ Furthermore, section 201(b)(1), in using the present tense, contemplates that the import-related serious injury be new and continuing "present" injury, as opposed to "old" injury. It is my view that "present" injury must be found by examining a time span which discounts brief and transitory episodes in the performance of the domestic industry and establishes a realistic performance for the industry in the present. 3/

1/ See Ways and Means Report, supra note 1, p. 30 at p. 47; see also Finance Report, supra note 1, p. 29 at p. 121.
2/ Ways and Means Report, supra note 1, at p. 47.
3/ See, for example, my views in Stainless Steel and Alloy Tool Steel: Report to the President on Investigation No. TA-201-5 . . ., USITC Publication 756, January 1976, pp. 22-23. For a further discussion of the meaning of the concept "serious injury," see Bolts, Nuts, and Screws of Iron or Steel . . ., supra note 1, p. 28, at pp. 9-11.

Oh, her heart's adrift, with one
On an endless voyage gone!
Night and morning
Hannah's at the window binding shoes. *Lucy Larcom.*

Idling of productive facilities.--The evidence before the Commission clearly shows that the domestic shoe industry is being seriously injured. There is currently significant and increasing idling of productive capacity. Estimated domestic production of all shoes has declined from 730 million pairs in 1970 to 625 million pairs in 1974. The number of firms producing nonrubber shoes has declined from 597 in 1969 to 409 in 1974, while the number of establishments in which nonrubber shoes are produced has declined from about 900 in 1969 to 600-700 in 1974. The number of establishments which reported production of rubber and plastic shoes as reflected in Standard Industrial Classification industry No. 3021 declined from 106 in 1972 to an estimated 85 in 1976. Thus, both domestic production and domestic capacity are down considerably. However, utilization of capacity has declined despite the fact that large numbers of firms have left the industry and domestic capacity and production have declined. The estimated percent of capacity utilized by firms in the nonrubber shoe industry has declined from 83 percent in 1968 to 76 percent in 1970 to 72 percent in 1974. Since production of canvas shoes decreased from 1971 to 1974 and the estimated production of protective-type shoes decreased from 1970 to 1974, there is no reason to believe that the utilization of capacity experience of producers of either of these types of shoe differs significantly from nonrubber shoe producers.

Him that makes shoes go barefoot himself. *Robert Burton.*

Profit and loss.--The evidence also shows that a significant number of firms in the industry are unable to operate at a reasonable level of profit. The rate of return on capital for the shoe industry is lower than that of most any other domestic industry. Some 33 of the 125 domestic nonrubber shoe firms from which the Commission received financial data 1/ showed losses in their shoe operations for 1974, indicating that upwards of 25 percent of the firms in the industry may be operating at a loss. The ratio of net operating profits to net sales of firms producing nonrubber footwear decreased without interruption from 6.7 percent in 1970 to 5.1 percent in 1974. The smaller the size of the firm, the greater was the tendency to show lower ratios of net operating profits to net sales; firms producing fewer than 2 million pairs per year nearly always had ratios of below 5 percent from 1970 to 1974, and they were usually decreasing or very low over the entire period. It is believed that the financial experience of producers of protective-type and canvas shoe producers does not differ significantly from nonrubber shoe producers. Such low levels of profit do not allow this industry to have sufficient working capital to make needed investments in new machinery or to purchase lasts, dies, and patterns for producing the most up-to-date styles at a profit.

Nor are we to use living creatures like old shoes or dishes and throw them away when they are worn out or broken with service. Plutarch.

Unemployment.--There is significant unemployment and underemployment in the industry. Employment of production workers decreased from 196,000 in 1971 to 177,000 in 1974, and further decreased from 181,000 workers in the period January-September 1974 to 159,000 workers in the period January-September 1975. This trend is also reflected in the data on average total hours worked, the level of which is significantly below that for all manufacturing and

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1/ These data were based on a scientifically designed statistical sample of producers in the nonrubber shoe industry and are considered to be representative of data for the entire industry.

for nondurable goods and the rate of decline of which is more rapid than for all manufacturing and nondurable goods.

> *For, God it wot, he sat ful still and song*
> *When that his scho ful bitterly him wrong.* *Chaucer.*

Substantial cause

The third criterion is that the increased imports must be "a substantial cause" of the serious injury, or the threat thereof. Section 201(b)(4) of the Trade Act defines substantial cause to mean "a cause which is important and not less than any other cause." It thus requires that a dual test be met--that imports must be both an "important" cause of serious injury and a cause "not less than any other cause." Where increased imports are just one of many causes of equal weight, it would be unlikely that they would constitute an "important" cause, but where imports are one of two factors of equal weight, they would constitute an "important" cause. 1/ The test of "not less than any other cause" is satisfied if imports are one of several equal causes of injury and no one cause is more important than imports. 2/ But the test is not satisfied if there is a cause of injury more important than imports. 3/ Furthermore, section 201 (b)(2)(C) of the Trade Act provides that the Commission, in determining "substantial cause," take into account all relevant economic factors "including (but not limited to). . . an increase in imports (either actual or relative to domestic production) and a decline in the proportion of the domestic market supplied by domestic producers."

1/ See the Ways and Means Report, supra note 1, p.30, at pp. 46-47, and the Finance Report, supra note 1 , p. 29, at pp. 120-121.
2/ See the Ways and Means Report, supra note 1 , p.30 , at pp. 46-47.
3/ Id.,at p. 46.

Congress did not intend to set rigid, impossible standards for the Commission to meet in order to determine whether increased imports are "a substantial cause" of the requisite injury or threat thereof. The Finance Report 1/ states (at pp. 120-121):

> The Committee recognizes that 'weighing' causes in a dynamic economy is not always possible. It is not intended that a mathematical test be applied by the Commission. The Commissioners will have to assure themselves that imports represent a substantial cause or threat of injury, and not just one of a multitude of equal causes or threats of injury. It is not intended that the escape clause criteria go from one extreme of excessive rigidity to complete laxity. 2/

Clearly it seems to me that with respect to the shoe industry increased imports are a cause which is important and not less than any other cause of the serious injury being suffered. Few industries have faced such large increases in imports over so prolonged a time period, imports which have taken an ever larger and more significant share of the domestic market.

The domestic shoe industry has been beset with serious problems for many years. I noted in my determination in the 1971 industry investigation cited previously imports even then "contributed significantly" to the industry's

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1/ Supra note 1, p. 29.
2/ For a further discussion of the meaning of "substantial cause," see Wrapper Tobacco: Report to the President on Investigation No. TA-201-3 . . ., USITC Publication 746, November 1975, pp. 4-7, and also Stainless Steel and Alloy Tool Steel . . ., supra note 3, p. 34, at pp. 25-26.

problems." 1/ In 1976, I find that the subject imports are a substantial cause of the serious injury being suffered by the domestic industry.

> *Cock a doodle doo!*
> *My dame has lost her shoe;*
> *My master's lost his fiddling-stick,*
> *And knows not what to do.* *Nursery Rhyme.*

U.S. imports of shoes described in the notice of investigation increased from 268 million pairs in 1970 to 318 million pairs in 1974. The estimated ratio of such U.S. imports to U.S. production of all shoes increased from 37 percent in 1970 to 51 percent in 1974. The ratio of U.S. imports to U.S. production of all shoes 2/ increased from 54 percent in the period January-September 1974 to 62 percent in the period January-September 1975. Imports of such shoes also increased their share of the entire shoe market from 27 percent in 1970 to 34 percent in 1974. In addition, the ratio of imports to consumption of all shoes, except for protective-type shoes, increased from 35 percent during January-September 1974 to 38 percent in January-September 1975. Thus, the specific economic factor enumerated in section 201(b)(2)(C) with respect to indicating substantial cause is present.

Factors which have caused injury to the domestic industry include the decline in U.S. apparent consumption and in U.S. per capita consumption of pairs of shoes, the recession in 1974 and 1975, and the drop in real disposable income in 1974. However, the long-standing nature of the import problem far outweighs any of these factors as causes of serious injury to the U.S. shoe industry. They only exacerbated the weakened condition of the shoe industry and did not exceed the importance of imports as a cause of injury.

1/ Nonrubber Footwear . . ., supra note 1, p. 24, at p. 47.
2/ Data on domestic production for partial-year periods do not include data on protective-type shoes, as they are unavailable.

Management can influence certain factors which affect its ability to compete in the domestic marketplace. Even with respect to these factors, increased imports severely hamper the efforts of U.S. producers. For example, financial institutions are reluctant to lend money to shoe producers, even those who are good credit risks, because higher rates of return can be realized in other areas of the economy and because they shy away from the high risks inherent in a volatile industry facing severe competition from imports. More capable management personnel are discouraged from entering a business which has a problematical future.

In spite of these problems, the U.S. industry has made significant efforts to compete with imports as shown by the results of the Commission's questionnaire to domestic producers, which are found elsewhere in this report. Most of the importer representatives agreed at the public hearings that the U.S. shoe industry is the most technologically efficient and its workers have the highest rate of productivity in the world. The results of the Commission's producer questionnaire also showed that expenditures on new and/or additional plants and additions to existing plants and purchases of machinery and other equipment increased significantly from 1970 to 1974. However, compared to all manufacturing, the shoe industry has a low value of rented assets, a low value of capital expenditures per employee, and a low value of capital utilized per worker, confirming the highly labor-intensive character of the industry, both currently and potentially. It is this very labor-intensive nature of the industry which makes the efforts of the industry to compete so difficult when faced with imports produced in low-wage countries.

The industry has attempted to strengthen itself by vertical integration. Manufacturers have acquired retail outlets and retailers have acquired manufacturing establishments. Some companies have either been acquired by producers of products other than shoes or have themselves diversified into other products. This trend toward concentration is of course occurring throughout the U.S. economy, but I believe that the competitive pressures of shoe imports have hastened the phenomenon in the shoe industry. In fact many producers in whole or in part have themselves turned to imports of shoes because of their inability to compete cost-wise and ultimately price-wise with imports in the production of certain styles and in some price ranges.

No one knows where the shoe pinches like the wearer.
Plutarch.

In the area of efforts to compete with imports, the so-called style problem or failure or unwillingness of the domestic industry to produce popular styles should not be given too much weight. The Volume Footwear Retailers Association (VFRA) alleged at the Commission's public hearings that a veritable "fashion revolution" in shoe styles took place in 1973 irrevocably changing the commercial conditions in the marketplace. 1/ Prior to that time they asserted shoe styles changed in merely an evolutionary manner. I believe it was established fully at the hearings that shoe styling has been changing rapidly since at least the mid-to-late 1960's and there was no fashion revolution in 1973 which could have been a substantial

1/ Hearing transcript, at pp. 408-409.

cause of serious injury to the domestic industry.1/ Even if the fashion revolution argument were accepted, it is specious on other grounds. U.S. producers are often innovators of shoe styles. Styles are based on ideas which are easily transferred throughout the world within days or, at most, weeks. Thus given economic production runs, U.S. producers can easily produce any style of shoe made in the world. In fact, a representative of the VFRA testified at the Commission's public hearings that the U.S. industry is ingenious at "knocking-off" shoe styles. 2/ There is no question in my mind that if the U.S. industry could economically produce the styles demanded by U.S. customers it would jump at the opportunity to increase its sales and profits.

This leads me to a discussion of the competitive advantage enjoyed by foreign suppliers of shoes. Beyond a doubt, the most important competitive advantage of foreign suppliers of shoes is the lower employee earnings paid by principal supplying countries. Although estimated total compensation per hour worked data are not completely comparable between the United States and other countries, in most cases the differences in such compensation are so large that one may safely assert that total compensation is much lower abroad. For example, such estimated compensation in 1975 was about 8-1/2 times higher in the United States than in Taiwan and Korea, about 5-1/2 times higher than in Brazil, about 2-1/2 times higher than in Spain, and about 20 percent higher

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1/ Hearing transcript, at pp. 561-565 and at 584-590.
2/ Hearing transcript, at p. 523.

than in Italy. Despite the U.S. industry's superior technology and higher worker productivity, such significant differentials in compensation are difficult to overcome when dealing with a product as labor-intensive as shoes.

Diddle, diddle, dumpling, my son John,
He went to bed with his stockings on;
One shoe off, one shoe on;
Diddle, diddle, dumpling, my son John.
Nursery Rhyme.

Conclusion as to eligibiltiy for relief

Having examined the evidence presented to the Commission in the course of this investigation, I determine that the domestic shoe industry is eligible for import relief, as shoes the subject of this investigation are being imported into the United States in such increased quantities as to be a substantial cause of serious injury to that industry.

Finding with respect to import relief

Section 201(d)(1) of the Trade Act provides, in part, that if the Commission finds with respect to any article, as a result of its investigation, the serious injury or threat thereof described in section 201(d)(1), it shall--

> (A) find the amount of the increase in, or imposition of, any duty or import restriction on such article which is necessary to prevent or remedy such injury, or
> (B) if it determines that adjustment assistance under chapters 2, 3, and 4 can effectively remedy such injury, recommend the provision of such assistance . . . .

An open hand, an easy shoe,
And a hope to make the day go through.
Bliss Carman.

In view of my determination of serious injury and of the eligibility of the domestic shoe industry for relief, I find that the increased tariffs set out previously in this report 1/ are required in order to remedy the serious

1/ See pp. 4-5, supra.

injury. The increased tariffs are established at three levels depending upon the customs value at which the imported shoe is entered into the United States. The structure of the tariffs is based upon the concept that the lower the customs value is, the higher the rate of duty should be.

Commissioners Moore and Bedell present a statement later in this series of Commissioners' views in support of their recommended relief. As such recommended relief is essentially the same as that which I find required to remedy the serious injury being suffered, I find myself generally in agreement with their statement and concur in it. However, I would add several comments. As indicated in my finding with respect to remedy set out previously in this report, I have excluded so-called hospital paper slippers from the list of imported articles for which I recommend a tariff increase. The bulk of imported paper slippers is used for surgery room purposes and may be worn over any other type of shoe. Such slippers do not affect the demand for footwear in toto, although they admittedly may result in a displacement of consumer purchases from one type of domestic footwear to another. Therefore such slippers have no adverse effect on the domestic shoe industry. All other imports considered in this investigation, however, are like or directly competitive with articles being produced by the domestic shoe industry.

They sold the righteous for silver, and
the poor for a pair of shoes. The Bible.

Fashioning an appropriate remedy in this case was a very difficult task. I have found one which I believe will relieve the domestic shoe industry of the serious injury it is suffering and permit it to adjust to the competition of imports. Without serious adjustment efforts by major segments of the domestic industry, I believe it is highly problematical whether this industry will survive in its present form. Indeed, even with significant adjustment efforts the industry could well deteriorate further. In the long run, the survival of the domestic shoe industry may require more than the temporary relief which I can recommend under the "escape clause."

And there is M'Fuze, and Lieutenant Tregooze,
And there is Sir Carnaby Jenks of the Blues,
All come to see a man die in his shoes. *Barham.*

Affirmative Views of Commissioner George M. Moore

On August 20, 1975, the United States International Trade Commission received a petition filed by the American Footwear Industries Association, the Boot and Shoe Workers' Union, and the United Shoe Workers of America requesting an investigation under section 201 of the Trade Act of 1974 with respect to imports of footwear, other than rubber and canvas.

The Commission instituted an investigation on September 17, 1975, to determine whether footwear, provided for in items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60), of the Tariff Schedules of the United States (TSUS), is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing articles like or directly competitive with the imported articles.

The Trade Act of 1974 requires that each of the following conditions be met before an affirmative determination can be made:

(1) There are increased imports (either actual or relative to domestic production) of an article into the United States;

(2) A domestic industry producing an article like or directly competitive with the imported article is seriously injured, or threatened with serious injury; and

(3) Such increased imports of an article are a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Determination

On the basis of the evidence developed by the Commission in this investigation, I have determined that nonrubber footwear for women and misses classified under TSUS items 700.05 through 700.27, 700.29, 700.30, 700.41, 700.43, 700.45, 700.58, and 700.66 through 700.85 is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing like or directly competitive articles, and that nonrubber footwear for men, youths, and boys classified under TSUS items 700.05 through 700.27, 700.29, 700.30, 700.35, 700.58, and 700.66 through 700.85 is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing like or directly competitive articles.

Further, I have determined that children's and infants' footwear, work footwear, and athletic footwear classified under TSUS items 700.05 through 700.45, 700.58, and 700.66 through 700.85 are not being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industries producing like or directly competitive articles.

The domestic industries

To fulfill its responsibilities under section 201(b)(1) of the Trade Act of 1974 the Commission is required to define the domestic industry (or industries) producing articles like or directly competitive with the imported articles.

I have determined that there are five domestic industries to be considered for the purposes of this investigation, which may be defined in terms of the facilities in the United States devoted to the production of--

(a) Women's and misses' footwear like the imported footwear for women and misses described in the notice of this investigation;

(b) Men's, youth's, and boys' footwear like the imported footwear for men, youths, and boys described in the notice of this investigation;

(c) Children's and infants' footwear like the imported footwear for children and infants described in the notice of this investigation;

(d) Work footwear like the imported work footwear described in the notice of this investigation; and

(e) Athletic footwear like the imported athletic footwear described in the notice of this investigation.

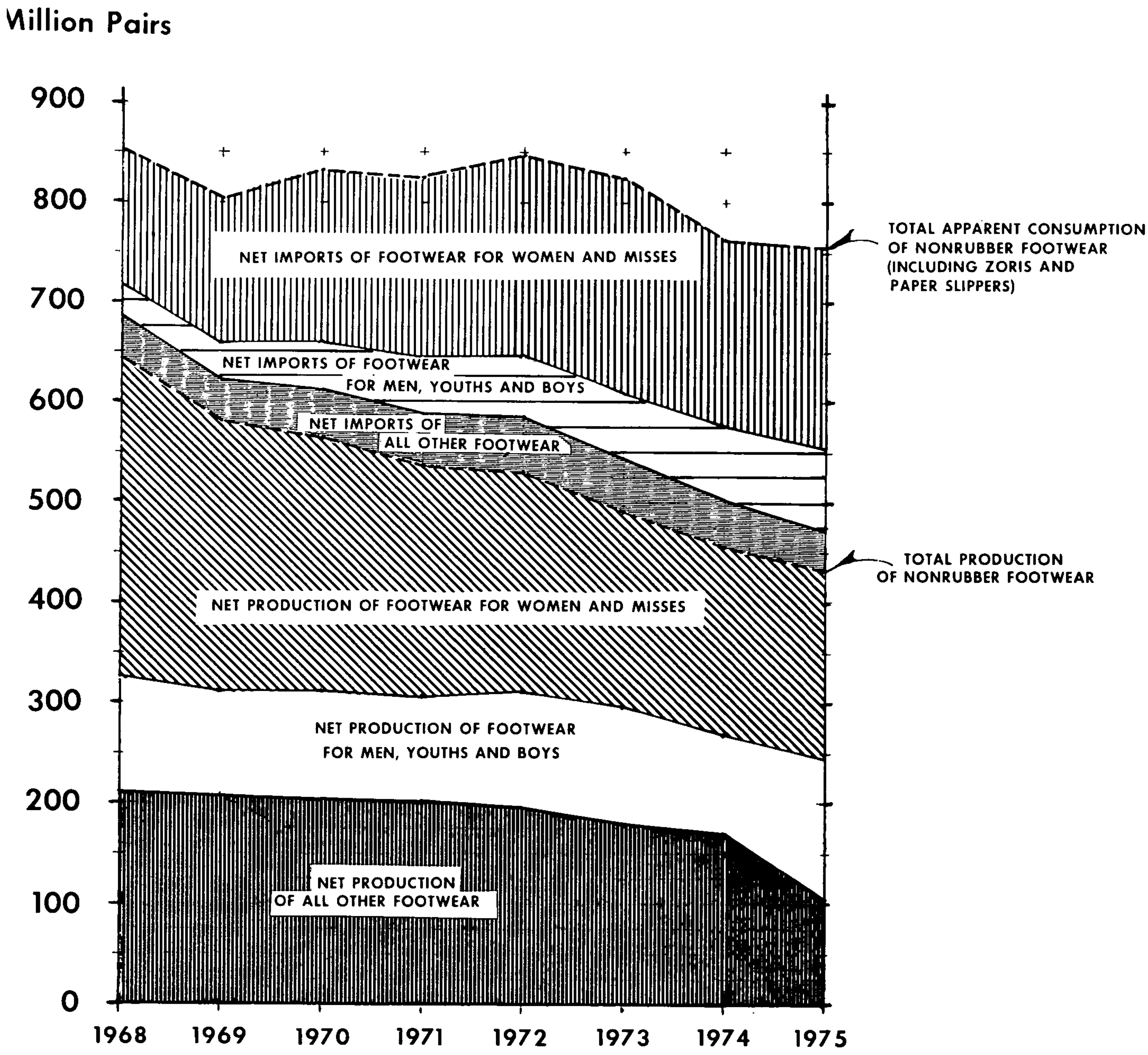
Although most of these industries utilize processes and equipment capable of producing footwear which falls into more than one of the industry groupings, there exist distinct differences between the various production operations and the end uses of these articles. Therefore, recognizing that no industry breakdown would satisfactorily encompass every possible situation, I believe, that there are five industries which are engaged in the production of domestic nonrubber footwear.

Increased imports

The chart on the following page demonstrates domestic consumption of nonrubber footwear in terms of U.S. production and imports, by types, during the period 1968-75.

NONRUBBER FOOTWEAR

U. S. PRODUCTION , BY TYPES; U. S. IMPORTS FOR CONSUMPTION, BY TYPES; AND APPARENT CONSUMPTION; 1968–1975 (WITH PROJECTIONS FOR 1975)



SOURCE: Compiled from official statistics of the U. S. Department of Commerce; imports partially estimated

I have determined that there are five domestic industries to be considered for the purposes of this investigation, which may be defined in terms of the facilities in the United States devoted to the production of--

(a) Women's and misses' footwear like the imported footwear for women and misses described in the notice of this investigation;

(b) Men's, youth's, and boys' footwear like the imported footwear for men, youths, and boys described in the notice of this investigation;

(c) Children's and infants' footwear like the imported footwear for children and infants described in the notice of this investigation;

(d) Work footwear like the imported work footwear described in the notice of this investigation; and

(e) Athletic footwear like the imported athletic footwear described in the notice of this investigation.

Although most of these industries utilize processes and equipment capable of producing footwear which falls into more than one of the industry groupings, there exist distinct differences between the various production operations and the end uses of these articles. Therefore, recognizing that no industry breakdown would satisfactorily encompass every possible situation, I believe, that there are five industries which are engaged in the production of domestic nonrubber footwear.

Increased imports

The chart on the following page demonstrates domestic consumption of nonrubber footwear in terms of U.S. production and imports, by types, during the period 1968-75.

in determining whether a domestic industry is seriously injured. These factors are the significant idling of productive facilities in the industry, the inability of a significant number of firms to operate at a reasonable level of profit, and significant unemployment or under-employment within the industry.

During the period 1969-75 the operating level of the plants (plant utilization) producing men's and boys' nonrubber footwear declined from 85 percent to 69 percent, while the operating level of plants producing women's and misses' nonrubber footwear declined from 76 percent to 65 percent. For both industries these declines in utilization increased unit costs to a point at which these industries cannot produce footwear at prices competitive with those of imported articles.

Information secured from the U.S. Bureau of the Census indicates that the number of firms producing women's and misses' nonrubber footwear dropped from 369 in 1969 to 272 in 1974, and the number of firms producing men's and boys' nonrubber footwear dropped from 202 in 1969 to 182 in 1974.

It is clear that these industries have experienced a significant idling of productive facilities.

Net operating profits for all domestic producers of nonrubber footwear amounted to $189 million in 1970. A slight increase to $197 million occurred in 1971; then decreasing profits were experienced in 1972 and 1973. In 1974, net operating profits were $186 million, an amount below the 1970 level.

The producers of nonrubber footwear reported a deterioration in the ratio of net operating profits to net sales annually from 1970 to 1974.

This ratio declined from 6.7 percent in 1970 to 5.3 percent in 1974. The latter ratio of net operating profit to net sales does not include nonoperating expenses or income taxes, which, if taken into account would lower the ratio to approximately 2 or 3 percent.

The ratio of net operating profits to net sales for men's and boys' shoes was 7.3 percent in 1970, declined to 6.9 percent in 1971, and to 5.3 percent in 1972, and rose to 5.6 percent in 1973, and to 6.3 percent in 1974. However, the percentage of return after income taxes and other income and expense would have amounted to approximately 3.6 percent in 1970, 3.4 percent in 1974, 2.6 percent in 1972, 2.8 percent in 1973, and 3.1 percent in 1974.

The return on net sales of women's and misses' shoes show an uninterrupted decline during the 5-year period, from 6.6 percent in 1970 to 6.2 percent in 1971, 5.6 percent in 1972, 4.6 percent in 1973, and 3.6 percent in 1974. The percentage of return after taxes and other income and expense would have been approximately 50 percent of the above figures or 3.3 percent in 1970, 3.1 percent in 1971, 2.8 percent in 1972, 2.3 percent in 1973, and 1.8 percent in 1974.

Federal Trade Commission quarterly financial reports show that net profits before taxes for all U.S. manufacturers were 6.8 percent in 1970, 7.0 percent in 1971, 7.7 percent in 1972, and 8.0 percent in 1973. Net profits after taxes for all U.S. manufacturers amounted to 4.2 percent in 1970, 4.1 percent in 1971, 4.3 percent in 1972, and 4.7 percent in 1973.

Based upon the above financial analysis it is clear that the women's and misses' and the men's, youths', and boys' footwear industries compare unfavorably with U.S. manufacturing industries generally, particularly in recent years.

Thus, it is clear that these two footwear industries are unable to operate at a reasonable level of profit.

During the period 1970-75, total employment in all U.S. manufacturing industries showed a slight decrease, while total employment in facilities producing nonrubber footwear decreased sharply.

Employment of production workers in nonrubber footwear facilities decreased 17 percent between 1970 and 1974. There was another decrease of 12 percent in the first 9 months of 1975, compared with employment in the corresponding period in 1974.

In these highly labor-intensive footwear establishments, unemployment has been substantially higher than the average for all manufacturing industries. In the past 7 years the number of workers employed in nonrubber footwear facilities decreased from a total of 233,400 in 1968 to 163,000 in 1975, a reduction of 30 percent. In 1975 the nonrubber footwear industries experienced an unemployment rate of about 15 percent.

The workers in nonrubber footwear firms have also suffered serious underemployment problems for the past 7 years. During this period the average weekly hours worked per employee dropped from 38 hours to 36 hours per week, a decline of 5.3 percent.

The accompanying report does not provide unemployment or underemployment data specifically relating to the women's and misses' and the men's, youths', and boys' footwear industries. However, since these two industries constitute nearly 65 percent of all production of nonrubber footwear, it is certain that they have experienced serious unemployment and underemployment.

Substantial cause

The Trade Act of 1974 contains both a definition of the term "substantial cause" and certain guidelines to be considered by the Commission in determining whether increased imports are a substantial cause of the serious injury. Section 201(b)(4) of the Trade Act of 1974 defines the term "substantial cause" to mean "a cause which is important and not less than any other cause." The guidelines to be considered by the Commission with regard to substantial cause are contained in section 201(b)(2(C), which states that in making its determination, the Commission shall consider (but not be limited to)--an increase in imports (either actual or relative to domestic production) and a decline in the proportion of the domestic market supplied by domestic producers.

In considering all the relevant economic factors, it is possible that the Commission investigation will reveal that several factors may be contributing to the serious injury suffered by the domestic industry. While the report of the Senate Finance Committee indicates that increased imports cannot be a substantial cause of serious injury if they are "just one of a multitude of equal causes," 1/ the statutory criteria are satisfied if increased imports are a single important cause or one of several equally important causes.

Imports of women's and misses' footwear increased their share of domestic consumption from 30 percent in 1968 to 44 percent in 1971 and to 51 percent in 1974. In the first 9 months of 1975 such imports accounted for 53 percent of domestic consumption. In direct proportion to the downward trend in domestic production, imports of women's and misses' footwear increased from the equivalent of 42 percent of domestic production in 1968 to 78 percent in 1971 and to 104 percent in 1974. In the first 9 months of 1975 imports were equivalent to 111 percent of domestic production.

Imports of men's, youths', and boys' footwear increased their share of domestic consumption from 21 percent in 1968 to 36 percent in 1971 and to 42 percent in 1974. They then increased to 46 percent of domestic consumption in the first 9 months of 1975. Here, again, in direct proportion to the downward trend in U.S. production, imports of men's, youths', and boys' footwear increased from the equivalent of 27 percent of domestic production in 1968 to 56 percent in 1971 and to 72 percent in 1974, and then increased to the equivalent of 85 percent of domestic production in the first 9 months of 1975.

Consumption of nonrubber footwear declined in 1973 and 1974 and in the first 9 months of 1975. However, the Trade Act of 1974 suggests

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1/ Trade Reform Act of 1974: Report of the Committee on Finance . . ., S. Report No. 93-1298 (93d Cong., 2d sess.), 1974, p. 120.

that reduced consumption may not be cited as a cause of serious injury more important than imports if it is found that increased imports are taking a significant share of the market while the domestic industry is experiencing a substantial loss in production.

Thus, there has been an increase in imports both actual and relative to domestic production, as well as a decline in the proportion of the domestic market supplied by domestic producers.

Among the causes of the serious injury to the domestic women's and men's footwear industries which have been cited are the following: (1) Imports; (2) the inefficiency of domestic producers and their inadequate research and development; (3) the inability of domestic producers to accept or respond quickly to style changes; (4) the recent decline in apparent U.S. consumption of nonrubber footwear; and (5) the recent recession.

The recent recession is not the most significant cause of the serious injury suffered by certain domestic footwear producers. The Commission's investigation shows that during the period 1968-75, domestic footwear production declined each year regardless of the health of the general economy. In contrast, footwear imports registered a slight decline in only 1 year--the recession year of 1974--while U.S. footwear consumption fell sharply. In 1975, domestic footwear production was down substantially while footwear imports increased.

The evidence shows that the level of technology possess larger U.S. footwear producers equals that of foreign producers. Some U.S. producers have developed new manufacturing processes in an effort to offset the lower priced imported footwear.

In the area of high-volume sales in the domestic market the demand for low-priced footwear generally prevails over the demand for style. In the higher priced, lower volume portion of the domestic market, consumer demand for style and comfort prevail over price for the most part. It is clear that in the domestic marketplace as a whole, consumer demand is for low-priced footwear. Style is important but generally not as important as price in today's market.

In addition to the basic advantage of low labor costs, there is another advantage that imported footwear has over domestically produced footwear. The Commission's investigation developed the fact that the markup on imports enjoyed by U.S. merchants exceed the markup they receive on domestic footwear. These advantages of imports have provided obstacles which domestic competition has been unable to overcome.

After considering all of the evidence developed during this investigation, I have concluded that increased imports of nonrubber footwear were a substantial cause--not less in importance than any other cause--of the serious injury suffered by the women's and misses' and the men's, youths', and boys' footwear industries.

Views of Commissioner Catherine Bedell

On August 20, 1975, the United States International Trade Commission received a petition filed by the American Footwear Industries Association, the Boot and Shoe Workers' Union, and the United Shoe Workers of America requesting an investigation under section 201 of the Trade Act of 1974 with respect to imports of footwear. On September 17, 1975, the Commission instituted an investigation to determine whether footwear, provided for in items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60), of the Tariff Schedules of the United States (TSUS), is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing articles like or directly competitive with the imported articles.

The Trade Act of 1974 requires that each of the following conditions be met before an affirmative determination can be made:

(1) There are increased imports (either actual or relative to domestic production) of an article into the United States;

(2) A domestic industry producing an article like or directly competitive with the imported article is seriously injured, or threatened with serious injury; and

(3) Such increased imports of an article are a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Determination

After considering the evidence obtained by the Commission in this investigation, I have determined that footwear, as provided for in items

700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60), of the TSUS, is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing like or directly competitive articles.

The domestic industry

It is my view that the domestic industry which is being seriously injured by the imported articles consists of the facilities in the United States devoted to the production of nonrubber footwear (hereinafter "footwear") comparable to the imported footwear covered in this investigation. Such footwear includes footwear for women and misses, men, youths, and boys, and children and infants; work footwear; and athletic footwear.

Increased imports

The first criterion requires a finding that there are increased imports. The Trade Act provides, at section 201(b)(2)(C), that an increase in imports has occurred when the increase is "either actual or relative to domestic production". Thus, the requirement is satisfied when the increase in actual or absolute terms or when the level of imports is declining in actual terms but is increasing relative to domestic production.

The statistics clearly show that imports have increased both in actual terms and relative to domestic production. Imports increased from 241.7 million pairs in 1970 to 266.4 million pairs in 1974, or by 24 percent, and the ratio of imports to domestic production increased from 43 percent in 1970 to 59 percent in 1974. Imports during the first 9 months of 1975, as measured in actual or absolute terms, were at a level equal to that of the corresponding period in 1974. The ratio of imports to domestic production was 68 percent during the first 9 months of 1975.

Serious injury or the threat thereof

The second criterion concerns the question of whether the domestic industry is suffering "serious injury, or the threat thereof". The Trade Act does not define the term "serious injury". Instead, it provides guidelines in the form of economic factors which the Commission should take into account. Section 201(b)(2) of the act states that, with respect to serious injury, the Commission should take into account "all economic factors which it considers relevant, including (but not limited to) . . . the significant idling of productive facilities in the industry, the inability of a significant number of firms to operate at a reasonable level of profit, and significant unemployment or underemployment within the industry. . . ."

The facts show that there is presently a significant idling of productive facilities within the industry. Utilization of capacity, domestic production, and the number of domestic firms and establishments producing footwear have all declined in recent years. Capacity for firms still producing footwear was 72 percent in 1974 (the latest full year for which data is available), down from 76 percent in 1970. At the same time domestic production declined from 562.3 million pairs in 1970 to 526.7 million pairs in 1972, to 490.0 million pairs in 1973, and to 453.0 million pairs in 1974.

The number of footwear firms declined from 597 in 1969 to approximately 375 in 1975, and the number of producing establishments declined from about 900 in 1969 to approximately 650 in 1975. Thus, a significant number of productive facilities were idled and utilization of capacity in those still producing declined.

Information before the Commission clearly demonstrates that a significant number of firms in the domestic industry are unable to operate at a reasonable level of profit. The ratio of net operating profit to net sales after taxes for the industry declined to a low of approximately 2.5 percent in 1974; this was below the levels of 2.8 percent in 1972 and 2.6 percent in 1973. In contrast, the ratio of net operating profit to net sales after taxes for all domestic manufacturers was 4.3 percent in 1972 and 4.7 percent in 1973 (the latest full year for which such data are available). Furthermore, 33 of the 125 domestic firms from which the Commission received financial data showed losses in 1974, indicating that approximately 25 percent of domestic producers not only did not operate at a reasonable level of profit in 1974, but they did not have any profit at all.

Employment in the industry has declined and underemployment has increased as domestic production has declined and shoe firms have shut their doors. Employment in the industry declined from 186,000 workers in 1970 to 154,000 in 1974 and to 139,000 in 1975. Furthermore, the average number of hours worked by footwear workers declined from 38.2 hours per week in 1972 to 36.8 hours in 1974, indicating significant and increasing underemployment in the industry. During 1975, the U.S.

Department of Labor found that some 7,200 unemployed or underemployed footwear workers were eligible for adjustment assistance benefits because increased imports of footwear had contributed importantly to their unemployment or underemployment.

There are other relevant economic factors that indicate serious injury. One is the inability of domestic footwear producers to increase wholesale footwear prices at a rate commensurate with increasing leather and vinyl costs, which has reduced profits and reduced the rate of return on capital to a low level. A second factor is that real hourly earnings of footwear workers decreased from $2.38 per hour in 1973 to $2.29 per hour in 1974, and to $2.22 per hour during the first 9 months of 1975.

Substantial cause

Section 201(b)(4) of the Trade Act defines the term "substantial cause" to mean "a cause which is important and not less than any other cause." Thus, increased imports must be both an "important" cause of the serious injury, or the threat thereof, and "not less than any other cause." The act also provides, as in the case of serious injury, that in determining "substantial cause" the Commission take into account "all economic factors which it considers relevant including (but not limited to) . . . an increase in imports (either actual or relative to domestic production) and a decline in the proportion of the domestic market supplied by domestic producers producers" (sec. 201(b)(2)).

The facts before the Commission clearly show increased imports to be a substantial cause of serious injury to the domestic industry. Imports have increased, both actually and relative to domestic production, as noted above. And the proportion of the domestic market supplied by domestic producers declined from 70 percent in 1970 to 61 percent in 1973 and to 59 percent during the first 9 months of 1975.

In this investigation the Commission looked at a number of relevant economic factors that may have contributed to the serious injury suffered by the domestic industry. Some of the causes cited as having had significant injurious impact on the footwear industry were the recent recession, inability of the industry to keep up with changes in technology and style, and decreased productivity. I have carefully considered these various factors and have concluded that, however they may have contributed to injury of the footwear industry, imports have been a far more important cause of that injury.

I do not think the recent recession is the most significant cause of the injury because the Commission's investigation revealed that in the period from 1968 to 1975, production of domestic footwear declined each year in spite of the fact that the general economy was healthy in most of those years. On the other hand, imports of footwear showed a small decline in 1 year only -- the 1974 recession year -- while consumption of U.S. footwear declined sharply. In the following year, 1975, production of domestic footwear was down while imports of footwear were on the increase. These factors signify to me that the recent recession is not the most important cause of injury to the domestic footwear industry.

Furthermore, my study of the facts in this investigation led me to the conclusions that the U.S. footwear industry is technologically advanced and efficient and the U.S. footwear worker is as productive as any in the world. The U.S. footwear industry has continued to lose more and more of its domestic market to lower priced imported footwear, not for reasons of technology or lower productivity, but because of lower foreign labor and production costs.

And, further, it is my view that there is nothing "magical" or "unique" about an imported shoe. U.S. footwear producers and workers can and do produce the high-quality, fashionable footwear demanded by discriminating U.S. consumers. After all, in these days of rapid communication, new fashions and styles are transmitted around the world in a matter of days. While it may be true that some U.S. consumers prefer the imported label as a status symbol, the Commission's study showed most clearly that the majority of U.S. consumers buy on the basis of price. In the course of the investigation the Commission studied the subject of style at the retail level carefully. Our study clearly showed that domestic retailers found that domestic producers could and would produce almost any style, quality, or type of shoe. Our study also showed that retailers prefer to buy domestically, and buy foreign footwear chiefly because of price.

In light of the above, it is my conclusion that imports are both an "important" cause of serious injury to the domestic and a cause "not less than any other cause." I therefore find that the third criterion, that of "substantial cause", is satisfied.

Statement by Commissioners George M. Moore and Catherine Bedell in Support of Recommended Relief Pursuant to Section 201(d)(1)(A) of the Trade Act of 1974

The increased rates of duty that we have recommended are designed to have their greatest impact with respect to imported footwear valued not over $6.00 per pair. It is in this value range that most of the footwear imports are entered, and it is in this range that domestic consumers purchase footwear on the basis of price.

An empirical analysis of the effects of price changes on the levels of imports of nonrubber footwear indicates that for every 1-percent rise in import prices relative to domestic prices, the quantity of imports falls by 1.33 percent. This relationship measures the direct impact of price change--which means that it exists as a cause-effect relationship whether the economy is healthy or is in recession. Hence, the relative prices of footwear imports compared with the prices of domestic footwear play an important role in determining the level of imports entering the United States.

The increased rates of duty which we have recommended also take into consideration the fact that production costs for foreign footwear are substantially less than those for domestic footwear and the fact that the profit margins for footwear imports are substantially higher. Therefore, we have recommended that the rates of duty be adjusted upward from the ratio indicated by the Commission's study in order to make certain that the duty increase would not be substantially absorbed by the foreign exporters and importers in the United States.

The relief provided by our recommendations will tend to stabilize the quantities of footwear imported during the projected 5-year period and also provide domestic footwear firms with an opportunity to recapture a greater share of the U.S. market through competitive forces which are absent in today's market.

It is our view that the problems of the domestic footwear industry are longstanding and have been caused substantially by the ever-increasing market penetration of footwear imports. The only relief which has thus far been granted has been adjustment assistance, and it has proven to be ineffective.

Under these conditions we believe that adequate import restrictions are required to enable the domestic footwear industry to survive. Any remedial action which fails to increase the domestic industry's share of the footwear market would be a meaningless remedy.

Inadequate relief for the domestic footwear industry on the basis of this investigation would not only be ineffective, but it would also remove the possibility of effective remedies for this industry under section 201 of the Trade Act of 1974 for some years to come. This is because section 203(j) precludes such action for a period of more than 2 years after any prior relief has terminated. If, on the other hand, it is determined later that our recommended increases in rates of duty have been overstated, there are adequate review procedures to temper the extent of such recommended rates of duty.

Views of Commissioner Italo H. Ablondi

On August 20, 1975, the United States International Trade Commission received a petition filed by the American Footwear Industries Association, the Boot and Shoe Workers' Union, and the United Shoe Workers of America requesting an investigation under section 201 of the Trade Act of 1974. On September 17, 1975, the Commission instituted an investigation to determine whether footwear, provided for in items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60), of the Tariff Schedules of the United States (TSUS), is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Section 201(b)(1) of the Trade Act requires that each of the following conditions be met before the Commission can recommend import relief to the President:

(1) Imports of an article into the United States are increasing (either actually or relative to domestic production);

(2) The domestic industry producing an article like or directly competitive with the imported article is being seriously injured or threatened with serious injury; and

(3) Increased imports are a substantial cause (i.e., a cause which is important and not less than any other cause) of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

It should be noted that the criteria for relief under section 201(b)(1) differ in significant respects from the criteria set out in section 301(b)(1) of the Trade Expansion Act of 1962 (TEA), under which the previous footwear "escape clause" action was brought. 1/ Under the TEA, petitioners were required to establish each of the following criteria:

(1) The subject articles must be entering the United States in increased quantities;

(2) The increased imports must result in major part from concessions granted under trade agreements;

(3) The domestic industry must be seriously injured or threatened with serious injury; and

(4) The increased imports must be the major factor causing, or threatening to cause, serious injury to the domestic industry.

A causal link between increased imports and trade-agreement concessions was a crucial element under the previous act. Under the Trade Act of 1974, however, it is only required that imports be increasing either absolutely or relative to domestic production, and the Commission need not inquire into the cause of the increase. In addition, a domestic industry may now become eligible for relief when it establishes that increased imports are a "substantial cause" of serious injury or the threat thereof. There is no longer a requirement that increased imports be the major factor causing injury--it is now sufficient that increased imports be an important cause of injury and no less important than any other cause.

1/ Nonrubber Footwear: Report to the President on Investigation No. TEA-I-18 Under Section 301(b)(1) of the Trade Expansion Act of 1962, TC Publication 359, 1971.

In prior footwear cases I generally voted in the negative primarily because I did not find that imports were the "major factor" (i.e., a cause greater than all other causes) causing injury. In its report on the Trade Reform Act of 1974 the Senate Finance Committee specifically noted at page 120 that such a standard "has proved in many cases to be an unreasonably difficult standard to meet." 1/

Determination

In view of the relaxed requirements with respect to causation and increased imports under the new act I can now conclude that the domestic industry producing nonrubber footwear has satisfied the criteria for relief. Accordingly, I have determined that footwear, as provided for in items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60), of the TSUS is being imported into the United States in such increased quantities as to be a substantial cause of serious injury to the domestic industry producing like or directly competitive articles.

1/ Trade Reform Act of 1974: Report of the Committee on Finance . . . , S. Rept. No. 93-1298 (93d Cong., 2d sess.), 1974. The committee elaborates on this point, stating:

"The requirement of the Trade Expansion Act that increased imports result in major part from trade concessions has been very difficult to satisfy in the past and has become a major barrier to import relief.

The criteria for import relief under the bill would relax the present import relief criteria by: (1) removing the "causal link" requirement that imports result in major part from trade agreement concessions and (2) requiring that increased imports need only be "a substantial cause . . . ."

Remedy

Upon making an affirmative determination of serious injury or the threat thereof with respect to an article, section 201(d)(1) of the Trade Act requires the Commission to--

> (a) find the amount of the increase in, or imposition of, any duty or import restriction on such article which is necessary to prevent or remedy such injury, or
>
> (b) if it determines that adjustment assistance under chapters 2, 3, and 4 can effectively remedy such injury, recommend the provision of such assistance.

Since this directive is stated disjunctively it follows that the Commission must recommend either import relief or adjustment assistance, but not both.

With respect to the options available to the Commission, the Senate Finance Committee report states:

> However, the Committee amended the House bill to permit the Commission to recommend adjustment assistance, in lieu of import relief in circumstances in which the Commission determines that such assistance would be a more effective remedy to the serious injury than import relief. 1/

After reviewing all the evidence developed during the course of this investigation, I am persuaded that adjustment assistance would be "a more effective remedy to the serious injury than import relief." Specifically, I have determined "that adjustment assistance under chapters 2, 3, and 4 can effectively remedy such injury."

1/ Trade Reform Act of 1974: Report of the Committee on Finance . . . , p. 123.

The only alternative to adjustment assistance which might have any significant salutary effect would be import relief in the form of either very high duties or severe quantitative restrictions. While such an alternative might provide a measure of temporary relief to the domestic industry, it would not be an effective remedy since I am not convinced that during the period that such import relief would be in effect, the domestic industry could effectively adjust to import competition.

The Commission has found that the industry producing nonrubber footwear is experiencing serious injury. I agree. However, within the industry there are a number of relatively large firms which have not been seriously injured by imports and which can be said to be effectively competing with imports. The forms of import relief provided by the act (viz, quotas and increased duties) are designed to afford industrywide protection. Accordingly, if import relief were proclaimed in the instant case, the aforementioned companies would be unnecessarily protected from import competition. Certainly, such a result is contrary to the purposes of "escape clause" relief. On the other hand, the smaller manufacturers, which constitute the great majority of the firms in the domestic industry, are being seriously injured and thus are entitled to a remedy which in the judgment of the Commission will most effectively alleviate injury. These firms are often family owned and family controlled, occupy small, older plant facilities, and are either marginally profitable or experiencing losses with weak cash flow and working capital positions.

In 1953, in the case United States v. United Shoe Machinery Co., U.S. District Court Judge Wyzanski described the shoe industry in the following manner:

> While there are a few shoe manufacturers such as International Shoe Corporation, with assets, employment rolls, and bargaining power comparable to defendant, the overwhelming majority of concerns are small in production, assets, and employment rolls. 1/

The foregoing description of the industry applies today. Although there are a great number of small companies producing nonrubber footwear, production is heavily concentrated among a few very large firms. For instance, of the 409 firms which produced nonrubber footwear in 1974, the 21 largest firms (each producing over 4,000,000 pairs annually) accounted for half of total domestic production, while the 309 firms which each produced less than 1,000,000 pairs annually accounted for less than one-fourth of total domestic production.

That these small firms have been most acutely impacted by import competition is confirmed by the evidence adduced during the investigation. Most of the decrease in the number of firms producing nonrubber footwear has taken place among such companies. In 1969, of the 597 domestic firms producing nonrubber footwear, 451 produced less than 1,000,000 pairs annually, and 21 firms produced over 4,000,000 pairs annually. By 1974, there were 142 fewer firms in the smaller output category, while the number of firms producing over 4,000,000 pairs annually remained unchanged. This precipitous decline in the number of small manufacturing firms is reflected in the decline in the share

1/ United States v. United Shoe Machinery Co., 110 F. Supp. 295, 301 (1953), aff'd. 347 U.S. 521, 74 SC 699.

of total domestic production accounted for by such firms. During the period 1969-74, the share of total output accounted for by firms producing less than 1,000,000 pairs annually declined from 24 percent to 20 percent, while the 21 firms which produced more than 4,000,000 pairs annually increased their share of total output from 37 percent to 50 percent.

The difference in the conditions of the small and large firms is most evident with respect to their financial performance. The ratio of net operating profit to net sales for firms producing less than 200,000 pairs annually averaged just below 2.6 percent during the period 1970-74, while during the same period profits for firms producing over 4,000,000 pairs annually were nearly triple that amount, or more than 7.1 percent.

Based on the foregoing data and on additional information gathered during this investigation and in prior investigations on the nonrubber footwear industry, I am satisfied that the condition of the small manufacturers is distinguishable from that of the large firms, and that such differences should be taken into account in fashioning a remedy. Thus, although I find no justification for the imposition of industrywide relief measures, I do believe that assistance is warranted for the many small firms which have been seriously injured.

I have recommended adjustment assistance fully mindful of past criticisms of the program. However, adjustment assistance as now provided for under the Trade Act substantially expands the range of benefits, simplifies filing procedures, and expedites the administrative process attending the disbursement of assistance.

Salient features of the new act include increases in the allowance payable to individual workers, extensions of the assistance period, job training services with supplemental assistance to defray the cost of same, provision for a job search allowance, and relaxed eligibility requirements for relocation allowances.

Firm adjustment assistance is also well suited to the needs of import-impacted companies producing nonrubber footwear. Such assistance includes technical aid in the development of an overall recovery program, ongoing managerial advice and counseling, and financial aid for use in the purchase of new equipment, modernization of plant facilities, research and development, and as working capital.

I have noted with concern that a total of only $20 million has been appropriated for the firm adjustment assistance program in fiscal year 1976. In my opinion such an amount is not sufficient to carry out the intended mission of the program properly. To date, of the 50 firms that have petitioned the Department of Commerce under the Trade Act of 1974, two have actually received assistance totaling $4 million in direct loans and loan guarantees. Only one petition has been denied. Thus, even if one disregards those firms which will file petitions later this fiscal year, 47 firms could become eligible for assistance before the end of the fiscal year. In view of the financial needs of these firms and bearing in mind the fact that disbursements have averaged $2 million, it is abundantly clear that the remaining funds are insufficient to treat effectively with the problems besetting the petitioning firms. Moreover, the officials administering the program would very likely approve funds on the basis of the amount of money available, rather than on the basis of the actual needs of firms. Clearly, measures should be undertaken forthwith to insure that the firms that meet the requirements of the act, in fact, receive an adequate level of assistance.

The adjustment assistance program will be put to its first major and perhaps decisive test if this remedy is implemented. I am convinced that if expeditiously administered, within the intent of the act, the program can become a valuable tool in alleviating the problems confronting import-impacted industries. I call upon the Executive and all agencies charged with the administration of the program to dedicate their efforts to that end.

INFORMATION OBTAINED IN THE INVESTIGATION

Introduction

Following receipt of a petition filed on August 20, 1975, by the American Footwear Industries Association (AFIA), the Boot and Shoe Workers' Union, and the United Shoe Workers of America, the U.S. International Trade Commission, (name changed from the U.S. Tariff Commission by the Trade Act of 1974), on September 17, 1975, instituted an investigation under section 201(b) of the Trade Act of 1974 to determine whether footwear, provided for in items 700.05 through 700.85, inclusive (except items 700.51, 700.52, 700.53, and 700.60), of the Tariff Schedules of the United States (TSUS), is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article. A public hearing in connection with this investigation was held on December 2-4 and December 8, 1975, in the Commission's hearing room in Washington, D.C. 1/ The act directs the Commission to complete its investigation within 6 months--in this case by February 20, 1976.

The petitioners allege that the domestic producers of the footwear considered in this investigation have already suffered serious injury and that the only effective remedy to stem increased deterioration of this industry is immediate implementation of quantitative restrictions on the footwear considered herein as provided for in section 203 of the Trade Act of 1974.

1/ Notice of the Commission's investigation and hearing was published in the Federal Register on Sept. 22, 1975 (75 F.R. 43561).

Previous Investigations

In recent years, the Commission has conducted a number of investigations on the footwear industry. On January 15, 1969, the Commission issued a report on an investigation (332-56) instituted at the request of the President under section 332 of the Tariff Act of 1930, in which it gathered information on the economic condition of domestic nonrubber footwear manufacturers, and the effects of imports upon those manufacturers. 1/

In December 1969, the Commission issued a report on an investigation (332-62) supplementing the previous section 332 investigation. This investigation was instituted by the Commission on its own motion to provide a current assessment of trends in domestic production and imports. 2/

On January 15, 1971, the Commission reported on an investigation (TEA-I-18) instituted at the request of the President under section 301(b)(1) of the Trade Expansion Act of 1962. The Commission, being equally divided, made no finding with respect to that investigation, and there was no further action announced by the President with respect to the Commission's report. 3/

Since 1968 the Commission has completed 155 footwear "adjustment assistance" investigation under sections 301(c)(1) (firms), and 301(c)(2) (workers). Of these, 128 were worker cases, and 27 were firm cases. The Commission

1/ Nonrubber Footwear: Report to the President on Investigation No. 332-56 . . ., TC Publication 276, 1969.
2/ Nonrubber Footwear: Report on Investigation No. 332-62 . . ., TC Publication 307, 1969.
3/ Nonrubber Footwear: Report to the President on Investigation No. TEA-I-18 . . ., TC Publication 359, 1971.

issued affirmative findings in 23 of the worker cases and 7 of the firm cases, negative determinations in 79 of the worker cases and 14 of the firm cases, and the Commissioners participating were evenly divided in 26 of the worker cases and 6 of the firm cases.

The Commission has conducted two investigations on footwear under the Antidumping Act, 1921, as amended. The first, in 1966 on leather work shoes from Czechoslovakia, resulted in a unanimously negative determination. 1/ The second, in 1975 on welt work shoes from Romania, resulted in a negative determination (Commissioners Leonard and Parker dissenting). 2/

The U.S. Treasury Department has conducted a number of countervailing duty investigations concerning footwear from Spain, Brazil, Argentina, Republic of Korea, and Taiwan. Countervailing duties have been imposed on nonrubber footwear imported into the United States from Spain, Brazil, Korea, and Taiwan. An affirmative finding was made with respect to rubber footwear from Korea; however, the imposition of countervailing duties was waived under the provisions of the Trade Act of 1974. A negative finding was made with respect to nonrubber footwear from Argentina.

1/ Leather Work Shoes from Czechoslovakia: Determination of No Injury or Likelihood Thereof in Investigation No. AA1921-48 . . ., TC Publication 185, 1966.
2/ Welt Work Shoes From Romania: Determination of No Injury or Likelihood Thereof in Investigation No. AA1921-144 . . ., USITC Publication 731, 1975.

Description of Products

The footwear cited in the notice of this investigation covers a wide variety of footwear, including dress, athletic, and work shoes, boots, sandals, clogs, zoris (which are generally considered to be rubber footwear), and other casual footwear. All of this footwear (except for zoris) is usually referred to as nonrubber footwear. However, all of it will be referred to as nonrubber footwear in this report. The imported footwear excluded in the notice of investigation is (1) protective-type footwear (rubbers, arctics, galoshes, overshoes, and other footwear of rubber and plastics) described in TSUS items 700.51, 700.52, and 700.53, and (2) certain footwear with uppers of fabric and soles of rubber or plastics described in item 700.60, which includes footwear commonly referred to as sneakers, tennis and basketball shoes, and a variety of slippers, boots, and other footwear designed for leisure, street, or beach wear. 1/

Nonrubber footwear is produced by establishments included in industry Nos. 3142, 3143, 3144, and 3149 of the Standard Industrial Classification (SIC). Industry No. 3142 consists of establishments primarily engaged in manufacturing house slippers, and industry No. 3143 consists of establishments enagaged in manufacturing men's footwear (other than athletic footwear). Establishments manufacturing women's footwear (other than athletic footwear) are included in No. 3144, and establishments manufacturing athletic footwear and footwear for misses, infants, and children are included in industry No. 3149. Both protective-type footwear and certain footwear with uppers of fabric and soles

1/Pt. 1A of schedule 7 of the TSUS, which is reproduced in App. A, covers articles of footwear.

of rubber or plastics are produced principally by establishments in industry No. 3021 (rubber footwear).

In 1975, as well as throughout the past decade, about half the nonrubber footwear produced in the United States was manufactured by the cement process 1/ and slightly more than an eighth, by the welt process. 2/ However, with respect to the upper material used in the manufacture of nonrubber footwear in the United States, there has been a definite shift from leather to the use of manmade materials. In 1975, about half the production of nonrubber footwear was produced with uppers of all leather, compared with two-thirds in 1970 and about three-fourths in 1965. This shift is a result of the increased cost of leather and the general acceptance by consumers of uppers of supported vinyl or other manmade materials. With respect to imported footwear, about two-fifths of the total imports during the past decade had uppers of leather.

In general or commercial usage the descriptive terms for footwear (e.g., dress, casual, sandals, work, and clogs) may have various meanings. Some terms are defined for tariff purposes in the headnotes (including statistical headnotes) to part 1A of schedule 7 (app. A). In the 1960's, dress shoes were probably more important than any other type of nonrubber footwear. However, since the late 1960's there has been a blurring of the distinction between dress and casual shoes, owing to the decline in strict dress codes and the emphasis on more casual

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1/ In the cement process, the outsole is affixed to the upper by an adhesive without sewing.

2/ In the welt process, a welt, a narrow strip of leather, extends around the edge of the thread portion of the sole, and the welt and shoe upper are sewed to a lip on the surface of the insole, and the outsole is sewed or cemented to the welt.

dress, with the result that most kinds of shoes are being worn and considered acceptable at most social and business functions.

With the emphasis on casual dress, there have been rapid style changes in nonrubber footwear during the past decade. In particular, women's footwear has been subjected to frequent and rapid changes in style as a result of modifications that have occurred in dress lengths and as trousers and other casual attire have become increasingly acceptable for almost every occasion. Women's boots gained popularity in the late 1960's with the introduction of new styles in women's wearing apparel, such as the miniskirt and the calf-length skirt, that accented boot designs. Such boots continued to be fashionable throughout 1970 and 1971. However, with the switch by women to other types of wearing apparel, particularly pants suits, the market for boots diminished markedly in 1972. It should be noted, however, that a renewed interest in boots began in 1974.

In 1970's footwear designs took a new direction. The footwear bottom (sole and heel) became the main interest in shoe design, and styles with soles an inch or more in thickness became popular. A variety of materials--crepe (rubber), "marshmallow" (pliable synthetic), leather combinations, and various plastics--were used to make soles, concealed platforms, and wedges. Some bottom assemblies were colored, painted, or sculptured. During 1970-72, such platform styles dominated most women's footwear. Although platforms became less extreme in 1973, their importance in shoe design continued into 1975; today a large volume of footwear in the more traditional styles is also being offered. While most fashion emphasis in recent years has focused on high heels, there as been a strong rebirth of interest in flats for dress occasions and low-heeled classic moccasins for casual wear.

The Question of Increased Imports

U.S. imports

U.S. imports of nonrubber footwear, which were negligible in the 1950's, rose steadily from 95 million pairs in 1963 to 227 million pairs in 1969 and to 339 million pairs in 1973 (table 1; fig. 1). The upward trend in imports of nonrubber footwear was interrupted in 1974, when they amounted to 318 million pairs. In January-September 1975, such imports amounted to 256 million pairs, compared with 249 million pairs in the corresponding period of 1974. In terms of value, imports of nonrubber footwear increased from $563 million in 1970 to $989 million in 1974. Table 1a and figure 1a show U.S. imports of nonrubber footwear excluding zoris and disposable paper slippers.

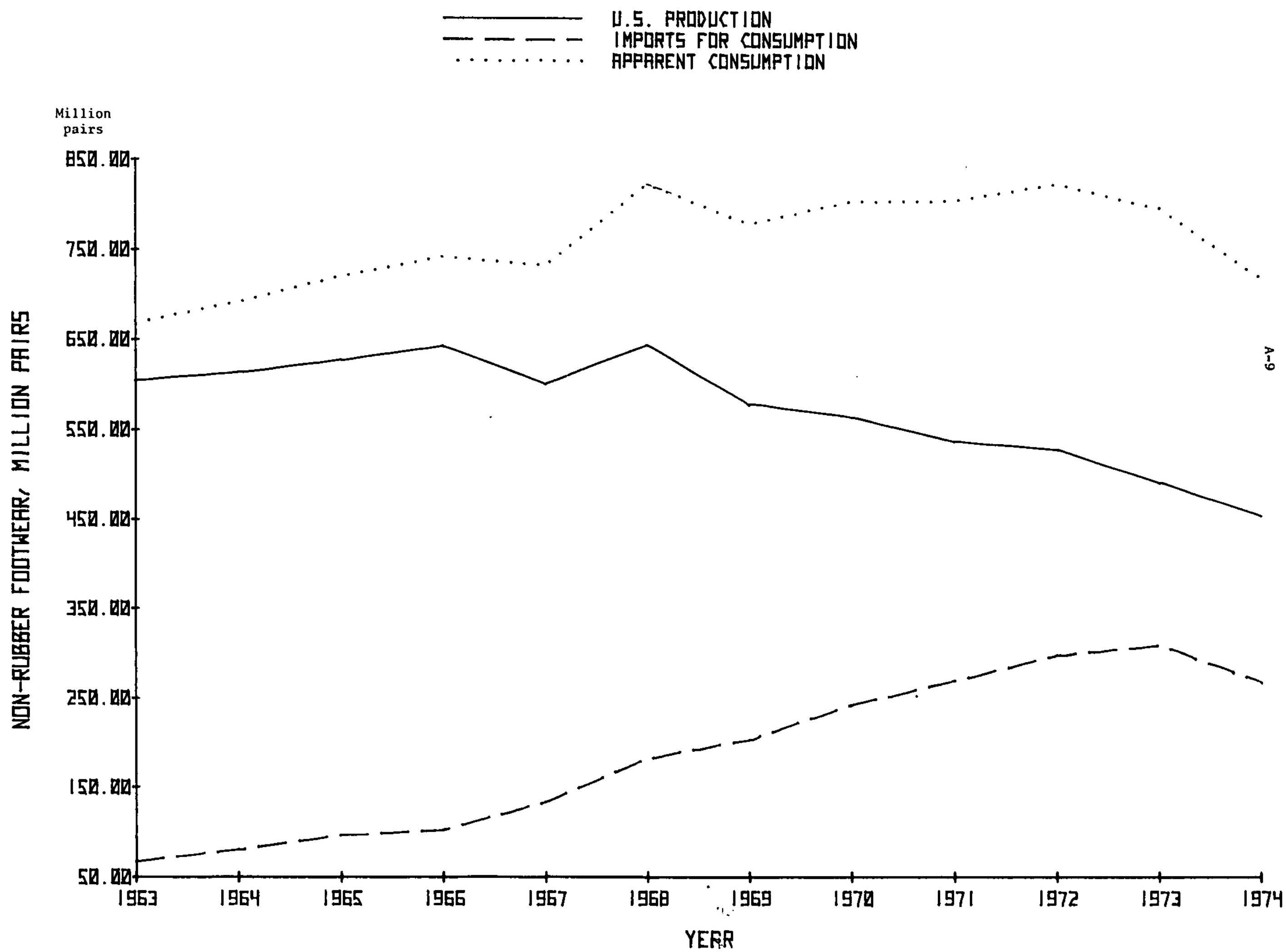
U.S. imports of zoris--thonged sandals of rubber or plastics, which are provided for in TSUS item 700.55 and thus included in this investigation--have been on a downward trend since the mid-1960's. Zoris are worn primarily as beach sandals or shower slippers. U.S. imports of zoris declined from 34 million pairs in 1965 to 26 million pairs in 1970 and to 24 million pairs in 1974.

Disposable paper slippers from Mexico are admitted under TSUS item 700.85 and are thus included in this investigation. 1/ Such slippers (which are valued at about 9 cents per pair), amounted to an

1/ Disposable paper slippers were imported in substantial volume beginning in 1973. These slippers, which are worn over shoes, are designed for use as a safety percaution against static electricity in hospitals. They are entered principally under item 807.00 of the TSUS, which means that the duty is assessed only on the value added by the Mexican fabricator. Components of the shoe covering are shipped to fabricators in Mexico for assembly and then returned to the United States.

FIGURE 1

NONRUBBER FOOTWEAR (INCLUDING ZORIS AND PAPER SLIPPERS): U.S. PRODUCTION, IMPORTS, AND APPARENT CONSUMPTION, 1963-74 1/

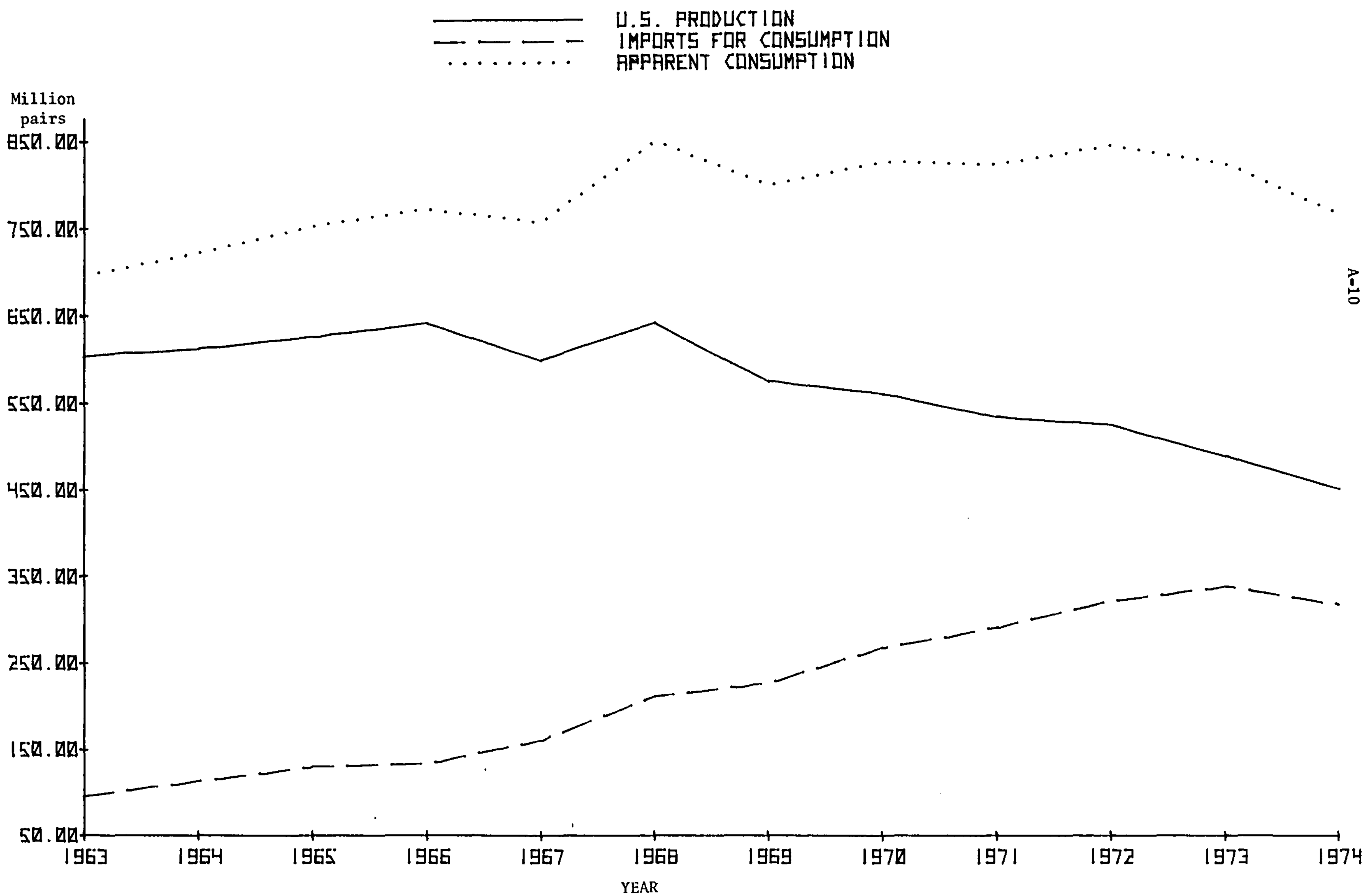


1/ Data on imports include all imports cited in the notice of investigation.

Source: Based on data in table 1.

FIGURE 1a

NONRUBBER FOOTWEAR (EXCLUDING ZORIS AND PAPER SLIPPERS): U.S. PRODUCTION, IMPORTS, AND APPARENT CONSUMPTION, 1963-74



Source: Based on data in Table 1.

estimated 8 million pairs in 1973, 28 million pairs in 1974, and 27 million pairs in January-September 1975, compared with 18 million pairs in the corresponding period of 1974. A representative of shoe producers in Mexico testified at the public hearing that an estimated 30.8 million pairs of paper slippers were shipped to the United States in 1974 and 27.6 million pairs were shipped in the first 11 months of 1975. 1/

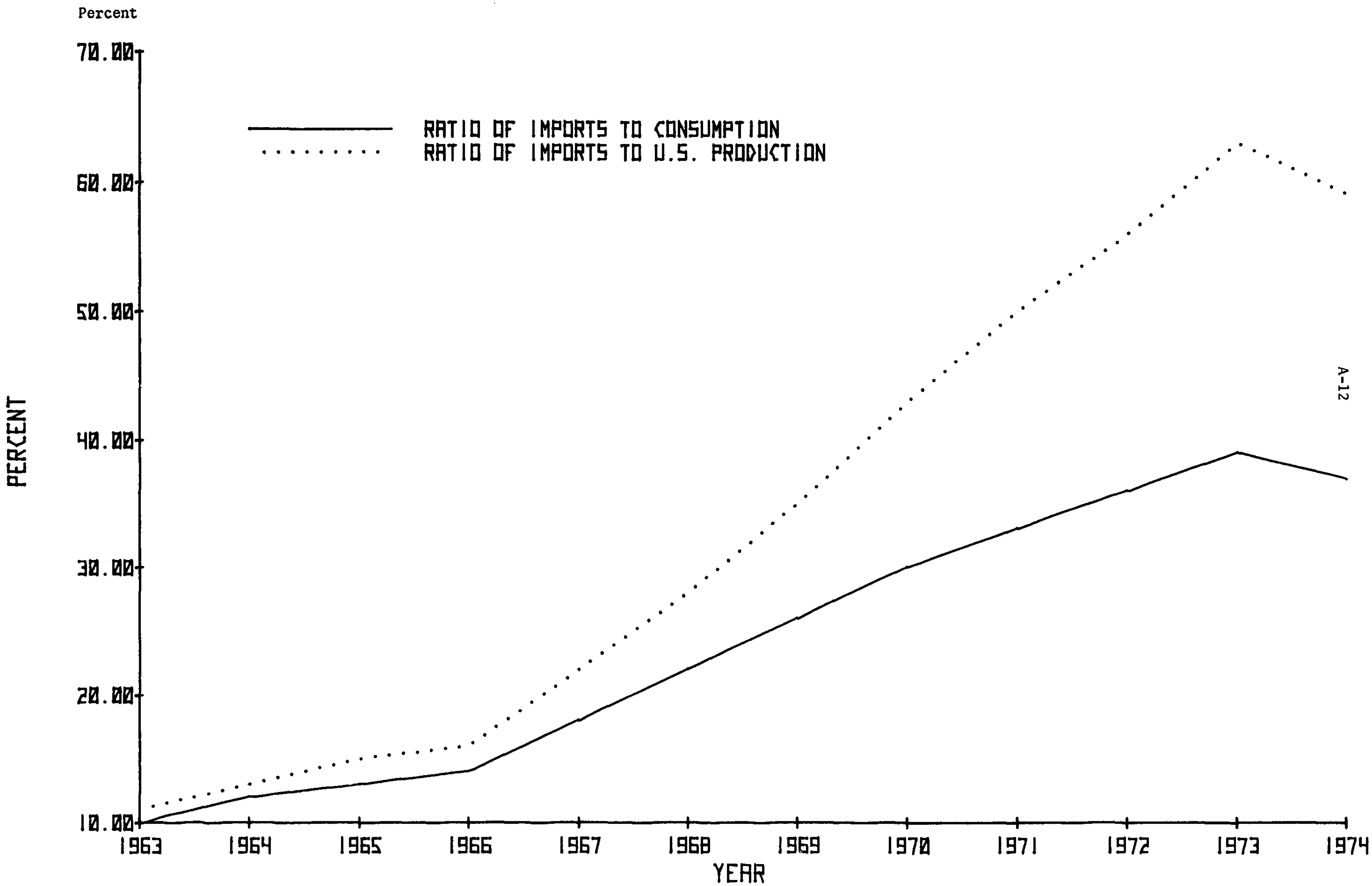
The ratio of imports of nonrubber footwear to domestic production 2/ increased steadily from a negligible 2 percent in the mid-1950's to 27 percent in 1967 and to 70 percent in 1974 (table 1 and fig. 2). The ratio of imports to production was 82 percent in January-September 1975, compared with 72 percent in the corresponding period of 1974. Fig. 2A shows the ratio of U.S. imports of nonrubber footwear, excluding zoris and paper slippers, to production and consumption for the period 1963-74.

U.S. imports of footwear with fabric uppers and soles of rubber or plastics (described in TSUS item 700.60 which is not listed in imported items in the notice of this investigation), doubled during the 10-year

1/ Transcript of the hearing, p. 891.
2/ Imports and market penetration are discussed in a later section.

FIGURE 2

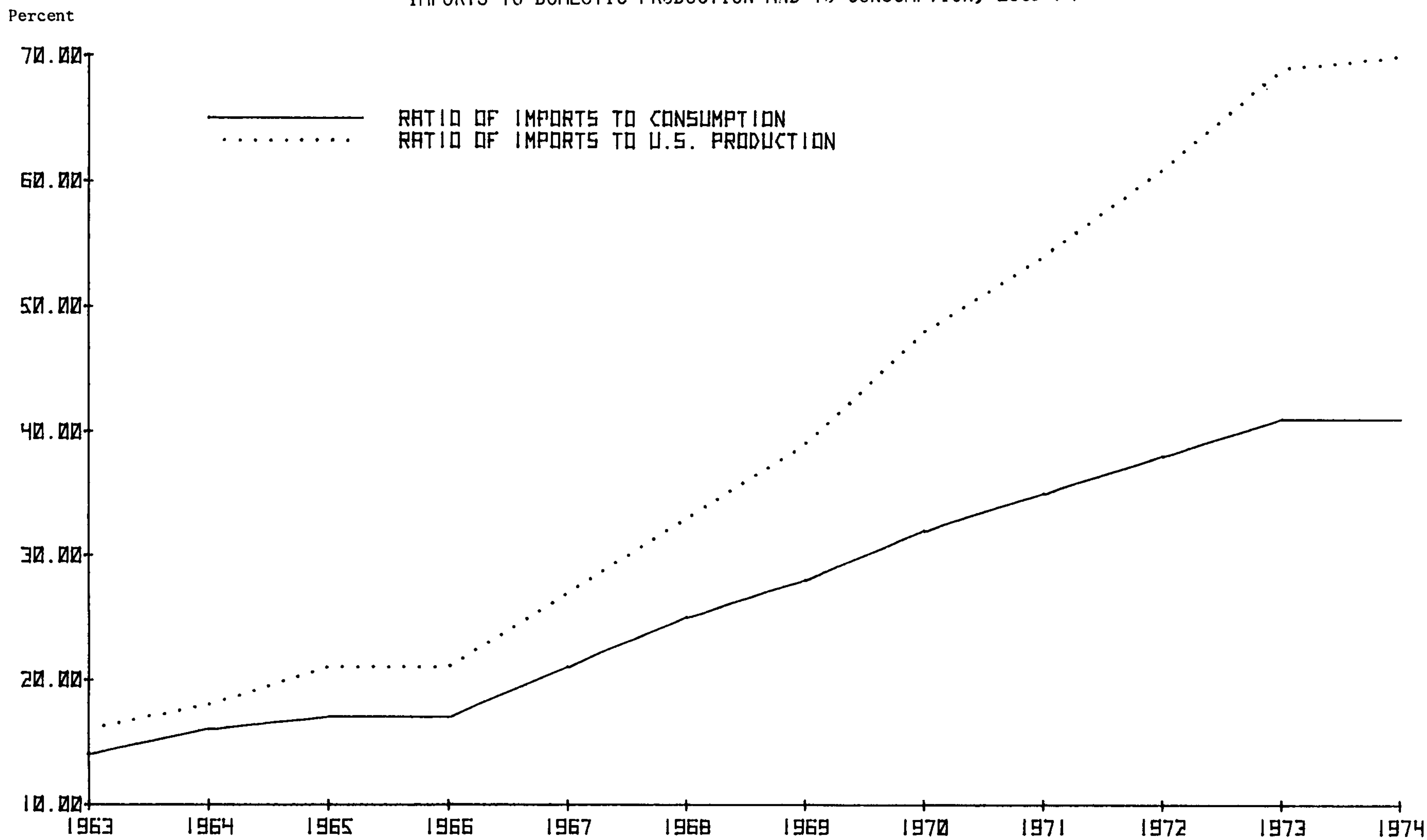
NONRUBBER FOOTWEAR (INCLUDING ZORIS AND PAPER SLIPPERS): RATIO OF U.S. IMPORTS TO DOMESTIC PRODUCTION AND TO CONSUMPTION, 1963-74 1/



1/ Data on imports include all imports cited in the notice of investigation.

Source: Based on data in table 1.

FIGURE 2a
NONRUBBER FOOTWEAR (EXCLUDING ZORIS AND PAPER SLIPPERS): RATIO OF U.S. IMPORTS TO DOMESTIC PRODUCTION AND TO CONSUMPTION, 1963-74



Source: Based on data in Table 1.

period 1965-74. Such footwear consists of tennis oxfords, basketball shoes, footwear commonly referred to as sneakers, slippers, scuffs, and a variety of boots. U.S. imports of such footwear rose from 33 million pairs in 1965 to 50 million pairs in 1970 and 67 million pairs in 1974. In recent years, nearly two-thirds of the imports have consisted of slippers, scuffs, and other footwear deemed by the U.S. Customs Service as "not like or similar to U.S. footwear" and thus not dutiable on the American-selling-price (ASP) basis of valuation. Imports of such footwear have been on an upward trend during the past decade, while imports of sneaker-type footwear (dutiable on the ASP basis of valuation) have been on a irregular trend.

The table on the next page shows U.S. imports of nonrubber footwear (except zoris and paper slippers), zoris separately, and footwear admitted under 700.60 during 1970-74, January-September 1974, and January-September 1975.

Nonrubber footwear, zoris, and certain footwear with fabric uppers and soles of rubber or plastics: U.S. imports for consumption, 1970-74, January-September 1974, and January-September 1975

Period	Non-rubber foot-wear 1/	Zoris 2/	Footwear with fabric uppers and soles of rubber or plastics: Similar to U.S. footwear 3/	Not similar to U.S. footwear 4/	Total
	Quantity (million pairs)				
1970	242	26	18	32	50
1971	269	23	28	34	62
1972	297	25	20	38	58
1973	308	23	24	42	66
1974	266	23	26	41	67
Jan.-Sept.--					
1974	213	19	21	34	55
1975	213	17	20	37	57
	Value (million dollars)				
1970	559	3	17	57	44
1971	678	3	29	33	62
1972	835	4	24	33	57
1973	975	4	37	42	79
1974	981	6	68	64	132
Jan.-Sept.--					
1974	750	5	53	50	103
1975	845	5	55	59	114
	Unit value (per pair)				
1970	$2.31	$0.12	$0.95	$0.87	$0.90
1971	2.53	.14	1.02	.96	.99
1972	2.81	.14	1.21	.88	.99
1973	3.17	.17	1.52	1.00	1.19
1974	3.68	.26	2.59	1.56	1.96
Jan.-Sept.--					
1974	3.52	.26	2.57	1.48	1.89
1975	3.97	.30	2.83	1.59	2.02

1/ Does not include zoris or paper slippers.
2/ Footwear entered under TSUSA item 700.5520.
3/ Footwear admitted under TSUSA items 700.6005-700.6030 and dutiable on the ASP basis of valuation.
4/ Footwear admitted under TSUSA items 700.6035-700.6060 and not subject to duty on the ASP basis of valuation.

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

Principal supplying countries.--In terms of quantity, Taiwan, Italy, Spain, and Brazil have been the principal suppliers of nonrubber footwear to the United States in recent years (tables 2, 3, 4, and 5). 1/ In 1974, Taiwan supplied 30 percent of the total imports; Italy, 20 percent; Spain, 11 percent; and Brazil, 7 percent. As shown in the table on the next page, Taiwan accounted for 64 percent of the total imports of footwear of plastics and zoris in 1974, while Italy, Spain, and Brazil together accounted for about three-fourths of the total imports of footwear of leather. Imports of footwear of plastics and zoris from Taiwan had an average dutiable value of $1.12 a pair; footwear of leather from Italy, Spain, and Brazil had an average dutiable value of $5.73, $5.90, and $4.24 a pair, respectively.

1/ See tables 2a, 4a, and 5a for data on imports of nonrubber footwear, excluding zoris and paper slippers.

Nonrubber footwear (including zoris and paper slippers): U.S. imports for consumption, by types of material and principal sources, 1974

Source	Leather	Plas- tics 1/	Other	Total
	Quantity (1,000 pairs)			
Republic of China (Taiwan)	1,548	89,195	5,476	96,219
Italy	43,702	16,590	2,311	62,603
Spain	28,405	5,830	798	35,033
Brazil	20,345	140	839	21,324
Republic of Korea	3,470	2,738	2,994	9,202
All other	30,419	23,816	39,405	93,640
Total	127,889	138,309	51,823	318,021
	Value (1,000 dollars)			
Republic of China (Taiwan)	6,590	99,706	7,428	113,724
Italy	250,596	65,769	7,183	323,548
Spain	167,655	20,938	4,215	192,808
Brazil	86,289	77	2,330	88,696
Republic of Korea	16,747	3,403	3,349	23,499
All other	178,537	40,589	27,753	246,880
Total	706,414	230,482	52,258	989,155
	Unit value (per pair)			
Republic of China (Taiwan)	$4.26	$1.12	$1.36	$1.18
Italy	5.73	3.96	3.11	5.17
Spain	5.90	3.50	5.28	5.50
Brazil	4.24	.55	2.78	4.16
Republic of Korea	4.83	1.24	1.12	2.55
All other	5.87	1.70	.70	2.64
Total	5.52	1.67	1.01	3.11
	Percent of total quantity			
Republic of China (Taiwan)	1	64	11	30
Italy	34	12	4	20
Spain	22	4	1	11
Brazil	16	2/	2	7
Republic of Korea	3	2	6	3
All other	24	18	76	29
Total	100	100	100	100

1/ Footwear having uppers principally of supported vinyl and zoris.
2/ Less than 0.5 percent.

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

Imports from Taiwan more than doubled during the period 1970-73 (table 2), but then declined considerably in 1974, while imports from Italy declined by nearly a fourth during the 5-year period 1970-74--from 81 million pairs to 63 million pairs. U.S. imports from Spain rose by nearly 75 percent between 1970 and 1973, but declined slightly in 1974. It should be noted that imports from Brazil, which accounted for a very small part of the total imports in 1970, increased to about 7 percent of the total in 1974. Imports from Korea also increased substantially during 1970-74--from 2 million to 9 million pairs. Conversely, imports of nonrubber footwear from Japan, a major supplier in 1970 and 1971, declined from 60 million pairs in 1970 to 7 million pairs in 1974, or by nearly 90 percent.

In 1974, U.S. imports from Taiwan consisted principally of vinyl slippers, sandals, and other inexpensive footwear for women and misses (table 6). A substantial portion of the imports from Italy, which had a considerably higher dutiable value ($5.17 a pair) than imports from Taiwan, consisted of leather dress and casual shoes for women and misses; about a fourth of the imports consisted of vinyl footwear for women and misses; and most of the remainder included leather dress and casual footwear for men, youths, and boys (table 7).

About half of the total imports from Spain consisted of leather dress and casual footwear for women and misses; leather dress and casual footwear for men, youths, and boys accounted for most of the remainder (table 8). Women's dress and casual footwear of leather accounted for most of the imports from Brazil (table 9).

Composition.--U.S. imports of footwear of leather (items 700.05-700.45), which had an average dutiable value of $5.52 a pair in 1974, have supplied about two-fifths of the total imports by volume in recent years (table 10); 1/ footwear with uppers principally of supported vinyl, which had an average value of $1.67 a pair in 1974, accounted for most of the remainder. The great bulk of the footwear considered in this investigation is entered under four TSUS items--700.35, 700.43, 700.45, and 700.55 (tables 11 and 12).

As shown in the table below, about 64 percent of the total imports entered in 1974 were admitted under items 700.45 and 700.55.

Nonrubber footwear: U.S. imports for consumption, by selected TSUS items, 1974

TSUS item No.	Description	Quantity	Value	Unit value	Share of total quantity
		1,000 pairs	1,000 dollars	Per pair	Percent
	Footwear of leather:				
	Other:				
700.35	For men, youths, and boys----------------	37,843	259,800	$6.87	12
	For other persons:				
700.43	Valued not over $2.50 per pair---	14,673	25,515	1.74	5
700.45	Valued over $2.50 per pair---------	67,023	365,642	5.46	21
700.55	Certain footwear of rubber or plastics-----	138,309	230,482	1.67	43

1/ See table 10a and figure 3a for U.S. imports of nonrubber footwear, excluding zoris, and paper slippers, by types.

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

As shown in the following table and in figure 3, during the period 1970-74, U.S. imports of women's and misses' footwear supplied over two-thirds of the total imports; imports of men's, youths', and boys' footwear supplied about a fifth of the total; and imports of children's and infants' footwear supplied most of the remainder.

Nonrubber footwear: U.S. imports for consumption, by types, 1968-74, January-September 1974, and January-September 1975 1/

Type	1968	1969	1970	1971	1972	1973	1974	January-September--	
								1974	1975
	Quantity (millions of pairs)								
Athletic	2	2	4	5	6	6	8	6	12
Work	2	2	2	2	2	3	3	3	2
Slippers 2/	3/	3/	3/	3/	3/	3/	3/	3/	3/
All other:									
Men, youths, and boys	31	38	48	57	62	66	73	54	62
Women and misses	133	140	166	181	199	215	191	151	150
Children and infants	14	19	21	22	27	26	19	15	14
Total	182	202	242	269	297	316	294	229	240
	Percent of total								
Athletic	1	1	2	3	2	2	3	3	5
Work	1	1	1	1	1	1	1	1	1
Slippers 2/	-	-	-	-	-	-	-	-	-
All other:									
Men, youths, and boys	17	20	20	21	21	21	25	24	25
Women and misses	73	69	68	67	67	68	65	66	63
Children and infants	8	9	9	8	9	8	6	6	6
Total	100	100	100	100	100	100	100	100	100

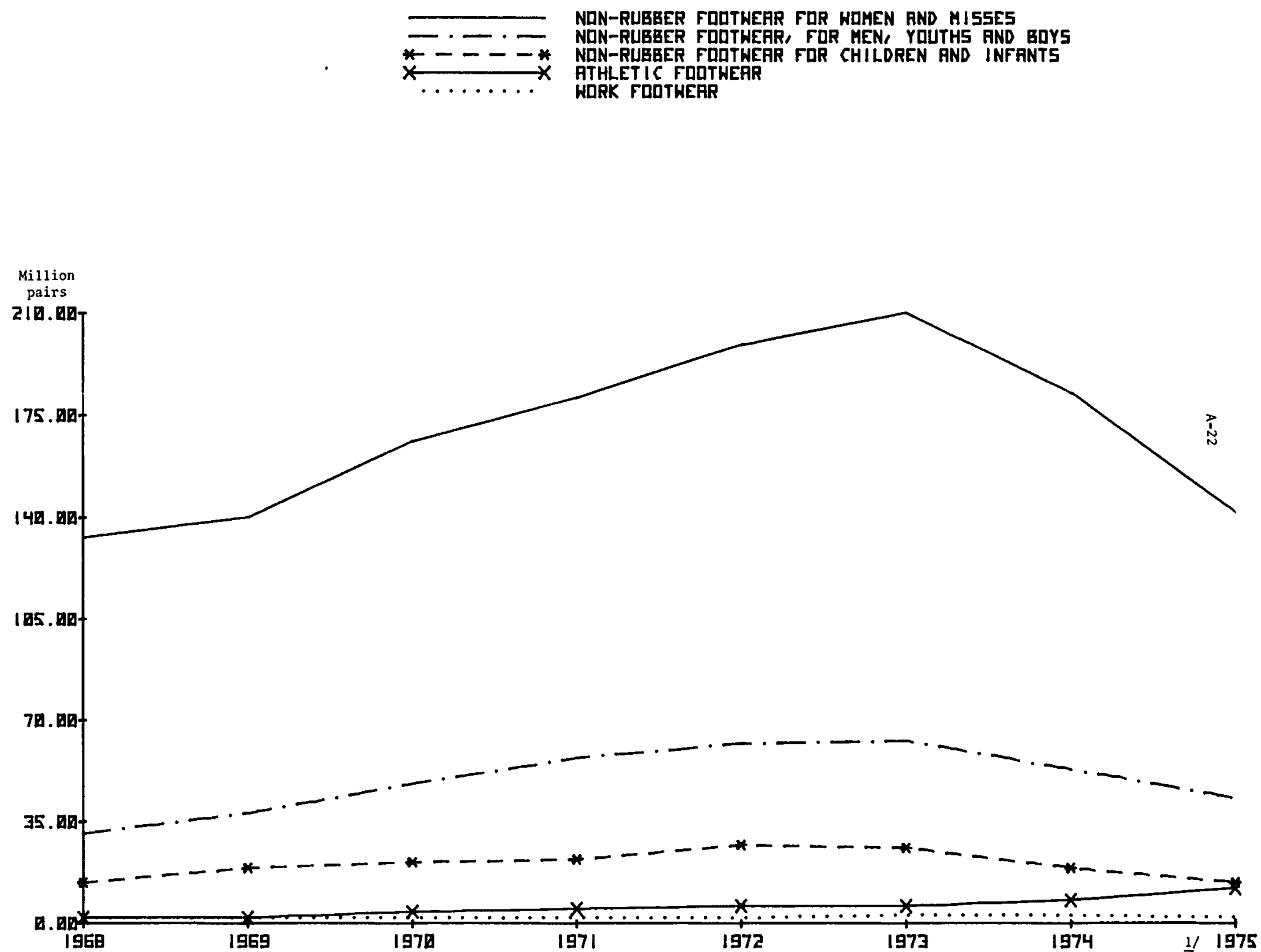
1/ Data on imports include paper slippers; however, they do not include data on zoris, which are not reported by sex.
2/ The term "slippers" (item 700.32), as defined in subpt. 1A, headnote 2(e), is a restrictive category that applies to only a small part of the slippers imported into the United States.
3/ Less than 500,000 pairs; in 1974, slippers entered under TSUS item 700.32 amounted to 65,000 pairs.

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

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

FIGURE 3

NONRUBBER FOOTWEAR (INCLUDING PAPER SLIPPERS): U.S. IMPORTS FOR CONSUMPTION, 1968-75 1/

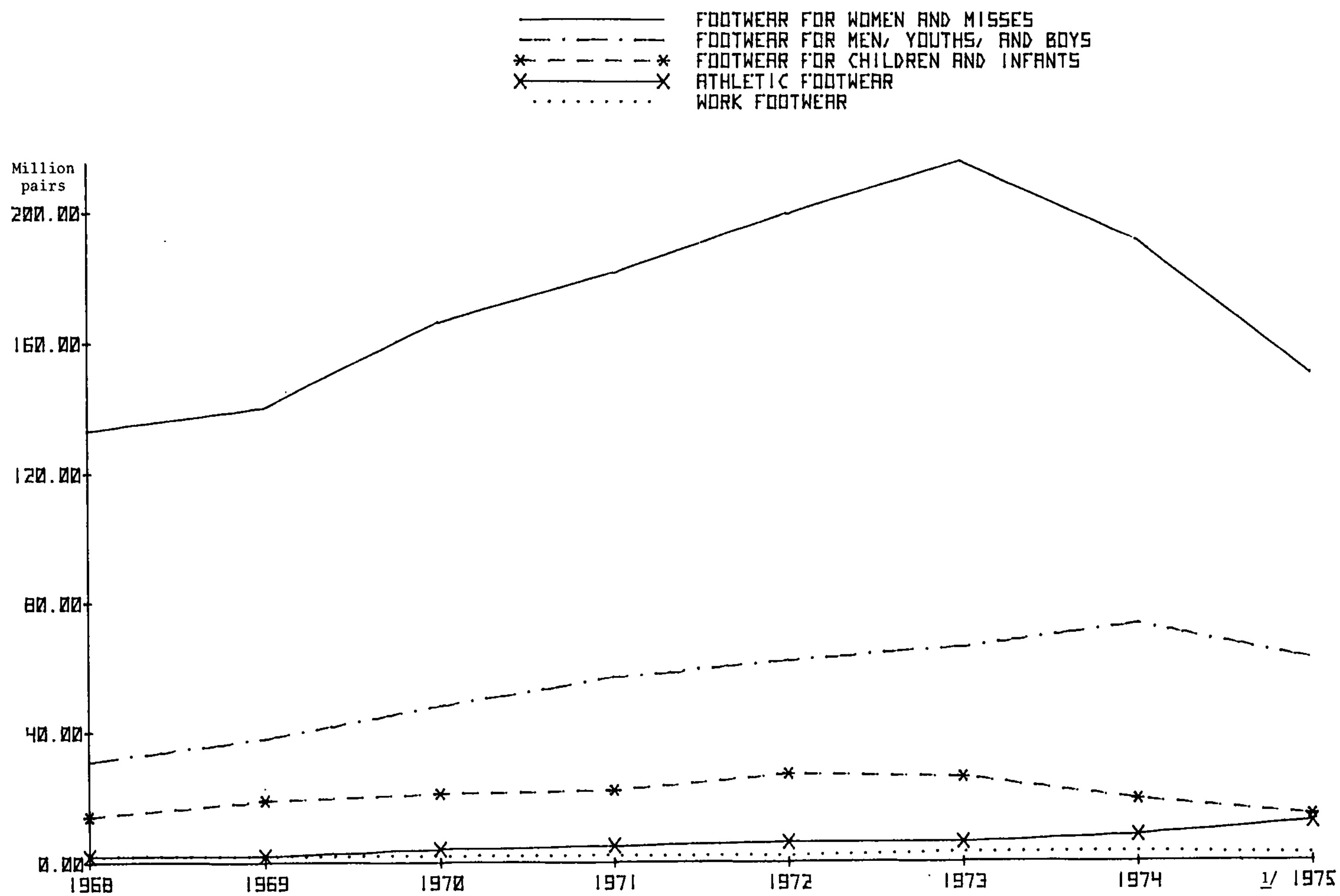


1/ Data include imports of paper slippers; however, they do not include data on imports of zoris, which are not reported by sex.
2/ 1975 data based on January-June period.

Source: Based on data in tables 13-17.

FIGURE 3a

NONRUBBER FOOTWEAR (EXCLUDING ZORIS AND PAPER SLIPPERS WHERE APPROPRIATE):
U.S. IMPORTS FOR CONSUMPTION, 1968-75



1/ 1975 data based on January-June period.

Source: Based on data in tables 13a, 14a, 15, 16, and 17.

Footwear for women and misses.--Figure 4 on the next page shows that U.S. imports of nonrubber footwear for women and misses (excluding zoris) increased from about 133 million pairs in 1968 to 215 million pairs in 1973--or by nearly 55 percent (table 13). 1/ Imports of women's and misses' footwear dropped significantly in 1974, and in January-September 1975 they were slightly lower than in the corresponding period of 1974.

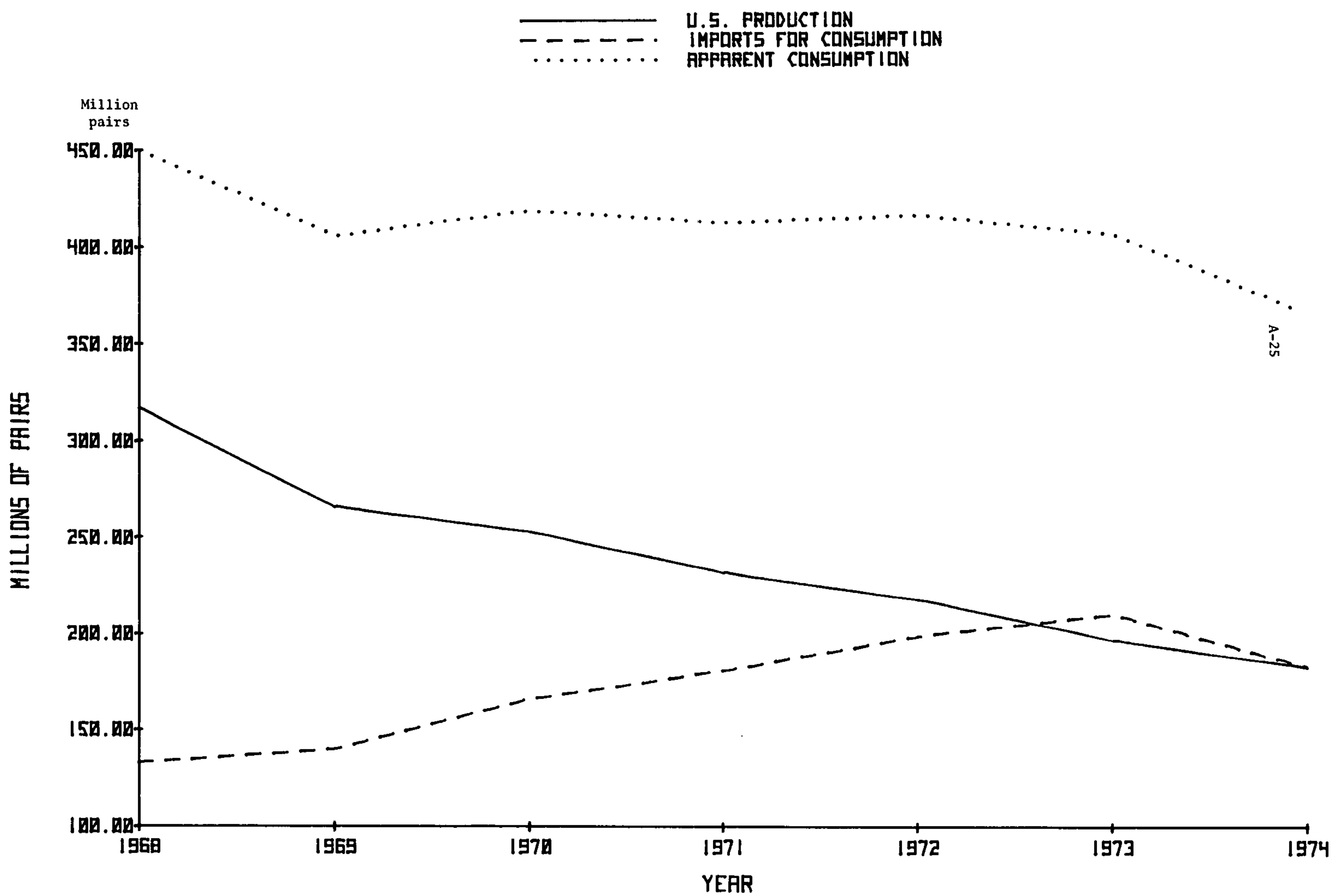
While imports were equal to only 42 percent of production in 1968, they were equal to 78 percent of production in 1971, and 104 percent in 1974. In January-September 1975, imports were equivalent to 111 percent of production, the same as in the corresponding period of 1974. In terms of quantity, Taiwan, Italy, Spain, and Brazil have been the principal suppliers of such footwear in recent years.

Footwear for men, youths, and boys.--Figure 5 and table 14 show that U.S. imports of nonrubber footwear (other than work or athletic) for men, youths, and boys (excluding zoris) doubled during the period 1968-74,increasing from 31 million pairs to 73 million pairs. 2/ They were about 62 million in January-September 1975, compared with 54 million pairs in the corresponding period of 1974. The ratio of imports to production rose from 27 percent in 1968 to 72 percent in 1974. The ratio of imports to production was 85 percent in January-September 1975,compared with 67 percent in the same period of 1974.

1/ See figure 4a and table 13a for data on imports of nonrubber footwear excluding zoris and paper slippers.
2/ See figure 5a and table 14a for data on imports of nonrubber footwear excluding zoris and paper slippers.

FIGURE 4

NONRUBBER FOOTWEAR (OTHER THAN ATHLETIC AND WORK AND INCLUDING PAPER SLIPPERS) FOR WOMEN AND MISSES: U.S. PRODUCTION, IMPORTS FOR CONSUMPTION, AND APPARENT CONSUMPTION, 1968-74 1/

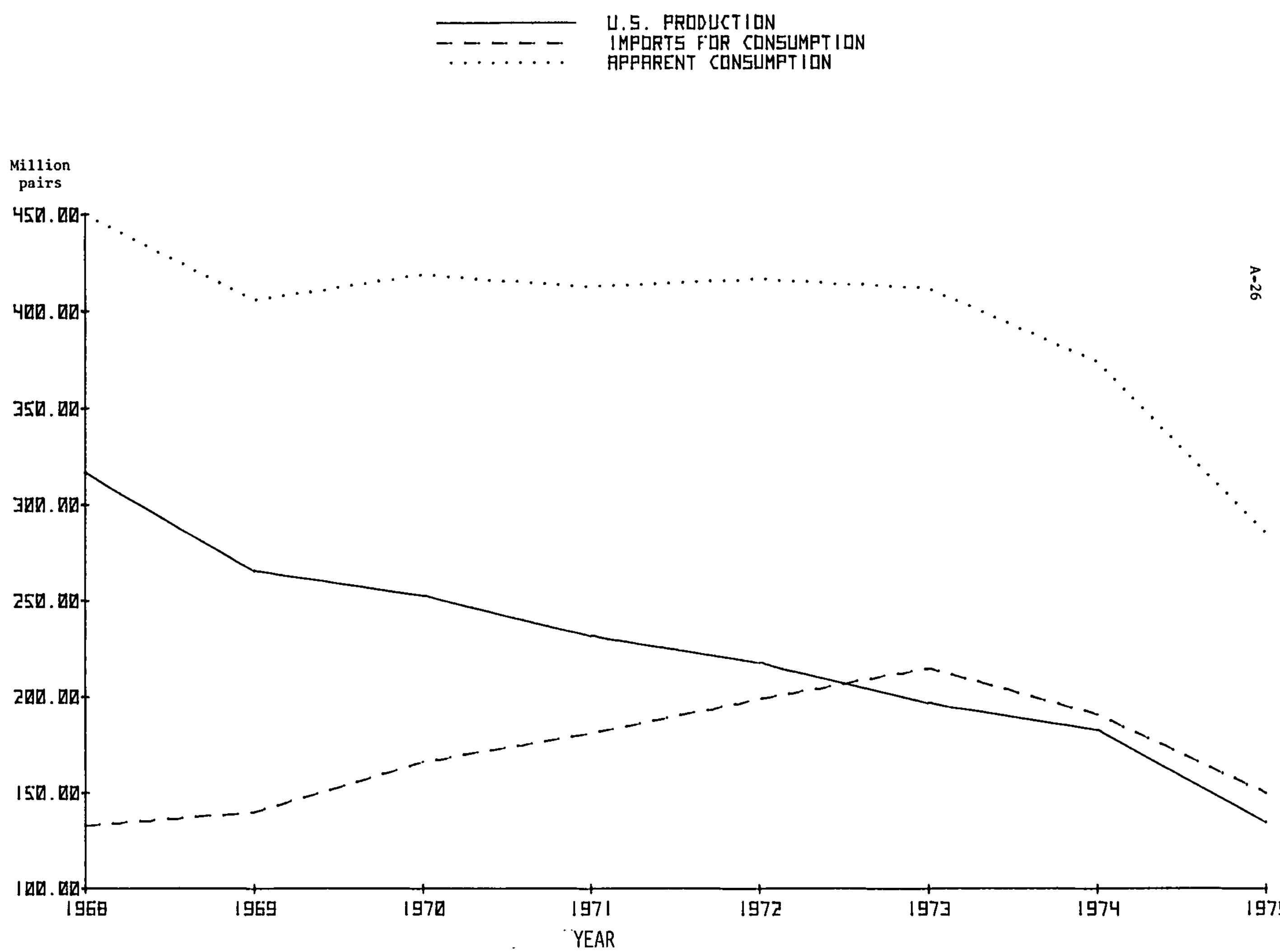


1/ Data include imports of paper slippers; however, they do not include data on imports of zoris, which are not reported by sex.

Source: Based on data in table 13.

FIGURE 4a

NONRUBBER FOOTWEAR (OTHER THAN ATHLETIC AND WORK) FOR WOMEN AND MISSES: U.S. PRODUCTION, IMPORTS FOR CONSUMPTION, AND APPARENT CONSUMPTION, 1963-74 1/

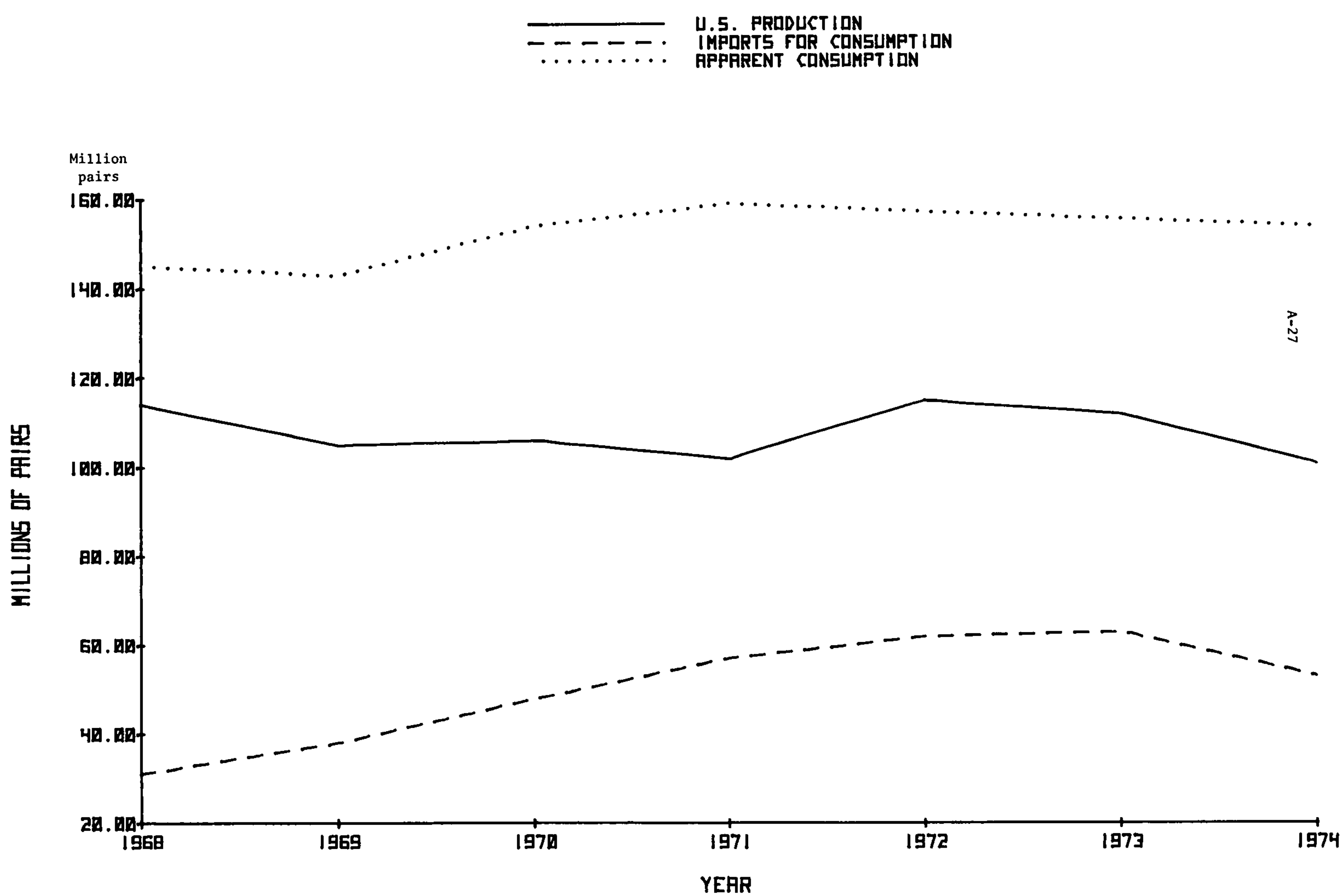


1/ Data on imports do not include zoris or paper slippers.

Source: Based on data in table 13a.

FIGURE 5

NONRUBBER FOOTWEAR (OTHER THAN ATHLETIC AND WORK AND INCLUDING PAPER SLIPPERS) FOR MEN, YOUTHS, AND BOYS: U.S. PRODUCTION, IMPORTS FOR CONSUMPTION, AND APPARENT CONSUMPTION, 1968-74 1/

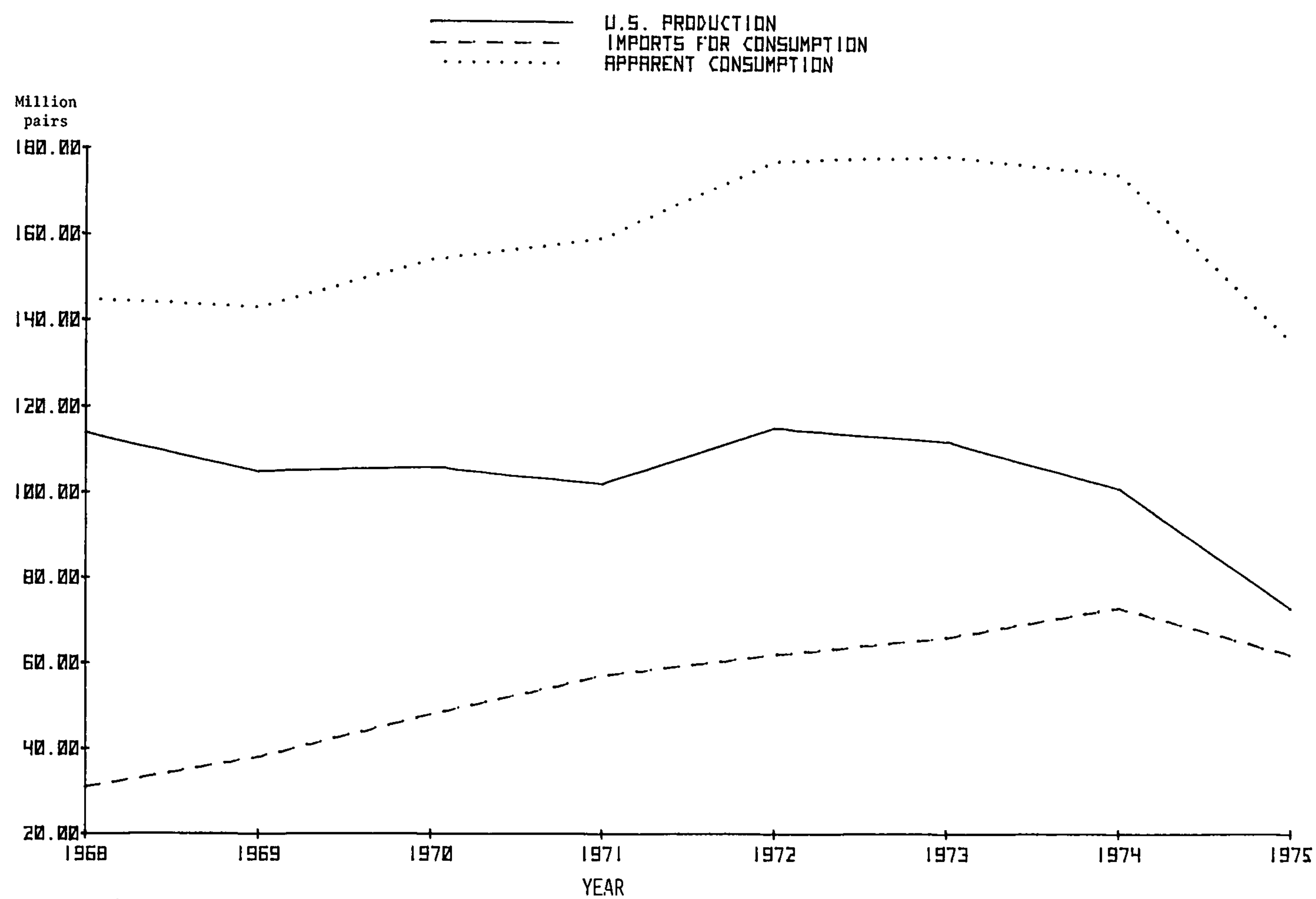


1/ Data include imports of paper slippers; however, they do not include data on imports of zoris, which are not reported by sex.

Source: Based on data in table 14.

FIGURE 5a

NONRUBBER FOOTWEAR (OTHER THAN ATHLETIC AND WORK) FOR MEN, YOUTHS, AND BOYS): U.S. PRODUCTION, IMPORTS FOR CONSUMPTION, AND APPARENT CONSUMPTION, 1968-74 1/



1/ Data on imports do not include zoris or paper slippers.

Source: Based on data in table 14a.

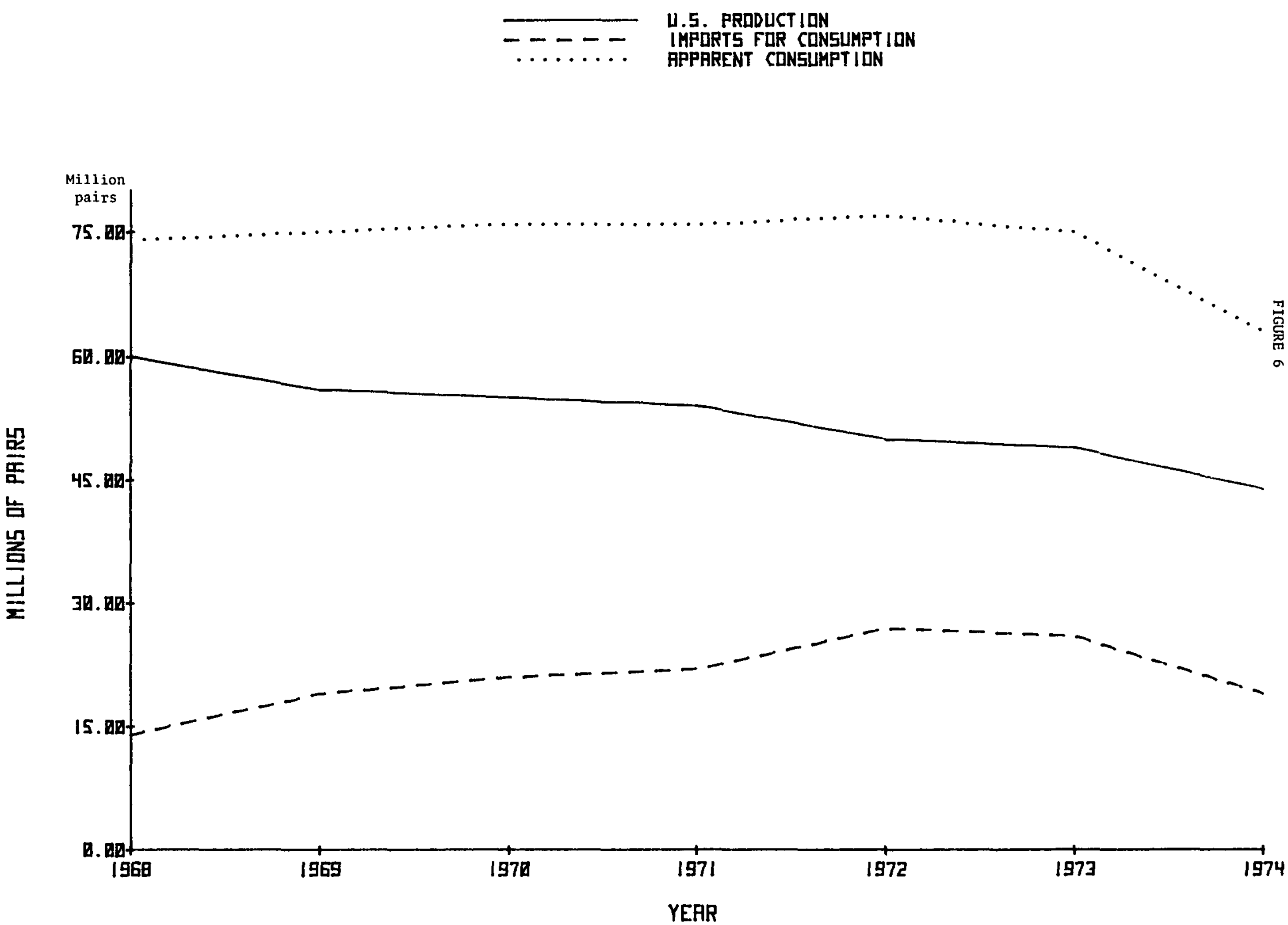
In recent years, Taiwan, Italy, and Spain have been the principal suppliers of such footwear.

Footwear for children and infants.--As shown in figure 6 and table 15, during the period 1968-73, imports of nonrubber footwear for children and infants nearly doubled, increasing from 14 million to 26 million pairs. Imports then declined to 19 million pairs in 1974; they amounted to 14 million pairs in January-September 1975, compared with 15 million pairs in the corresponding period of 1974. The ratio of imports to production increased from 23 percent in 1968 to 53 percent in 1973, but declined to 43 percent in 1974. Imports were equivalent to 45 percent of production in January-September 1974 and 48 percent in the corresponding period of 1975.

In 1974, U.S. imports of footwear of plastics for children and infants amounted to about 10 million pairs, or about half the total imports of footwear for children and infants; footwear of leather accounted for about 5 million pairs and other nonrubber footwear, 4 million pairs. In terms of quantity, Taiwan, Spain, Italy, and Japan have been the principal suppliers of imports on nonrubber footwear for children and infants in recent years.

FIGURE 6

NONRUBBER FOOTWEAR (OTHER THAN ATHLETIC AND WORK) FOR CHILDREN AND INFANTS: U.S. PRODUCTION, IMPORTS FOR CONSUMPTION, AND APPARENT CONSUMPTION, 1968-74



Source: Based on data in table 15.

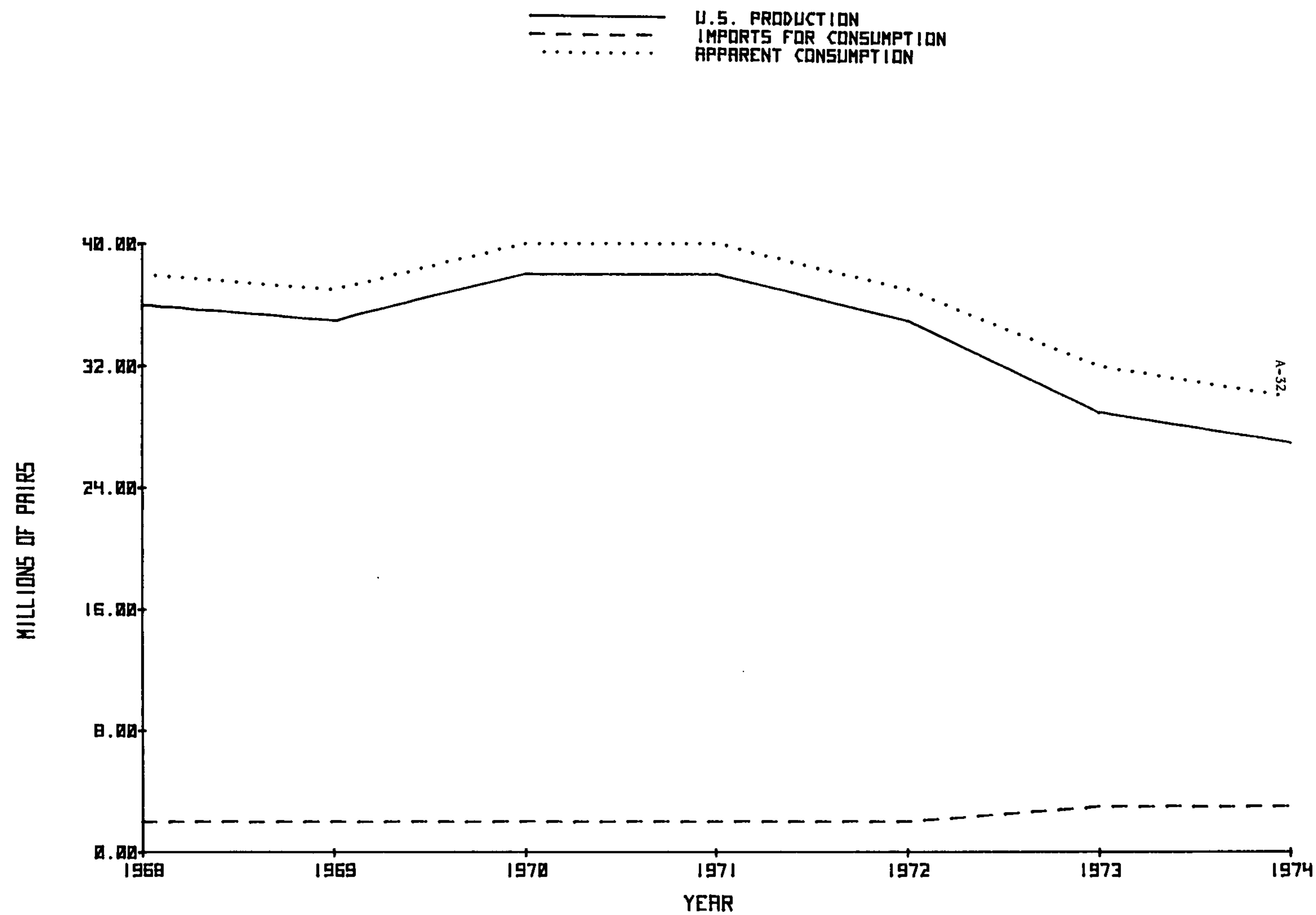
Work footwear.--Figure 7 and table 16 show that U.S. imports of work footwear 1/ as reported in official statistics amounted to 2 million pairs in each of the years 1968-72, but increased to 3 million pairs in 1973 and 1974. The ratio of imports to production rose from 5 percent in 1970 to 11 percent in 1974. However, it should be noted that production data shown for 1973 and 1974 represent production of work shoes of ankle height or higher only (including steel-toed shoes), while data for previous years represent production of both oxford-height and above-the-ankle type. Romania, Korea, and Canada have been the principal suppliers of work shoes in recent years.

Athletic footwear.--Figure 8 and table 17 show that U.S. imports of athletic footwear increased from 2 million pairs in 1968, when they were equal to one-fourth of production, to 8 million pairs in 1974, when they were equal to four-fifths of production. Imports continued their upward trend as they amounted to 12 million pairs in January-September 1975, equivalent to 150 percent of production, compared with 6 million pairs in the corresponding period of 1974, equivalent to 86 percent of production. However, it should be noted that the data on imports do not include footwear with permanently attached skates, while the data on production include such footwear. In recent years, imports of shoes with skates attached have been estimated at about 1 million pairs annually, and production of such footwear has been estimated at about 1 million to 4 million pairs annually. Also, some imports consist of ski boots and high-quality, high-priced specialized athletic shoes of which there is relatively little domestic production.

1/ Work footwear is described in subpt. 1A, statistical headnote 1(b) of schedule 7 as footwear "having outsoles 1/4 inch or over in thickness (measured at the ball of the foot) and having uppers of grain leather extending above the ankle." Although the above description refers only to above-the-ankle-type footwear, Customs officials in New York and Baltimore report that oxford-height work shoes are generally included as work footwear under the item.

FIGURE 7

WORK FOOTWEAR: U.S. PRODUCTION, IMPORTS FOR CONSUMPTION, AND APPARENT CONSUMPTION, 1968-74

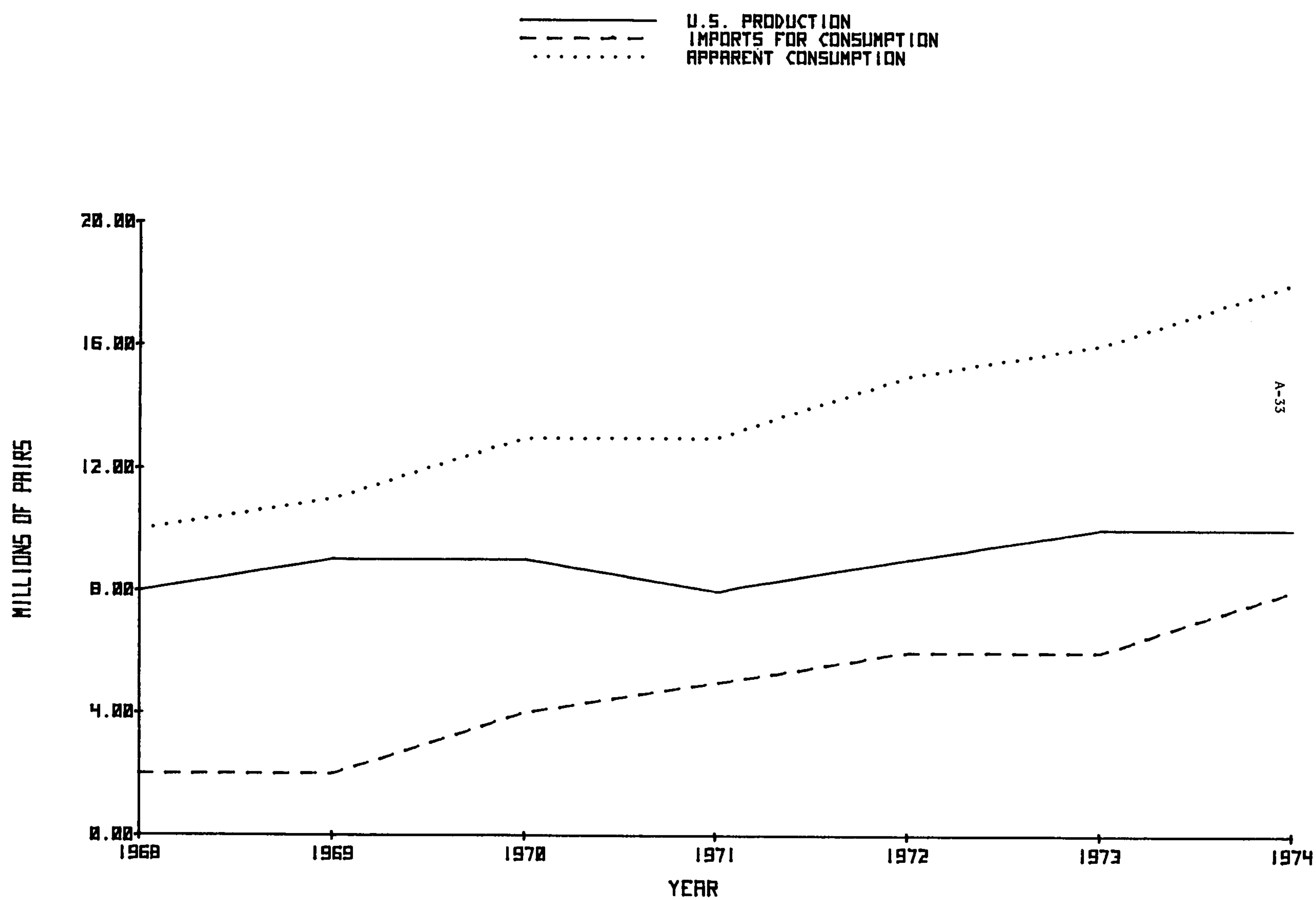


Source: Basedon data in Table 16.

A-32.

FIGURE 8

ATHLETIC FOOTWEAR: U.S. PRODUCTION, IMPORTS FOR CONSUMPTION, AND APPARENT CONSUMPTION, 1968-74



Source: Based on data in Table 17.

U.S. imports of athletic footwear entered under TSUSA item 700.3515, which include athletic footwear of leather other than welt footwear and ski boots, supplied the great bulk of the imports, as shown in the following tables. Imports in that category increased from 1 million pairs in 1968 to nearly 8 million pairs in 1974. The increased popularity of specialized athletic footwear with leather uppers probably accounted for the substantial increase in imports (see table on page A-36, which shows U.S. imports of athletic footwear entered under item 700.3515 in 1974 by principal sources).

Athletic footwear: U.S. imports for consumption, by TSUSA item, 1968 and 1974

TSUSA No.	Description	Quantity 1968	Quantity 1974	Value 1968	Value 1974	Principal source and value in 1974
		1,000 pairs	1,000 pairs	1,000 pairs	1,000 pairs	
	Footwear of leather:					
	Valued over $6.80 per pair:					
700.2800	Welt ski boots-----------	351	4	6,372	78	Norway, $60,000
700.2920	Other welt athletic footwear.	57	128	643	2,671	West Germany, $1,268,000; Italy, $460,000; Switzerland, $315,000; United Kingdom, $244,000.
700.3505	"Other" ski boots-----------	222	124	3,417	1,604	Norway, $1,188,000; Italy,$159,000.
700.3515	"Other" athletic footwear---	1,004	7,534	4,768	53,825	France, $14,589,000; West Germany, $11,060,000; Yugoslavia, $9,973,000; Italy, $3,794,000.
	Valued not over $2.50 per pair:					
700.4305	Athletic footwear for women, misses, infants, and children.	20	22	16	46	Republic of Korea, $38,000.
	Valued over $2.50 per pair:					
700.4505	Athletic footwear for women, misses, infants, and children.	111	531	1,519	4,392	France, $1,929,000; Sweden, $628,000; Norway, $277,000.
	Total--------------	1,765	8,343	16,735	62,616	

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

Athletic footwear (TSUSA item 700.3515): U.S. imports for consumption, by principal sources, 1974

Source	Quantity	Value	Unit value
	1,000 pairs	1,000 dollars	Per pair
France	1,876	14,589	$7.78
West Germany	1,243	11,060	8.90
Yugoslavia	1,314	9,973	7.59
Italy	358	3,794	10.60
Republic of Korea	1,002	3,708	3.70
Colombia	563	2,644	4.70
Japan	349	2,582	7.40
Sweden	131	1,439	10.98
Republic of China (Taiwan)	274	1,217	4.44
Canada	114	847	7.43
United Kingdom	111	673	6.06
Spain	27	132	4.89
Hong Kong	16	132	8.25
All other	156	1,035	6.63
Total	7,534	53,825	7.14

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

Slippers.--U.S. imports of leather slippers entered under TSUS item 700.32 have been negligible in recent years, as shown in the table below. However, it should be noted that the definition of "slippers" is a restrictive definition that applies to only a small part of the slippers imported into the United States. According to part 1, subpart A, statistical headnote 1(b) of schedule 7 of the TSUS, the term "slippers" (item 700.32) means footwear of the slip-on type without laces, buckles, zippers, or other closures, the heel of which is of underwedge construction, and (1) having a leather upper permanently trimmed with a real or imitation fur collar, or (2) having a leather upper and a split leather tread sole (including heel) held together by a blown sponge-rubber midsole created and simultaneously vulcanized thereto. Imports of slippers of the type produced by the domestic footwear industry are entered under various TSUS item numbers. The bulk of the imports are probably entered under items 700.55 and 700.60.

Slippers (TSUS item 700.32): U.S. imports for consumption, 1970-74, January-September 1974, and January-September 1975

Period	Quantity	Value	Unit value
	1,000 pairs	1,000 dollars	Per pair
1970	313	808	$2.58
1971	206	549	2.67
1972	100	288	2.88
1973	85	246	2.89
1974	65	250	3.85
January-September--			
1974	25	78	3.12
1975	33	103	3.12

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

Data reported by respondents to importers' questionnaire

Data reported by 66 importers, which accounted for about a third of the total nonrubber footwear imported in 1974, are shown in table 17a. According to the data reported, men's dress shoes accounted for nearly 30 percent of the total imports of men's footwear entered by these importers in 1974; men's work shoes, 15 percent; men's sandals, about 10 percent; and men's boots (other than fashion type), 7 percent. About a fifth of the imports of men's footwear were reported as having an importers' net selling price of less than $6 a pair. With respect to women's footwear, nearly 45 percent of the imports in 1974 were identified as being sandals, and about 15 percent each were reported as sport-type and dress shoes. It should be noted that women's fashion boots were on an upward trend during 1970-73, but declined precipitously in 1974. About a third of the imports of women's footwear in 1974 reportedly had a net selling price of less than $4 a pair. In regard to imports of children's and infants' footwear in 1974, about half were identified as being sandals, and nearly 85 percent of the total imports were reported as having an importers' net selling price of less than $4 a pair.

Data reported by respondents to producers' questionnaire

Data reported by 32 domestic producers with respect to their imports of nonrubber footwear are shown in table 17b. Men's dress shoes accounted for nearly 50 percent of the total imports of men's shoes entered by these producers in 1974, and men's work shoes accounted for 30 percent. A small portion of the imports were reported as having an importers' selling price of less than $6 a pair. With respect to imports of women's footwear, nearly 60 percent of the imports of such footwear were identified as sandals; nearly 15 percent, sport-type shoes; and 10 percent, house slippers. About 22 percent of the imports of women's shoes had an importers' net selling price of less than $4 a pair. With respect to imports of children's and infants' footwear, about half of such imports were reported as sandals and about a third as athletic footwear. About 80 percent of the imports had an importers' net selling price of less than $4 a pair.

Foreign production

Presently there is insufficient data to estimate world production of nonrubber footwear in 1974; however, the U.S. Department of Commerce estimates that such production amounted to 2.5 billion pairs in 1963, and available figures indicate that world production exceeded 4.0 billion pairs in 1973. Although data are not available for all countries, statistics are published on the annual production of nonrubber footwear in a number of countries, including many of those that have been major suppliers of U.S. imports of nonrubber footwear in recent years (table 18).

While the United States and the U.S.S.R. were the individual countries with the largest production of nonrubber footwear throughout the period 1954-73, the number of other countries with relatively high levels of production greatly increased during this period. The only countries with production exceeding 100 million pairs in 1954 were the United States (530 million), the U.S.S.R. (271 million), the United Kingdom (122 million), and France (115 million). In 1973, the countries with production exceeding 100 million pairs were the U.S.S.R. (647 million), the United States (490 million), Italy (288 million), Taiwan (191 million), France (202 million), the United Kingdom (178 million), Spain (143 million), Japan (142 million), and West Germany (119 million). The countries now constituting the European Community (EC) had a production level of 389 million in 1954. as compared with 829 million in 1973.

An overall increase in production occurred between 1954 and 1973 in nearly every one of the countries for which data are available, and for many countries the increase exceeded 1954 production by 100 percent.

The only countries which showed an overall decrease in production during this period are Norway (33 percent), the Netherlands (30 percent), Switzerland (27 percent), and the United States (8 percent), and only Belgium-Luxemburg, Denmark, and Sweden showed no overall change in production. The countries or country grouping with production increases exceeding 1954 levels by 100 percent or more are Italy (1,152 percent), Japan (788 percent), Spain (496 percent), Portugal (400 percent), Austria (186 percent), Czechoslovakia (255 percent), Poland (376 percent), Hungary (290 percent), the U.S.S.R. (152 percent), India (133 percent), and the EC as a whole (113 percent). The United States is the only country with production exceeding 100 million pairs in 1954 which showed an overall decline in production between 1954 and 1973.

It should be noted that most of the growth in world production occurred prior to 1968. Since 1968, many countries have experienced a decline in production , and any growth in production that has occurred has been slight in comparison to the overall 1954-68 growth pattern. On the basis of available data, only the following countries showed an increase in production between 1968 and 1973: Spain (70 percent), Italy (21 percent), Austria (18 percent), Sweden (10 percent), France (9 percent), and the EC as a whole (1 percent). Countries that showed decreases in production during this period are the Netherlands (48 percent), Belgium-Luxemburg (36 percent), Switzerland (33 percent), the United States (24 percent), Canada (22 percent), West Germany (22 percent), Japan (10 percent), Portugal (6 percent), and the United Kingdom (2 percent). Only Ireland showed no overall change in production level.

Short profiles of principal supplying countries of nonrubber footwear to the United States are given below.

Italy.--Italy is probably the fourth largest producer of footwear in the world, following the U.S.S.R., the United States, and the People's Republic of China (actual production of the latter is not known, but it has an estimated population of 800 million; one pair of shoes per capita per annum would mean annual production of 800 million pairs). In 1974, Italy led all nations exporting nonrubber footwear into the United States in terms of value, and was second in terms of quantity.

The Italian National Association of Shoe Manufacturers (NASM) developed the following information on the number of firms and number of employees based on employment per firm in 1974.

Nonrubber footwear: Number of Italian employees per firm, number of firms, and number of employees, 1974

Number of employees per firm	Number of firms	Employment by size of firm	
		Number of employees	Percent of total
1 to 20	5,578	33,730	25.5
21 to 50	973	25,935	19.6
51 to 100	492	31,280	23.7
101 to 200	155	24,505	18.5
201 to 500	39	11,885	9.0
501 and over	8	4,845	3.7
Total	7,245	132,180	100.0

Source: U.S. Department of State Airgram, July 11, 1975.

With respect to the data given above, the survey showed that 25 percent of the work force was under 20 years of age, 50 percent was female, and about 9,100 or 7 percent were home workers.

Estimates of total production by NASM, which differ slightly from figures shown elsewhere in this report, show fairly constant levels since 1971, about 360 million pairs, except for a drop to 339 million pairs in 1973 before an increase to 364 million pairs in 1974. In 1973 and 1974 the proportion of footwear and slippers of leather decreased slightly compared with earlier years, but remained close to 75 percent.

Leather footwear ranked fifth among Italian exports in 1974; since 1970 about 65 percent of production of leather footwear has been exported. The United States was the principal market until it was replaced by West Germany in 1974, taking only 30 percent of exports in 1974 compared with 42 percent in 1970. Italy has gradually increased exports of footwear to other EC countries.

Spain.--Imports of nonrubber footwear into the United States from Spain in 1974 amounted to 35 million pairs, valued at $193 million, ranking Spain second in terms of value and third in terms of quantity. Eighty percent had uppers of leather.

In 1974 the Spanish footwear industry had approximately 2,000 shoe producers, compared with estimates of over 3,000 prior to 1972. Most of this reduction occurred in the Province of Alicante in southeast Spain in the area around the city of Elba, Spain's "shoe capital" and center of production of footwear for export. Larger manufacturers more than offset the amount of lost capacity. This is reported to be a desolate area whose only other sources of income are marble cutting and as the location for an occasional film needing a lunar or desert-like setting. Most of the footwear for domestic consumption is made in the Balearic Islands. Each area accounts for about 50 percent of total production. Such production increased from an estimated 87 million pairs in 1970 to 143 million pairs in 1973. The Spanish industry is heavily dependent upon imports of hides and skins.

Most of the establishments are still small, averaging 13 workers per plant. However, those establishments producing principally for export range in size from 20-25 workers to 250-300 workers with an average of 50 to 150 workers, which the industry believes is the optimum size needed for supplying the constantly changing, fashion-conscious international shoe market.

About half of Spain footwear production, in terms of value, is exported. In recent years the United States has been the market for approximately 70 percent of such exports. As noted above, most have uppers of leather. In 1974, shoes accounted for roughly 25 percent of total exports to the United States by Spain. At the same time Spain had a bilateral trade deficit with the United States of $1.6 billion. In 1973, footwear led manufactured exports from Spain, and only citrus fruit exceeded it in importance.

Taiwan.--Imports of nonrubber footwear from Taiwan ranked first in terms of quantity and third in terms of value in 1974. Taiwan led in both quantity and value of imports of footwear with uppers principally of rubber or plastics (TSUS item 700.55). Low-priced sandals and slippers accounted for about half of total nonrubber plastic footwear exports in 1974.

The number of plants and employees (the majority of whom are women) in the plastic footwear industry (about 90 percent of all imports from Taiwan in 1974 had uppers of rubber or plastics) increased rapidly from 69 plants, employing 18,750 workers, in 1969 to 290 plants, employing about 75,000 workers, in 1973. The number of plants decreased to about 250 in 1974, while employment remained the same. As many as 1,500 workers are employed in some large factories, the monthly capacity of each being about 450,000-500,000 pairs. Strikes are illegal. The following tabulation shows the number of firms producing plastic footwear based on employment per firm in 1973:

Number of employees per firm	Number or firms
1 to 100	57-63
101 to 300	203
301 to 500	0
501 to 1,000	20-25
1,001 and over	4-5

Estimated production rose from 41 million pairs of shoes in 1969 to 191 million pairs in 1973 before dropping to about 160 million pairs in 1974. By value, roughly 85 to 90 percent of total plastic footwear production is exported from Taiwan; the United States is the market for about 70 percent of such exports. In 1973, plastic footwear was Taiwan's fourth most important export, by value. As labor and raw-material costs rise and increasing competition is faced from nations producing at lower costs, Taiwan expects to upgrade the quality of its product and increase investment in newer, more sophisticated machinery. Taiwan produced all but about 10 percent of its raw material needs and makes much of its own machinery.

Brazil.--Since 1969, the amount and rate of growth of imports of nonrubber footwear from Brazil into the United States have been the highest among the principal supplying countries except Taiwan, most of whose footwear is low-priced vinyl. Almost all Brazilian footwear, both for export and for domestic consumption, is leather in the low-to-medium price range.

Total employment in the footwear industry is believed to be about 50,000 workers, concentrated geographically around the city of Novo Hamburgo in the State of Rio Grande do Sul and in the city of Franca and the greater Sao Paulo area, both in the State of Sao Paulo.

Estimates indicate that at least 1,500 factories produced footwear in 1975. Most are of small-to-medium size in terms of employment and production. Only the largest firms export, with orders averaging 10,000 pairs. Export production is concentrated in Novo Hamburgo, which specializes in women's footwear and accounted for 72 percent of the quantity of total exports in 1974, and in Franca, which specializes in men's footwear. In 1974, 133 firms exported from Rio Grande do Sul, but only 20 accounted for over 80 percent of the value. The United States purchased 77 percent of Rio Grande do Sul's sales in 1974, compared with 90 percent in 1973; Australia was the next largest market, buying 4 percent of sales in 1974.

No definitive statistics on Brazilian production exist. As much as half may go unreported. However, production was estimated at 140 million pairs in 1974, of which 28 million pairs were exported in

1974--90 percent to the United States--according to Brazilian statistics; the remainder were consumed domestically (about one pair per capita per annum). Brazil exported quite small amounts of footwear to the United States prior to 1969. Production amounted to about 90 million pairs in 1971 and may have reached 180 million pairs in 1975. No footwear is imported into Brazil.

Republic of Korea.--In 1974, imports of nonrubber footwear into the United States from the Republic of Korea ranked fifth in quantity and seventh in value. Although nonrubber footwear imports from Korea constitute only 2 percent of the value of total U.S. imports and 4 percent of the quantity, pairage increased nearly fourfold from 1970 to 1974: 1.9 million pairs, valued at $2.9 million, entered in 1970, compared with 9.2 million pairs, valued at $23.5 million, in 1974. Additionally, in January-September 1975, 10.1 million pairs, valued at $34.2 million, were imported, both figures exceeding those for total imports of nonrubber footwear from Korea in 1974. Footwear with leather uppers accounted for about 40 percent of nonrubber footwear imports from Korea in 1974, but 78 percent in January-September 1975. Footwear with uppers of plastics or other materials each accounted for about 30 percent in 1974.

Production data for Korea are not available, but the country meets all the domestic needs of a population estimated at 33 million in 1972, since all imports of footwear are banned. There are a large number of fairly small firms, but a relatively few large firms accounted for the bulk of exports.

Based upon Korean export statistics for 1974, estimated nonrubber footwear exports to the United States amounted to 50 percent of total nonrubber footwear exports, but only 20 percent of all footwear exported from Korea to the United States. The remainder consisted mainly of canvas sneakers and protective rubber footwear with an estimated value of $73 million. The United States received about 51 percent of all footwear exported from Korea in 1974.

Korea depends greatly upon imported raw materials, and the United States is the principal source of raw hides and skins. In 1974 the United States supplied 79 percent ($25.3 million) of 32.2 million dollars' worth of imports of raw hides and skins. This figure includes imports for use in the production of all manufactured products. In a brief provided at the public hearing, the Korean footwear industry showed that Korean footwear manufacturers imported 9.1 million dollars' worth of raw hides and 559,000 dollars' worth of leather in 1974, both exclusively for reexport to the United States, and 1.6 million dollars' worth of shoe machinery. 1/

Argentina.--In 1974, Argentina ranked sixth in value of imports of nonrubber footwear into the United States and eighth in quantity. However, in January-September 1975, imports of nonrubber footwear into the United States declined by about three-fourths in both quantity and value, compared with the corresponding period of 1974. Prior to 1975, imports of nonrubber footwear, nearly all with uppers of leather, had

1/ Statement of Jonathan Russin on behalf of the Korean footwear industry, second table, presented Dec. 8, 1975 and transcript of the hearing, p. 1,146.

increased sharply from 56,000 pairs, valued at $219,000, in 1970 to 5.3 million pairs, valued at $23.7 million, in 1974.

No official statistics are available on production of footwear in Argentina. One estimate placed it at 113 million pairs of shoes of all types in 1974. Of this amount, 105 million pairs went for domestic consumption and 8 million pairs, for export. This is an annual per capita consumption of between 4 and 4.5 pairs per person. If these figures are correct, about 7 percent of production was exported. About two-thirds of 1974 exports went to the United States.

The footwear industry is composed of very small units and is fragmented. Few firms have large capacity for exporting.

Several factors contributed to the large decline in footwear exports from Argentina in 1975. The country is suffering a very high rate of inflation (some reports say 200-300 percent annually) and increasing production costs. Carlos S. Morrelli, president of the sixth annual International Exhibit Fair of Argentina Footwear was quoted in the July 7, 1975, issue of Footwear News (p. 1) as having said, "Foreign exchange policy makes our footwear prices abroad uncompetitive." Argentina has had a fixed exchange rate with respect to the dollar. That country also suffered political instability during 1975.

Other countries.--In addition to the countries, already discussed, others have registered rapid and sustained rates of growth of exports of nonrubber footwear to the United States in recent years. Among market economy countries, two such are Greece and Colombia. Imports of nonrubber footwear from Greece increased from 480,000 pairs in 1970 to 3.2 million pairs in 1974. In January-September 1975, imports nearly exceeded the total for 1974. The average unit value decreased from $7.23 a pair in 1970 to $5.65 in 1974 and in January-September 1975. About 60 percent of the shoes have uppers of leather. Nearly all the imports of footwear from Colombia have uppers of leather. Imports from Colombia increased from 36,000 pairs, valued at $103,000, in 1970 to 1.2 million pairs, valued at $4.9 million, in 1974. Pairage in January-September 1975 exceeded the total for 1974.

Although supplying small proportions of total U.S. imports, certain nonmarket economy countries experienced rapid rates of increase in exports of nonrubber footwear to the United States from 1970 to 1974. These include Yugoslavia, Poland, and Romania. For the first two, export pairage to the United States during January-September 1975 exceeded total imports for 1974. Following Romania's agreement to limit its exports of leather upper welt work shoes to the United States, U.S. imports of Romanian nonrubber footwear decreased in January-September 1975, compared with the corresponding period of 1974.

Finally it should be noted that France, ranked 5th in value of U.S. imports and 11th in quantity, has provided about 3 million pairs of shoes annually since 1970, most having uppers of leather. This is more expensive, quality footwear with an average unit value of $8.06 in 1974 and $9.44 in January-September 1975, compared with $7.84 in the corresponding period of 1974.

The Question of Serious Injury to the Domestic Industry

U.S. producers

Number of firms and establishments.--According to American Footwear Industries Association estimates made in August and September 1975, nonrubber footwear is produced by 350 to 375 companies in about 600 to 700 establishments situated in 37 States. The Commission stated in earlier reports on the nonrubber footwear industry that in 1967 nonrubber footwear was produced by about 675 companies in approximately 1,000 establishments situated in 38 states and that in 1969 the number of companies had decreased to about 600 producing in about 900 establishments situated in 38 States. According to U.S. Bureau of the Census figures, 409 firms produced nonrubber footwear in 1974. The Commission estimated that about 1,000 companies produced nonrubber footwear in approximately 1,300 to 1,400 establishments in the mid-1950's. The downward trend began considerably before the mid-1950's. Most of the decrease in the number of establishments took place among those employing less than 250 persons. In 1972, 106 establishments reported the production of rubber and plastics footwear in SIC industry No. 3021. In early 1976, it is estimated that protective-type footwear is produced in about 35 establishments and canvas footwear, in about 50 establishments.

Major producing areas.--The Middle Atlantic and New England States are still the leading producing areas of nonrubber footwear, even though they registered substantial decreases in production of 26 percent and 46 percent, respectively from 1965 to 1973, the most recent year for which official statistics are available (table 19). During the same time Maine, New Hampshire, and Massachusetts suffered the largest decreases, between 43 and 49 percent.

Only Wisconsin, Tennessee, and "other States" (not identified) had increases in production during those years--5 percent, 1 percent, and 23 percent, respectively. In 1973, producers in the Middle Atlantic area accounted for 27 percent of total production; those in New England, for 22 percent; those in the East North Central area, for 12 percent; and those in other divisions, mainly the South and West, for 39 percent. In 1972, 48 percent of the producers manufacturing footwear classified in SIC industry No. 3021 were located in the Northeast, and 25 percent, in the South.

Establishments in Puerto Rico.--Contrary to the trend on the mainland, the number of establishments producing nonrubber footwear in Puerto Rico increased from 24 in 1964 to 39 in 1969. Then, as on the mainland, the number of establishments declined, falling to 27 in 1973. An additional 3 plants closed, leaving 24 establishments in 1975. About three-fourths of all establishments are subsidiaries of U.S. firms. Employment decreased from 4,680 workers in 1969 to 3,108 in 1975. Data relating to the production or shipments of nonrubber footwear in Puerto Rico, which are not included in the official statistics on U.S. output or shipments of such footwear, are included in this report only where noted.

Entries and exits.--The U.S. footwear industry has traditionally been characterized by a high rate of turnover of both firms and plants. Entry into the industry is facilitated by the common practice of the leasing of major equipment with a resulting low investment requirement. New firms may thus gain quick entry in order to capitalize on popular fashion items. These entry incentives are also largely responsible for many firms' closings or failures. Under-capitalization and vacillating consumer preferences contribute heavily to the closings of many marginal firms. In Report of the Task Force on Nonrubber Footwear 1/ data were presented from a study that was made of 1969 plant closings. The study enumerated many reasons for the closings, but was unable to provide a definitive statement with regard to the degree to which imports were a contributing factor.

The number of plants producing nonrubber footwear, as estimated by the American Footwear Industries Association, declined from 858 in 1953 to 467 in 1974 (table 20). The annual net change in the number of firms, based on a 5-year moving average, was -22 in 1953, -3 in 1962, and -36 in 1972. Data available for 1973 and 1974 indicate that the annual net changes remained approximately the same as in 1972.

1/ Prepared by members of the Departments of Labor, Treasury, State, and Commerce under the chairmanship of the Office of the Special Representative for Trade Negotiations, June 1, 1970.

U.S. Bureau of the Census data show that the number of U.S. producing companies declined 38 to 48 percent in each of the five smallest size-of-output categories from 1967 to 1974, while the number of firms in the largest category (companies producing over 4 million pairs) showed an increase of 31 percent.

The following table, which shows the number of U.S. producing companies, by type of output, indicates a decline from 1967 to 1974 in the number of firms producing each type of footwear listed. The number of companies producing shoes declined by 37 percent during this period, while the number producing slippers declined by 49 percent.

Nonrubber footwear: Number of U.S. producing companies, by SIC product classes, 1967, 1969, 1974

SIC product class	1967	1969	1974	Net change, 1974 from 1967
Shoes and slippers, except rubber, total	675	597	409	-266
Shoes, total	569	503	358	-211
Athletic 1/	91	81	67	-24
Men's work	94	79	54	-40
Men's (except work)	135	122	119	-16
Youths' and boys'	101	80	63	-38
Women's	324	283	214	-110
Misses'	110	86	58	-52
Children's	126	109	81	-45
Infants' and babies'	113	98	75	-38
Slippers	169	147	86	-83

1/ Includes miscellaneous footwear reported under SIC class 3141798 in 1967 and 1969 and under SIC class 3149400 in 1974.

Source: U.S. Bureau of the Census.

Note.--The sum of the companies for each product class is greater than the total number of producing companies because a single company may produce more than one class of product and would appear in the count of each product class for which it has production.

Capacity.-- Owing to the high rate of firm and plant turnover, as mentioned in the preceding section, and the frequent production adjustments necessitated by changes in consumer preference, utilization of capacity in the nonrubber footwear industry has fluctuated markedly on a year-to-year basis since 1953. In this regard, in the Report of the Task Force on Nonrubber Footwear, (P.iii), the conclusion is made that "capacity and the extent to which it is being utilized is a measure of somewhat dubious relevancy to the footwear industry."

Plant capacity increased irregularly from 679 million pairs in 1953 to a peak of 789 million pairs in 1962, and then declined to 618 million pairs in 1974 (table 21). 1/ Production reported by the American Footwear Industries Association increased from 532 million pairs in 1953 to a peak of 642 million pairs in 1966 and 1968, and then declined steadily to 444 million pairs in 1974. 2/ Utilization of capacity during this period ranged from a high of 84 percent in 1959 to a low of 72 percent in 1974. The most notable trend occurred during 1968-74, when utilization of capacity fell 11 percentage points, from 83 to 72 percent.

Data on utilization of capacity by type of footwear reveal that utilization of capacity for men's shoes was generally higher than the industry average, while that for women's shoes was usually lower then the industry average (table 22). This perhaps reflects the fact that men's shoe styles change less frequently and less drastically than those for women,

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1/ Total effective capacity is the sum of the monthly production peaks for each type of footwear over a 36-month period ending Dec. 31 of the years involved.

2/ Based on official statistics, the Commission estimates production to have been 453 million pairs in 1974.

and that producers of men's shoes are consequently better able to forecast future consumption trends and adapt their productive facilities accordingly. The greater utilization of capacity for men's shoes as opposed to women's is also indicative of the growing importance of men's shoes in the composition of U.S. production. As will be noted later in the report, the share of the aggregate nonrubber footwear output taken by men's shoes rose from 14 percent in 1968 to 18 percent in 1974, while the share held by women's shoes declined from 44 percent to 37 percent in the same period.

Size groups.--The annual output of companies producing nonrubber footwear in 1974 ranged from less than 1,000 pairs to nearly 30 million pair. In that year 21 companies, each of which produced at least 4 million pairs, accounted for about half of the domestic output of such footwear; 79 companies, each producing from 1 million to 4 million pairs, accounted for almost a third; and the remaining 309 companies, each producing less than a million pairs, accounted for less than a fourth of the domestic output (table 23b; see also tables 23 and 23a and fig. 9 for comparable data for 1967 and 1969). The following table shows the number of companies producing nonrubber footwear and their share of the total output, by size of output, in 1967, 1969, and 1974

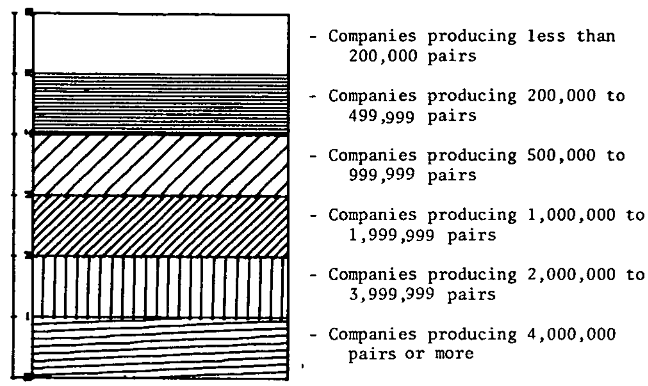
Nonrubber footwear: Number of U.S. producing companies, by size of output, 1967, 1969, and 1974

Size-of-output group	Number of companies				Percent of total output			
	1967	1969	1974	Net change 1974 over 1967	1967	1969	1974	Change in percentage points 1974 over 1967
Less than 200,000 pairs	226	192	139	-87	2	2	2	0
200,000 to 499,999 pairs	170	146	105	-65	10	8	8	-2
500,000 to 999,999 pairs	121	113	65	-56	14	14	10	-4
1,000,000 to 1,999,999 pairs	100	93	57	-43	24	24	17	-7
2,000,000 to 3,999,999 pairs	42	32	22	-20	19	15	13	-6
4,000,000 pairs or more	16	21	21	+5	31	37	50	+19
Total	675	597	409	-266	100	100	100	

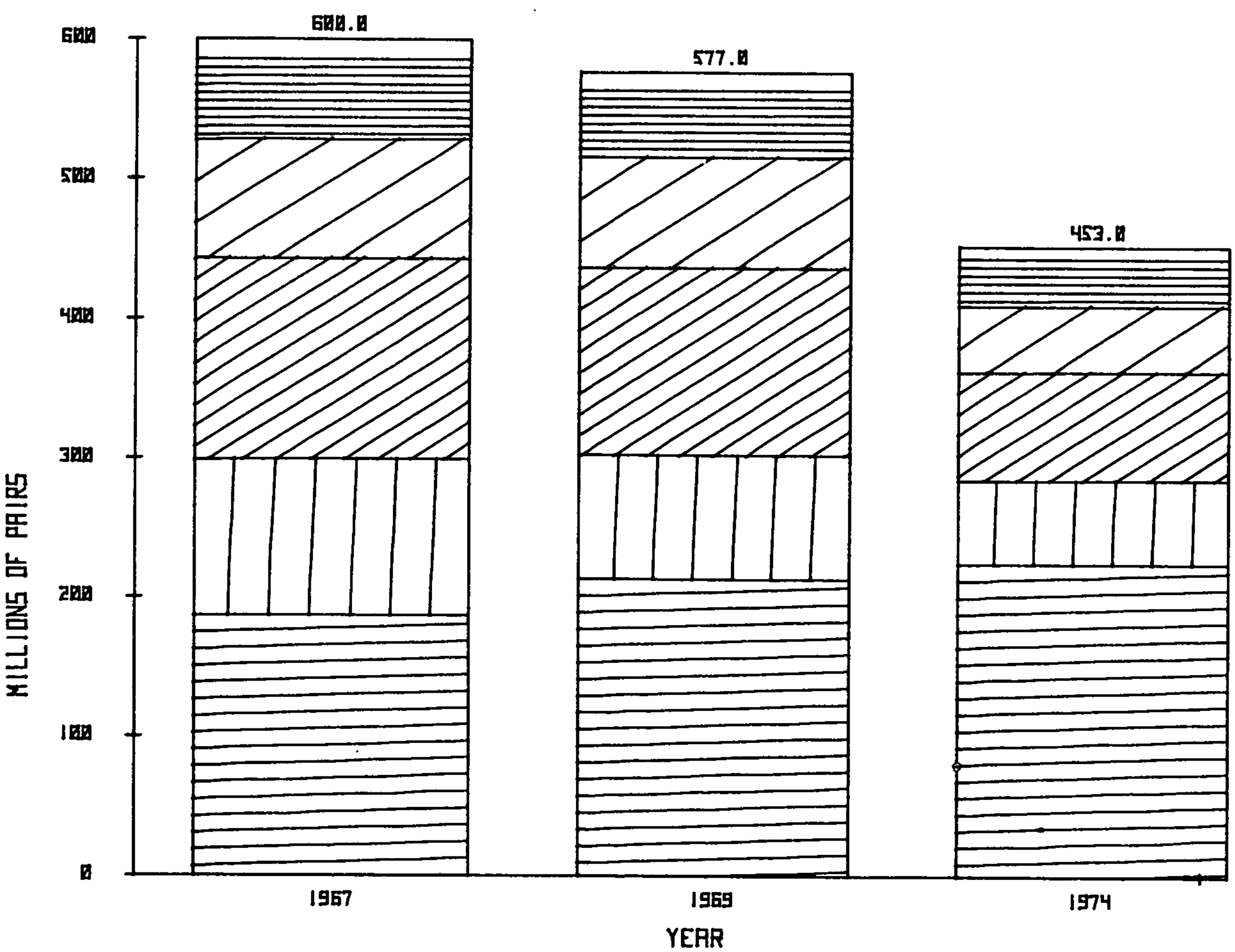
Source: Compiled from data supplied by the U.S. Bureau of the Census.

FIGURE 9

NON-RUBBER FOOTWEAR: AGGREGATE OUTPUT BY SIZE OF COMPANY, 1967, 1969 AND 1974



Note.--Rounded to nearest thousand pairs.



Source: Based on data in tables 23, 23a, and 23b.

Product specialization.--As noted earlier in this report, the term "nonrubber footwear" covers a wide variety of footwear, including dress, casual, work, and athletic shoes, as well as sandals, slippers, slipper socks, moccasins, and boots. Although some companies, particularly larger firms, produce a full line of footwear, many companies specialize in footwear for particular categories of consumers (viz, women, men, or children); those that produce for various categories of consumers usually have separate facilities for making footwear for each of the categories. Moreover, among the producers of women's (or men's) footwear are firms concentrating on a particular style (viz, casual or dress) and, frequently, in a rather narrow price range. Some producers specialize in footwear for active sports (i.e., athletic footwear for men and/or women) or in work shoes (usually for men). In 1974, 214 companies (over half the total number of companies) reported production of nonrubber footwear for women, and 119 companies (including some of the foregoing 214) reported production of such footwear for men (table 23b).

The data obtained from the Commission's sample of 157 nonrubber footwear producers in the 1971 report on investigation No. TEA-I-18 indicated considerable specialization among firms in all size-of-output groups. The smaller the annual output, however, the higher the degree of specialization. Of the 16 companies producing 4 million pairs or more, 9 did not have 75 percent of their production in one type of footwear. The following table shows, by size of output, the number of firms in that sample with 75 percent or more of their 1967 output in particular types of footwear.

Nonrubber footwear: Number of U.S. producers in sample, total and those with 75 percent or more of 1967 production in particular types of footwear, by size of output, 1970

Size-of-output group	Total number of companies in sample	Number with 75 percent or more of 1967 production of footwear consisting of-- Women's and misses'	Men's and boys'	Children's	Athletic	Slippers	Work	All other
Less than 200,000 pairs	35	10	6	8	1	6	2	2
200,000 to 499,999 pairs	32	11	6	4	1	3	0	7
500,000 to 999,999 pairs	31	13	4	4	0	6	1	3
1,000,000 to 1,999,999 pairs	26	11	0	1	0	8	1	5
2,000,000 to 3,999,999 pairs	17	9	0	1	0	2	1	5
4,000,000 pairs or more	16	4	1	0	0	2	0	9
Total	157	58	17	18	2	27	5	30

Source: Calculated by the U.S. International Trade Commission from data supplied by domestic producers of nonrubber footwear.

In returns received from 133 of the 179 firms in the Commission's current sample of the nonrubber footwear industry, a high degree of specialization was observed in all size-of-output groups in 1974 except that producing 4 million or more pairs of shoes. As with the 1967 data, the smaller the annual output, the greater the tendency to specialize. The following table, based on 1974 production data, shows, by size of output, the number of firms in that sample with 75 percent or more of their output in particular types of footwear.

Nonrubber footwear: Number of U.S. producers in sample, total and those with 75 percent or more of 1974 production in particular types of footwear, by size of output, 1975

Size-of-output group	Total number of companies in sample	Number with 75 percent or more of 1974 production of footwear consisting of --						
		Women's and misses'	Men's, youths', and boys'	Children's and infant's	Athletic	House Slippers	Work	All other
Less than 200,000 pairs	29	6	5	2	2	5	3	6
200,000 to 499,999 pairs	30	6	3	3	3	6	2	7
500,000 to 999,999 pairs	23	7	4	2	2	4	1	3
1,000,000 to 1,999,999 pairs	25	9	3	3	-	2	1	7
2,000,000 to 3,999,999 pairs	10	2	2	-	-	1	1	4
4,000,000 pairs or more	16	3	-	-	-	1	-	12
Total	133	33	17	10	7	19	8	39

Source: Calculated by the U.S. International Trade Commission from data supplied by domestic producers of nonrubber footwear.

Industry concentration.--The nonrubber footwear industry appears to be heavily concentrated in terms of value of shipments. In 1970 the four largest firms, representing less than 1 percent of the total number of producing companies, accounted for 28 percent of all shipments on a value basis (table 24). 1/ Further, the eight largest companies, approximately 1.3 percent of all companies, accounted for 36 percent of the total value of shipments in 1970. Complete data are not available for 1970 with respect to the 20 or 50 largest firms; however, in 1967 these firms made 46 percent and 61 percent of the total value of shipments, respectively. Production concentration data for the footwear industry in 1972 is not directly comparable with the data of prior years (table 24).

Among the companies producing house slippers there is a distinct trend toward more concentration (table 24). The percentages of the value of shipments accounted for by the 4, 8, 20, and 50 largest firms generally appear to be rising, based on the 1954-72 period. The increases have been particularly evident since 1966. For example, over the 1966-72 period, concentration within the four and eight largest firms increased by 116 percent and 87 percent, respectively. In 1972 there were 83 companies in the house slipper industry, and the 4, 8, 20, and 50 largest firms accounted for 39, 58, 80, and 97 percent of shipments, respectively.

1/ These calculations are based on data prepared by the Bureau of the Census for a 1971 Commission investigation on footwear which indicate that in 1969 there were 597 firms in the nonrubber footwear industry.

Marketing channels.--In recent years significant changes have occurred in the marketing of footwear and other soft goods, as developments in merchandising techniques have accompanied the changing age structure of the U.S. population, increasing per capita income, growth of leisure activities, and expansion of market outlets in suburban areas. Changes of particular importance to the marketing of footwear noted in the Commission's previous reports on the subject include the increase in "scrambled merchandising," 1/ the growth of discount outlets, and the opening of new shopping malls. In addition, there has been an evident increase in the concentration of retail outlets for footwear owned by the major firms.

Retail outlets. 2/--In 1972, footwear was marketed in the United States by 93,565 establishments. Retail outlets for all footwear (including other than nonrubber footwear) can be divided into three main groups: the general merchandise group, including department stores and variety stores; the apparel group, including shoe stores, family clothing stores, men's and boys' clothing stores, and women's specialty stores; and mail-order and all other outlets.

As may be noted in tables 25 and 25a, the apparel group contained the largest number of retail outlets (about 48 percent of the total) and accounted for about 60 percent of the aggregate footwear retail sales

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1/ "Scrambled merchandising" refers to the addition of unconventional product lines to such outlets as supermarkets and drugstores.

2/ Data in this section are based largely on the 1963, 1967, and 1972 Census of Business reports and estimates made by the American Footwear Industries Association appearing in Leather and Shoes, Chain Stores and Leased Shoe Department Operators Directory for 1971, 1972, and 1975, Rumpf Publishing Co.

value of $7,673 million in 1972. 1/ The increase in the number of retail outlets (11 percent) and sales (70 percent) for the apparel group between 1963 and 1972 was below the average increases for total industry outlets and sales, 13.7 and 83 percent, respectively. This below-average increase held true for shoe stores, the largest type of retail outlet in the apparel group. Shoe stores accounted for about a quarter of the retail outlets in 1972.

Although sales for shoe stores and the apparel group as a whole increased less than the average increase for all footwear sales from 1963 to 1972, sales by two types of retail outlets--men's shoe stores and men's and boys' clothing stores--increased dramatically, by 131 and 128 percent, respectively. Most of the increase in sales and percent of total sales for men's shoe stores and men's and boys' clothing stores occurred between 1967 and 1972. Conversely, increases in sales by women's shoe stores and women's specialty stores were below the average total sales increase. Sales for other specialty stores, including those apparel stores not classified or identified, declined during the same period, but this is most likely because of refined classification techniques resulting in the reclassification of formerly unidentified apparel stores into one of the other apparel categories.

The general merchandise group accounted for 35 percent of total retail outlets in 1972, an increase of 16.3 percent over 1963. For the same period, sales by this group more than doubled, with department store footwear sales accounting for all of the increase in percent of sales. In 1972, 8 percent of the total retail outlets selling footwear

1/ Data only for stores with payrolls.

were department stores, compared with less than 5 percent in 1963. Department stores accounted for more than 29 percent of total footwear sales in 1972. While footwear sales by variety and other general merchandise stores increased during the period, the percent of total sales by these stores declined somewhat. Most of the sales increase attained by the department stores appears to have been at the expense of the apparel group rather than other outlets in the general merchandise group.

Mail-order 1/ sales declined in relative importance, while sales from "all other outlets," although still small, enjoyed the largest growth, 236 percent.

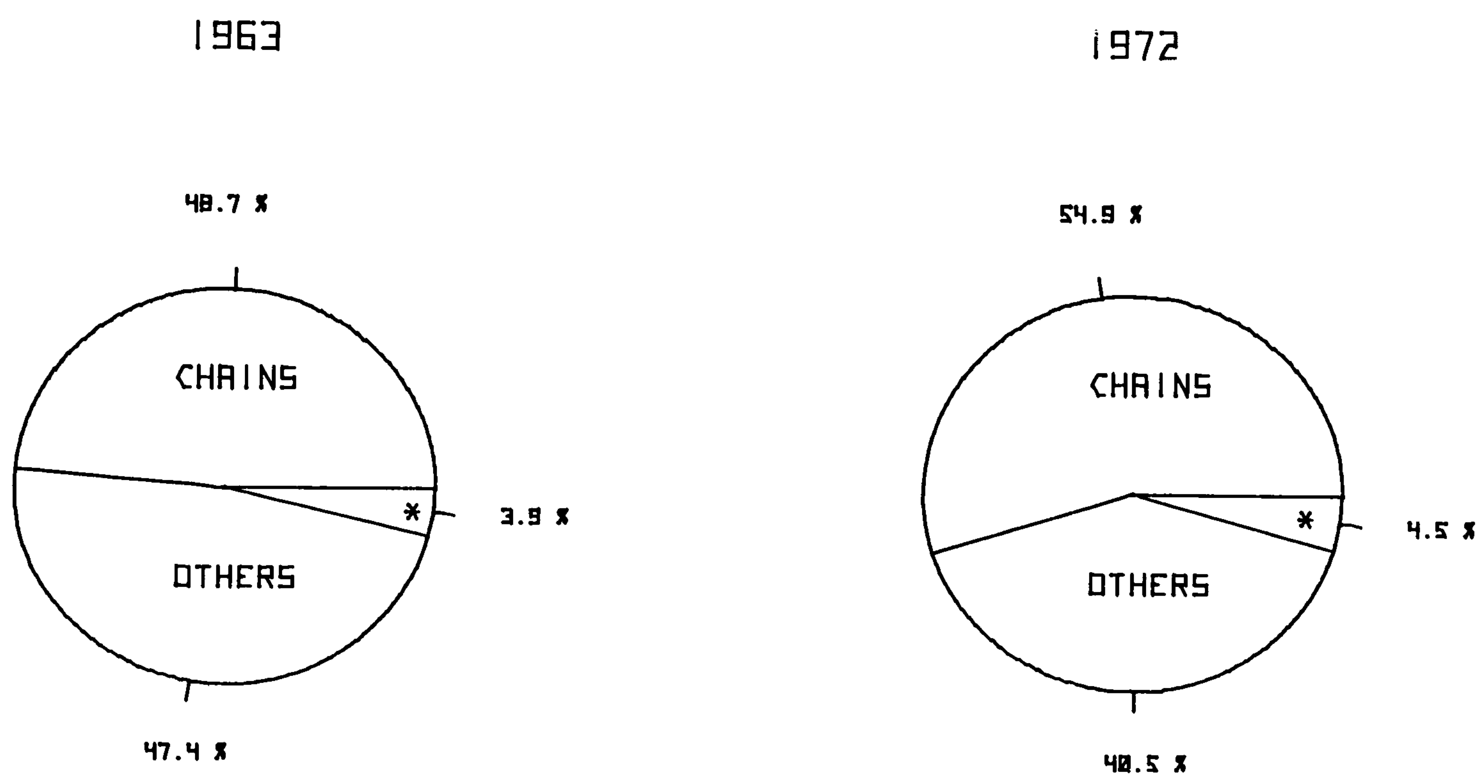
In 1972, retail chains (i.e., firms owning or leasing 11 or more retail outlets) accounted for 55 percent of the aggregate sales of footwear, estimated at $7,673 million. 2/ So-called independent retailers (i.e., firms owning or leasing from 1 to 10 retail outlets) marketed about 41 percent of the footwear, while mail-order houses and other outlets accounted for the remainder (fig. 10). As may be noted in table 25b, the retail chains substantially increased their share of the U.S. footwear market between 1963 and 1972--from 49 percent to 55 percent. Concentration of footwear sales by chains is most evident with department stores: footwear sales by chains increased more than 186 percent, while sales by independents declined 9 percent, between 1963 and 1972.

1/ Mail-order houses are defined in the Census of Business as establishments "primarily selling merchandise as a result of orders received by mail." Sales made from catalog order desks, however, are included with the sales of the retail establishment in which they are located.

2/ Includes sales made only by stores with payrolls.

FIGURE 10

SHARE OF MARKET OF RETAIL FOOTWEAR SALES IN U.S. BY TYPE OF OUTLET, 1963 & 1972



* MAIL ORDER AND MISCELLANEOUS

Source: Based on data in table 25b.

Table 26 shows 32 parent companies that each operated 100 or more shoe retail outlets between 1971 and 1975. A number of these shoe retail outlets are owned, operated, or leased by divisions or subsidiaries of domestic firms also engaged in the production of footwear. Of the 32 companies, 11 both produce footwear domestically and import footwear, 12 only import footwear, 5 are domestic producers only, and 4 are strictly retailers. The 11 domestic producers that also import footwear accounted for about 66 percent of the units operated in 1975. More than 50 percent of the 13,751 units in this category are operated by the 6 largest firms, and 75 percent of the total is accounted for by 11 parent companies. Four of the six largest firms increased their number of outlets between 1971 and 1975. The number of units operated by the two largest parent firms increased by more than 25 percent, compared with a total average increase of less than 5 percent for the period 1971-75. Of 21 firms which operated more than 99 retail outlets for the entire period, two-thirds increased the number of retail outlets.

Table 27 shows the leading shoe chains--companies operating 50 or more chain stores or leased show departments between 1971 and 1975. A number of these chains are the individual subsidiaries or divisions of the aforementioned parent companies. Of the 65 chains listed, 53 operated more than 49 stores and leased departments throughout the period. Domestic producers of footwear, including those producers that import footwear, control 31 of the chains, accounting for 61 percent of these units operated in 1975. Of the 65 companies or their parent companies, 43 import footwear. The chains that import footwear accounted for 87 percent of the 14,110 units operated in 1975, up from 79 percent of 13,808 units operated in 1971. The number of units operated by the nine largest companies increased from 46 percent of the total in 1971 to over 50 percent in 1975. About 75 percent of the units were operated by 22 companies in 1975, compared with about 67 percent in 1971. Although approximately 50 percent of the companies increased the number of stores and departments operated, the total number of units increased only slightly more than 2 percent between 1971 and 1975.

Distribution of U.S. production and imports.--Data obtained from domestic producers of nonrubber footwear 1/ indicate that more than 85 percent of the quantity of footwear produced by them in 1974 was sold directly to retail outlets. This pattern has stayed relatively stable since 1969. Data obtained from importers 2/ show that 87-90 percent of imported footwear was sold directly to retail outlets from 1970 to 1974. For producers, the largest proportion of sales were through retail outlets not owned or leased by the reporting or parent firms. Sales by producers through their own retail outlets increased slightly; from about 13 percent of total sales in 1970 to about 15 percent in 1972 and 1973, then dropped to 14 percent in 1974. Importers' sales through their own retail outlets showed an increasing trend from 1970 to 1974, rising from about 46 percent of total sales in 1970 to about 60 percent in 1974. Importers' sales through other retail outlets decreased from 43 percent of total sales to 30 percent, as shown in table 27a. Sales by producers to jobbers and wholesalers and all other outlets remained

1/ Of 179 questionnaires, 133 were usable.
2/ Of 161 questionnaires, 54 were usable.

relatively stable at approximately 11 percent and 3 percent of total sales, respectively (table 27b). Sales by importers to jobbers and wholesalers ranged from 6 to 7 percent over the same period, and sales through other outlets accounted for the remainder.

Table 27c shows, for 1970, 1972, and 1974, the percentage distribution of U.S. producers' sales by size of output and type of market outlet. The table indicates that, in general, the larger the producer, the larger the percentage of his output sold directly to retail outlets owned or leased by the firm or parent firm. Significant sales through producer-owned or producer-leased retail outlets occur only in those firms producing a million pairs or more annually. The data for producers making 2,000,000 to 3,999,999 pairs each run in contradiction to this trend, however. Generally, the smallest producers (less than 200,000 pairs annually) rely on sales to retail outlets owned by other firms and on outlets other than retail outlets, including jobbers or wholesalers.

As may be noted in table 27d, 66 importers responding to the questionnaire operated 9,870 retail outlets on January 31, 1975. This is an increase of approximately 8 percent over the number operated in 1971. Conversely, the number of retail outlets operated by the 133 producers rose slowly during the same period to 7,267 outlets, increasing 1-1/2 percent. Table 27e shows the number of retail outlets operated by U.S. producers by size-of-output group for 1971, 1973, and 1975. As noted previously, almost all retail outlets are operated by those companies producing a million pairs or more annually. There was a fourfold increase in retail outlets operated by producers manufacturing 2,000,000 to 3,999,999 pairs between 1973 and 1975. This was the result of a drop in class from the largest production group (4,000,000 pairs or more annually) by a few companies, not a great increase in outlets owned by the previous producers in that class.

Nonrubber footwear is imported into the United States not only by concerns engaged principally in the importing business, but also by domestic firms manufacturing and/or retailing such footwear. The great bulk of the footwear entered by domestic producers was accounted for by large firms (i.e., those having an annual production in excess of 4 million pairs). Most, if not all, domestic firms that own or lease retail establishments, including those that import directly, purchase imported nonrubber footwear from importing concerns. The major producer-retailers have separate divisions (or subsidiaries) to handle their imports; these divisions often distribute imports to wholesalers and retailers outside the parent firm. Retail outlets operated by producers, moreover, often buy from outside sources, foreign as well as domestic.

Research and technological changes in the U.S. nonrubber footwear industry.--This section attempts to analyze the present level of U.S. nonrubber footwear industry technology and to compare it with that of other countries. Present and future technological change in the U.S. industry is also described.

Comparison of U.S. and foreign footwear technology.--The U.S. footwear industry is characterized by relatively higher labor costs than most other U.S. industries, and may be described as not having economies of scale as important as those in most other industries in the U.S. economy, i.e., large shoe factories do not often have lower costs per shoe produced than do small factories. 1/ With relatively equal international prices of materials for shoe construction 2/ and with few apparent advantages going to large shoe producers, much of the technological innovation that is introduced in the industry is to reduce labor usage.

While labor costs are analyzed in another section of this report, it can be added here that U.S. footwear workers, according to industry sources, tend to be more productive than foreign workers. 3/ One important U.S. shoe machinery manufacturer feels that U.S. shoe workers are from 25 to 50 percent more productive than European workers on a given piece of machinery. 4/ Part of the reason for this advantage is probably attributable to U.S. organization and management.

Most footwear machinery is made in the United States, West Germany, France, Great Britain, Italy, or Czechoslovakia. According to two knowledgeable sources, there tends to be one worldwide level of technology. 5/

1/ See for example, Leather and Leather Products, United Nations Industrial Development Organization, 1971, pp. 70-84.

*   *   *   *   *   *   *

2/ According to Norman Germany, AFIA, in testimony before the Commission on Dec. 3, 1975,

*   *   *   *   *   *   *

3/ United Shoe Machinery Corp. study in 1969 offered by Norman Germany, AFIA, on Dec. 3, 1975.

4/

*   *   *   *   *   *   *

5/

In other words, any given machine or industrial process for the production of footwear is available to virtually any country. Machinery from West Germany tends to be very similar to French- or U.S.-produced footwear machinery. Developing countries such as Brazil or Taiwan buy their machinery from either Western European or U.S. companies.

The level of technology in the U.S. footwear industry equals or sightly exceeds the level of technology in other countries. U.S. industry tends to provide its workforce with more machinery and investment per worker than do other countries (particularly developing countries). However, for similar footwear production processes, there is no significant difference among countries in the quality of the machines used.

Innovations in U.S. footwear technology.--U.S. manufacturers of nonrubber footwear have developed certain improvements in production techniques. In footwear manufacturing machinery, for example, a list of important innovations includes a computer-controlled stitching machine, a sophisticated assembly-line-material transporter, quicker and more accurate leather-cutting machines, and material and leather sorters and graders.

Another innovation in the U.S. industry has been to implement better and more uniform shoe sizes and fit. The new sizes are proportional rather than "arithmetic," and allow for a reduction in the number of sizes and widths produced to facilitate mass production of shoes. 1/ Computers and electronic data processing have also helped reduce production costs in U.S. shoe factories.

1/ An AFIA survey showed that 15 important U.S. shoe companies had increased their use of proportionate lasts from 10.7 percent in 1972 to 46 percent in 1974 (document submitted by Norman V. Germany with his testimony at the Commission's public hearings, Dec. 2, 1975).

With regard to actual shoe construction and materials, U.S. nonrubber footwear manufacturers have implemented extensive use of two processes called flow molding and injection molding. These processes allow for rapid and efficient use of plastics and vinyls in the making of the show uppers and soles. While both of these processes were first developed in Western Europe, U.S. manufacturers have since implemented them extensively. U.S. industry has also developed some valuable synthetic materials for shoes, such as Dupont Corp.'s Corfam. While the Corfam product proved to be commercially unsuccessful as a vinyl for shoe uppers, it did lead the way for the presently successful vinyls. 1/ Chemical companies have also developed other useful chemicals for improving treatment and tanning of leather, adding to its suppleness and durability.

Nature of U.S. footwear industry research.--Most research and development affecting footwear is conducted not by the footwear manufacturers themselves, but by the machinery and chemical companies supplying the footwear industry. Most of the machinery innovations have come from the United Shoe Machinery Corp., which sells over 43 percent of all U.S. footwear machinery. 2/ Large chemical companies such as Dupont or the B. F. Goodrich Chemical Co. have extensive, ongoing research programs. Nearly all these supplier companies are multinational. As a result, they actively promote and often manufacture the product in many other countries. United Shoe Machinery Corp. sells

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1/ * * * * * * *

2/ Footwear News, p. 4, Nov. 17, 1975.

in at least 24 countries, produces footwear machinery in 3 countries, and derives over 54 percent of its sales from foreign countries. 1/

Perhaps owing to the generally fragmented shoe industry, technological research by the shoe manufacturers themselves has been the exception rather than the rule. Some research has been done by their trade associations; the U.S. Department of Commerce is presently financing a $210,000 study of styling and productivity of the U.S.shoe industry by the American Footwear Industries Association.

1/ Robert Gilpin, "An Alternative Strategy to Foreign Investment," Challenge, November/December 1975, p. 14;

* * * * * * *

U.S. producers' efforts to compete with imports.--Capital expenditures (investment) for facilities which are used directly or indirectly in the manufacture of U.S. nonrubber footwear are set forth in the table below and in figure 11.

Nonrubber footwear: Expenditures by U.S. producers on new and/or additional plants, additions to existing plants, and all purchases of machinery and other equipment, 1970-74

(In thousands of dollars)

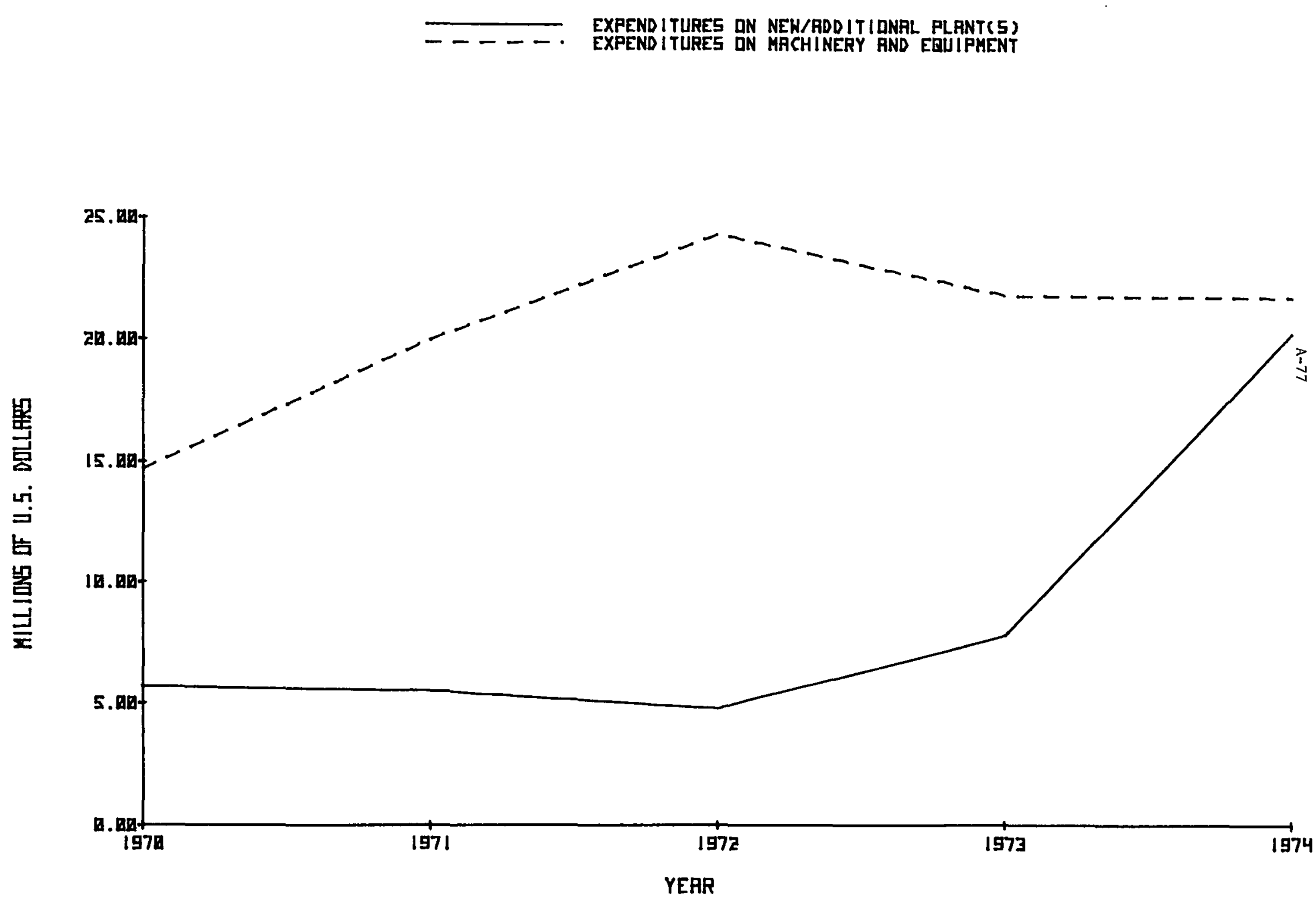
Year	Plant	Machinery and equipment
1970	5,666	14,697
1971	5,488	19,964
1972	4,816	24,261
1973	7,833	21,796
1974	20,210	21,702

Source: Compiled from data submitted in response to questionnaires of the U.S. International Trade Commission.

Annual expenditures on new plants rose by 25.7 percent from 1970 to 1974, while purchases of machinery and equipment increased by 47.7 percent. The significant increase in plant expenditures in 1974 can be attributed to several large manufacturers' expanding and constructing new plant facilities, which they stated was for the purpose of becoming more competitive with foreign producers. Since much of the machinery and equipment used by manufacturers is leased or rented, these figures do not fully reflect total capital expenditures. (Rental expenses are discussed in the section on productivity.) The most dramatic shift in plant investment for the period occurred in 1974, with a $12.4 million increase (13.8 percent) over 1973. Disregarding the peak in 1972, investment in machinery and equipment remained in the $14 million to $21 million range during 1970-74. Such investment may have been simply

FIGURE 11

EXPENDITURES ON PLANT AND EQUIPMENT FOR USE IN THE PRODUCTION OF FOOTWEAR, 1970-1974



Source: Based on data in the table on pg. A-76.

replacement of wornout machinery. The 47.7-percent increase in the value of investment in machinery and equipment for 1974 over 1970 translates into an average annual increase of less than 9.5 percent for the 5-year period.

Commission questionnaires sent to the footwear industry indicate that approximately two-thirds of the reporting companies have made some specific type of effort since 1970 to compete more effectively in the U.S. market. Of those companies reporting such efforts 79 percent stated that their efforts were instituted to compete primarily against imports of footwear rather than other domestic production. A wide variety of actions have been initiated to improve competitiveness. The more important of these are specifically mentioned below.

Investment in new equipment and machinery was the most common action, taken by 51 percent of the companies reporting. Either production of a larger variety of styles or changes in style were reported by 25 percent of the companies. Plant expansion or addition of plants occurred in 22 percent of the companies. Technological research and development, such as in the area of new types of production machinery, was carried on by 24 percent of the companies. Various competitive pricing practices such as lowering price points to or near the import price level were reported by 18 percent. Diversification into other types of footwear and efforts to increase employee productivity were reported by 13 percent and 9 percent, respectively, of the companies responding to the survey.

Other miscellaneous competitive efforts were reported by 35 percent of the companies. These efforts included better service to customers; expanded sales force; expanded market area; cost-reduction measures such as blanket pay cuts, increased quality control, and product testing; importation of footwear; and diversification into products other than footwear.

U.S. production and shipments

Trend of production and shipments.--Annual U.S. production of nonrubber footwear averaged 569 million pairs in 1954-56, 614 million pairs in 1963-65, and 490 million pairs in 1972-74 (table 1). The annual average output of footwear in 1972-74 declined by 14 percent from that in 1954-56.

Annual production of nonrubber footwear during the period 1963-66 increased from 604 million pairs to almost 642 million pairs, dropped in 1967 to 600 million pairs, and then peaked in 1968 at more than 642 million pairs (table 1). Since then, such production of footwear has declined consistently to 453 million pairs in 1974, or by 29 percent. Compared with production in January-September 1974, production of footwear declined further in January-September 1975, from 346 million pairs to 314 million pairs--representing a decrease of about 9 percent. Additionally the rate of decline of domestic production had increased from 2 percent between 1971 and 1972 to 7 percent between 1972 and 1973 and to 8 percent between 1973 and 1974. 1/

Annual domestic shipments of footwear, which approximate production, rose from 601 million pairs in 1963 to 639 million pairs in 1966, declined to 604 million pairs in 1967, peaked at slightly more than 639 million pairs in 1968, and then declined continuously to 453 million pairs in 1974 (table 28). During January-September 1975, such shipments of footwear declined to 324 million pairs, compared with 355 million pairs during the corresponding period in 1974.

The wholesale value of annual U.S. shipments of footwear increased from $2.3 billion in 1963 to $3.0 billion in 1968 (table 28); it dropped to $2.9 billion in 1969. The value of such shipments fluctuated slightly between 1969 and 1973 and ammounted to $3.2 billion in 1974.

1/ For data on U.S. production which include canvas footwear and to a limited extent protective-type footwear, see table 1b.

During January-September 1975, the value of U.S. shipments of footwear declined to $2.3 billion, compared with $2.4 billion during the corresponding period in 1974. During 1963-74, the average value per pair of shoes shipped increased from $3.86 to $7.00; in January-September 1975, it was $6.93 per pair.

U.S. production of footwear with fabric uppers and soles of rubber or plastics (described in TSUS item 700.60), decreased from 155 million pairs in 1968 to 137 million pairs in 1970 and then rose sharply to 158 million pairs in 1971 before declining to 147 million pairs in 1974. 1/ Such production declined slightly during January-September 1975, compared with what it was in the correspondding period in 1974, from 113 million pairs to 100 million pairs, as shown in the following tabulation:

Period	U.S. production (million pairs)
1968	155
1969	141
1970	137
1971	158
1972	154
1973	151
1974	147
January-September--	
1974-------------	113
1975-------------	100

1/ The ratio of imports to consumption ranged from 12 to 15 percent from 1968 to 1974, with no apparent trend. The ratio of imports to production ranged from 13 to 18 percent during the same period.

Precise data are not available on U.S. production of protective-type footwear (described in TSUS items 700.51, 700.52, and 700.53). However, it is estimated that during the period 1970-74 production of such footwear declined from 31 million pairs to 25 million pairs. 1/

Shipments from Puerto Rico.--As indicated previously, the number of establishments producing nonrubber footwear in Puerto Rico, which is part of the customs territory of the United States, declined in recent years. The production of such footwear in Puerto Rico, which is not shown in the data on U.S. production given above, was an estimated 12 million pairs in 1974, of which nearly 11 million pairs, with a value of $45 million, were shipped to the United States mainland (table 29). The quantity of such shipments accounted for 2 percent of the total of Puerto Rican and U.S. shipments. Shipments from Puerto Rico to the United States had increased from 7 million pairs, valued at $26 million, in 1965 to a peak of more than 14 million pairs, valued at nearly $52 million, in 1970 before declining irregularly to the 1974 level.

Shipments of canvas footwear (described in TSUS item 700.60) from Puerto Rico to the United States has also trended downward from 15 million pairs in 1969 to 11 million pairs in 1974.

Composition of production.--Annual official production data are available for a number of broad categories of nonrubber footwear (table 29a). In 1974, footwear for women accounted for nearly two-fifths of

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1/ During the period under consideration, it is believed that annual imports accounted for about 45 percent of U.S. production and 30 percent of U.S. consumption of such footwear.

annual production; footwear for men and slippers accounted for nearly a fifth each; footwear for youths and boys, for misses, for children, for infants, and for work, each accounted for about a twentieth; and athletic footwear accounted for the remainder. During the period 1968-74, slippers and footwear for men each increased their share of total U.S. production--from 16 to 19 percent and from 14 to 18 percent, respectively. During the same period the share of such production accounted for by women's footwear decreased from 44 to 37 percent. The share of such production of other types of footwear did not change substantially throughout the period.

In 1974 about 50 percent of U.S. production of footwear had uppers of leather, 30 percent had uppers of supported vinyl, and the rest had uppers of other materials (table 30). In comparsion, slightly under 50 percent of imports of footwear in 1974 had uppers of leather, 43 percent had principally supported-vinyl uppers, and the remainder had uppers of other materials.

Footwear for women.--U.S. production of women's footwear, 1/ including dress, street, and work shoes (as reported in official statistics 2/), has declined continuously from 284 million pairs in 1968 to 167 million pairs in 1974 (table 29a). Production of such footwear in the first 9 months of 1975 showed a slight decline, compared with that in the corresponding period of 1974--from 125 million pairs to 124 million pairs.

1/ The term "women's" is used here, as in the TSUS, to differentiate a size category of footwear, not the age of wearer, as follows: footwear in American women's sizes 4 and larger.

2/ In SIC industry No. 3144 (women's footwear, except athletic).

Footwear for misses.--U.S. production of footwear for misses 1/ averaged about 25 million pairs annually from 1969 to 1972 (table 29a). By 1974 such production had decreased to 16 million pairs. Production in the first 9 months of 1975 was the same as production in the corresponding period in 1974, 11 million pairs.

Footwear for men.--U.S. production of men's footwear 2/ averaged about 82 million pairs annually from 1969 to 1971, averaged about 90 million pairs in 1968 and in 1972 and 1973, and decreased to 83 million pairs in 1974 (table 29a). Such production also decreased from 67 million pairs to 59 million pairs in January-September 1975, compared with that in the equivalent period in 1974.

Footwear for youths and boys.--During the period 1968-73, U.S. production of footwear for youths and boys 3/ averaged 23 million pairs annually (table 29a). Such production declined to 18 million pairs in 1974. During the first 9 months of 1975, such production remained the same as it had been in the corresponding period in 1974--14 million pairs.

1/ The term "misses" is used here, as in the TSUS, differnetiate a size category of footwear, not the age of wearer, as follows: American misses' sizes 12-1/2 and larger but not as large as American women's size 4. In SIC industry No. 3149 (footwear, except rubber, not elsewhere classified).

2/ The term "men's" is used here, as in the TSUS, to differentiate a size category of footwear (not including footwear commonly worn by both sexes), not the age of wearer, as follows: American men's sizes 6 and larger. In SIC industry No. 3143 (men's footwear, except athletic).

3/ The term "youths and boys" is used here, as in the TSUS, to differentiate a size category of footwear for males (not including footwear commonly worn by both sexes), not the age of wearer as follows: American youths' sizes 11-1/2 and larger but not as large as American men's size 6. In SIC industry No. 3149 (footwear, except rubber, not elsewhere classified).

Footwear for children.--Annual U.S. production of footwear for children 1/ declined from 31 million pairs in 1968 to 20 million pairs in 1974 (table 29a). Production of such footwear also declined from 15 million pairs during the first 9 months of 1974 to 12 million pairs in the first 9 months of 1975.

Footwear for infants.--The annual U.S. production of footwear for infants 2/ averaged 28.5 million pairs from 1968 to 1971 and then declined to 24 million pairs in 1974 (table 29a). The pairage also dropped from 18 million to 17 million during the first 9 months of 1975, compared with that in the first 9 months of 1974.

Athletic footwear.--U.S. production of athletic footwear 3/ increased from 8 million pairs to 10 million pairs over the period 1968-74 (table 29a).

1/ American children's sizes 8-1/2 and larger but not as large as American youths' size 11-1/2 and American misses' size 12-1/2. In SIC industry No. 3149 (footwear, except rubber, not elsewhere classified).

2/ Footwear smaller than American children's size 8-1/2. In SIC industry No. 3149 (footwear, except rubber, not elsewhere classified).

3/ In SIC industry No. 3149 (footwear, except rubber, not elsewhere classified). In the TSUS, athletic footwear covers footwear of special construction for baseball, football, soccer, track, skating, skiing, and other athletic games or sports. However, it excludes footwear with skates permanently attached (roller skates and ice skates) provided for in TSUS items 734.90 and 734.91. Domestic production data include footwear with skates permanently attached. During the period 1968-73, domestic production of roller skates is estimated to have been $15 million annually. Estimates of U.S. production of ice skates, available on a quantity basis only, decreased from 2.0 million pairs in 1970 to an average of 1.3 million pairs annually in 1971-73.

Slippers.--U.S. production of slippers 1/ fluctuated during the period 1968-74 but showed an overall decline from 105 million pairs in 1968 to 86 million pairs in 1974. A further decline occurred during the first 9 months of 1975, compared with the first 9 months of 1974, from 66 million pairs to 50 million pairs.

Work Shoes.--U.S. production of men's work shoes 2/ increased from 36 million pairs in 1968 to 38 million pairs in 1970 and 1971 (table 29a). Such production then declined to 27 million pairs in 1974 and showed further decline during the first 9 months of 1975, compared with the same period in 1974, from 21 million pairs to 17 million pairs. However, it should be noted that the reporting definition for such footwear changed in 1973 to include only work shoes of ankle height or higher (including steel-toed shoes) and excluded work shoes of a height below the ankle, which had been included previously. In 1972, work shoes less than 6 inches high amounted to 8 million pairs (table 29a).

Information obtained from producers' questionnaire.--Table 30a shows the quantity of domestic production by size of output and types of footwear produced in 1974. Information from 133 producers shows that firms producing more than 4 million pairs accounted for 67 percent of output; nearly

1/ In SIC industry No. 3142 (house slippers of leather or other materials). Such production data are not comparable to slippers reported separately in the TSUS. Import data relate only to the type of leather slippers reported under TSUS item 700.32; imported slippers of other construction and material are not reported separately and are included in the import figures by the class of person for whom the footwear is imported.

2/ In SIC industry No. 3143 (men's footwear, except athletic).

every type of footwear, except athletic, shows increases in the proportion produced as the size of output increases in amount. Firms each producing 500,000 to 999,999 pairs accounted for 35 percent of athletic footwear.

About two-fifths of the footwear produced by the sample is footwear for women and misses, and about a third is footwear for men, youths, and boys (table 30b). The percentage distribution of types of footwear produced in 1974 does not differ significantly from that shown in official statistics, except for footwear for men, youths, and boys (29 percent compared with 22 percent) and for houses slippers (10 percent compared with 19 percent), (table 29a).

Tables 30c-30g contain information on output of nonrubber footwear of firms in the sample, by size of output and by types, for 1970-74, January-June 1974, and January-June 1975. Dress shoes are the most important type for all persons but children and infants. However, dress shoes decreased in importance throughout the period, dropping from 50 percent of production of women's and misses' footwear in 1970 to 42 percent in 1974 and from 59 percent of production of men's, youths', and boys' footwear in 1970 to 53 percent in 1974. About two-fifths of footwear for children and infants fell in the "all other" category during the 1970-74 period. In general, as dress types decreases in importance, casual and sport types increased their share of total production. House slippers and athletic and work shoes maintained about the same share of total output, except for women's house slippers, which increased from 21 percent to 29 percent.

The following tabulation, based upon information in tables 30c-30g, shows the percent of total quantity of output of manufacturers' production of "makeup" footwear (produced to customers' specifications) in 1970 and 1974:

Type of footwear	1970 (percent)	1974 (percent)
Women's----------------------	40	32
Misses'----------------------	18	18
Men's------------------------	27	24
Youths' and boys'------------	18	22
Children's and infants'------	17	21

Tables 30c-30g also provide data on the proportion of manufacters' output of footwear for women, misses, and children and infants that sells at a wholesale value of less than $4 a pair and the proportion of footwear for men, youths, and boys that sells at less than $6 a pair. The percent of total quantity of such output selling at less than $4 a pair is shown for 1970 and 1974 in the following tabulation:

Type of footwear	1970 (percent)	1974 (percent)
Women's----------------------	27	15
Misses'----------------------	37	18
Children's and infants'------	55	47

The next tabulation shows the percent of output selling at a wholesale value of less than $6 a pair in 1970 and 1974:

Type of footwear	1970 (percent)	1974 (percent)
Men's-----------------------	11	9
Youths' and boys'-----------	43	43

U.S. exports

U.S. exports of footwear averaged about 2.2 million pairs annually during 1970-72. Such exports increased to 4.0 million pairs in 1974. During the first 9 months of 1975, compared with the first 9 months of 1974, such exports increased from 2.9 million pairs to 3.4 million pairs (table 31).

In 1974, U.S. exports of footwear for men accounted for about 20 percent of total exports, those for women, for about 30 percent, and those not elsewhere classified, for about 20 percent. The remainder are scattered in small amounts in the other categories. In 1974, total exports accounted for less than 1 percent of total U.S. production.

In terms of quantity, the principal markets for nonrubber footwear in 1974 were Canada, Mexico, Japan, Bahamas, and the Netherlands Antilles (table 31a).

U.S. producers' inventories

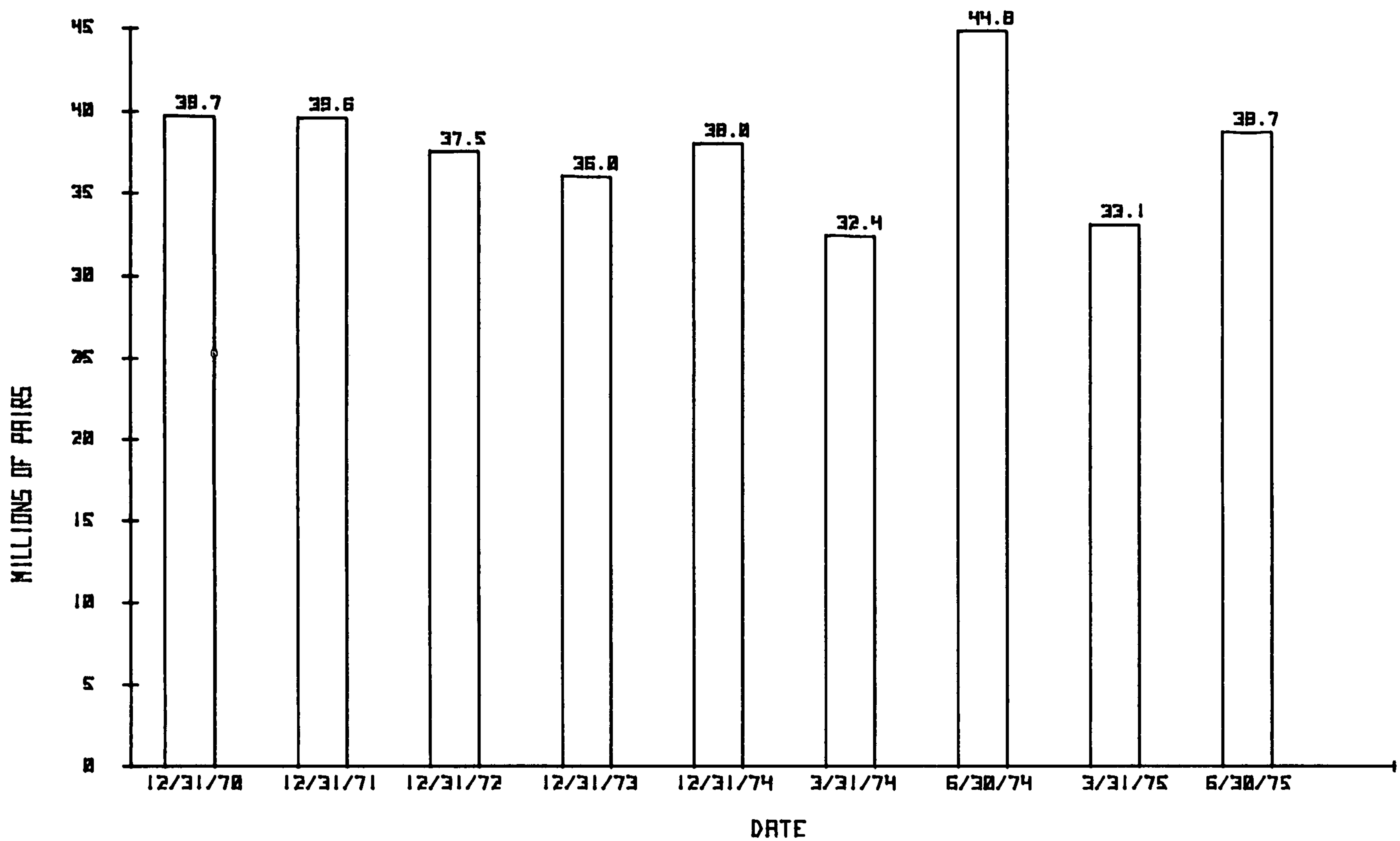
Nonrubber footwear inventories of U.S. producers declined slightly from about 39.7 million pairs in 1970 to 38.0 million pairs in 1974, or about 4.4 percent (table 31b and fig. 12). The value of these nonrubber footwear inventories for the same period, however, increased from 169.9 million to 221.0 million, or approximately 30.1 percent. The most recent figures for inventories showed that the number of pairs of nonrubber footwear in inventory fell about 6.0 million pairs from 44.8 million pairs on June 30, 1974, to 38.7 million pairs on June 30, 1975, or by 3.5 percent. The value of inventories for the same period fell by almost $18.5 million, or by 8.7 percent.

The fluctuations in inventories appear to follow the general economic situation and manufacturers' apprehensions or optimism. In addition, the seasonal nature of footwear sales can be seen, as well, as manufacturers' inventories tend to fall in the spring (March 31, 1975, inventories dropped to 17.6 million pairs) during traditionally heavy retail sales. By summer, manufacturers' inventories usually rise (June 30, 1975, inventories rose to 21.4 million pairs) as retail sales decline.

Another aspect of manufacturers' inventories was the rise in the value of each pair of footwear held. On December 31, 1970, the average pair held was worth $4.28; by June 30, 1975, the average pair was valued at $5.25 (an increase of 22.7 percent). The annual increase in the value of the average pair held during the 4-1/2-year period was only about 8 percent.

FIGURE 12

FOOTWEAR INVENTORIES, BY QUANTITY, 1970-1975



Source: Based on data in Table 31b.

Thus, for the period surveyed, nonrubber footwear manufacturers' inventories tended to fall in the absolute number of pairs of footwear held, but (discounting for inflation) have remained roughly unchanged as to the value of each pair held.

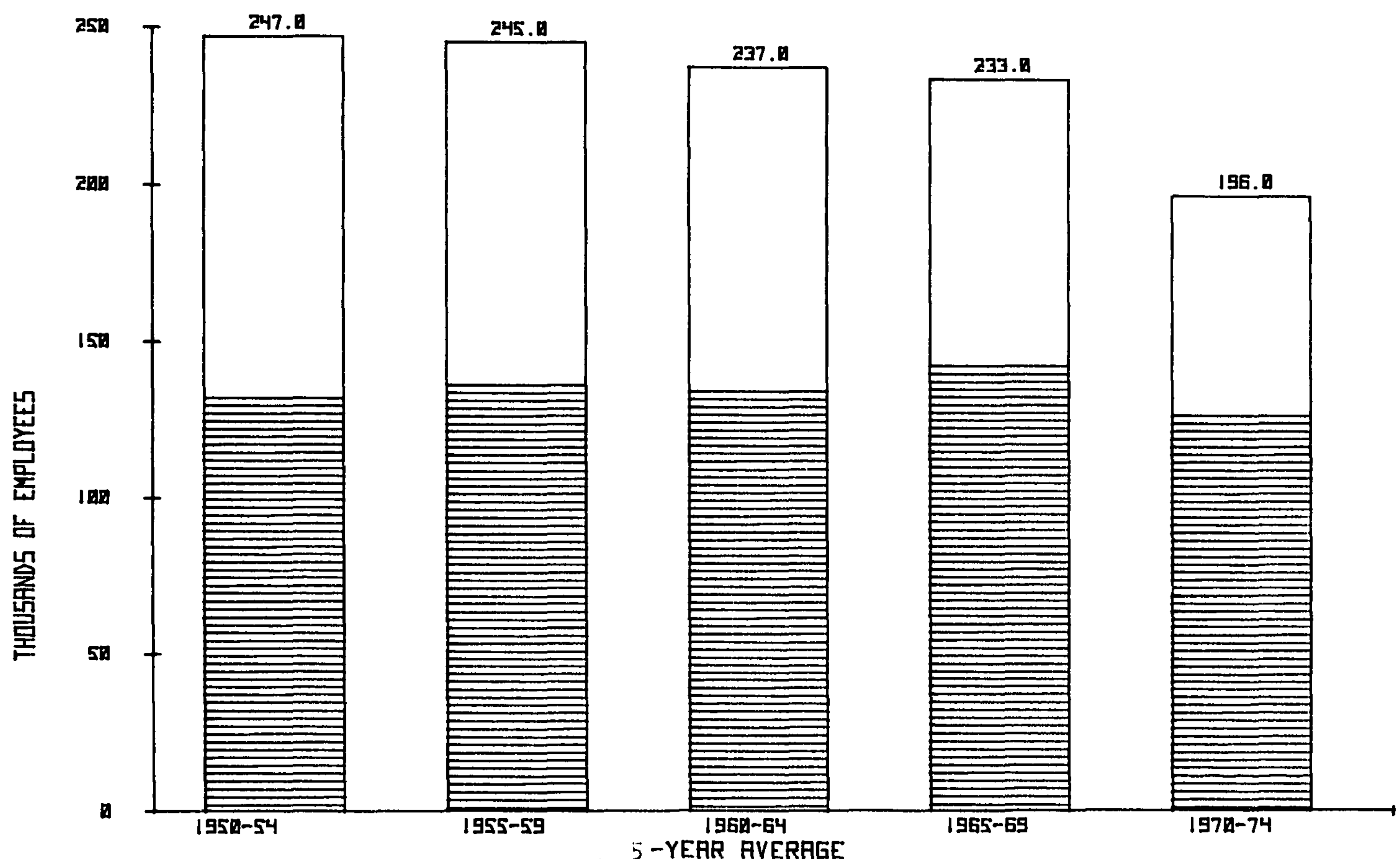
U.S. employment

Since 1950, total employment in U.S. manufacturing has increased slowly; in contrast, total employment in establishments producing nonrubber footwear has decreased at an increasing rate (table 32 and figs. 13 and 14). From 1950 to 1974, total employment in manufacturing increased 22 percent; employment in the production of nonrubber footwear declined 28 percent over the same period. Employees engaged in the production of nonrubber footwear decreased from 1.5 percent of total manufacturing employees in the 1950's to 0.9 percent in January-September 1975. The average number of employees producing nonrubber footwear decreased 16.6 percent between 1970 and 1974 and fell another 11.0 percent in the first 9 months of 1975, compared with what is was in the first 9 months of 1974. Total employment in the industry decreased 10.1 percent between 1950 and 1969.

The decrease in the number of total employees in the industry in the early 1970's was matched by an almost equal decline in the number of production workers; such employment decreased 16.8 percent between 1970 and 1974, followed by a decrease of 11.5 percent in the first 9 months of 1975 from corresponding period in 1974. For all manufacturing, the average number of production workers increased 4.2 percent between 1970 and 1974, followed by a decrease of 2.1 percent in the first 9 months of 1975, compared with the corresponding period in 1974. The average number of production workers in the nonrubber footwear industry was 154,000 in 1974--representing a decline of 26.3 percent since 1965. For the first 9 months of 1975 the average number of production workers was 139,000--a decrease of 18,000 workers

FIGURE 13

NUMBER OF ALL EMPLOYEES AND WOMEN EMPLOYEES IN NONRUBBER FOOTWEAR INDUSTRY, BY 5-YEAR AVERAGES, 1950-74 1/

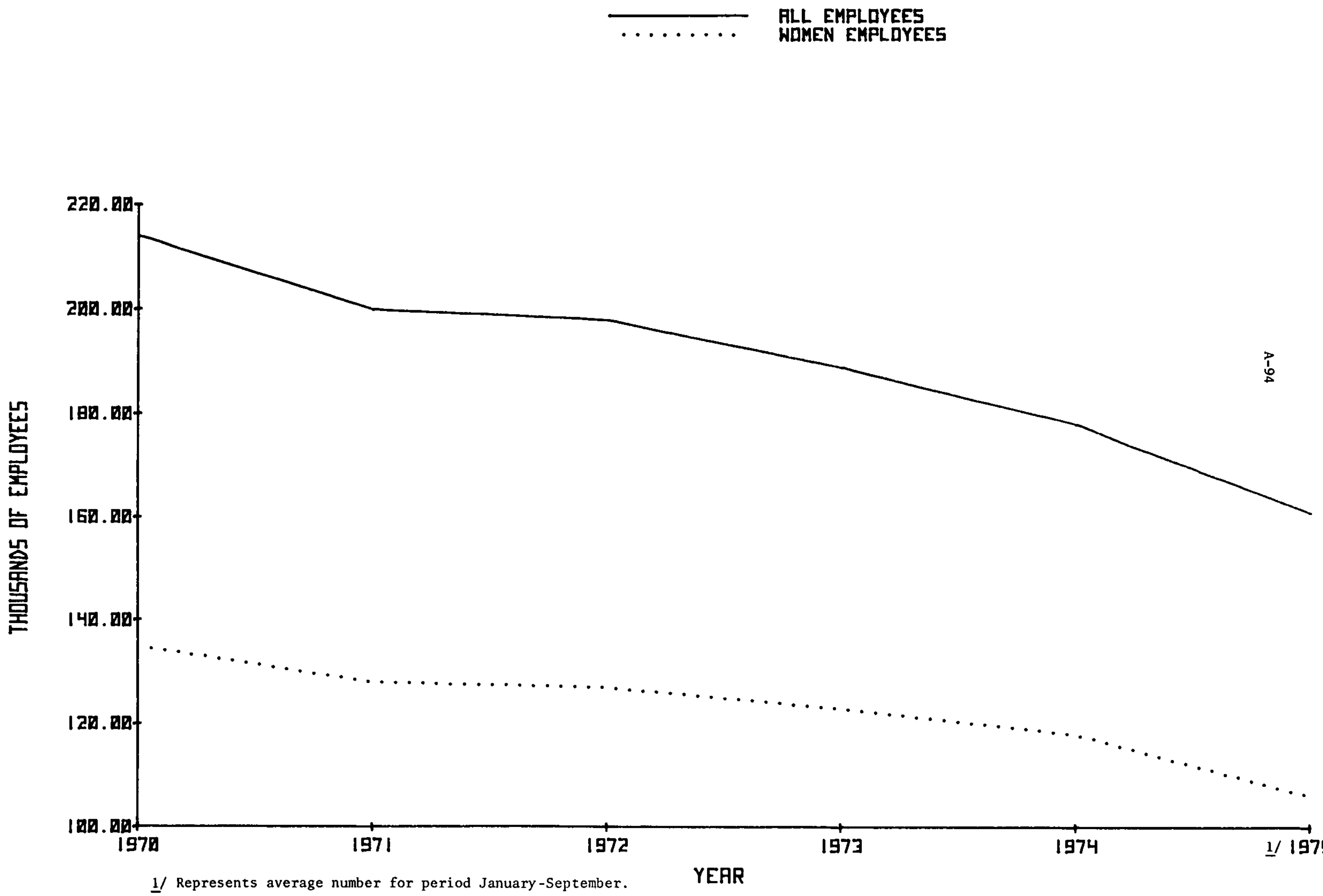


1/ Shaded area represents number of women employees.

Source: Based on data in Table 32.

FIGURE 14

NUMBER OF ALL EMPLOYEES AND WOMEN EMPLOYEES
IN NONRUBBER FOOTWEAR INDUSTRY, 1970-75



1/ Represents average number for period January-September.

Source: Based on data in Table 32.

from the corresponding period in 1974. The sharp decline in employment of production workers in the industry since the 1950's has been accompanied by a severe drop in nonproduction workers--the percentage of production workers as a share of total footwear employees decreased from an average of 90 percent in the 1950's to 86.5 percent in the first 9 months of 1975. By comparison, the share of total employment for all manufacturing taken by production workers has remained relatively constant at about 72 percent.

The trend in employment in the combined nonrubber and rubber footwear industries parallels the trend in the nonrubber footwear industry. Total employment decreased from 238,000 workers in 1970 to 205,000 workers in 1974. Employment of production workers decreased from 207,000 in 1970 to 177,000 in 1974. The number of women employees decreased from 149,000 in 1970 to 134,000 in 1974; however, the percentage of women employees as a share of total employment in the industry increased from 62.6 percent in 1970 to 65.4 percent in 1974 (table 32a).

Table 32b shows the number of U.S. establishments producing nonrubber footwear by the number of employees between 1969 and 1973. Except for the two categories of 1-3 employees and 4-7 employees, the number of establishments in all other categories declined absolutely. The largest declines were, in the larger establishments (100 or more employees). The proportion of smaller establishments increased somewhat during the period.

Along with the trend of significantly declining total employment in the nonrubber footwear industry, there has been a continuing shift in its geographical distribution. Employment in those States which historically accounted for most of the U.S. production of nonrubber footwear has declined relatively rapidly, while employment in a few other States has actually increased. 1/ In 1960, eight States 2/--Massachusetts, Maine, New Hampshire, New York, Pennsylvania, Missouri, Illinois, and Wisconsin--accounted for four-fifths of the total U.S. employment in the production of nonrubber footwear (table 33). By 1969, however, these same States accounted for only two-thirds of the total employment; by 1974, their share had declined to about three-fifths. The two aforementioned trends in employment in the production of nonrubber footwear--i.e., declining number of total employees and geographical redistribution--are indicated, for selected years 1960-74, in the following tabulation:

	U.S. total (number)	8 States 1/ (number)	All other States (number)	Percent of U.S. total in 8 States 1/
1960	242,600	188,700	53,900	77.8
1965	234,500	170,500	64,000	72.7
1969	226,800	151,500	75,300	66.8
1973	189,100	104,700	84,400	55.4
1974	178,100	105,500	72,600	59.2
Percentage change:				
1960-69	-6.5	-19.7	+39.7	
1969-74	-21.5	-30.4	-3.6	

1/ Massachusetts, Maine, New Hampshire, New York, Pennsylvania, Missouri, Illinois, and Wisconsin.

The average number of hours worked each week by production workers in nonrubber footwear establishments increased from 37.2 in 1970 to 37.5 in 1971 and 38.2 in 1972, but decreased thereafter to 37.9 in 1973, 36.8 in 1974, and 36.1 in the first 9 months of 1975 (table 34). By comparison, the average number of weekly hours worked by production workers

1/ Between 1969 and 1973, employment increased in Kentucky and Tennessee. The share of total U.S. employment in the nonrubber footwear industry in these two States rose from 7.8 percent in 1969 to 10.3 percent in 1973. County Business Patterns, U.S. Department of Commerce.

2/ Nonrubber footwear is produced in some 30 States in addition to those listed, principally Tennessee, Arkansas, Ohio, and Kentucky.

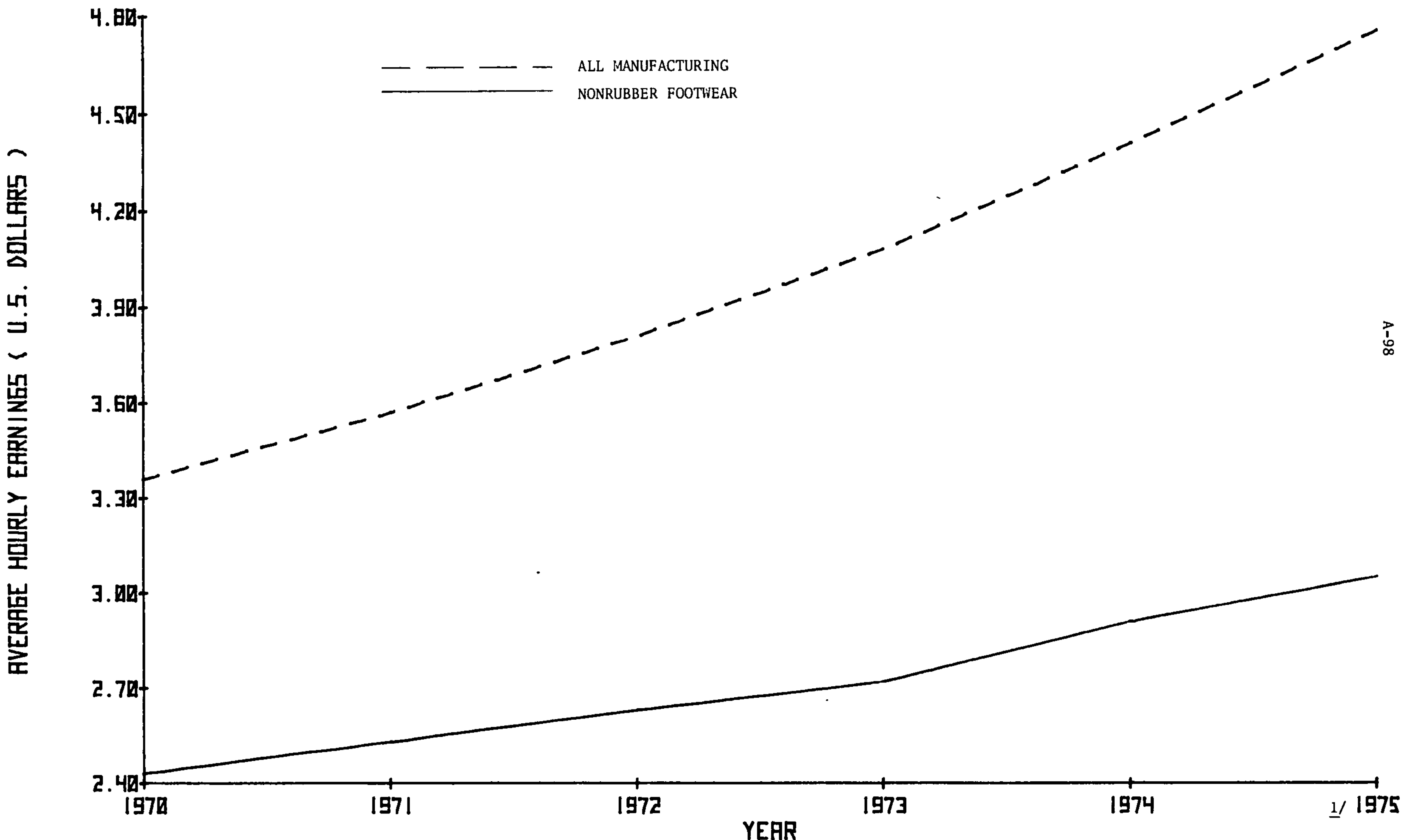
in all manufacturing was 40.2 in the period 1970-74, declining to 39.1 in the first 9 months of 1975. As shown in table 34, which covers 1950-74 and January-September 1975, nonrubber footwear production workers customarily work not only fewer total hours per week, but also only about half as many overtime hours per week as employees in all manufacturing.

Employee earnings: level and trend.--Historically, earnings in establishments producing nonrubber footwear have been among the lowest in manufacturing. For 1970, average hourly earnings in nonrubber footwear were less than three-fourths (72 percent) of those in all manufacturing (table 35; fig. 15), and by 1975, less than two-thirds (64 percent). This indicates a slower growth rate of hourly earnings of production workers in nonrubber footwear (4.6 percent annually in the 1970-74 period compared with 7.0 percent annually for all manufacturing) and a widening gap in the earnings between these two groups from a differential of $0.93 per hour in 1970 to $1.71 per hour in 1975. The data on average weekly earnings give evidence of the same pattern. The gap in weekly earnings rose from $43.33 in 1970 to $75.89 in 1975, reflecting principally the growing differential in hourly earnings, but also because footwear workers work fewer hours per week (table 34).

If one accounts for price changes as measured by the Consumer Price Index, the data show a decline in real earnings of nonrubber footwear production workers since 1970 (table 36; fig. 16). Their real earnings fell an average of about 1.5 percent a year in the 1970's; real earnings of production workers in all manufacturing rose slightly less than 1 percent a year. A worker in the nonrubber footwear industry in 1970 earned an average of $90.00 a week. For the first 9 months of 1975 his average weekly wage of $110.37 would buy him the equivalent of $80.33 in 1970 dollars, a decline of 11.1 percent in the overall

FIGURE 15

AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS IN ALL MANUFACTURING AND IN NONRUBBER FOOTWEAR INDUSTRY, 1970-75

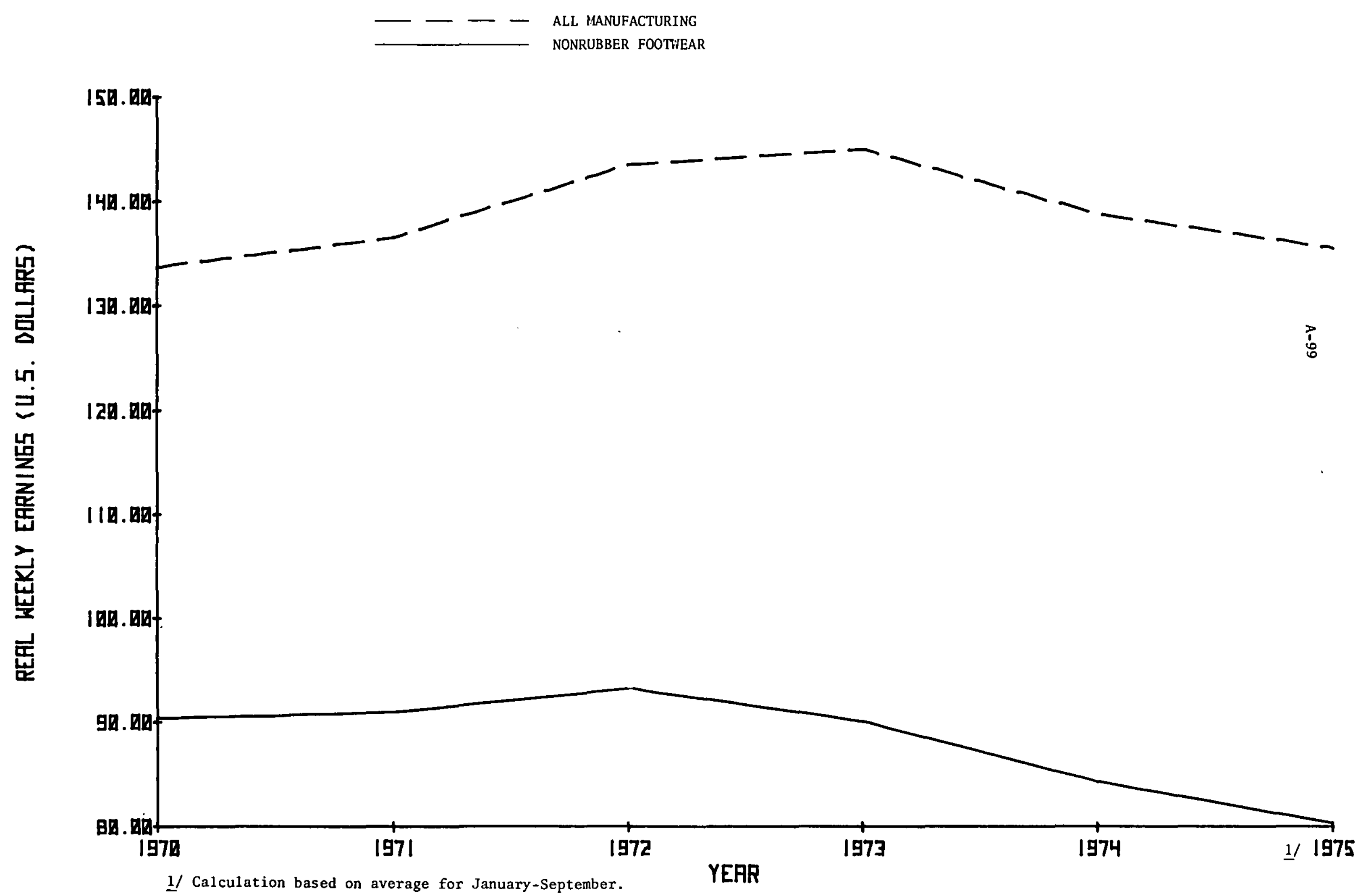


1/ Calculation based on average for January-September.

Source: Based on data in Table 35.

FIGURE 16

REAL WEEKLY EARNINGS OF PRODUCTION WORKERS IN ALL MANUFACTURING
AND IN NONRUBBER FOOTWEAR INDUSTRY, 1970-75



1/ Calculation based on average for January-September.

Source: Based on data in Table 36.

purchasing power of his weekly wages. There are several reasons for the relatively low earnings and the slow growth of monetary wages (and thus a decline in real wages) in the nonrubber footwear industry. The low earnings level may result from the fairly low skill requirement for production workers in the industry and from the high ratio of production workers to total employees. In addition, there is a fairly high unemployment rate in the industry, as indicated by data on unemployment insurance. The below-average growth in wages appears to be attributable to a large extent to the below-average price increases in the industry during 1970-75, attributable in part to competitive pressures from both domestic and imported footwear.

The level and trend of earnings in the nonrubber footwear industry have several implications. The trend toward even lower wages relative to other industries means that the nonrubber footwear industry will continue to hire mostly unskilled and semiskilled workers. The decline in real earnings implies that there is little incentive for productivity to increase through the employment of more efficient workers. It is more likely that productivity will continue its declining pattern of the past few years (see tabulation in productivity section later in the report). Furthermore, the low earnings probably mean a continuation of the high turnover rate in the nonrubber footwear industry, as workers will have an incentive to look for better jobs elsewhere. It seems likely that more women than men, particularly in the older and younger age groups, will continue to enter the industry. Women workers have a higher average turnover rate than male production workers. With real labor costs decreasing, it appears that there will be little incentive from the low level of earnings for the industry to become more capital intensive, particularly in relation to other U.S. manufacturing industries.

Earnings: survey characteristics.--Over 70 percent of the production workers employed in establishments producing nonrubber footwear are paid on the basis of an incentive wage system, which is almost always based on individual piecework. The remainder are time-rated workers (i.e., those paid hourly wages). Slightly over half of the latter are paid according to a formal plan; the rest are paid under informal systems which determine rates primarily according to an individual's qualifications. 1/

A survey of straight-time hourly earnings of production workers in establishments producing nonrubber footwear was conducted by the Bureau of Labor Statistics in March 1971. Earnings of workers covered by the survey averaged \$2.42 an hour: men averaged \$2.72 an hour, while women received an average of \$2.25 an hour. The survey showed that 33.1 percent of total production workers, 21.6 percent of male employees, and 39.6 percent of female employees earned less than \$2.00 an hour, while the proportion of workers earning between \$2.00 and \$2.49 an hour was 30.9 percent for total workers, 26.5 percent for men, and 33.4 percent for women. According to the survey, average pay levels for men and women differ for several reasons, including the variation in the distribution of the sexes among establishments with differing pay scales and among jobs with differing skill and pay levels. Men tend to be employed in cutting, lasting, bottoming, and maintenance jobs. Women are generally found in top-stitching, fitting, finishing, and inspection operations. Differences in average earnings for men and women

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1/ U.S. Department of Labor, Bureau of Labor Statistics, Industry Wage Survey, Footwear, March 1971, Bulletin 1792, 1973, p. 67.

in the same job and area may reflect minor differences in duties performed, since job descriptions in wage surveys usually are more generalized than those in individual establishments to allow for minor differences among establishments in specific duties performed. In addition, production at piece rates determines the earnings of many workers.

Table 37 shows the average straight-time hourly earnings for men and women in metropolitan and nonmetropolitan areas for the two major industry branches, men's Goodyear-welt dress shoes and women's cement-process (conventional-lasted) shoes. Workers in metropolitan areas averaged higher wages than those in nonmetropolitan areas, except for those engaged in the production of men's Goodyear-welt dress shoes in establishments of 50-249 workers.

The survey also reveals certain geographical differences in earnings. Workers in New England, where 30.2 percent of the total nonrubber footwear employment is located, earned the second highest wage--$2.52 an hour. Workers in the Great Lakes region, 1/ where 13.9 percent of the total nonrubber footwear employment is located, earned $2.61 an hour--the highest wage, and those in the "border States," 2/ constituting 6.0 percent of the work force, earned the least--$2.16 an hour. 3/

1/ Ibid., p. 75. The Great Lakes region as defined in the survey includes Illinois, Indiana, Michigan, Minnesota, Ohio, and Wisconsin.

2/ Ibid., p. 75. The "border States" as defined in the survey include Delaware, District of Columbia, Kentucky, Maryland, Virginia, and West Virginia.

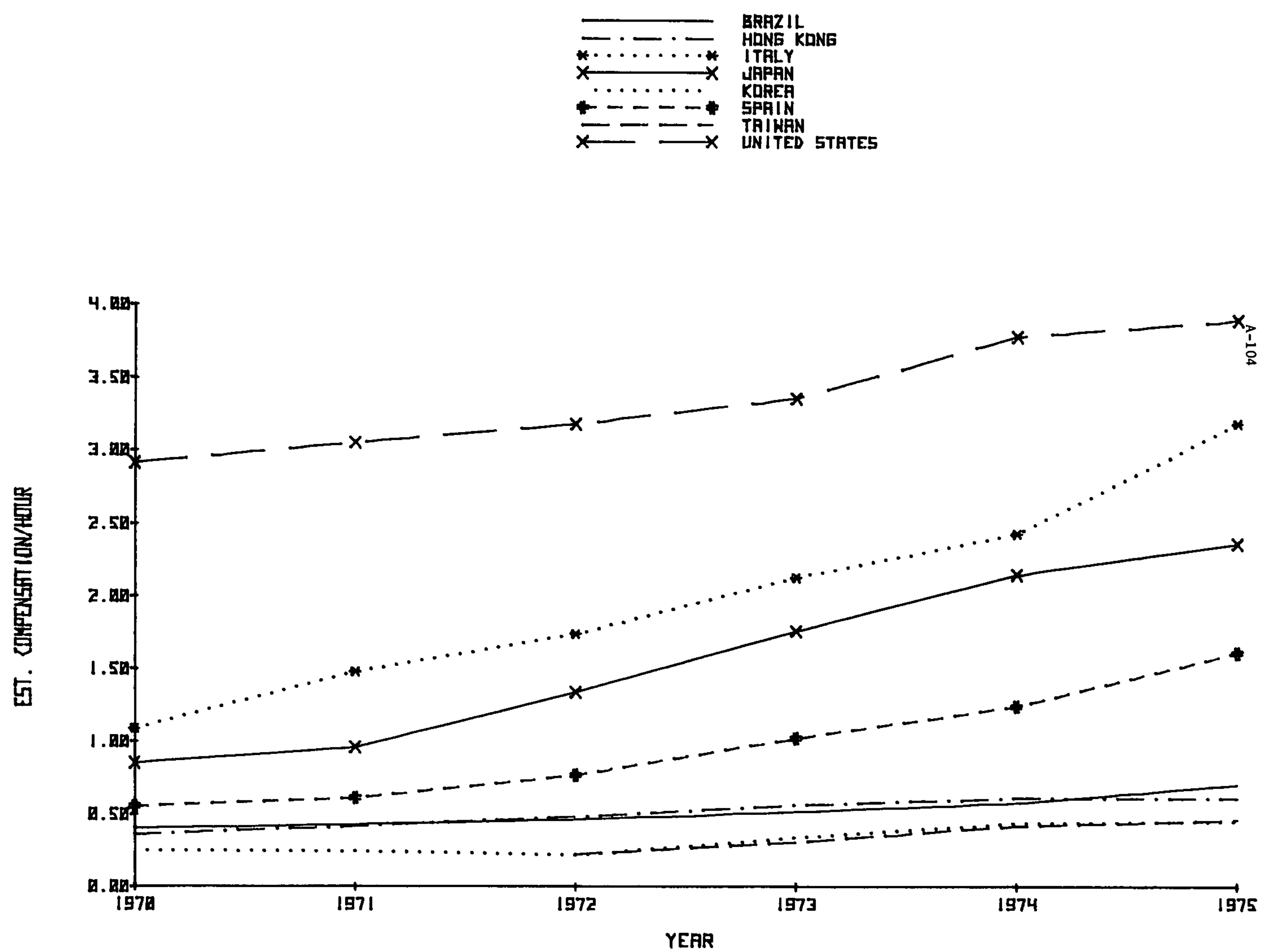
3/ There has been some movement in the industry from high- to low-wage areas. The significance of this trend is not apparent, however, since some States in low-wage areas have also lost employment.

Foreign wage rates.--In a highly labor-intensive industry such as that producing footwear, the wages paid to workers may have a significant relationship to the final price of the product. Foreign wage rates vary according to country (table 37a, fig. 17), but all foreign wage rates are considerably below the rate paid in this country. Wages in Korea and Taiwan have been only about 10 percent of the U.S. wage rate, while wages in Italy currently average about 50 percent of the U.S. rate for average hourly earnings and close to 80 percent in terms of estimated compensation per hour worked. In all of the countries studied, wages rose substantially more on a percentage basis than they did in the United States for the period 1970-75. 1/

1/ Figures for 1975 are a midyear estimate converted to U.S. dollars at the preliminary 1975 average exchange rate based on either 10 or 11 months.

FIGURE 17

ESTIMATED COMPENSATION IN FOOTWEAR-TYPE INDUSTRIES OF 8 COUNTRIES, 1970-75



Source: Based on data in Table 37a.

Characteristics of the work force.--The work force of the nonrubber footwear industry differs from that in all manufacturing in various significant ways. Characteristics of the industry work force compared with those for all manufacturing are summarized below.

(1) Reflecting the high labor-intensiveness of the industry, production workers in 1975 constituted 86.5 percent of employees, compared with an average of 72 percent for all manufacturing.

(2) Almost 70 percent of total employment in nonrubber footwear consists of semiskilled job classifications; for all manufacturing, only 48 percent of all employees are classified as semiskilled operatives and kindred workers. Skilled craftsmen make up 14 percent of total employment in the nonrubber footwear industry, compared with 20 percent in all manufacturing. 1/

(3) Women make up a substantially greater proportion of total employees in the footwear industry than they do among manufacturing industries. In 1974, about 66 percent of the total were women, compared with 29 percent in all manufacturing and 39 percent in nondurable goods. 2/ Moreover, although the number of female workers declined absolutely between 1970 and the first 9 months of 1975, the ratio of female workers to total footwear employees increased from 63.2 percent in 1970 to the present 65.5 percent.

(4) Nonrubber footwear workers are concentrated more heavily in the under-20 and over-60 age brackets than are workers in all manufacturing.

1/ U.S. Department of Commerce, Occupation by Industry, 1970 figures. Data for 1974 based on the Consumer Population Survey (Bureau of the Census), a survey of 47,000 households, show a similar breakdown.

2/ U.S. Department of Labor, Bureau of Labor Statistics, Employment and Earnings, 1974.

In 1970, the last year for which data are available, 6.7 percent of employees in nonrubber footwear were under 20 and 10.6 percent were over 60, compared with 5.3 percent and 7.4 percent, respectively, in all manufacturing. 1/ The proportion of workers between 25 and 54 years of age was lower than the average in all manufacturing. 2/

(5) The turnover of employees in the nonrubber footwear industry is higher than the average for all manufacturing and has been rising steadily (table 37b). A survey of 24 percent of the industry conducted by Kurt Salmon Associates, Inc., 3/ indicates an annual turnover rate of 73 percent in 1974. The highest turnover rate was observed in the South and the lowest, in the Midwest. The survey found that of nonrubber footwear employees who left voluntarily, 32 percent had found another job outside the industry, while only 0.8 percent had found another job within the industry. Furthermore, in a study by James E. McCarthy of workers in the shoe industry in Massachusetts who suffered layoffs, it was found that one-fourth of those laid off had never found another job even though at the time of the interview the workers had been laid off from 20 to 56 months. Half the workers in the sample were not employed full time. Moreover, for all workers, the mean change in real wage from prelayoff jobs to jobs held at the time of the interview was a reduction of $17.81. 4/

1/ The interagency task force mentioned in the President's letter requesting the 1970 investigation of the industry noted in its report that the concentration of workers in the under-25 and over-60 age brackets results primarily from the large proportion of women in total employment (Report of the Task Force on Nonrubber Footwear, June 1970). A typical work pattern involves leaving the work force at an early age, and returning after families have been raised.

2/ U.S. Department of Commerce, Detailed Characteristics, 1973.

3/ Kurt Salmon Associates, Inc., management consultants, Atlanta, Ga., in conjunction with the American Footwear Industries Association, Turnover in the Footwear Industry, October 1975.

4/ James E. McCarthy, Adjustment to Import Competition, Federal Reserve Bank of Boston, June 1975.

Productivity.--The average annual output of nonrubber footwear per production worker, as well as the average output per man-hour worked by such employees, remained relatively constant between 1965 and 1974, as indicated in the following table.

Nonrubber footwear: Output per production worker and per man-hour worked, 1965-74

Year	Output per--			
	Production worker		Man-hour	
	Quantity	Index (1967=100)	Quantity	Index (1967=100)
	Pairs		Pairs	
1965	2,996.2	101.4	1.52	101.3
1966	2,998.6	101.5	1.50	100.0
1967	2,955.7	100.0	1.50	100.0
1968	3,103.4	105.0	1.56	104.0
1969	2,914.1	98.5	1.52	101.3
1970	3,031.3	102.6	1.57	104.7
1971	3,086.4	104.4	1.58	105.3
1972	3,058.7	103.5	1.54	102.7
1973	2,982.3	100.9	1.51	100.7
1974	2,936.5	99.3	1.53	102.0

Source: U.S. Department of Commerce, Bureau of the Census, Current Industrial Reports, Shoes and Slippers, by Type of Construction and Price Line, 1974, August 1975.

The average annual change in output per production worker in the nonrubber footwear industry during 1965-74 was -0.20 percent, compared with a positive growth rate of 1.8 percent during 1947-67. For output per man-hour, the average annual increase between 1965 and 1974 was 0.07 percent. The low rate of productivity increase in the industry results in part from short production runs, characteristic of the industry because of the many different varieties, sizes, colors, styles, and materials used.

Another factor contributing to the low rate of productivity increase is the extremely small percentage of employees engaged in research and development.

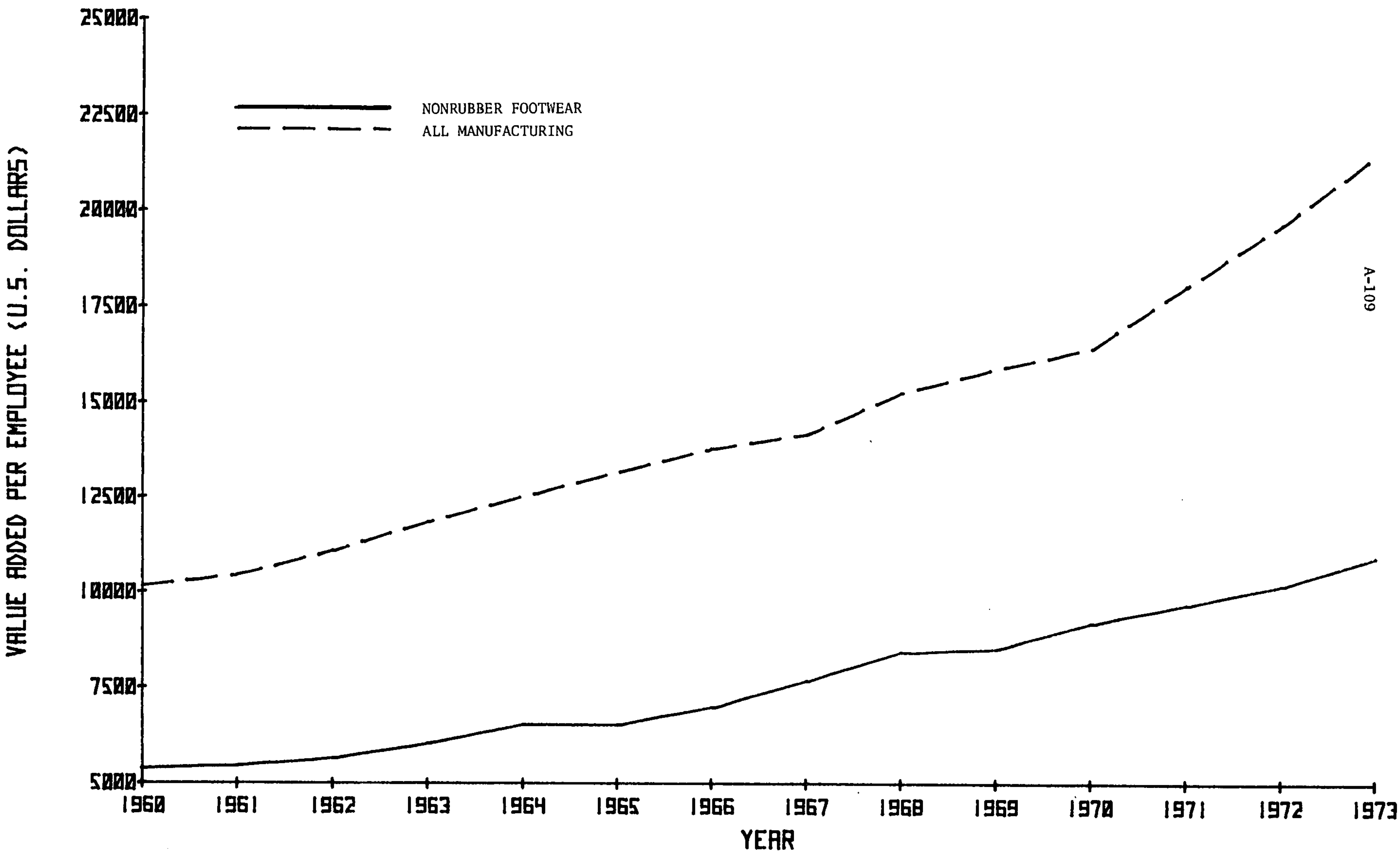
* * * * * * *

In all probability, therefore, any technological developments to increase productivity in the nonrubber footwear industry must come from outside the industry.

Value added by manufacture per employee--often used as an alternative measure of productivity--in the production of nonrubber footwear is about half the average in all manufacturing--$10,926 and $21,443, respectively, in 1973 (the latest year for which data are available). Table 37c (figs. 18 and 19) shows that, although value added per employee in the nonrubber footwear industry is below the average in all manufacturing, after 1960 it increased by approximately the same percentage. Between 1960 and 1969, value added in all manufacturing increased 56.5 percent, while that in the nonrubber footwear industry increased 59.2 percent. The trend was reversed between 1969 and 1973, however, as value added in all manufacturing increased 34.9 percent, and that in the nonrubber footwear industry, 27.9 percent. The increase in the industry since 1970 was probably attributable to

FIGURE 18

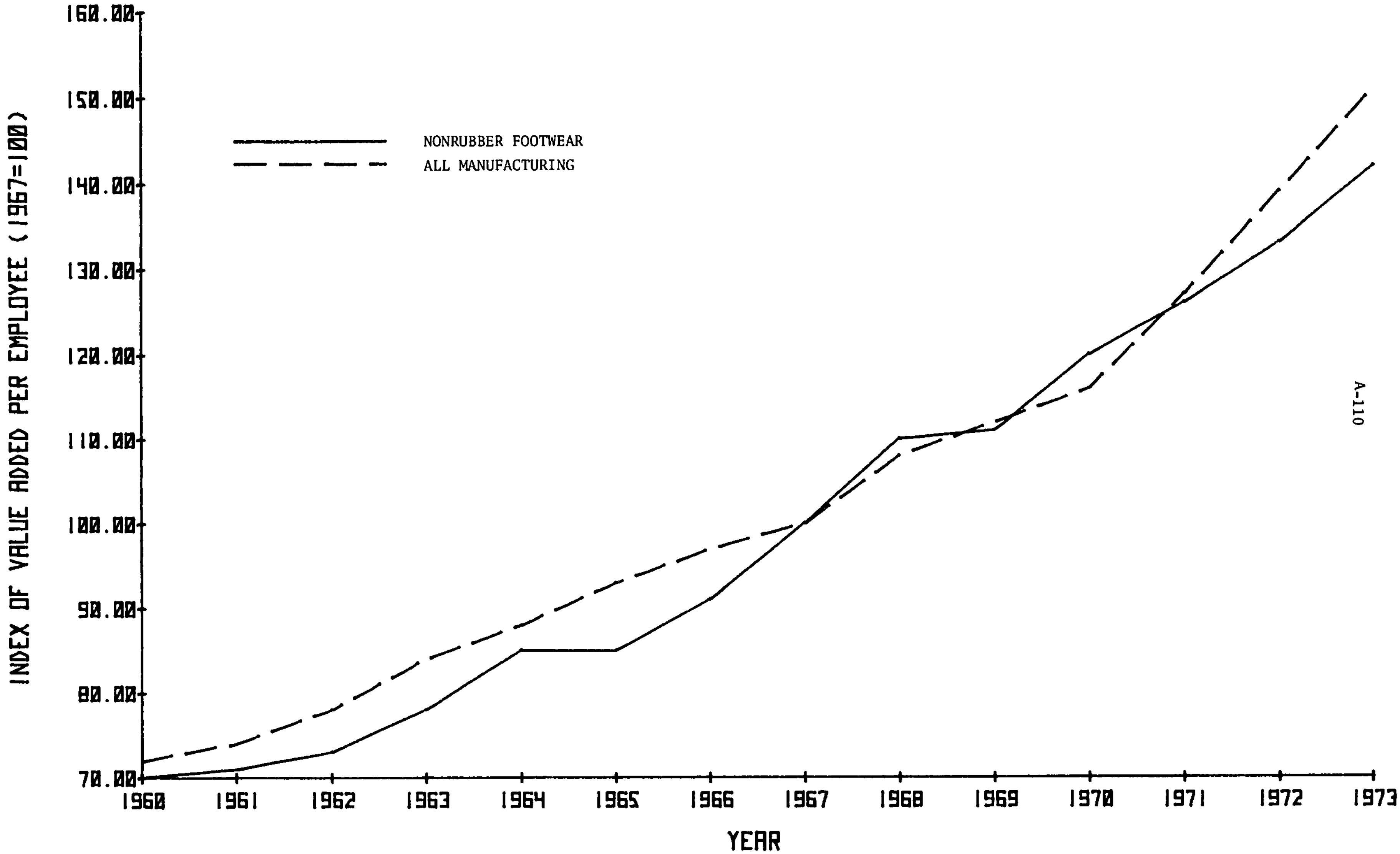
VALUE ADDED PER EMPLOYEE IN ALL MANUFACTURING AND
IN THE NONRUBBER FOOTWEAR INDUSTRY, 1960-73



Source: Based on data in Table 37c.

FIGURE 19

INDEXES OF VALUE ADDED PER EMPLOYEE IN ALL MANUFACTURING
AND IN THE NONRUBBER FOOTWEAR INDUSTRY, 1960-73



Source: Based on data in Table 37c.

increasing wholesale prices for nonrubber footwear owing to inflation and/or upgrading of product lines. On the other hand, the comparatively low value added per employee in the industry, which has traditionally been regarded as labor intensive, may have resulted in part from its low investment record.

While figure 20 shows that expenditures per production worker for new plant and equipment have been rising much faster for nonrubber footwear than for all manufacturing since 1967, table 38 shows that these expenditures in 1973 were much lower for nonrubber footwear, averaging $292, compared with $1,897 for all manufacturing and $2,138 for nondurable goods. It should be noted, however, that many establishments producing nonrubber footwear lease machinery and equipment, rather than purchase it outright. In addition, many firms follow the practice of expensing, rather than capitalizing, the costs of new lasts, dies, and patterns.

The value of rented assets is determined by the rental paid on a piece of property and includes depreciation, property and income taxes, return on investment, and often payments for repair and maintenance of the property. The tabulation below shows that the value of rented assets as a percentage of owned assets in 1968-72 was more than twice as high for the nonrubber footwear industry as it was for all industries:

Year	U.S. industrial average (percent)	Leather shoe industry (percent)
1968	10.8	27.8
1969	11.7	28.9
1970	13.4	29.3
1971	13.1	26.7
1972	12.4	31.2

FIGURE 20

INDEXES OF EXPENDITURES PER PRODUCTION WORKER FOR NEW PLANT AND EQUIPMENT IN ALL MANUFACTURING AND IN THE NONRUBBER FOOTWEAR INDUSTRY, 1960-73

Source: Based on data in Table 38.

Nevertheless, as can be seen from table 38a, the value of rented assets per worker in the nonrubber footwear industry averaged only about one-third of that in all U.S. industry in 1968-72. In 1972, the last year for which data are available, the value of rented assets per worker in the nonrubber footwear industry averaged $427, the lowest value since 1969, compared with an average of $1,538 for all industry.

The value of owned assets is defined as depreciation plus return on investment. 1/ In 1968-72, the average value of owned assets per worker was more than eight times as high for all industries as for the nonrubber footwear industry. Furthermore, the trend is of a slowly widening gap, both geometrically and arithmetically, between the values of rented and owned assets per worker in the nonrubber footwear industry and in U.S. industries as a whole, as evidenced by the smaller percentage increase in the footwear industry.

Hence, the low value of rented assets, the low value of capital expenditures per employee, and the low value of capital utilized per worker confirm the high labor-intensiveness of the industry, both currently and potentially.

Unemployment.--Published data pertaining to unemployment in the nonrubber footwear industry are not available. A good indicator of the general trend of unemployment in the nonrubber footwear industry is the number of insured unemployed persons whose last employment was in establishments producing leather

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1/ George Stigler uses this method of computing the value of owned assets in Capital and Rates of Return in Manufacturing Industries. Book value is an alternative measure of owned assets; however, comparisons between industries are not as reliable, because of different accounting methods. Use of the book value measure does not alter the trend observed above.

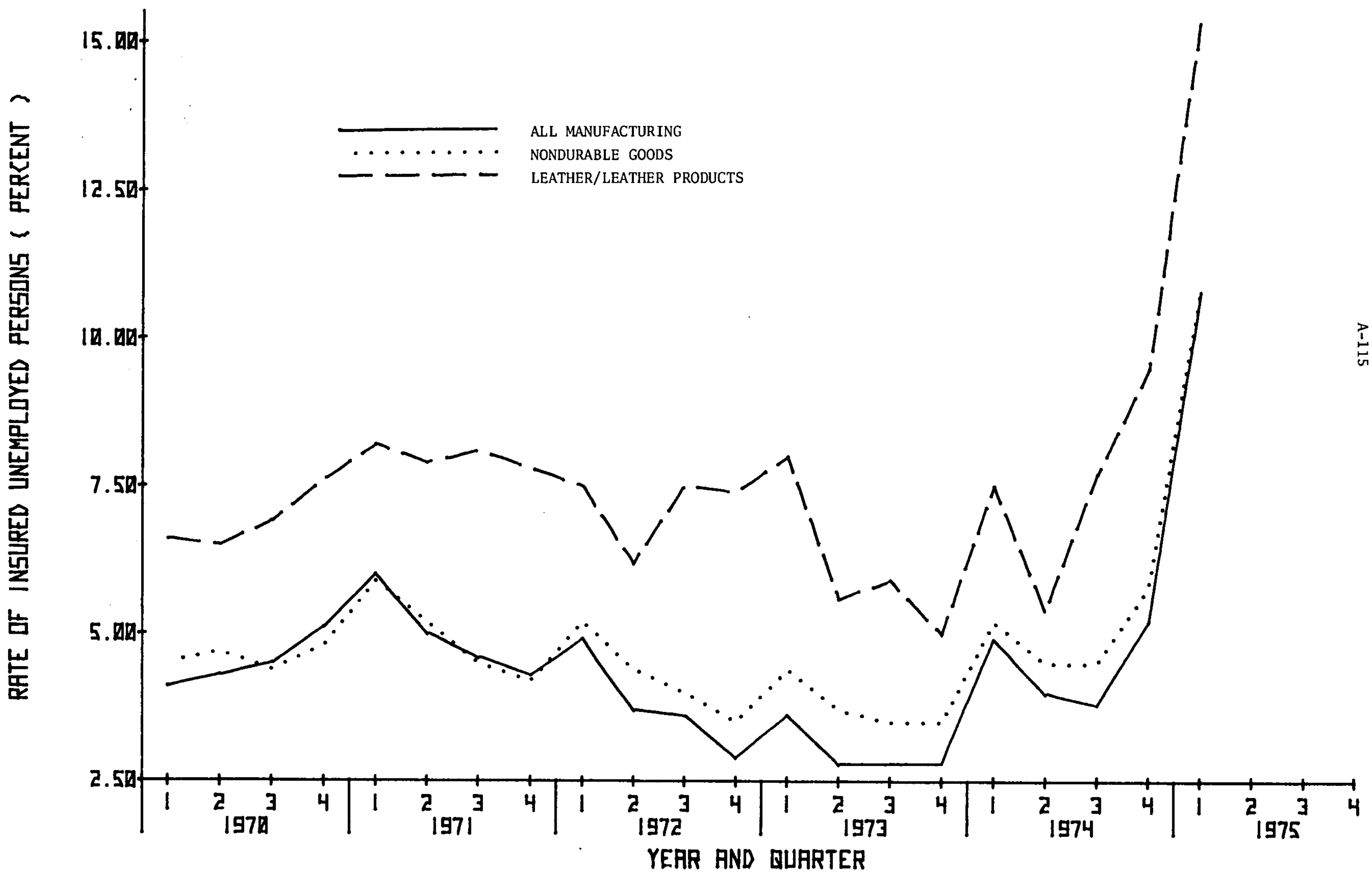
and leather products (SIC industry No. 31). 1/ In recent years, the rate of unemployment for this broader industrial classification--about two-thirds of which is estimated to consist of footwear--has been consistently more than twice as high as the average for all manufacturing. The total number of insured unemployed in the leather and leather products industry rose from a low of 14,600 in 1968 to 21,800 in 1969, 25,080 in 1970, and 27,630 in 1971, decreasing to 22,980 in 1972, 18,840 in 1973, and then increasing sharply to 22,870 in 1974 and 45,550 in the first 4 months of 1975. The most recent trends coincide with the U.S. recession. In spite of increased unemployment, the leather and leather products industry accounted for only 2.1 percent of total insured unemployed persons in manufacturing in the first 4 months of 1975 and for slightly less than 3 percent in the period 1970-74.

Table 39 and figure 21 show that during the period January 1970 to December 1974 the rate of unemployment in the leather and leather products industry--as measured by the number of insured unemployed expressed as a percentage of the average number of insured workers--ranged between 4.7 and 11.2 percent (averaging 7.1 percent), while the corresponding rate in all manufacturing was considerably lower, ranging between 2.5 and 6.8 percent (averaging 4.2 percent). For the first 4 months of 1975 the rate increased sharply in both categories, averaging 15.3 percent in the leather and leather products industry and 10.7 percent in all manufacturing.

1/ Insured unemployment represents the number of persons reporting a week of unemployment under an unemployment insurance program. Excluded are persons who have exhausted their benefits and workers who have not yet earned rights to unemployment insurance. Thus such statistics probably understate the actual number of unemployed persons to some extent. Moreover, no information is available concerning the number of persons who leave an industry for other jobs or who voluntarily withdraw from the labor force and do not collect unemployment compensation.

FIGURE 21

RATE OF INSURED UNEMPLOYED PERSONS, AS A PERCENT OF AVERAGE COVERED EMPLOYMENT, IN SELECTED MANUFACTURED COMMODITIES, 1970-75



Source: Based on data in Table 39.

The percentage of insured unemployed persons in the leather and leather products industry claiming less than 5 weeks of unemployment compensation was generally higher during January 1970-December 1974 than that in all manufacturing (table 39a). After 1971, the average number of insured unemployed in both manufacturing and the leather industries claiming more than 14 weeks of unemployment compensation decreased annually; however, no trends are apparent in the statistics on unemployment claims of less than 5 weeks.

Prices in the U.S. market

Pricing practices and markups.--As noted in the Commission's previous investigations, nonrubber footwear is often produced and marketed with a specific retail price in mind. Wholesalers will sell a given shoe at a price that will give the retailer a certain percentage markup if the shoe is retailed at a projected price--for example, $10.99. Retailers follow the practice of backward pricing. This means that instead of selecting footwear on the basis of style, fashion, or material, and then retailing it at its corresponding markup price, the merchandiser first establishes basic retail price categories and then purchases shoes at a wholesale price for which the markup value fits his price categories. When production costs increase, producers may introduce changes in style or construction in order to continue supplying their customers with footwear in the usual price categories. Obviously, however, the ability of producers to achieve this objective is limited, since increasing production costs and inflation eventually force producers to raise prices or discontinue low-end categories.

Although statistical data on retail markups are not available, representatives of the footwear industry generally agree that the retail markup on domestically produced nonrubber footwear currently averages about 50 percent of the retail price. It is often maintained by domestic producers that an important incentive for retailers to favor imported over domestic nonrubber footwear results from the common retail practice of taking a larger markup on less costly imported footwear and selling it at or near the same price as its domestic counterpart. Incentives for increasing retail markups whenever possible undoubtedly exist (e.g., rising retail costs and the greater uncertainty, risk, and delay in handling imported merchandise); however, according to a representative of the domestic shoe industry, the practice of taking larger markups on imports than on equivalent domestic shoes enables the taking of larger markdowns on imports, with the beneficial result of still maintaining larger gross profit margins. 1/

Price trends.--Wholesale and retail prices for footwear have increased absolutely since 1970, but at an average annual rate less than that for all commodities. Whereas the wholesale price index shows an average annual growth rate of 9.7 percent for all commodities and 10.2 percent for nondurable manufactured goods from 1970 to 1974, the comparable rate for footwear is 5.4 percent. For the same period, the consumer price index shows an average annual growth rate of 6.2 percent for all commodities, compared with 4.1 percent for footwear.

1/ Transcript of the hearing, p. 86.

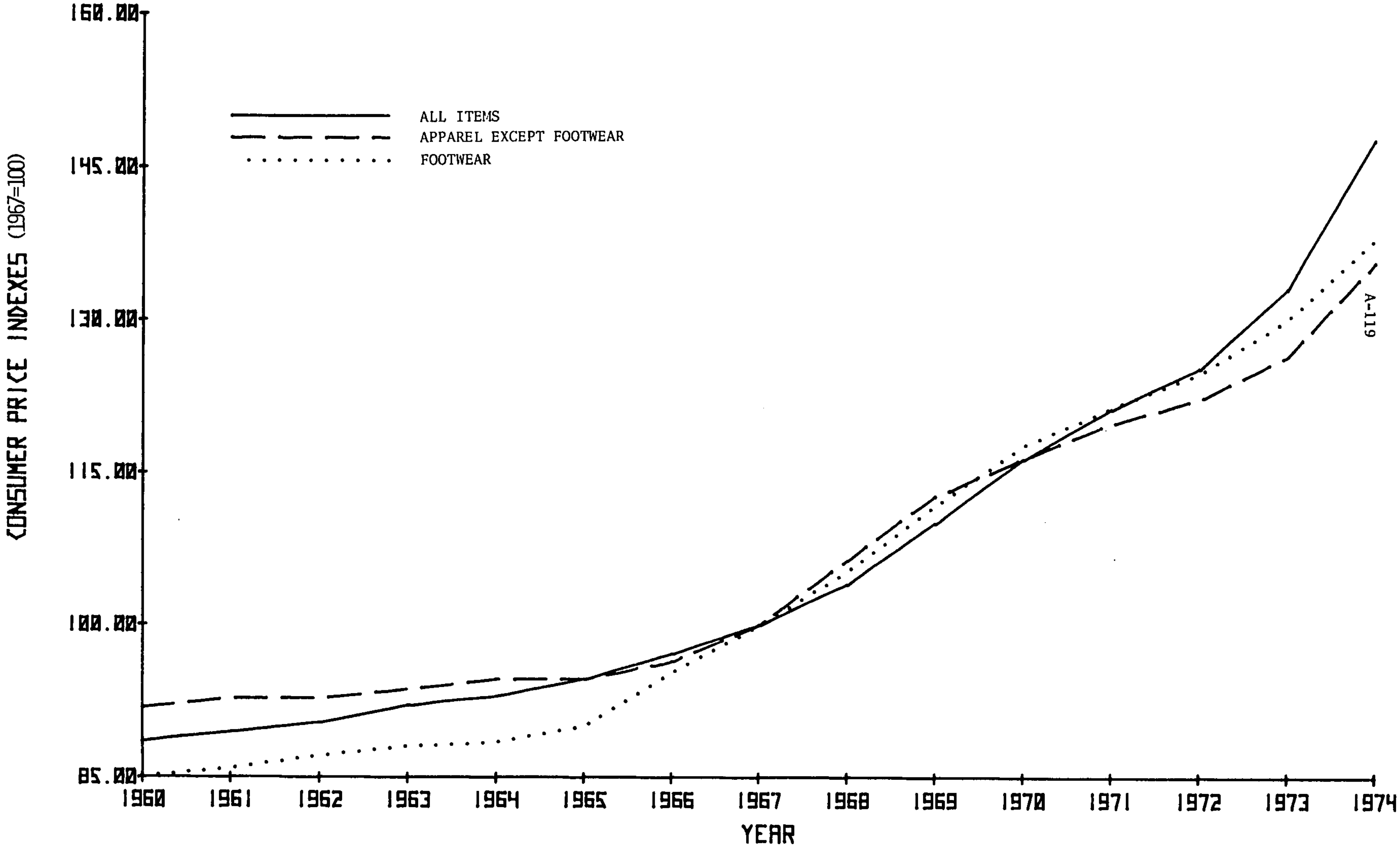
Within the footwear industry, wholesale prices for women's and misses' footwear and children's and infants' footwear from 1970 to 1974 increased at average annual rates of 3.9 and 4.3 percent, respectively, or less than the industry average, while men's and boys' footwear rose by an average annual rate of 5.8 percent (table 40). The wholesale price for wearing apparel increased an average of 3.9 percent annually during this period. In all categories except women's and misses' footwear and children's and infants' footwear, the wholesale price increased at a greater average annual rate between 1970 and 1974 than it did between 1965 and 1969. The following tabulation shows the wholesale price indexes computed by the Bureau of Labor Statistics (BLS) for 1974, indicating how much prices have risen since 1967:

Item	Index (1967=100)
All commodities	160.1
Nondurable manufactured goods	159.5
Wearing apparel	129.5
Footwear (except rubber), total	140.0
Women's and misses'	132.8
Men's and boys'	140.0
Children's and infants'	138.5

BLS consumer price indexes show a similar trend, although prices of most items increased somewhat less rapidly than those at the wholesale level (table 41; fig. 22). The average annual price rise for all items increased from 3.8 percent between 1965 and 1969 to 6.2 percent between 1970 and 1974; for footwear, however, the rate of price increases slowed from 5.6 percent between 1965 and 1969 to 4.1 percent between 1970 and 1974. A comparison of prices in the first 9 months of 1975 with those in the first 9 months of 1974 shows that the average annual growth rate was 5.1 percent

FIGURE 22

U.S. CONSUMER PRICE INDEXES FOR FOOTWEAR
AND OTHER COMMODITIES, 1960-74



Source: Based on data in Table 41.

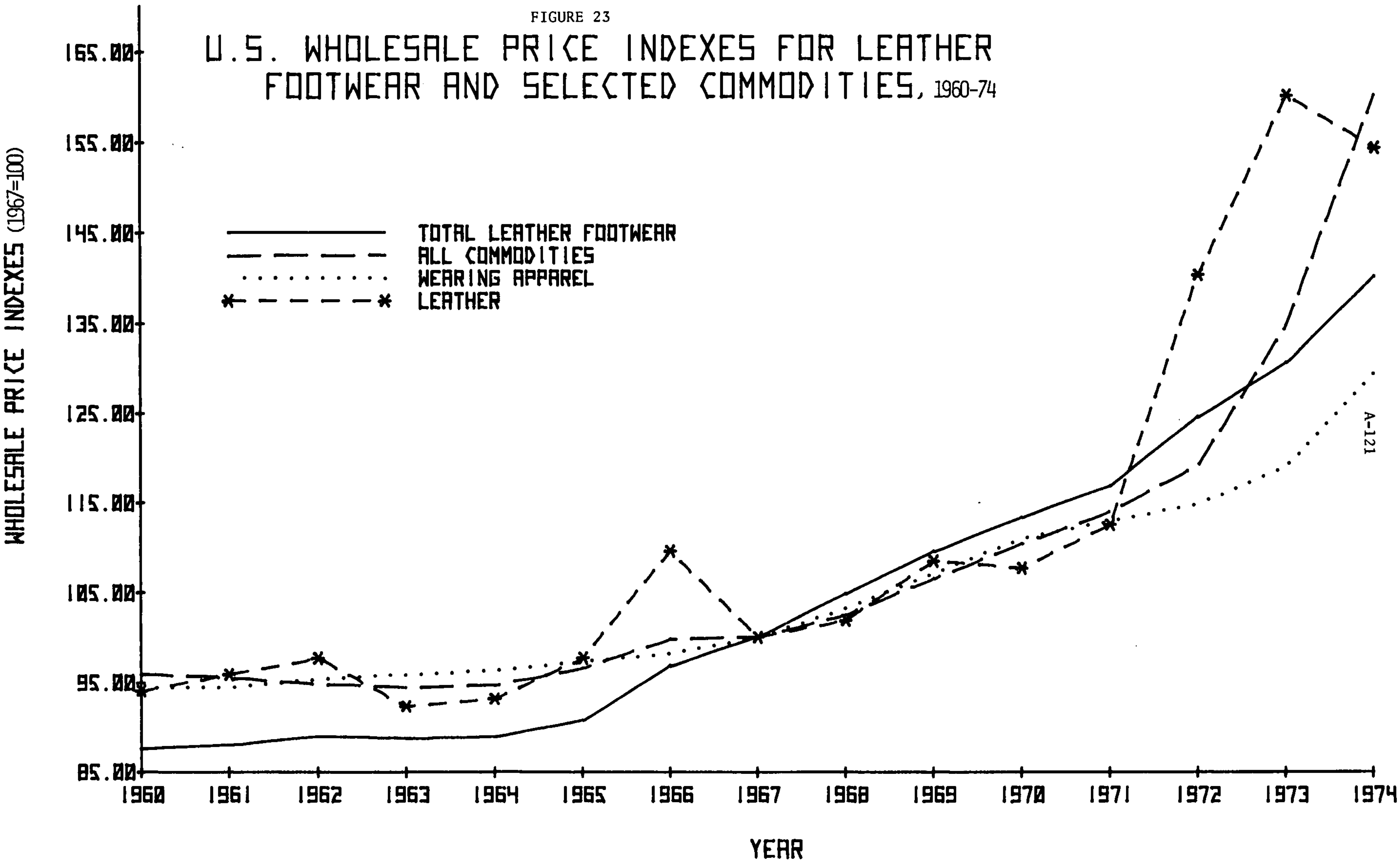
for footwear and 9.7 percent for all items. Various consumer price indexes for 1974 were as follows (1967=100): All items--147.7; all commodities except food--143.6; apparel except footwear--135.7; and footwear--138.1.

The less rapid increase since 1970 in the wholesale prices of nonrubber footwear compared with those of all commodities (fig. 23) appears to be caused by the following: (1) Hourly wages for production workers engaged in the production of nonrubber footwear increased by an average of 4.6 percent during 1970-74; the corresponding increase in wages for production workers in all manufacturing was 7.0 percent per year; and (2) wholesale prices of leather have increased substantially in recent years, resulting in some substitution of vinyl, rubber, and synthetic rubber. Before 1974 the wholesale prices of these substitute materials remained fairly stable. However, the wholesale price indexes in 1974 for leather, rubber heels and soles, and synthetic rubber (1967=100) were 154.3, 136.0, and 130.7 percent, respectively, compared with 160.1 percent for all commodities. Data using 1967 as a base are not available for polyvinyl chloride (tables 40 and 41a).

Real expenditures for total personal consumption rose by 13 percent from 1970 through 1974, while real expenditures for shoes and other footwear increased by only 7.6 percent. From 1970 to 1973 demand for footwear increased at about the same rate as total demand; however, from 1973 to 1974 there was a much sharper drop in real expenditures fot footwear than for all goods and services. Thus, the slower rise in footwear expenditures helps explain price movements only since 1973. It appears that footwear producers could have raised prices faster than they actually did so long

FIGURE 23

U.S. WHOLESALE PRICE INDEXES FOR LEATHER FOOTWEAR AND SELECTED COMMODITIES, 1960-74



A-121

Source: Based on data in Table 40.

as demand was holding up. That this did not happen seems to be the result of highly competitive conditions within the industry. These could have been in the form of (1) severe competition among domestic firms; (2) competitive pressures resulting from imports; or (3) a combination of the first two conditions.

With an increased emphasis on style in recent years and with more rapid style changes, costs of lasts, dies, and patterns have risen, since they must be changed more frequently. This helps explain why wholesale prices for nonrubber footwear rose at a faster rate in the 1970's than in the late 1960's.

The only category of nonrubber footwear imports for which published wholesale price data are available is women's and misses' footwear (table 42). 1/ If 1970 is used as a base, the average annual growth rate of prices for women's and misses' imported footwear exceeded that for women's and misses' domestic footwear. Thus, for the period 1970-74, the gap between prices for domestic and imported footwear for women and misses has narrowed. However, except for the recession year of 1974, imports have been increasing. This lends support to the contention of retailers that other factors along with price (specifically style, quality, and value) have been responsible for the increasing share of the market taken by imports.

1/ However, this index is only based on prices of imported leather-upper dress pumps and leather-upper sandals from Italy.

Domestic and import prices.--Wholesale price data for 1970-75 was obtained in this investigation by means of special price questionnaires sent to a selected number of domestic producers and importers of non-rubber footwear. The objective was to obtain price data which would reflect wholesale price movements over time, with changes for styles and quality factored out to as great an extent as possible. Because many footwear products do change substantially over time, many respondents experienced difficulty with the questionnaire, particularly for the earlier years (1970 and 1971) owing to a lack of records and also because it was more difficult to remember the exact nature of style changes during earlier years.

Prices were sought for 14 product sectors, listed in the note to tables 43 and 44. The best responses were obtained for sectors A, E, and F, which is not unexpected as these were the most popular types of footwear being sold in the United States during 1970-75. The prices were combined into indexes to reflect price movements, with January 1973 as a base. Tables 43 and 44 are the end product of this effort and are best interpreted together.

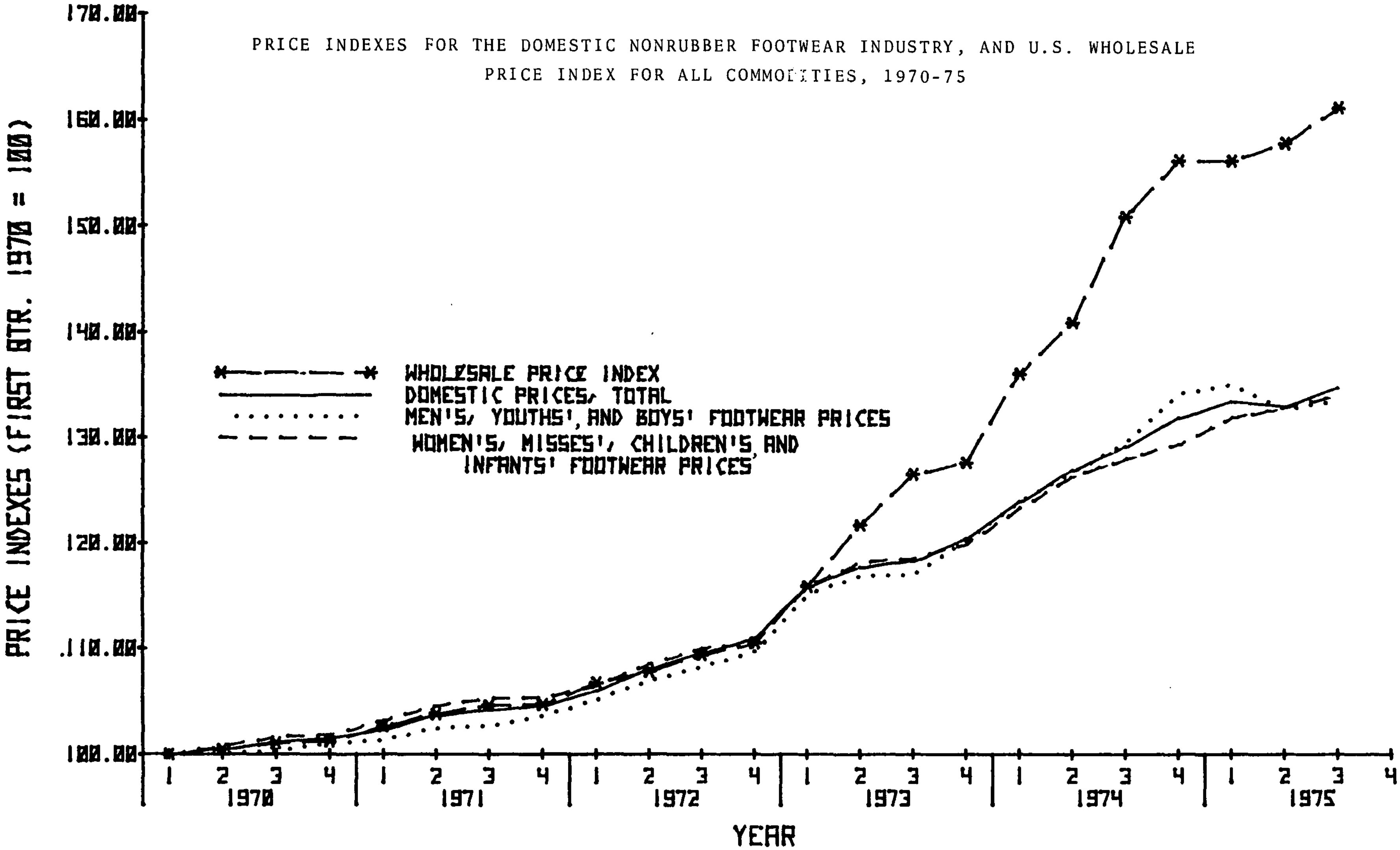
The price rises for the principal domestic sectors (A, E, and F) are comparable during this period. For imports, however, prices of men's shoes (A) appear to have gone up more rapidly than those for women's (sectors E and F), although the rise for imported medium-heel shoes (sector G) is much higher than for these other sectors. Price increases for domestically produced work shoes (sector C) have been slightly more rapid than for imported work shoes: the price index of the domestic shoes rose from 90.53 in January-March 1972 to 120.84 in July-September 1975, compared with a rise from 91.74 to 116.85 in the same period for imported work shoes. Prices of imported athletic footwear have been increasing more rapidly than for other types of imported footwear, while those of imported slippers have been stable.

The overall price trends become more evident in tables 45 and 46 and in the accompanying figures (figs. 24-28). Since 1970, price movements for women's and men's nonrubber footwear have been very similar, while prices for all goods as measured by the wholesale price index have risen substantially more than for nonrubber footwear (table 45; fig.24). Price movements for nonrubber footwear and for all goods were very similar from 1970 through early 1973, and then prices for all goods began rising at a much more rapid pace. Since footwear imports were generally rising from 1970 through 1973, and then declined in 1974, there seems to be little reason for imports to have caused this price gap beginning in 1973. Much of the large rise in the wholesale price index since early 1973 was due to the sharply escalating costs of raw materials, particularly those which are energy related. 1/ Footwear is much more labor intensive than other industries and much less energy dependent. Hence, it is likely that costs have risen more slowly for footwear. Real consumption for footwear rose at the same rate as for total personal consumption from 1970 to 1973, but declined much more sharply in 1974, a factor which helps explain the widening price gap in 1974.

1/ The wholesale price index for manufactured items indicates a price rise similar to that of the index for all goods. The respective indexes in July-September 1975 were 159 and 161.

FIGURE 24

PRICE INDEXES FOR THE DOMESTIC NONRUBBER FOOTWEAR INDUSTRY, AND U.S. WHOLESALE PRICE INDEX FOR ALL COMMODITIES, 1970-75



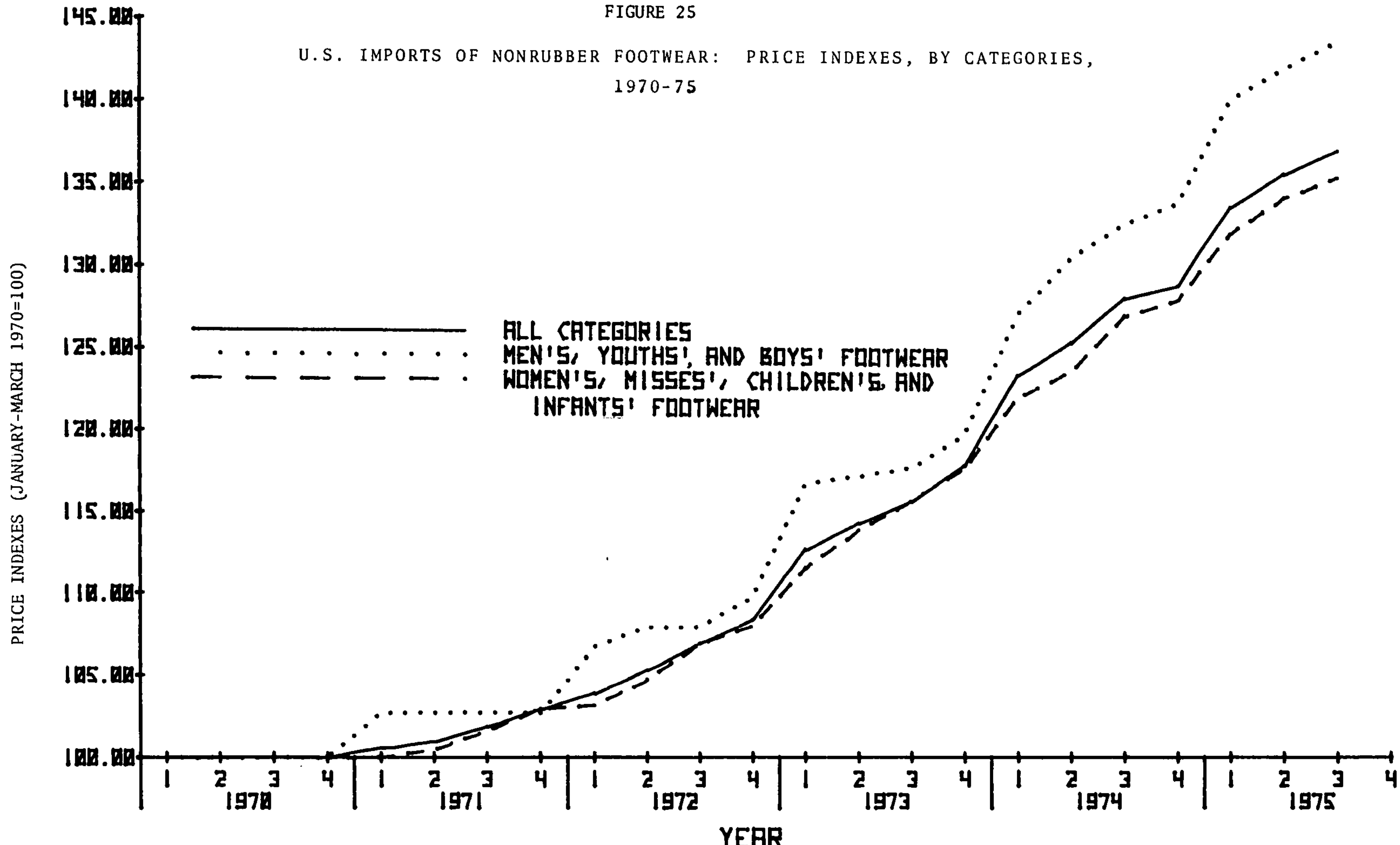
Source: Wholesale price index prepared by Bureau of Labor Statistics. Footwear price indexes based on table 45.

Wholesale price movements for imported footwear show a greater divergence in the pattern of the men's and women's categories (table 46; fig. 25). In 1974, prices of men's imported footwear rose almost 8 percent more than those of women's imported footwear. Prices for imported footwear as a whole went up at about the same rate as those for domestic footwear during 1970-75 (fig. 26). Interestingly enough, they increased at a faster rate than prices of domestic footwear after late 1974. The general similarity in the movement of the two price indexes indicates price competition between domestic and foreign footwear. It also is evidence that the relative price of imported footwear compared with that of domestic footwear remained fairly constant throughout the 1970's. Considering that foreign wage rates have been rising much more quickly than domestic prices (table 37a), it is almost surprising that import prices have not increased even faster. Part of the explanation lies in the shifts taking place in production of footwear abroad. Relatively more U.S. imports have been coming in from Taiwan and Brazil at the expense of Japan and Italy, which have higher wages.

Sufficient price data is available to make comparisons between domestic and import price movements for women's footwear and for men's footwear (figs. 27 and 28). Prices for women's footwear generally moved together in 1970-75, and in 1975 were a little over 35 percent higher than they were in early 1970. Domestic and import prices for the men's categories showed great similarity in movement through 1973. They diverged for awhile in 1974, and in 1975 import prices moved up much more rapidly than prices for men's domestic footwear. Based on past trends, it would appear that this gap is likely to narrow.

FIGURE 25

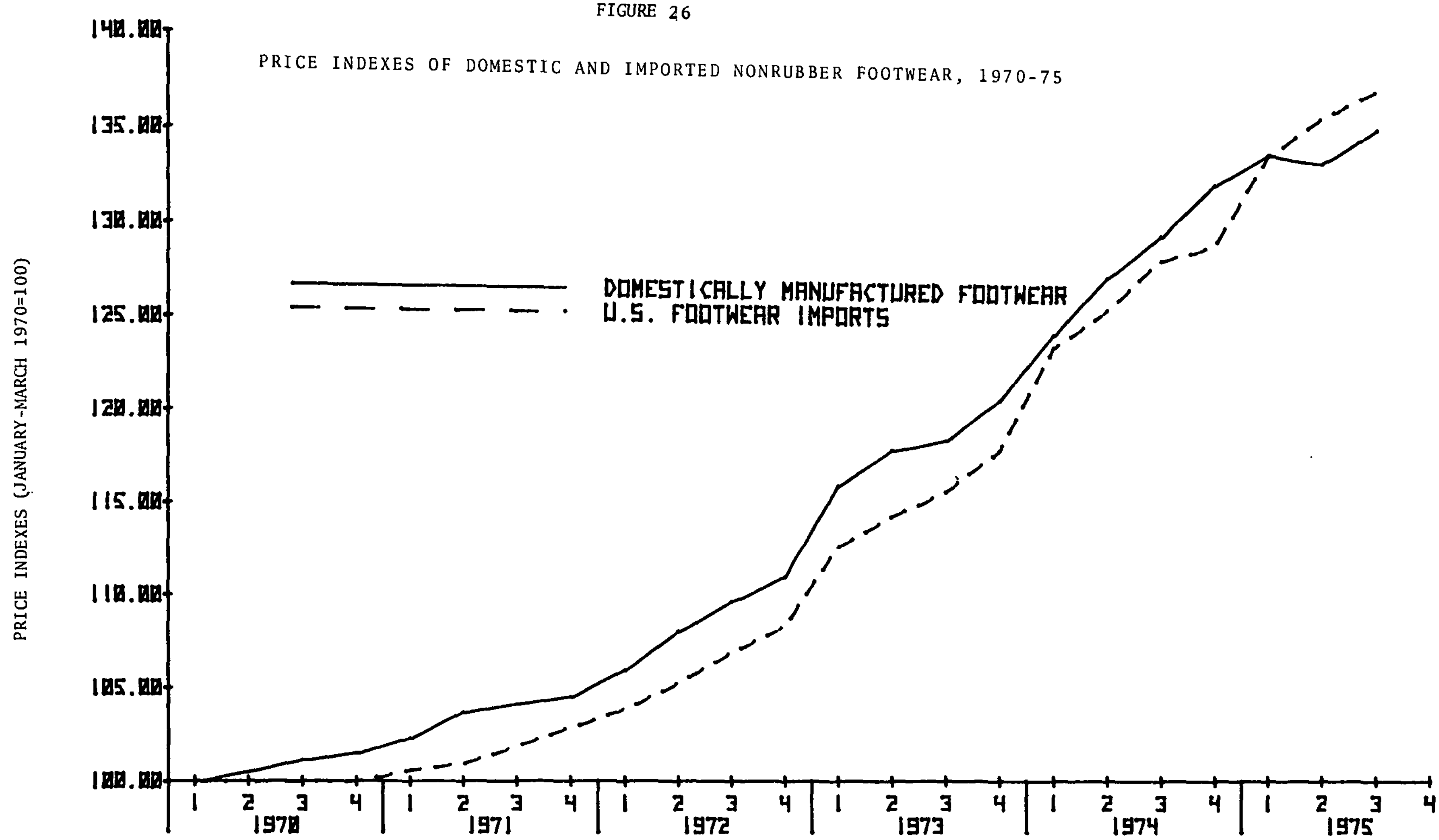
U.S. IMPORTS OF NONRUBBER FOOTWEAR: PRICE INDEXES, BY CATEGORIES, 1970-75



Source: Based on data in Table 46.

FIGURE 26

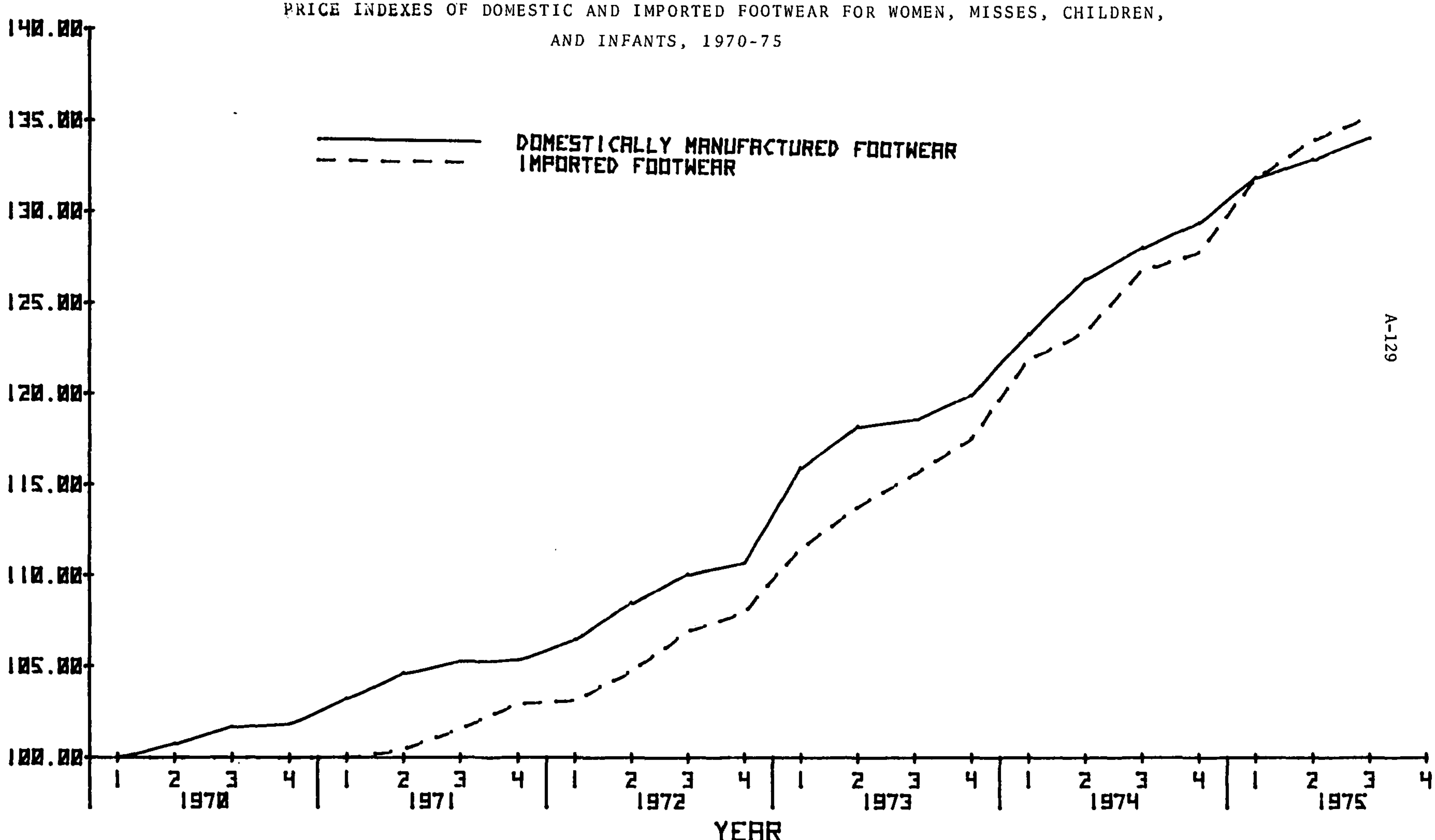
PRICE INDEXES OF DOMESTIC AND IMPORTED NONRUBBER FOOTWEAR, 1970-75



Source: Based on data in tables 45 and46.

FIGURE 27

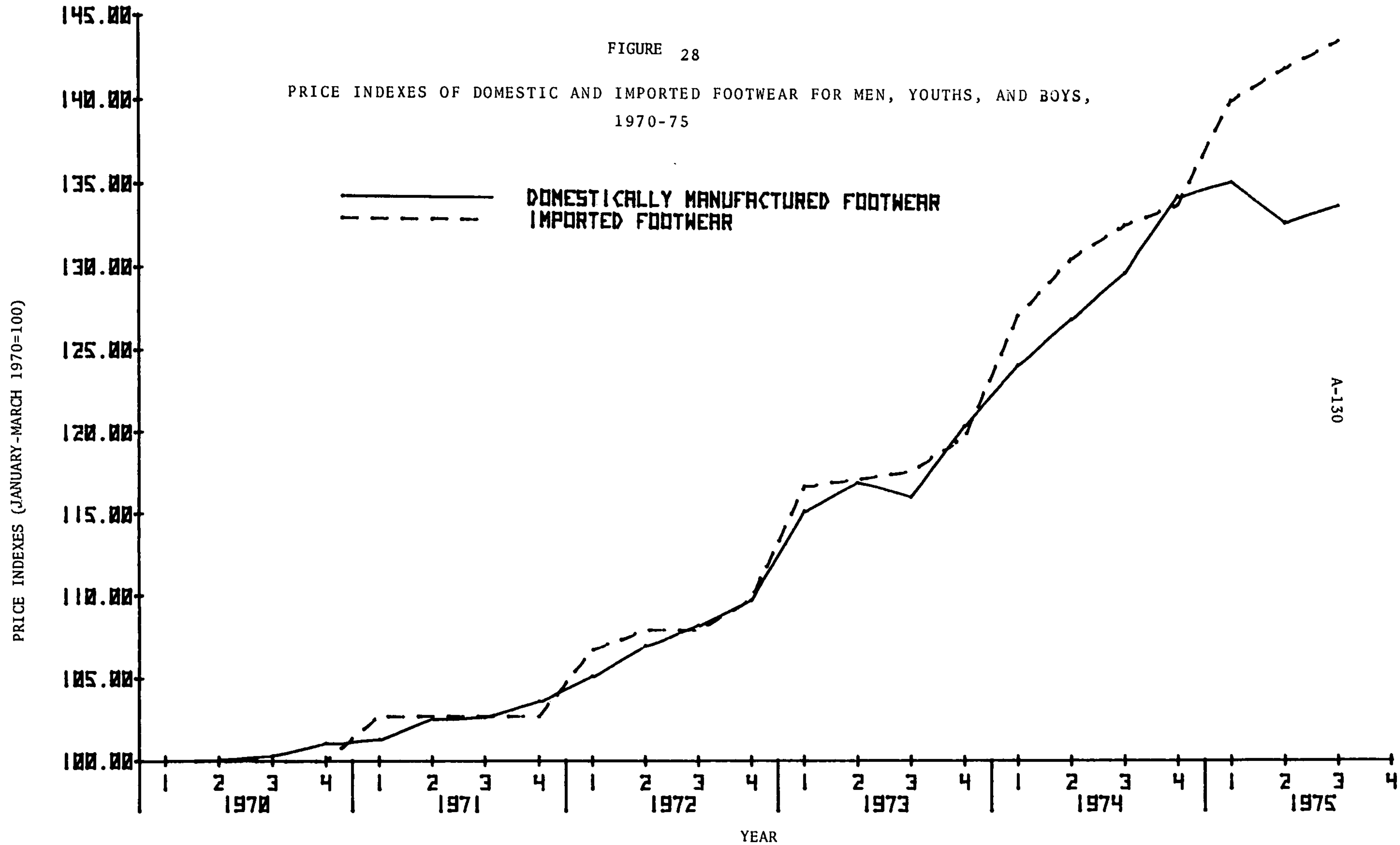
PRICE INDEXES OF DOMESTIC AND IMPORTED FOOTWEAR FOR WOMEN, MISSES, CHILDREN, AND INFANTS, 1970-75



Source: Based on data in tables 45 and 46.

FIGURE 28

PRICE INDEXES OF DOMESTIC AND IMPORTED FOOTWEAR FOR MEN, YOUTHS, AND BOYS, 1970-75



Source: Based on data in tables 45 and 46.

Wholesale price ranges.--Table 47 compares the percentage distribution of importers' sales with that of the domestic sales, by types and price ranges, for 1974. For men's dress and casual shoes, relatively more imports than domestic production are concentrated in the lower and higher price ranges. Domestic output is concentrated in the medium price ranges. In the women's-flat-shoes category, slightly over half of total shipments, both domestic and imported, are in the lowest price range. Women's shoes with heels 1 inch or higher make up the largest single category of imported shoes (52 percent of total imports); the imported shoes are concentrated in the lower price ranges, while domestic production is centered in the medium price ranges. Imported misses', children's, and infants' shoes fall almost exclusively into the lowest price categories; domestic production of these shoes is dispersed among the various price ranges.

Profit-and-loss experience of domestic producers

The financial data in this section were compiled from data submitted by 125 producers of footwear, but exclude data on rubber and canvas footwear. Questionnaires were sent to 179 firms, which included the 22 largest on the basis of their production in 1974. Responses were received from these 22 manufacturers and are included in this section of the report. The remaining companies were selected by random sample and were arrayed into six size groups based on production figures for 1974. Sales, profits, and so forth for total establishment operations in which footwear was produced, by size groups, are shown in table I, pg. 134; financial experience on only footwear operations is shown in table II, pg. 136. In each year the footwear operations account for approximately 97-98 percent of total establishment operations.

Sales of footwear increased each year during the 5-year period, increasing steadily from \$2.8 billion in 1970 to \$3.6 billion in 1974. Gross profits followed the same trend as sales, increasing each year, but net operating profits fluctuated from a high of \$194 million in 1971 to a low of \$183 million in 1973. The ratio of net operating profit to net sales showed a steady decline from 6.7 percent in 1970 to 5.1 percent in 1974 (table III, pg. 138)

With regard to footwear operations only, the two largest size groups showed a better profit return than the other four, even though the profit ratio showed a downward trend. The highest level of return reached by the less-than-200,000-pairs group was in 1972, when it reached 3.4 percent.

The 1,000,000-to-1,999,999-pairs group had reasonable returns of 6.6 percent in 1970 and 5.5 percent in 1971 before the returns decreased to 1.8 percent in 1972, 1.6 percent in 1973, and 1.4 percent in 1974. The profit ratios for the 500,000-to-999,999-pairs group was reasonably stable, staying within a range of 4.1 to 5.2 percent. The return on sales for the 200,000-to-499,999-pairs group was unstable in all 5 years.

Only 13 companies reported losses in 1970 but 33 companies reported operating losses in 1974.

The Commission did not request partial-year financial data for the companies, but some of the companies reported data that included part of the year 1975.

Table I.--Profit-and-loss experience of producers of footwear, except protective-type and canvas, on total establishment operations in which such footwear was produced, 1970-74

Size-of-output group and year	Net sales	Cost of sales	Gross profit	Selling, administrative, and general expenses	Net operating profit	Other (expense), net	Net profit or (loss) before taxes	Ratio of net operating profit to net sales
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent
Less than 200,000 pairs								
1970	63,744	44,517	19,227	15,714	3,513	(585)	2,928	5.5
1971	73,268	49,205	24,063	18,975	5,088	(525)	4,563	6.9
1972	81,916	55,055	26,861	20,761	6,100	(239)	5,861	7.5
1973	98,280	64,945	33,335	24,968	8,367	(211)	8,156	8.5
1974	115,193	77,922	37,271	30,659	6,612	(489)	6,123	5.7
200,000 to 499,999 pairs								
1970	207,371	169,400	37,971	33,862	4,109	(2,904)	1,205	2.0
1971	201,216	158,272	42,944	34,460	8,484	(1,646)	6,838	4.2
1972	223,254	177,166	46,088	38,130	7,958	(1,253)	6,705	3.6
1973	238,194	195,762	42,432	40,157	2,275	(2,327)	(52)	1.0
1974	274,828	218,483	56,345	44,197	12,148	(2,413)	9,735	4.4
500,000 to 999,999 pairs								
1970	210,488	166,322	44,166	35,347	8,819	(1,968)	6,851	4.2
1971	250,343	199,188	51,155	37,970	13,185	(1,212)	11,973	5.3
1972	285,781	227,976	57,805	43,526	14,279	(1,289)	12,990	5.0
1973	312,723	246,425	66,298	50,835	15,463	(1,531)	13,932	4.9
1974	353,998	275,587	78,411	58,081	20,330	(4,875)	15,455	5.7
1,000,000 to 1,999,999 pairs								
1970	429,079	341,497	87,582	60,027	27,555	(4,100)	23,455	6.4
1971	471,877	370,747	101,130	75,003	26,127	(4,927)	21,200	5.5
1972	483,734	395,517	88,217	78,167	10,050	(3,461)	6,589	2.1
1973	545,998	451,917	94,081	83,000	11,081	(6,604)	4,477	2.0
1974	545,583	449,925	95,658	85,916	9,742	(9,379)	363	1.8

Table I.--Profit-and-loss experience of producers of footwear, except protective-type and canvas, on total establishment operations in which such footwear was produced, 1970-74--Continued

Size-of-output group and year	Net sales	Cost of sales	Gross profit	Selling, administrative, and general expenses	Net operating profit	Other (expense), net	Net profit or (loss) before taxes	Ratio of net operating profit to net sales
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent
2,000,000 to 3,999,999 pairs								
1970	471,060	351,459	119,601	86,813	32,788	(8,880)	23,908	7.0
1971	479,963	358,130	121,833	91,504	30,329	(5,920)	24,409	6.3
1972	547,914	412,605	135,309	99,003	36,306	(6,144)	30,162	6.6
1973	599,035	455,373	143,662	113,230	30,432	(7,534)	22,898	5.1
1974	616,855	463,085	153,770	123,779	29,991	(13,792)	16,199	4.9
More than 4,000,000 pairs								
1970	1,558,037	1,156,238	401,799	282,899	118,900	(7,884)	111,016	7.6
1971	1,651,428	1,224,827	426,601	302,504	124,097	(4,853)	119,244	7.5
1972	1,847,418	1,395,535	451,883	326,973	124,910	(4,570)	120,340	6.8
1973	1,910,333	1,433,057	477,276	350,732	126,544	(6,453)	120,091	6.6
1974	1,951.981	1,450,424	501,557	375,534	126,023	(13,060)	112,963	6.5

Source: Compiled from data submitted to the U.S. International Trade Commission by the domestic producers.

Table II.--Profit-and-loss experience of producers of footwear except protective-type and canvas, on footwear operations only, 1970-74

Size-of-output group and year	Net sales	Cost of sales	Gross profit	Selling, administrative, and general expenses	Net operating profit	Other (expense), net	Net profit or (loss) before taxes	Ratio of net operating profit to net sales
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent
Less than 200,000 pairs								
1970	38,652	29,796	8,856	7,862	994	(653)	341	2.6
1971	41,223	31,086	10,137	9,227	910	(707)	203	2.2
1972	43,020	32,594	10,426	8,978	1,448	(481)	967	3.4
1973	47,143	35,357	11,786	10,288	1,498	(413)	1,085	3.2
1974	54,608	41,683	12,925	12,098	827	(645)	182	1.5
200,000 to 499,999 pairs								
1970	200,504	164,531	35,973	32,443	3,530	(2,920)	610	1.8
1971	193,947	153,033	40,914	33,072	7,842	(1,654)	6,188	4.0
1972	213,195	169,502	43,693	35,932	7,761	(1,284)	6,477	3.6
1973	229,104	187,161	41,943	37,833	4,110	(2,340)	1,770	1.8
1974	268,780	213,904	54,876	43,111	11,765	(2,051)	9,714	4.4
500,000 to 999,999 pairs								
1970	207,397	164,086	43,311	34,817	8,494	(1,635)	6,859	4.1
1971	246,404	196,323	50,081	37,320	12,761	(824)	11,937	5.2
1972	280,717	224,323	56,394	42,695	13,699	(876)	12,823	4.9
1973	305,986	241,618	64,368	49,759	14,609	(1,079)	13,530	4.8
1974	335,876	264,404	71,472	56,633	14,839	(555)	14,284	4.4
1,000,000 to 1,999,999 pairs								
1970	413,977	329,167	84,810	57,578	27,232	(3,759)	23,473	6.6
1971	448,455	351,130	97,325	72,813	24,512	(4,580)	19,932	5.5
1972	455,661	372,122	83,539	75,362	8,177	(3,189)	4,988	1.8
1973	509,311	421,136	88,175	79,830	8,345	(6,010)	2,335	1.6
1974	510,987	420,878	90,109	82,983	7,126	(7,892)	(766)	1.4

Table II.--Profit-and-loss experience of producers of footwear, except protective-type and canvas, on footwear operations only, 1970-74 --Continued

Size-of-output group and year	Net sales	Cost of sales	Gross profit	Selling, administrative, and general expenses	Net operating profit	Other (expense), net	Net profit or (loss) before taxes	Ratio of net operating profit to net sales
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent
2,000,000 to 3,999,999 pairs								
1970	471,060	351,459	119,601	86,813	32,788	(8,880)	23,908	7.0
1971	479,963	358,130	121,833	91,504	30,329	(5,920)	24,409	6.3
1972	539,248	406,062	133,186	97,802	35,384	(5,743)	29,641	6.6
1973	598,026	454,851	143,175	112,561	30,614	(7,767)	22,847	5.1
1974	616,855	463,085	153,770	123,779	29,991	(13,792)	16,199	4.9
More than 4,000,000 pairs								
1970	1,474,660	1,106,889	367,771	251,635	116,136	(7,911)	108,225	7.9
1971	1,568,850	1,175,923	392,927	272,004	120,923	(4,628)	116,295	7.7
1972	1,755,280	1,342,372	412,908	292,919	119,989	(4,727)	115,262	6.8
1973	1,818,462	1,380,415	438,047	314,329	123,718	(6,798)	116,920	6.8
1974	1,854,918	1,396,619	458,299	336,639	121,660	(13,209)	108,451	6.6

Source: Compiled from data submitted to the U.S. International Trade Commission by the domestic producers.

Table III.--Profit-and-loss experience of producers of footwear, except protective-type and canvas, by establishment operations and those for footwear only, 1970-74

Size-of-output group and year	Net sales	Cost of sales	Gross profit	Selling, administrative, and general expenses	Net operating profit	Other (expense), net	Net profit before taxes	Ratio of net operating profit to net sales
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent
Establishment operations:								
1970	2,939,779	2,229,433	710,346	514,662	195,684	(26,321)	169,363	6.7
1971	3,128,095	2,360,369	767,726	560,416	207,310	(19,083)	188,227	6.6
1972	3,470,017	2,663,854	806,163	606,561	199,602	(16,956)	182,646	5.8
1973	3,704,563	2,847,479	857,084	662,922	194,162	(24,660)	169,502	5.2
1974	3,858,438	2,935,426	923,012	718,166	204,846	(44,008)	160,838	5.3
Footwear operations:								
1970	2,806,250	2,145,928	660,322	471,148	189,174	(25,758)	163,416	6.7
1971	2,978,842	2,265,625	713,217	515,941	197,276	(18,313)	178,963	6.6
1972	3,287,121	2,546,975	740,146	553,687	186,459	(16,300)	170,159	5.7
1973	3,508,033	2,720,538	787,495	604,600	182,895	(24,408)	158,487	5.2
1974	3,642,024	2,800,573	841,451	655,243	186,208	(38,144)	148,064	5.1

Source: Compiled from data submitted to the U.S. International Trade Commission by the domestic producers.

The Question of Imports as Substantial Cause of Serious Injury

Apparent U.S. consumption

Nonrubber footwear is the predominant type of footwear sold in the United States, accounting for more than three-quarters of the consumption of all footwear other than the protective type during each of the years 1954-74. Comparison of the 3-year averages 1954-56 and 1972-74 shows that apparent U.S. consumption of nonrubber footwear, rose at an average annual rate of approximately 1.7 percent--a rate of increase greater than the 1.3 percent average annual increase in the U.S. population during the same period. 1/ On a per capita basis, average annual U.S. consumption of nonrubber footwear rose from 3.5 pairs in 1954-56 to 3.9 pairs in 1972-74, an average annual rise of 0.4 percent. However, this rise was erratic, with many year-to-year increases and decreases. The highest level of per capita consumption--4.2 pairs--occurred in 1968.

Consumption of nonrubber footwear in 1970-74 decreased at an average annual rate of 1.9 percent, dropping from 828 million pairs to 767 million pairs (table 1). The 1.1 percent average annual increase which occurred from 1970 to 1972 was more than offset by the sharp drop in consumption in 1973 and 1974 at an annual rate of 7.6 percent. Consumption during January-September 1975 was 4.3 percent lower than in the corresponding period of 1974. Per capita consumption for 1970-74 dropped from 4.0 pairs to 3.6 pairs,

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1/ The calculation of average annual rates of change between 1954-56 and 1972-74 are based on annual data for 1954-56 and 1972-74. The 3-year averages are used to avoid atypical annual fluctuations.

an average annual rate of 2.7 percent, with the largest actual decreases occurring in 1973 and 1974. The decrease in per capita consumption continued into the first 9 months of 1975, with a drop of 5.0 percent from the corresponding period in 1974.

The sharp drop in consumption of nonrubber footwear beginning in 1973, accelerating through 1974, and continuing into the first 9 months of 1975 coincided with the recession in the U.S. economy. Because of lowered levels of consumer confidence during recession periods, consumer purchases of durable or semidurable articles such as footwear tend to be lessened or postponed.

The share of consumption of nonrubber footwear accounted for by the major categories of footwear did not change significantly during the 1970-74 period, although slight upward trends can be seen in the share of consumption accounted for by athletic footwear and by nonrubber footwear for men, youths, and boys (table 48). 1/ In addition, a slight decrease can be seen in the share held by work shoes. On the average during 1970-74, athletic footwear accounted for 2 percent of consumption, slippers, for 12 percent; and work shoes, for 4 to 5 percent. Nonrubber footwear for women and misses accounted for roughly half of sales; footwear for men, youths, and boys, for a fifth; and footwear for children and infants, about a tenth. While the share of consumption accounted for by the broad footwear categories has remained relatively stable in recent years, the popularity of various identifiable types of footwear within categories often changes. For example, women's boots were in style in the early 1970's and then decreased in fashion importance. In 1975, their popularity again increased.

1/ See table 48a for data excluding zoris and paper slippers.

Imports and market penetration

As shown in the table on the following page, U.S. imports of footwear for women and misses increased their share of the market from 30 percent in 1968 to 52 percent in 1973 and then decreased slightly to 51 percent in 1974. Such imports accounted for 53 percent of the market in both the first 9 months of 1975 and the corresponding period of 1974. Imports of nonrubber footwear for men, youths, and boys supplied 21 percent of apparent domestic consumption in 1968 and 36 percent in 1971; during the period 1972-74 and the first 9 months of 1974 and 1975, imports of such footwear supplied two-fifths of the market.

U.S. imports of footwear for children and infants rose from 19 percent of apparent domestic consumption in 1968 to 35 percent in 1972 and 1973. The ratio dropped to 30 percent in 1974, but then increased to 33 percent in the first 9 months of 1975; the penetration was about the same in the first 9 months of 1974 as in the full year. U.S. imports of work shoes supplied 5 percent of the market in the period 1968-72 and 10 percent in 1974 (see footnote 2 of the table on following page).

The ratio of U.S. imports of athletic footwear to apparent domestic consumption of such footwear has been on a upward trend in recent years. Imports of athletic footwear supplied 20 percent of the market in 1968, 38 percent in 1971, and 44 percent in 1974. As a result of a substantial increase in imports of athletic footwear during the first 9 months of 1975, imports supplied 60 percent of the market in that period, compared with 46 percent in the corresponding period of 1974. However, it should be noted that a substantial portion of the imports include high-quality, high-priced, specialized athletic shoes of a type that are not produced to any great extent

Nonrubber footwear: Ratio of imports to U.S. consumption, 1/ by types, 1968-74, January-September 1974, and January-September 1975

(In percent)

Type	1968	1969	1970	1971	1972	1973	1974	Jan.-Sept. -- 1974	Jan.-Sept. -- 1975
Work	5	5	5	5	5	2/ 9	2/ 10	2/ 13	2/ 11
Athletic	20	18	31	38	40	38	44	46	60
Other:									
Women's and misses'	30	34	40	44	48	52	51	53	53
Men's, youths', and boys'	21	27	31	36	35	37	42	40	40
Children's and infants'	19	25	28	29	35	35	30	31	33
Slippers 3/	-	-	-	-	-	-	-	-	-
Total	25	28	32	35	38	41	41	42	45

1/ Based on quantity.

2/ Data not comparable with those for 1968-72. The production data reported for years prior to 1973 include all "work shoes" regardless of ankle height; those for 1973 and subsequent years include only such shoes of ankle height or higher. (In 1972, production of work shoes less than 6 inches high amounted to 8 million pairs.)

3/ U.S. imports of leather slippers entered under TSUS item 700.32 have been negligible in recent years. However, it should be noted that the definition of "slippers" is a restrictive definition that applies to only a small part of the slippers imported into the United States.

Source: Compiled from official statistics of the U.S. Department of Commerce (a small part of the imports are estimated, based on official statistics).

in the United States.

Precise data are not available with respect to imports of house slippers; thus, the share of the market supplied by such imports is not known. However, it is believed, that there is a substantial volume of inexpensive slippers imported annually. It is estimated that such imports, in recent years, have accounted for between one-third and two-thirds of the market.

Factors affecting U.S. consumption

Various factors explain the increasing U.S. consumption of footwear. The following appear to be the most significant.

Population.--Although the U.S. population has continued to increase in recent years, the annual rate of growth has declined continuously since the beginning of the 1960's. The annual rate of increase averaged 1.05 percent during the period 1970-74, compared with 1.26 percent during the 1960's and 1.79 during the 1950's. Expressed in absolute terms, the annual increase in the U.S. population averaged nearly 3 million in the late 1950's but only about 2 million in the early 1970's.

Changes in the age composition of the U.S. population have had a significant influence not only on the volume but also on the types of nonrubber footwear consumed. Between 1970 and 1974, as shown in the table on the following page, the greatest gains in population were in the 25-34-year age bracket, with an average annual growth rate of 4.63 percent, followed by increases in the ages 15-24 and 65 and older, which increased annually by 2.89 percent and 2.07 percent, respectively. The population aged between 35 and 64 remained relatively stable, while the population of children, aged 14 and under, had both a negative annual growth rate and a declining absolute population.

The growth in the population aged 15-34, coupled with the trend toward casual living and leisure activities, has increased the consumption of casual, nondressy footwear. The rise in the share of the U.S. population aged 65 and over has also altered the composition of U.S. footwear consumption. Persons in that age category tend to buy more traditional, dressy shoes; however, because they are mostly retired, with limited income, their per capita purchases of footwear and other wearing apparel are likely to be below the average for the total population. This factor has been offset somewhat by the large increase in population between the ages of 15 and 24, a group which has tended to be rather affluent as well as style conscious.

Percentage distribution and changes in annual growth rate of the U.S. population, by age groups, specified dates 1950 to 1974

Age groups	Percent distribution				Annual rate of increase or decrease (-) in population in each age group		
	Apr. 1 1950	Apr. 1 1960	July 1, 1970	July 1, 1974 1/	1960 over 1950	1970 Over 1960	1974 over 1970
All ages	100.0	100.0	100.0	100.0	1.79	1.26	1.05
Under 5 years	10.8	11.3	8.4	7.7	2.27	-1.70	-1.21
5-14	16.3	19.8	20.1	18.2	3.81	1.43	-1.62
15-24	14.7	13.4	17.4	18.3	.87	3.89	2.89
25-34	15.7	12.7	12.2	14.1	-.35	.85	4.63
35-44	14.1	13.4	11.4	10.8	1.26	-.40	-.34
45-54	11.4	11.5	11.4	11.3	1.85	1.17	.70
55-64	8.8	8.8	9.2	9.2	1.77	1.73	1.13
65 and older	8.2	9.0	9.9	10.3	2.87	2.18	2.07

1/ Estimated by U.S. Bureau of Census.

Disposable personal income.--Per capita disposable income has increased substantially since 1960 (table 49). It has risen by 139 percent, resulting in an average growth rate of 6.4 percent a year. This growth in income has allowed for corresponding increases in personal consumption expenditures. As the following table shows, however, this rise has not been fully shared by the footwear industry. Per capita expenditures for all types of footwear, including rubber and canvas, rose by 5.1 percent annually in the 1960-74 period, compared with increases of 6.1 percent for all goods and services and 6.4 percent for clothing. Yet the rise in personal disposable income appears to be a major factor affecting persona; expenditure and consumption of footwear in the United States, as indicated in the following table.

Personal expenditures in the United States, total and per capita, for all goods and services, for footwear, and for clothing, 1960, 1965, and 1968-74 1/

Item	All goods and services	Footwear	Clothing 2/
	Total expenditures (billion dollars) 3/		
1960	325.2	4.5	22.7
1965	432.8	5.4	30.4
1968	536.2	7.0	39.1
1969	579.5	7.8	42.2
1970	617.6	8.0	44.7
1971	667.1	8.4	48.7
1972	729.0	9.3	53.7
1973	805.2	10.4	59.7
1974	876.7	10.5	63.6
	Per capita expenditures 4/		
1960	$1,800	$25	$126
1965	2,224	28	156
1968	2,664	35	194
1969	2,851	38	208
1970	3,008	39	217
1971	3,215	41	235
1972	3,484	44	257
1973	3,819	49	283
1974	4,129	50	300
	Percent of increase		
Increase, 1974 over 1960:			
Total	170	133	180
Annual average	7.3	6.2	7.6
Per capita	129	100	138
Annual average	6.1	5.1	6.4

1/ Expenditures in current dollars.
2/ Includes accessories but excludes footwear.
3/ From U.S. Department of Commerce, Office of Business Economics, The National Income and Product Accounts of the United States, 1929-1965: Statistical Tables, and Survey of Current Business, July 1974.
4/ Computed on the basis of the population data shown in table 47.

Interviews with purchasers of footwear.--In an effort to develop additional information on the relative competitiveness of imported and domestic footwear, the Commission interviewed buyers for 31 of the largest footwear retail companies in the United States in addition to taking the testimony of the buyers and retailers in the Commission's public hearings. With respect to the interviews outside the hearings, the primary objectives were to ascertain the crucial factors in each buyer's decision on whether to import a particular style or type of footwear and to obtain other information pertinent to the investigation. All 31 companies purchase both domestic and imported footwear, and 11 of the firms supply part of their footwear requirements through either wholly or partly owned manufacturing facilities. At least five of the firms market footwear on a wholesale as well as a retail basis.

Virtually all of the buyers interviewed stated that fashions generally originate abroad, though a few insisted that many styles (particularly men's) are now originating in the United States and are being copied in Europe and the Far East. Many indicated that domestic manufacturers as a group have been slow to respond to style changes, some buyers noted that in many cases a "response" was futile, owing to the short life span of typical fashion items and the relatively long time required to retool production. There was near unanimous agreement that finding producers in the United States willing to produce a specifically requested style was a major problem.

Most buyers indicated that fashion is the single most important determinant in the decision to import. They stated that foreign designers tend to be more innovative and that certain styles are often not available from domestic producers. Also mentioned with regard to fashion was the belief that the value of imported shoes, particularly those from Europe, is enhanced to some degree by their "snob appeal."

Additional comments by many buyers indicated that price was the principal factor in the inability of domestic producers to compete with respect to fashion. These respondents felt that domestic manufacturers are unable to produce a competitively styled shoe at a competitive price. The costs and risks (implicit cost) involved in retooling equipment for short production runs and wage differentials appeared to be the main problems involved in production of a competitively priced fashionable shoe by a domestic manufacturer. Although many domestic firms have remained production oriented as opposed to embracing the marketing concept, many of these firms have found it economically unfeasible to compete with foreign manufactured footwear.

Though much mention was made of standard problems associated with importing, i.e., the long lead time between ordering and delivery and inadequate quality control, these problems seem to have diminished somewhat in importance. Virtually all the buyers interviewed indicated that, owing to recent increases in demand, many domestic producers now have a large backlog of orders and often require up to 6 months for delivery. There also seemed to be a consensus that quality control was no longer a problem peculiar to imports, and that in general the spoilage ratio for imported footwear was comparable with that for the domestic.

According to most buyers, the fact that foreign producers require letters of credit to secure transactions remains a definite deterrent to importing. This practice requires the purchaser's money to be tied up for a much longer period than is typical in transactions with domestic manufacturers.

The buyers interviewed had several observations concerning the general state of the U.S. footwear industry. Many buyers indicated that the trend toward mass production (longer production runs) of footwear in the United States is associated with a decreased flexibility in adapting production to style changes as well as with a deterioration in craftsmanship.

Many buyers noted that while many domestic facilities are slowly succumbing to the pressures presented by imported footwear, many others are strained to capacity. These buyers indicated that the "innovators" and "risk takers" are faring extremely well, while other conservatively managed or undercapitalized firms are being "weeded out" by competitive pressures.

Review of Footwear News.--In an effort to ascertain fashion trends in imported and domestic footwear, the Commission reviewed copies of Footwear News (Jan. 1972-Oct. 1975) a weekly trade publication covering developments in the footwear industry. It was hoped that such a study might reveal pertinent information regarding the respective fashion trends and their effect on the competitive posture of imported and domestic footwear in the United States.

With few notable exceptions, it appears from this source, that basic footwear fashions originate in Europe, particularly Paris and Rome. Footwear styles revealed in fashion shows there, usually held 6 to 9 months before the advent of the particular season they are designed for, generally reflect the future course of U.S. styling. It is probable that this European initiative is not so much a result of domestic producers' inability to anticipate consumer preference as it is a reflection of the fact that footwear fashions are supplemental, or secondary, to clothing fashions, which have traditionally originated in Europe. As Paris fashion shows were introducing the "bulky" look in women's clothes in 1971, they were simultaneously introducing the bulky look in shoes, with increased emphasis on sole design. U.S. producers followed suit then, just as they are doing now with emphasis on a thinner and sleeker look in clothes and footwear.

It is difficult to determine whether the European fashion initiative is to the detriment or advantage of U.S. producers. It is detrimental not only because U.S. styles are sometimes viewed by the fashion-conscious buyer as only copies of the European originals, but also because U.S. producers often have less time to adapt their productive facilities. However, U.S. producers are in the advantageous position of being able to incorporate the European motif into their own ideas regarding future consumer buying habits.

In the material covered, there was no indication of the relative ability or inability of domestic and foreign producers to produce or market particular footwear styles. The lack of such information in Footwear News, which is otherwise thorough and comprehensive in its reporting, might be presumed to indicate that there is little or no such distinction. However, it might also be indicative of the problems in reporting posed by the complex structure of the U.S. footwear industry, where a number of firms market both domestically manufactured and imported footwear, sold in a multitude of styles with varying degrees of similarity.

The Commission staff also searched the Jan. 1972-Oct. 1975 issues of Footwear News for articles relating to the effect import competition has had on individual domestic footwear manufacturers.

During the 46-month period covered there were 22 instances reported in which domestic producers either terminated footwear production completely or closed one or more plants, and attributed such closings to import competition. An additional four firms entered chapter XI bankruptcy proceedings or reported severe losses, blaming imports as a prime cause of their insolvency. Eight firms were reported as having substituted imports for types of footwear they had previously manufactured themselves, while four more formed import divisions to supplement their domestic lines. Conversely, four domestic firms marketing imports in addition to their own lines reported having expanded their footwear production to replace part or all of their import requirements.

It should be noted that in many more articles than those cited in the preceding pagagraph in which domestic manufacturers reported closings, losses, or bankruptcy, causation was not mentioned or was expressed in general terms--"financial difficulties," for example.

Consumer-behavior studies.-- In addition to information gained through testimony, fieldwork, and the survey of Footwear News, the Commission examined a group of three consumer-behavior studies conducted by Yandkelovich, Skelly and White, Inc., The Gallup Organization, Inc, and National Family Opinion, Inc., for the American Footwear Institute and a 10-year-old study done by Elmo Roper & Associates. 1/ The objective of these studies was to determine the reasons behind the failure of consumer expenditures on footwear to keep pace with or run ahead of the rise in real purchasing power of the U.S. consumer.

A principal point brought out in the majority of the studies was that the footwear marketplace has undergone a metamorphosis relating to the changing lifestyle of the consumer. Roper pointed out 10 years ago that the market for dress shoes was shrinking, and the greatest potential lay in the casual shoe market. Yankelovich further emphasized this fact by pointing out that former dress occasions are now casual, and that there has been a deemphasis of high fashion.

The primary reason for purchasing shoes was determined to be replacement for either wornout or out-of-style merchandise. The extent to which this reason was given varied with respect to the sex and age of the respondent; however, in general, replacement was given as the main reason.

1/ Roper Elmo & Associates, Study of Consumer Attitudes Toward Shoes, August 1965. Dr. George H. Brown. 1974 Consumer Research on Footwear, 1975.

While consumers are considered to be price conscious, comfort and looks are the principal factor in the purchasing decision. Store loyalty and brand preference play a very minor role, while advertising and sales promotion play practically no role. Men tend to be more concerned about the practicality of a certain shoe, while women may be more concerned about stylishness.

Many consumers appear to find shoe purchasing an unpleasant experience. High prices, poor service, and styling and size problems tend to accentuate this attitude. Shoe purchasing is considered to be a practical matter.

With regard to quality, consumers do not tend to equate price with quality, and do not believe that there has been a decline in quality recently. Leather is considered to connote quality; however, consumers have a difficult time distinguishing leather from manmade products. Roper noted in his sutdy that the public is highly receptive to the use of new synthetic materials, but in the more recent studies it was noted that consumers consider synthetic materials as inferior. One consumer remarked with regard to shoes (principally polyurethane) carried in discount stores, "Discount stores carry shoes from Taiwan and Hong Kong which burn the feet."

Overall, consumers expressed a general level of satisfaction with the value of footwear they are purchasing. This satisfaction appears to cover all price levels and sex of footwear purchasers.

With respect to the use of casual as opposed to dress shoes, Roper pointed out that men wear dress shoes more often than women, and have been slower to react to the casual trend. The National Family Opinion poll also pointed out that females maintain a greater percentage of less formal shoes than men, and that only 10 percent of women's dress shoes compared with 25 percent of men's dress shoes, are worn every day.

Gallup made mention of the varying types of men's and women's dress footwear. For men, dress boots are worn for basically the same occasions as dress shoes, while for women dress boots and dress shoes are more highly differentiated. Also, sandals play a much greater role for women than for men, while women's use of sneakers is less highly specialized than men's. Sneakers account for the largest share of the children's market. Men also tend to purchase more special-purpose shoes than women.

Men and women tend to differ as to the basic reasoning in the actual purchase decision. The purchase of men's and children's footwear is more likely to be as a replacement for worn-out shoes, while the women's purchase is concerned with variety. Color plays a more extensive role for women and children than for men. Women tend to be concerned with finding a shoe that will go with any outfit, the right color shoe, a shoe needing no breaking in, and softness and extra support, while men are concerned with finding a shoe of the finest leather from a well-known manufacturer. Generally, men are much less concerned with style than women, while more concerned with quality. In this respect, men are more brand conscious than women.

Roper also found a strong tendency for men to be much more concerned with quality than women, and more interested in leather than vinyl shoes. As far as children's shoes are concerned, the children make the actual purchase decision, with the parents being most concerned with the shoe fit and price. Both men and women believe that youths are the current source of style trends, as opposed to the high-fashion leaders of the past.

In terms of general satisfaction level with a footwear purchase, satisfaction appears to be high at all price levels of men's, women's, and children's shoes; however, men appear to have a lower level of satisfaction with respect to low-priced shoes than do women. Men generally seen to be less satisfied with the overall buying process than do women.

As far as shoe ownership is concerned, Yankelovich found that the average price for a pair of women's shoes is in the $7.50-$15.00 range, while the bulk of men's shoes sell for over $15.00, with one-third selling for over $22.50. The male respondents owned from 3 to 12 pairs of shoes, reporting the median number owned to be 3, while the female respondents owned from 4 to more than 30 pairs, with the median reported to be 10.

Industry survey of footwear fashion sources.--In an attempt to better understand and predict footwear styles and sources used by line builders, 1/ the AFIA obtained a technical assistance grant from the Economic Development Administration. The grant was utilized to make a study of the origins of fashion ideas. 2/ The study attempted to show such origins for different geographic areas, different product lines according to age and sex of the wearer, and different price-range market sources. Although the study is quite useful in showing the first place the industry looks for ideas and news of fashion trends--e.g., travel, retailers, customer information, and trade publications--it does not explain how the fashion ideas originate and what causes them to be accepted or rejected by consumers. Its real significance is in shedding light on the complexity of the process of formulating footwear fashion ideas owing to the large number of sources of fashions and problems in translating them successfully into sales.

1/ A line builder gathers ideas from a variety of sources and develops a line of footwear for his customers. A line of shoes may be for one or more age/sex groups.

2/ Footwear Fashion Sources Used by Line Builders. . ., prepared by the American Footwear Industries Association under a Technical Assistance Grant from the Economic Development Administration, May 1975.

Information obtained from reports filed with the Securities and Exchange Commission

The Commission staff reviewed annual reports and other material (10-K forms) filed with the Securities and Exchange Commission by 36 companies that produce a million or more pairs of shoes annually. Many of the respondents also import footwear. Of these 36 firms, 7 made specific references to competition experienced from imported footwear. The pertinent comments from these firms are quoted below.

> "Competition from foreign imports has continued to increase during the past several years and has contributed significantly to the decline in sales and profit of the Registrant." (Shaer Shoe Corp., from 10-K, 1974.)

> "Foreign shoe manufacturers have become a significant competitive factor in the shoe industry inasmuch as they are often able to produce a similar product at lower costs than domestic manufacturers." (Lehigh Valley Industries, Inc., form 10-K, 1974.)

> "In addition to competition from domestic manufacturers, Gettysburg is faced with increasing competition from shoes manufactured abroad." (Dero Industries, Inc., form 10-K, 1973.)

> "The company faces substantial competition with respect to its products from domestic and foreign competition." (Hyde Athletic Industries, Inc., form 10-K, 1975.)

> "In recent years, production of men's dress shoes in the United States has remained relatively constant, while imports to the United States of men's dress shoes have increased substantially." (Weyenberg Shoe, form 10-K, 1974.)

> "Domestic shoe manufacturers were adversely affected in the early 1970's by competition from imported shoes, which have captured a significant share of the United States shoe market on the basis of styling and underpricing." (Kayser-Roth Shoe Division, form 10-K, 1975.)

"It must also be kept in mind that the year ended September 30, 1972, was not a typical year for the company. This decline in sales was due to the intense competition from foreign imports and the general economic conditions prevalent during the year." (Certified Creations, form 10-K, 1973.)

APPENDIX A

PART 1A OF SCHEDULE 7 OF THE TARIFF SCHEDULES OF THE UNITED STATES ANNOTATED (1975)

Item	Stat. Suf-fix	Articles	Units of Quantity	Rates of Duty	
				1	2

PART 1. - FOOTWEAR; HEADWEAR AND HAT BRAIDS; GLOVES; LUGGAGE, HANDBAGS, BILLFOLDS, AND OTHER FLAT GOODS

Subpart A. - Footwear

Subpart A headnotes:

1. This subpart covers boots, shoes, slippers, sandals, moccasins, slipper socks (socks with applied soles of leather or other material), scuffs, overshoes, rubbers, arctics, galoshes, and all allied footwear (including athletic or sporting boots and shoes) of whatever material composed, and by whatever method constructed, all the foregoing designed for human wear except --
   (i) footwear with permanently attached skates or snowshoes (see part 5D of this schedule),
   (ii) hosiery (see part 6C of schedule 3), and
   (iii) infants' knit footwear (see part 6F of schedule 3).

2. For the purposes of this subpart --
   (a) the term "huaraches" (item 700.05) means a type of leather-soled sandal having a woven-leather upper laced to the insole, with the insole machine-stitched to the outsole, and having a heel which is nailed on;
   (b) the term "McKay-sewed footwear" (item 700.10) means footwear the soles of which are sewed to the upper by means of a McKay chainstitch, with the stitching passing through the outsole, upper, lining, and insole;
   (c) the term "moccasins" (item 700.15) means footwear of the American Indian handicraft type, having no line of demarcation between the soles and the uppers;
   (d) the term "welt footwear" (items 700.25 through 700.29) means footwear constructed with a welt, which extends around the edge of the tread portion of the sole, and in which the welt and shoe upper are sewed to a lip on the surface of the insole, and the outsole of which is sewed or cemented to the welt;
   (e) the term "slippers" (item 700.32) means footwear of the slip-on type without laces, buckles, zippers, or other closures, the heel of which is of underwedge construction, and (1) having a leather upper permanently trimmed with a real or imitation fur collar, or (2) having a leather upper and a split leather tread sole (including heel) held together by a blown sponge-rubber midsole created and simultaneously vulcanized thereto;
   (f) the term "footwear for men, youths, and boys" (item 700.35) covers footwear of American youths' size 11-1/2 and larger for males, and does not include footwear commonly worn by both sexes; and
   (g) the term "fibers" means unspun fibrous vegetable materials, vegetable fibers, wool, silk, or other animal fibers, man-made fibers, paper yarns, or any combination thereof.

Item	Stat. Suf-fix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty 2
		3.(a) For the purposes of items 700.51 through 700.55, the rubber or plastics forming the exterior surface area specified, if supported by fabric or other material, must coat or fill the supporting material with a quantity of rubber or plastics sufficient to visibly and significantly affect the surface otherwise than by change in color, whether or not the color has been changed thereby.			
		(b) Subject to the provisions of section 336(f) of this Act, the merchandise in item 700.60 shall be subject to duty upon the basis of the American selling price, as defined in section 402 or 402a of this Act, of like or similar articles manufactured or produced in the United States.			

Subpart A statistical headnote:

1. *For the purposes of this subpart --*

(a) the term "athletic footwear" covers footwear of special construction for baseball, football, soccer, track, skating, skiing, and other athletic games, or sports;

(b) the term "work footwear" covers footwear having outsoles 1/4 inch or over in thickness (measured at the ball of the foot) and having uppers of grain leather extending above the ankle;

(c) the term "soled 'moccasins'" covers footwear in which the vamp extends completely under the foot, whether or not seamed, forming both the bottom and the sides to which an outsole is attached;

(d) the term "cement footwear" covers footwear in which the outsole (or midsole, if any) is affixed to the upper by an adhesive without sewing, but not including footwear having vulcanized soles or injection molded soles;

(e) the term "soft sole footwear" covers footwear in which the upper and the tread sole are sewn together in such manner that both are folded inward with their outer surfaces in contact inside the footwear at the seam;

(f) the term "casual footwear" covers footwear constructed with a wedge heel, or with an open toe and so constructed that the heel of the foot is not over 1 inch above the ball of the foot;

(g) the term "boots" covers footwear (other than footwear of oxford height) designed to be worn next to the sock rather than over the shoe;

(h) the term "footwear for men" covers footwear of American men's size 6 and larger for males, and does not include footwear commonly worn by both sexes;

(i) the term "footwear for youths and boys" covers footwear of American youths' size 11-1/2 and larger but not as large as American men's size 6, and does not include footwear commonly worn by both sexes;

(j) the term "footwear for women" covers footwear of American women's size 4 and larger, whether for females or of types commonly worn by both sexes;

(k) the term "footwear for misses" covers footwear of American misses' size 12-1/2 and larger but not as large as American women's size 4, whether for females or of types commonly worn by both sexes;

(l) the term "footwear for children" covers footwear of American children's size 8-1/2 and larger but not as large as the footwear described in statistical headnotes (i) and (k);

(m) the term "footwear for infants" covers all footwear not included in the foregoing statistical headnotes (h), (i), (j), (k), and (l); and

(n) the term "oxford height" covers footwear the upper of which does not extend above the ankle.

Item	Stat. Suf-fix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty 2
		Footwear, of leather (except footwear with uppers of fibers):			
700.05	00	Huaraches	Prs.	20% ad val.	20% ad val.
700.10	00	McKay-sewed footwear	Prs.	10% ad val.	30% ad val.
700.15	00	Moccasins	Prs.	10% ad val.	20% ad val.
700.20		Turn or turned footwear		2.5% ad val.	10% ad val.
	20	*For men, youths, and boys*	*Prs.*		
	45	*For women*	*Prs.*		
	50	*For misses*	*Prs.*		
	60	*For children and infants*	*Prs.*		
		Welt footwear:			
700.25	00	Valued not over $2 per pair	Prs.	17% ad val.	20% ad val.
700.26		Valued over $2 but not over $5 per pair		17¢ per pair	20% ad val.
	10	*Work footwear*	*Prs.*		
		Other:			
	30	*For men*	*Prs.*		
	50	*Other*	*Prs.*		
700.27		Valued over $5 but not over $6.80 per pair		5% ad val.	20% ad val.
	18	*Work footwear*	*Prs.*		
		Other:			
	38	*For men*	*Prs.*		
	48	*Other*	*Prs.*		
		Valued over $6.80 per pair:			
700.28	00	Ski boots	Prs.	Free	20% ad val.
700.29		Other		5% ad val.	20% ad val.
	20	*Athletic footwear other than ski boots*	*Prs.*		
	40	*Work footwear*	*Prs.*		
		Other:			
	60	*For men*	*Prs.*		
	80	*Other*	*Prs.*		
700.30	00	Footwear with molded soles laced to uppers	Prs.	5% ad val.	20% ad val.
700.32	00	Slippers	Prs.	5% ad val.	20% ad val.
		Other:			
700.35		For men, youths, and boys		8.5% ad val.	20% ad val.
		Athletic footwear:			
	05	*Ski boots*	*Prs.*		
	15	*Other athletic footwear*	*Prs.*		
		Work footwear:			
	27	*For men*	*Prs.*		
	29	*For youths and boys*	*Prs.*		
		Soled "moccasins":			
	30	*For men*	*Prs.*		
	35	*For youths and boys*	*Prs.*		
		Other:			
		With soles vulcanized to uppers or with soles simultaneously molded and attached to uppers:			
	40	*For men*	*Prs.*		
	45	*For youths and boys*	*Prs.*		
		Cement footwear:			
	50	*For men*	*Prs.*		
	55	*For youths and boys*	*Prs.*		
		Other:			
	75	*For men*	*Prs.*		
	80	*For youths and boys*	*Prs.*		
		For other persons:			
700.41		Sandals of buffalo leather, the uppers of which consist primarily of straps across the instep and big toe		10% ad val.	20% ad val.
	10	*For women*	*Prs.*		
	20	*For misses*	*Prs.*		
	30	*For children*	*Prs.*		
	40	*For infants*	*Prs.*		

SCHEDULE 7. - SPECIFIED PRODUCTS; MISCELLANEOUS AND NONENUMERATED PRODUCTS
Part 1. - Footwear; Headwear and Hat Braids; Gloves; Luggage, Handbags, Billfolds, and Other Flat Goods

Item	Stat. Suf-fix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty 2
		Footwear, of leather, etc. (con.):			
		Other (con.):			
		For other persons (con.):			
		Other:			
700.43		Valued not over $2.50 per pair......	....	15% ad val.	20% ad val.
	05	*Athletic footwear*.............	*Prs.*		
		Casual footwear:			
	10	*For women*................	*Prs.*		
	15	*Other*.....................	*Prs.*		
		Soled "moccasins":			
	20	*For women*................	*Prs.*		
	25	*Other*.....................	*Prs.*		
		Other:			
		With soles vulcanized to uppers or with soles simultaneously molded and attached to uppers:			
	30	*For women*............	*Prs.*		
	35	*Other*................	*Prs.*		
		Cement footwear:			
	40	*For women*............	*Prs.*		
	45	*For misses*...........	*Prs.*		
	50	*For children*.........	*Prs.*		
	55	*For infants*..........	*Prs.*		
		Other:			
	60	*For women*............	*Prs.*		
	65	*For misses*...........	*Prs.*		
	70	*For children*.........	*Prs.*		
	75	*For infants*..........	*Prs.*		
700.45		Valued over $2.50 per pair.........	....	10% ad val.	20% ad val.
	05	*Athletic footwear*.............	*Prs.*		
		Casual footwear:			
	10	*For women*................	*Prs.*		
	15	*Other*....................	*Prs.*		
		Soled "moccasins":			
	20	*For women*................	*Prs.*		
	25	*Other*....................	*Prs.*		
		Other:			
		With soles vulcanized to uppers or with soles simultaneously molded and attached to uppers:			
	30	*For women*...........	*Prs.*		
	35	*Other*...............	*Prs.*		
		Cement footwear:			
	40	*For women*...........	*Prs.*		
	45	*For misses*..........	*Prs.*		
	50	*For children*........	*Prs.*		
	55	*For infants*.........	*Prs.*		
		Other:			
	60	*For women*...........	*Prs.*		
	65	*For misses*..........	*Prs.*		
	70	*For children*........	*Prs.*		
	75	*For infants*.........	*Prs.*		

Item	Stat. Suf-fix	Articles	Units of Quantity	Rates of Duty	
				1	2
		Footwear (whether or not described elsewhere in this subpart) which is over 50 percent by weight of rubber or plastics or over 50 percent by weight of fibers and rubber or plastics with at least 10 percent by weight being rubber or plastics:			
		Hunting boots, galoshes, rainwear, and other footwear designed to be worn over, or in lieu of, other footwear as a protection against water, oil, grease, or chemicals or cold or inclement weather, all the foregoing having soles and uppers of which over 90 percent of the exterior surface area is rubber or plastics (except footwear with uppers of nonmolded construction formed by sewing the parts thereof together and having exposed on the outer surface a substantial portion of functional stitching):			
700.51	00	Having soles and uppers of which over 90 percent of the exterior surface area is polyvinyl chloride, whether or not supported or lined with polyvinyl chloride but not otherwise supported or lined........	Prs.....	12.5% ad val.	25% ad val.
700.52	00	Footwear (except footwear provided for in item 700.51), the uppers of which do not extend above the ankle, designed for use without closures, whether or not supported or lined.....................	Prs.....	25% ad val.	50% ad val.
700.53		Other.......................................	....	37.5% ad val.	75% ad val.
	20	*Boots*..................................	*Prs.*		
	40	*Other*..................................	*Prs.*		
		Other footwear (except footwear having uppers of which over 50 percent of the exterior surface area is leather):			
700.55		Having uppers of which over 90 percent of the exterior surface area is rubber or plastics (except footwear having foxing or a foxing-like band applied or molded at the sole and overlapping the upper)................................	....	6% ad val.	35% ad val.
	20	*Zoris (thonged sandals)*.................	*Prs.*		
	23	*Soft sole footwear*......................	*Prs.*		
		Footwear having supported vinyl uppers:			
	37	*For men*............................	*Prs.*		
	39	*For youths and boys*................	*Prs.*		
	47	*For women*..........................	*Prs.*		
	49	*For misses*.........................	*Prs.*		
	57	*For children*.......................	*Prs.*		
	59	*For infants*........................	*Prs.*		
		Other:			
	77	*For men*............................	*Prs.*		
	79	*For youths and boys*................	*Prs.*		
	81	*For women*..........................	*Prs.*		
	83	*For misses*.........................	*Prs.*		
	85	*For children*.......................	*Prs.*		
	87	*For infants*........................	*Prs.*		
700.60		Other.......................................	....	20% ad val.	35% ad val.
		Like or similar to U.S. footwear:			
		Oxford height:			
	05	*For men, youths, and boys*......	*Prs.*		
	15	*For women and misses*...........	*Prs.*		
	25	*For children and infants*.......	*Prs.*		
	30	*Other*.............................	*Prs.*		
		Not like or similar to U.S. footwear:			
		Oxford height:			
	35	*For men, youths, and boys*......	*Prs.*		
	45	*For women and misses*...........	*Prs.*		
	55	*For children and infants*.......	*Prs.*		
	60	*Other*.............................	*Prs.*		

Item	Stat. Suf-fix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty 2
		Footwear, with uppers of fibers:			
		With soles of leather:			
700.66		Valued not over $2.50 per pair	....	15% ad val.	35% ad val.
	20	*Slipper socks*	*Prs.*		
		Other:			
	40	*For men, youths, and boys*	*Prs.*		
	60	*Other*	*Prs.*		
700.68		Valued over $2.50 per pair	....	10% ad val.	35% ad val.
	20	*Slipper socks*	*Prs.*		
		Other:			
	40	*For men, youths, and boys*	*Prs.*		
	60	*Other*	*Prs.*		
		With soles of material other than leather:			
700.70		With uppers of vegetable fibers	....	7.5% ad val.	35% ad val.
	20	*For men, youths, and boys*	*Prs.*		
	65	*For women*	*Prs.*		
	70	*For misses*	*Prs.*		
	75	*For children*	*Prs.*		
	80	*For infants*	*Prs.*		
700.75		With soles and uppers of wool felt	....	7% ad val.	35% ad val.
	10	*For men (125)*	*Prs.*		
	20	*For youths and boys (125)*	*Prs.*		
	30	*For women (125)*	*Prs.*		
	40	*For misses (125)*	*Prs.*		
	50	*For children (125)*	*Prs.*		
	60	*For infants (125)*	*Prs.*		
700.80		Other	....	12.5% ad val.	35% ad val.
	20	*For men, youths, and boys*	*Prs.*		
	65	*For women*	*Prs.*		
	70	*For misses*	*Prs.*		
	75	*For children*	*Prs.*		
	80	*For infants*	*Prs.*		
		Other footwear:			
700.83		Of wood	....	8% ad val.	33-1/3% ad val.
	10	*For men*	*Prs.*		
	20	*For youths and boys*	*Prs.*		
	30	*For women*	*Prs.*		
	40	*For misses*	*Prs.*		
	50	*For children*	*Prs.*		
	60	*For infants*	*Prs.*		
700.85		Other	....	12.5% ad val.	35% ad val.
	20	*For men, youths, and boys*	*Prs.*		
	65	*For women*	*Prs.*		
	70	*For misses*	*Prs.*		
	75	*For children*	*Prs.*		
	80	*For infants*	*Prs.*		

Subpart B. - Headwear and Hat Braids

Subpart B headnote:

1. For the purposes of this subpart --
   (a) the term "headwear" includes hats, caps, berets, bonnets, hoods, and all other head coverings, of whatever material composed (including bodies, forms, plateaux, manchons, and shapes for headwear), designed for human wear, except infants' knit headwear, but does not include mufflers, scarves, shawls, mantillas, veils, and similar articles; hair nets; hair ornaments; or wigs and similar articles; and
   (b) the term "caps" (items 702.15 and 702.20) means headwear without a brim but with a shade or visor in front.

APPENDIX B

STATISTICAL TABLES

Table 1.--Nonrubber footwear (including zoris and paper slippers): U.S. production, imports for consumption, exports of domestic merchandise, apparent consumption, and per capita consumption, 3-year averages 1954-62, annual 1963-74, January-September 1974, and January-September 1975 1/

Period	Production	Imports 2/	Exports	Apparent consumption	Ratio of imports to consumption	Ratio of imports to production	Per capita consumption
	Million pairs	Million pairs	Million pairs	Million pairs	Percent	Percent	Number of pairs
3-year average:							
1954-56	569.2	10.0	4.6	574.6	2	2	3.46
1957-59	607.4	27.0	4.0	630.4	4	4	3.60
1960-62	608.7	57.0	3.0	662.7	9	9	3.61
Annual:							
1963	604.3	95.1	2.8	696.6	14	16	3.68
1964	612.8	112.8	2.8	722.3	16	18	3.76
1965	626.2	129.7	2.5	753.4	17	21	3.88
1966	641.7	133.5	2.7	772.5	17	21	3.93
1967	600.0	160.3	2.2	758.1	21	27	3.82
1968	642.4	211.2	2.4	851.2	25	33	4.24
1969	577.0	227.0	2.3	801.7	28	39	3.96
1970	562.3	267.9	2.2	828.0	32	48	4.04
1971	535.8	291.3	2.1	825.0	35	54	3.99
1972	526.7	322.1	2.3	846.5	38	61	4.05
1973	490.0	338.9	3.6	825.3	41	69	3.92
1974	453.0	318.0	4.0	767.0	41	70	3.62
Jan.-Sept.--							
1974	346.0	249.1	2.9	592.2	42	72	2.79
1975	313.7	256.4	3.4	566.7	45	82	2.65

1/ Data on imports include all imports cited in the notice of investigation.
2/ Data for 1954-63 partly estimated. Data on zoris are not available for 1954-62.

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

Table 1a.--Nonrubber footwear: U.S. production, imports for consumption, exports of domestic merchandise, apparent consumption, and per capita consumption, 3-year averages 1954-62, annual 1963-74, January-September 1974, and January-September 1975

Period	Production	Imports 1/	Exports	Apparent consumption	Ratio of imports to consumption	Ratio of imports to production	Per capita consumption
	Million pairs	Million pairs	Million pairs	Million pairs	Percent	Percent	Number of pairs
3-year average:							
1954-56	569.2	10.0	4.6	574.6	2	2	3.46
1957-59	607.4	27.0	4.0	630.4	4	4	3.60
1960-62	608.7	57.0	3.0	662.7	9	9	3.61
Annual:							
1963	604.3	67.0	2.8	668.5	10	11	3.53
1964	612.8	80.7	2.8	690.7	12	13	3.60
1965	626.2	96.0	2.5	719.7	13	15	3.70
1966	641.7	101.7	2.7	740.7	14	16	3.77
1967	600.0	133.3	2.2	731.1	18	22	3.68
1968	642.4	181.5	2.4	821.5	22	28	4.09
1969	577.0	202.2	2.3	776.9	26	35	3.83
1970	562.3	241.7	2.2	801.8	30	43	3.91
1971	535.8	268.6	2.1	802.3	33	50	3.88
1972	526.7	296.7	2.3	821.1	36	56	3.93
1973	490.0	307.5	3.6	793.9	39	63	3.77
1974	453.0	266.4	4.0	715.4	37	59	3.38
Jan.-Sept.--							
1974	346.0	212.8	2.9	555.9	38	62	2.62
1975	313.7	212.8	3.4	523.1	41	68	2.45

1/ Data for 1954-63 partly estimated.

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

Note.--Data on imports of so-called disposable paper slippers from Mexico, which were entered in substantial quantities beginning in 1973, have been excluded from this table. Such imports amounted to an estimated 28 million pairs in 1974. Data on zoris have also been excluded from this table; such imports amounted to 24 million pairs in 1974.

Table 1b.--Footwear (including canvas footwear and zoris and paper slippers): U.S. production, imports for consumption, exports of domestic merchandise, apparent consumption, and per capita consumption, 1963-74, January-September 1974, and January-September 1975

Period	Production	Imports 1/	Exports	Apparent consumption	Ratio of imports to consumption	Ratio of imports to production	Per capita consumption
	Million pairs	Million pairs	Million pairs	Million pairs	Percent	Percent	Number of pairs
1963	757.3	95.1	2.8	849.6	11	13	4.49
1964	774.4	112.8	2.8	884.3	13	15	4.61
1965	792.2	129.7	2.5	919.4	14	16	4.73
1966	801.7	133.5	2.7	932.5	14	17	4.74
1967	753.0	160.3	2.2	911.1	18	21	4.59
1968	797.4	211.2	2.4	1,006.2	21	26	5.01
1969	718.0	227.0	2.3	942.7	24	32	4.65
1970	2/ 699.3	267.9	2.2	965.0	28	38	4.71
1971	693.8	291.3	2.1	983.0	30	42	4.75
1972	680.7	322.1	2.3	1,000.5	32	47	4.79
1973	633.0	338.9	3.6	968.3	35	54	4.60
1974	2/ 600.0	318.0	4.0	914.0	35	53	4.31
Jan.-Sept.--							
1974	459.0	249.1	2.9	705.2	35	54	3.33
1975	413.7	256.4	3.4	666.7	38	62	3.12

1/ Data on imports include all imports cited in the notice of investigation.

2/ Production of protective-type footwear was an estimated 31 million pairs in 1970 and 25 million pairs in 1974. Adjusting 1970 and 1974 data accordingly, total production increases to 730.3 million and 625.0 million pairs, respectively; apparent consumption increases to 996.0 million and 939.0 million pairs; the ratio of imports to consumption declines to 27 and 34 percent; the ratio of imports to production declines to 37 and 51 percent; and per capita consumption increases to 4.86 and 4.43 pairs.

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

Table 2.--Nonrubber footwear (including zoris and paper slippers): U.S. imports for consumption, by principal sources, 1970-74, January-September 1974, and January-September 1975

Source	1970	1971	1972	1973	1974	January-September-- 1974	January-September-- 1975
	Quantity (1,000 pairs)						
Italy	80,687	77,968	79,716	76,892	62,614	50,896	44,691
Spain	21,245	31,245	39,255	36,830	35,037	25,902	28,764
Republic of China (Taiwan)	47,382	70,567	98,791	123,215	96,219	80,369	79,207
Brazil	2,410	8,200	11,809	19,528	21,338	16,309	19,533
France	3,105	2,886	2,957	2,742	2,965	2,059	2,950
Argentina	56	284	464	3,875	5,328	4,361	910
Republic of Korea	1,920	3,300	8,021	7,176	9,202	7,717	10,110
Mexico	3,964	3,538	4,192	14,809	32,204	20,989	29,831
Greece	480	778	1,581	2,381	3,238	2,296	3,082
West Germany	2,806	2,455	2,666	1,816	1,668	1,185	1,275
Canada	2,527	2,196	2,272	2,665	2,552	1,806	1,353
Yugoslavia	297	540	1,232	965	1,784	1,289	2,379
Austria	270	364	1,374	3,108	2,746	1,905	874
Romania	585	682	1,068	2,467	2,817	2,374	1,759
United Kingdom	2,773	2,326	1,603	1,064	955	700	491
Ireland	337	391	444	676	785	569	524
Japan	60,300	64,856	35,775	11,869	6,933	5,509	3,928
Switzerland	564	614	559	406	363	266	197
Poland	341	613	1,065	1,349	1,679	1,391	2,257
Hong Kong	9,147	9,277	16,322	15,530	18,710	14,680	14,074
Colombia	36	285	545	740	1,164	786	817
Czechoslovakia	1,791	1,605	1,928	1,343	841	605	801
India	2,926	3,029	3,547	2,762	2,924	2,349	3,175
All other	21,884	3,331	4,934	4,748	3,955	2,883	3,423
Total	267,833	291,330	322,126	338,956	318,021	249,195	256,405
	Value (1,000 dollars)						
Italy	264,001	285,205	337,304	360,779	323,577	253,172	261,650
Spain	78,051	125,295	171,434	189,202	192,818	139,369	168,320
Republic of China (Taiwan)	29,402	51,156	80,490	118,740	131,961	111,053	112,857
Brazil	6,126	23,457	41,806	81,260	88,698	67,593	85,944
France	14,685	16,306	17,803	21,930	23,912	16,161	27,856
Argentina	219	1,040	2,057	16,719	23,681	19,118	4,626
Republic of Korea	2,935	6,059	13,420	16,818	23,499	15,212	34,194
Mexico	8,487	9,585	9,792	14,048	22,268	4,809	18,577
Greece	3,471	5,137	8,959	13,863	18,306	12,883	17,410
West Germany	16,044	16,963	19,306	17,508	15,390	10,808	13,100
Canada	10,434	10,007	11,377	15,850	15,332	9,946	11,615
Yugoslavia	2,107	4,113	8,272	7,769	13,699	9,634	21,397
Austria	4,253	4,073	7,689	16,595	13,159	9,710	6,470
Romania	1,231	1,803	2,862	8,640	11,329	9,507	5,873
United Kingdom	19,478	17,622	13,581	9,893	9,065	6,186	5,513
Ireland	2,537	2,996	3,857	6,297	8,154	5,946	6,184
Japan	62,399	66,358	42,100	13,559	8,072	5,872	5,889
Switzerland	8,718	8,988	9,316	7,699	6,737	4,428	4,811
Poland	1,070	1,441	2,665	4,306	4,791	4,784	8,176
Hong Kong	4,354	5,313	5,778	5,725	7,764	6,093	5,502
Colombia	103	1,019	1,921	2,864	4,871	3,173	3,991
Czechoslovakia	4,410	4,420	5,148	5,208	4,233	2,941	4,287
India	2,938	3,190	3,845	3,090	3,922	3,112	5,230
All other	15,145	9,997	17,735	21,860	13,917	21,689	12,945
Total	562,598	681,543	838,517	980,222	989,155	756,199	852,417

1/ Data include all imports cited in the notice of investigation.

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

Table 2a.--Nonrubber footwear: U.S. imports for consumption, by principal sources, 1970-74, January-September 1974, and January-September 1975

Source	1970	1971	1972	1973	1974	January-Setember-- 1974	January-Setember-- 1975
	Quantity (1,000 pairs)						
Italy	80,679	77,847	79,698	76,853	62,603	50,886	44,639
Spain	21,245	31,221	39,254	36,805	35,033	25,898	28,763
Republic of China (Taiwan)	42,046	64,786	91,253	111,703	88,284	73,845	73,389
Brazil	2,410	8,146	11,809	19,528	21,324	16,295	19,533
France	3,101	2,886	2,957	2,742	2,965	2,059	2,950
Argentina	56	284	463	3,875	5,328	4,361	910
Republic of Korea	1,920	3,296	7,950	7,173	9,202	7,717	10,102
Mexico	3,964	3,538	4,044	6,664	4,145	3,242	3,306
Greece	480	778	1,581	2,381	3,238	2,296	3,082
West Germany	2,806	2,452	2,666	1,795	1,668	1,185	1,274
Canada	2,527	2,196	2,272	2,665	2,534	1,788	1,353
Yugoslavia	297	540	1,232	965	1,784	1,289	2,379
Austria	270	364	1,374	3,108	2,746	1,905	874
Romania	585	682	1,068	2,467	2,817	2,374	1,759
United Kingdom	2,773	2,326	1,603	1,064	896	642	491
Ireland	337	391	444	676	785	569	524
Japan	59,843	51,415	27,544	9,166	5,855	4,740	3,218
Switzerland	564	614	559	406	363	266	197
Poland	341	613	1,065	1,349	1,677	1,391	2,257
Hong Kong	5,516	6,003	6,814	6,647	5,580	4,403	4,502
Colombia	36	285	545	740	1,164	786	817
Czechoslovakia	1,791	1,605	1,928	1,343	841	605	801
India	2,926	3,029	3,547	2,762	2,924	2,349	3,175
All other	5,143	3,328	5,033	4,671	2,667	1,908	2,458
Total	241,656	268,625	296,703	307,549	266,423	212,799	212,753
	Value (1,000 dollars)						
Italy	263,992	285,151	337,262	360,685	323,547	253,146	261,504
Spain	78,051	125,276	171,431	189,175	192,807	139,358	168,313
Republic of China (Taiwan)	28,712	50,355	79,326	116,587	129,468	109,009	110,772
Brazil	6,126	23,438	41,806	81,260	88,696	67,591	85,944
France	14,681	16,306	17,803	21,930	23,912	16,161	27,856
Argentina	219	1,040	2,054	16,719	23,681	19,118	4,626
Republic of Korea	2,935	6,055	13,413	16,816	23,499	18,212	34,192
Mexico	8,487	9,585	9,791	13,352	20,007	15,025	16,127
Greece	3,471	5,137	8,959	13,863	18,306	12,883	17,408
West Germany	16,044	16,921	19,306	17,478	15,390	10,808	13,096
Canada	10,434	10,007	11,377	15,850	15,313	9,927	11,615
Yugoslavia	2,107	4,113	8,272	7,769	13,699	9,634	21,397
Austria	4,253	4,073	7,689	16,595	13,159	9,710	6,470
Romania	1,231	1,803	2,862	8,640	11,329	9,507	5,873
United Kingdom	19,478	17,622	13,581	9,893	9,053	6,178	5,513
Ireland	2,537	2,996	3,857	6,297	8,154	5,946	6,184
Japan	60,221	64,490	40,824	12,957	7,420	5,411	5,426
Switzerland	8,718	8,988	9,316	7,699	6,737	4,428	4,811
Poland	1,070	1,441	2,665	4,306	5,804	4,784	8,176
Hong Kong	3,989	4,963	4,774	4,658	5,027	3,958	3,381
Colombia	103	1,019	1,921	2,864	4,871	3,173	3,991
Czechoslovakia	4,410	4,420	5,148	5,208	4,233	2,941	4,287
India	2,938	3,190	3,845	3,090	3,922	3,112	5,230
All other	15,144	9,993	17,724	21,793	12,633	9,712	12,588
Total	559,351	678,382	835,006	975,484	980,667	749,732	844,780

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

Note.--Data on imports of so-called disposable paper slippers from Mexico, which were entered in substantial quantities beginning in 1973, have been excluded from this table. Such imports amounted to an estimated 28 million pairs in 1974. Data on zoris have also been excluded from this table; such imports amounted to 24 million pairs in 1974.

Table 3.--Footwear of leather: U.S. imports for consumption, by principal sources, 1970-74, January-September 1974, and January-September 1975

Source	1970	1971	1972	1973	1974	January-September-- 1974	January-September-- 1975
	Quantity (1,000 pairs)						
Italy	74,699	69,637	69,234	58,456	43,702	35,099	33,757
Spain	19,821	28,236	35,123	30,751	28,405	20,928	23,729
Brazil	2,390	7,748	11,651	18,894	20,345	15,386	19,201
Argentina	55	261	419	3,640	5,090	4,179	789
France	2,874	2,629	2,599	2,333	2,451	1,667	2,684
Republic of Korea	462	777	1,176	1,907	3,470	2,506	7,849
Mexico	3,764	3,229	2,635	2,509	2,903	2,290	2,394
West Germany	1,689	2,044	2,217	1,606	1,513	1,052	1,255
Yugoslavia	261	479	1,188	899	1,769	1,283	2,368
Greece	461	763	1,525	1,991	2,006	1,484	1,847
Romania	585	682	1,068	2,467	2,813	2,370	1,759
Canada	1,057	898	918	1,223	1,007	675	739
United Kingdom	2,663	2,171	1,470	881	796	568	436
Ireland	337	391	444	670	762	546	523
Republic of China (Taiwan)	57	588	878	1,662	1,548	1,237	3,979
Poland	339	610	1,058	1,346	1,662	1,377	2,257
Switzerland	469	489	443	318	289	213	167
Colombia	26	269	524	718	1,145	771	775
Czechoslovakia	1,791	1,605	1,928	1,343	841	605	801
India	2,916	3,021	3,543	2,761	2,896	2,321	3,160
Japan	1,336	1,794	935	919	619	442	519
All other	1,913	1,863	2,680	3,031	1,858	1,365	1,920
Total	119,965	130,184	143,656	140,325	127,889	98,364	112,908
	Value (1,000 dollars)						
Italy	249,545	259,738	304,560	296,826	250,596	195,470	208,773
Spain	75,554	117,283	161,740	168,746	167,655	121,670	145,814
Brazil	6,088	23,283	41,679	79,502	86,289	65,424	84,858
Argentina	216	996	1,847	16,010	22,884	18,525	4,130
France	13,015	14,215	15,549	18,639	20,512	13,591	26,149
Republic of Korea	1,808	2,957	5,061	9,935	16,747	12,661	31,145
Mexico	8,329	9,347	9,407	11,055	16,046	11,914	13,653
West Germany	11,130	13,536	15,840	14,702	14,234	9,937	12,967
Yugoslavia	1,682	3,400	7,667	6,708	13,353	9,505	21,197
Greece	3,391	5,015	8,742	12,426	12,990	9,538	11,516
Romania	1,231	1,803	2,862	8,640	11,325	9,503	5,873
Canada	7,362	6,907	8,481	11,651	11,313	7,406	9,660
United Kingdom	19,018	17,063	12,972	8,837	8,329	5,710	5,135
Ireland	2,537	2,996	3,857	6,229	7,904	5,697	6,172
Republic of China (Taiwan)	90	808	1,732	4,870	6,590	5,142	14,342
Poland	1,068	1,437	2,680	4,298	5,789	4,772	8,176
Switzerland	6,109	6,449	6,556	5,255	5,718	4,041	4,071
Colombia	98	1,005	1,906	2,834	4,814	3,128	3,889
Czechoslovakia	4,410	4,420	5,148	5,208	4,233	2,941	4,287
India	2,925	3,184	3,841	3,089	3,836	3,028	5,192
Japan	3,926	5,873	4,007	5,171	3,797	2,551	3,411
All other	8,848	7,830	12,009	17,843	11,461	8,160	11,457
Total	428,380	509,545	638,143	718,474	706,415	530,314	641,897

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

Table 4.--Certain footwear of rubber or plastics (TSUS item 700.55--including zoris): U.S. imports for consumption, by principal sources, 1970-74, January-September 1974, and January-September 1975

Source	1970	1971	1972	1973	1974	January-September-- 1974	January-September-- 1975
	Quantity (1,000 pairs)						
Republic of China (Taiwan)	46,941	68,989	95,923	115,936	89,195	74,585	71,849
Italy	5,111	7,865	9,661	15,897	16,590	13,799	9,243
Spain	1,354	2,933	4,014	5,495	5,830	4,457	4,462
Hong Kong	8,256	8,483	15,288	14,598	17,248	13,734	12,703
Republic of Korea	998	1,494	3,662	3,488	2,738	2,606	588
Austria	121	135	168	256	96	87	92
Japan	69,854	55,303	28,453	7,098	2,445	1,895	1,370
Canada	777	749	763	835	816	673	151
Mexico	165	306	203	449	692	552	485
France	163	180	195	159	92	81	34
Switzerland	88	116	115	85	69	49	26
West Germany	199	192	160	81	48	36	7
All other	1,508	2,066	1,218	1,123	2,450	1,825	1,491
Total	135,535	148,811	159,823	165,500	138,309	114,379	102,501
	Value (1,000 dollars)						
Republic of China (Taiwan)	28,904	49,263	76,551	108,224	117,943	99,706	93,328
Italy	12,590	24,328	30,110	56,785	65,769	51,940	45,780
Spain	2,341	7,843	9,387	18,304	20,938	15,299	19,062
Hong Kong	3,435	4,373	4,934	4,498	6,524	5,177	4,450
Republic of Korea	949	1,956	5,520	4,827	3,403	3,189	1,200
Austria	2,619	2,702	3,488	5,695	3,184	2,923	2,860
Japan	55,026	57,213	35,680	6,774	2,489	1,896	1,387
Canada	1,282	1,577	1,345	2,558	1,822	1,159	483
Mexico	121	206	193	768	1,790	1,376	1,232
France	1,432	1,850	1,814	2,237	1,358	1,267	375
Switzerland	2,525	2,498	2,750	2,423	1,001	374	728
West Germany	2,857	2,730	2,645	2,439	803	557	42
All other	2,565	3,582	2,621	5,422	3,458	2,581	1,863
Total	116,646	160,121	177,038	220,954	230,482	187,444	172,790

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

Table 4a.--Certain footwear of rubber or plastics (TSUS item 700.55--excluding zoris): U.S. imports for consumption, by principal sources, 1970-74, January-September 1974, and January-September 1975

Source	1970	1971	1972	1973	1974	January-September-- 1974	January-September-- 1975
	Quantity (1,000 pairs)						
Republic of China (Taiwan)	41,605	63,209	88,385	104,423	81,260	68,061	66,031
Italy	5,111	7,865	9,661	15,897	16,590	13,789	9,191
Spain	1,354	2,933	4,014	5,495	5,830	4,453	4,461
Hong Kong	4,625	5,210	5,780	5,714	4,118	3,457	3,131
Republic of Korea	998	1,494	3,662	3,488	2,738	2,606	580
Austria	121	135	168	256	96	87	92
Japan	52,668	41,862	20,222	4,394	1,367	1,126	660
Canada	777	749	763	835	816	655	151
Mexico	165	306	203	449	692	552	480
France	163	180	195	159	92	81	34
Switzerland	88	116	115	85	69	49	26
West Germany	199	192	160	81	48	36	6
All other	1,488	1,855	1,072	1,411	1,049	778	526
Total	109,362	126,106	134,400	142,687	114,765	95,730	85,369
	Value (1,000 dollars)						
Republic of China (Taiwan)	28,214	48,462	75,387	106,071	115,450	97,662	91,243
Italy	12,590	24,328	30,110	56,785	65,769	51,914	45,634
Spain	2,341	7,843	9,387	18,304	20,938	15,288	19,055
Hong Kong	3,070	4,023	3,927	3,431	3,787	3,042	2,329
Republic of Korea	949	1,956	5,520	4,827	3,403	3,189	1,198
Austria	2,619	2,702	3,488	5,695	3,184	2,923	2,860
Japan	52,848	55,345	34,404	6,172	1,837	1,435	924
Canada	1,282	1,577	1,345	2,558	1,822	1,140	483
Mexico	121	206	193	768	1,790	1,376	1,224
France	1,432	1,850	1,814	2,237	1,358	1,267	375
Switzerland	2,525	2,498	2,750	2,423	1,001	374	728
West Germany	2,857	2,730	2,645	2,439	803	557	38
All other	2,551	3,440	2,557	5,202	3,113	2,377	1,504
Total	113,399	156,960	173,527	216,912	224,255	182,544	167,595

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

Table 5.--Other nonrubber footwear (including paper slippers): U.S. imports for consumption, by principal sources, 1970-74, January-September 1974, and January-September 1975

Source	1970	1971	1972	1973	1974	January-September-- 1974	January-September-- 1975
	Quantity (1,000 pairs)						
Austria	57	144	63	2,559	2,499	1,715	744
Republic of China (Taiwan)	266	754	1,989	5,619	5,476	4,547	3,379
Italy	869	345	803	2,500	2,311	1,998	1,690
Greece	16	15	44	267	1,082	669	1,197
Spain	70	52	116	559	798	517	574
Republic of Korea	460	1,013	3,107	1,777	2,994	2,605	1,673
Brazil	13	16	29	405	839	769	268
Canada	693	549	591	606	712	458	457
Mexico	21	4	1,206	11,851	28,604	18,147	26,952
France	64	77	163	250	423	311	239
Japan	5,839	7,760	6,388	3,853	3,868	3,172	2,039
Sweden	1,189	197	834	674	175	138	137
Argentina	3	40	43	232	235	179	121
Hong Kong	658	520	878	773	1,365	871	1,213
Philippines	6	12	26	39	97	42	86
All other	2,105	838	2,367	718	345	314	227
Total	12,329	12,336	18,647	32,682	51,823	36,452	40,996
	Value (1,000 dollars)						
Austria	198	492	224	8,911	9,062	6,148	3,008
Republic of China (Taiwan)	274	957	2,205	5,646	7,428	6,204	5,186
Italy	1,857	1,084	2,592	7,074	7,183	5,753	7,097
Greece	67	122	173	962	4,704	2,770	5,734
Spain	156	150	304	2,125	4,215	2,400	3,444
Republic of Korea	445	1,140	2,831	2,054	3,349	2,963	1,849
Brazil	33	26	66	997	2,330	2,090	1,044
Canada	1,789	1,522	1,551	1,641	2,178	1,381	1,467
Mexico	31	31	189	2,224	4,431	3,303	3,692
France	234	241	450	1,054	2,041	1,304	1,338
Japan	3,447	3,272	2,413	1,614	1,786	1,425	1,091
Sweden	3,567	590	2,798	2,721	787	618	766
Argentina	9	74	205	699	778	575	496
Hong Kong	306	288	451	565	755	524	563
Philippines	11	17	27	40	138	93	143
All other	5,147	1,871	6,857	2,467	1,093	891	812
Total	17,571	11,877	23,336	40,794	52,258	38,442	37,730

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

Table 5a.--"Other" nonrubber footwear (excluding paper slippers): U.S. imports for consumption, by principal sources, 1970-74, January-September 1974, and January-September 1975

Source	1970	1971	1972	1973	1974	January-September-- 1974	January-September-- 1975
	Quantity (1,000 pairs)						
Austria	57	144	63	2,559	2,499	1,715	744
Republic of China (Taiwan)	266	754	1,989	5,619	5,476	4,547	3,379
Italy	869	345	803	2,500	2,311	1,998	1,690
Greece	16	15	44	267	1,082	669	1,197
Spain	70	52	116	559	798	517	574
Republic of Korea	460	1,013	3,107	1,777	2,994	2,605	1,673
Brazil	13	16	29	405	839	769	268
Canada	693	549	591	606	712	458	457
Mexico	21	4	1,206	3,706	550	400	432
France	64	77	163	250	423	311	239
Japan	5,839	7,760	6,388	3,853	3,868	3,172	2,039
Sweden	1,189	197	834	674	175	138	137
Argentina	3	40	43	232	235	179	121
Hong Kong	658	520	878	773	1,365	871	1,213
Philippines	6	12	26	39	97	42	86
All other	2,105	838	2,367	719	345	314	227
Total	12,329	12,336	18,647	24,538	23,769	18,705	14,476
	Value (1,000 dollars)						
Austria	198	492	224	8,911	9,062	6,148	3,008
Republic of China (Taiwan)	274	957	2,205	5,646	7,428	6,204	5,186
Italy	1,857	1,084	2,592	7,074	7,183	5,753	7,097
Greece	67	122	173	962	4,704	2,770	5,734
Spain	156	150	304	2,125	4,215	2,400	3,444
Republic of Korea	445	1,140	2,831	2,054	3,349	2,963	1,849
Brazil	33	26	66	997	2,330	2,090	1,044
Canada	1,789	1,522	1,551	1,641	2,178	1,381	1,467
Mexico	31	31	189	1,529	2,171	1,736	1,250
France	234	241	450	1,054	2,041	1,304	1,338
Japan	3,447	3,272	2,413	1,614	1,786	1,425	1,091
Sweden	3,567	590	2,798	2,721	787	618	766
Argentina	9	74	205	699	778	575	496
Hong Kong	306	288	451	565	755	524	563
Philippines	11	17	27	40	138	93	143
All other	5,147	1,871	6,857	2,467	1,093	891	812
Total	17,571	11,877	23,336	40,099	49,998	36,875	35,288

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

Table 6.--Nonrubber footwear: U.S. imports for consumption from Taiwan, by selected TSUSA items, 1974

TSUSA item	Description	Quantity	Value	Unit value
		1,000 pairs	1,000 dollars	Per pair
	All nonrubber footwear, total or average	96,219	131,961	$1.37
	Footwear of leather, total or average	1,548	6,590	4.26
	Welt footwear:			
	Valued over $5 but not over $6.80 per pair:			
700.2718	Work footwear	170	1,008	5.93
	Other:			
	For men, youths, and boys:			
	Athletic footwear:			
700.3515	Other athletic footwear	274	1,217	4.44
	Cement footwear:			
700.3550	For men	171	742	4.34
	For other persons:			
	Valued over $2.50 per pair:			
	Other:			
700.4560	For women	160	748	4.68
	All other	773	2,875	3.72
	Footwear of rubber or plastics, total or average	89,195	117,943	1.32
	Other footwear of rubber or plastics:			
700.5520	Zories	7,935	2,493	.31
700.5523	Soft sole footwear	459	355	.77
	Footwear having supported vinyl uppers:			
700.5537	For men	7,159	14,319	2.00
700.5539	For youths and boys	3,075	5,220	1.70
700.5547	For women	51,906	72,040	1.39
700.5549	For misses	4,550	5,918	1.30
700.5557	For children	4,445	5,544	1.25
700.5559	For infants	811	785	.97
	Other:			
700.5577	For men	773	1,148	1.49
700.5579	For youths and boys	342	552	1.61
700.5581	For women	6,208	7,907	1.27
700.5583	For misses	592	761	1.28
700.5585	For children	659	712	1.08
700.5587	For infants	281	189	.67
	Other nonrubber footwear, total or average	5,476	7,428	1.36
	Footwear with uppers of fibers:			
	With soles of material other than leather:			
700.7065	For women	1,780	2,457	1.38
	With soles and uppers of wool felt:			
700.7510	For men	112	183	1.63
	Other:			
700.8020	For men, youths, and boys	590	932	1.58
700.8065	For women	920	1,031	1.12
700.8070	For misses	143	119	.83
	Other footwear:			
	Of wood:			
700.8330	For women	487	841	1.73
	Other:			
700.8520	For men, youths, and boys	100	190	1.90
700.8565	For women	691	1,027	1.49
700.8580	For infants	159	22	.14
	All other	494	626	1.27

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

Table 7.--Nonrubber footwear: U.S. imports for consumption from Italy, by selected TSUSA items, 1974

TSUSA item	Description	Quantity	Value	Unit value
		1,000 pairs	1,000 dollars	Per pair
	All nonrubber footwear, total or average	62,603	323,547	$5.17
	Footwear of leather, total or average	43,702	250,596	5.73
	Turn or turned footwear:			
700.2045	For women	305	2,660	8.72
	Other:			
	For men, youths, and boys:			
	Athletic footwear:			
700.3515	Other athletic footwear	358	3,794	10.60
	Soled "moccasins":			
700.3530	For men	198	2,302	11.63
	Other:			
	With soles vulcanized to uppers or with soles simultaneously molded and attached to uppers:			
700.3540	For men	385	3,004	7.80
700.3545	For youths and boys	131	410	3.13
	Cement footwear:			
700.3550	For men	6,213	51,458	8.28
700.3555	For youths and boys	388	1,331	3.43
	Other:			
700.3575	For men	1,093	13,227	12.10
700.3580	For youths and boys	107	512	4.79
	For other persons:			
	Other:			
	Valued not over $2.50 per pair:			
	Casual footwear:			
700.4310	For women	310	503	1.62
700.4315	Other	103	169	1.64
	Other:			
	Cement footwear:			
700.4340	For women	3,835	7,171	1.87
700.4345	For misses	345	665	1.93
700.4350	For children	792	1,490	1.88
700.4355	For infants	482	864	1.79
	Valued over $2.50 per pair:			
	Casual footwear:			
700.4510	For women	1,594	8,054	5.05
	Other:			
	With soles vulcanized to uppers or with soles simultaneously molded and attached to uppers:			
700.4530	For women	473	1,994	4.22
	Cement footwear:			
700.4540	For women	24,737	139,479	5,64
700.4550	For children	427	1,727	4.04
	Other:			
700.4560	For women	689	3,961	5.75
	All other	737	6,123	8.31

Table 7.--Nonrubber footwear: U.S. imports for consumption from Italy, by selected TSUSA items, 1974--Continued

TSUSA item	Description	Quantity	Value	Unit value
		1,000 pairs	1,000 dollars	Per pair
	Footwear of rubber or plastics, total or average	16,590	65,768	3.96
	Footwear having supported vinyl uppers:			
700.5537	For men	469	7,434	15.85
700.5547	For women	11,263	36,895	3.28
700.5549	For misses	250	810	3.24
700.5557	For children	327	979	2.99
	Other:			
700.5577	For men	292	5,433	18.61
700.5581	For women	3,648	13,159	3.61
700.5585	For children	119	279	2.34
	All other	222	779	3.51
	Footwear with uppers of fibers, total or average	2,064	6,310	3.06
	With soles of material other than leather:			
	With uppers of vegetable fibers:			
700.7065	For women	358	1,376	3.84
	Other:			
700.8065	For women	106	282	2.66
	Other footwear, total or average	1,847	5,526	2.99
	Of wood:			
700.8330	For women	1,223	3,500	2.86
	Other:			
700.8565	For women	377	1,152	3.06
	All other	247	874	3.54

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

Table 8.--Nonrubber footwear: U.S. imports for consumption from Spain, by selected TSUSA items, 1974

TSUSA item	Description	Quantity	Value	Unit value
		1,000 pairs	1,000 dollars	Per pair
	All nonrubber footwear, total or average	35,033	192,807	5.50
	Footwear of leather, total or average	28,405	167,655	5.90
	Turn or turned footwear:			
700.2045	For women	411	1,489	3.62
	Welt footwear:			
	Valued over $6.80 per pair:			
	Other:			
700.2960	For men	346	4,876	14.09
	Other:			
	For men, youths, and boys:			
	Other:			
	With soles vulcanized to uppers or with soles simultaneously molded and attached to uppers:			
700.3540	For men	442	1,918	4.34
	Cement footwear:			
700.3550	For men	6,652	42,437	6.38
700.3555	For youths and boys	866	2,964	3.42
	Other:			
700.3575	For men	1,266	6,102	4.82
700.3580	For youths and boys	201	599	2.98
	For other persons:			
	Other:			
	Valued not over $2.50 per pair:			
	Casual footwear:			
700.4315	Other	151	235	1.56
	Other:			
	Cement footwear:			
700.4340	For women	572	973	1.70
700.4345	For misses	100	174	1.74
700.4350	For children	550	904	1.64
700.4355	For infants	410	656	1.60
	Other:			
700.4370	For children	223	368	1.65
	Valued over $2.50 per pair:			
	Casual footwear:			
700.4510	For women	418	2,465	5.90
	Other:			
	Cement footwear:			
700.4540	For women	13,237	89,981	6.80
700.4545	For misses	105	561	5.34
700.4550	For children	436	1,798	4.12
700.4555	For infants	222	808	3.64
	Other:			
700.4560	For women	1,017	5,445	5.35
	All other	780	2,902	3.72
	Footwear of rubber or plastics, total or average	5,830	20,938	3.59
	Footwear having supported vinyl uppers:			
700.5537	For men	254	879	3.46
700.5547	For women	2,660	11,440	4.30
700.5549	For misses	355	1,050	2.96
700.5557	For children	620	1,363	2.20
700.5559	For infants	616	866	1.41
	Other:			
700.5581	For women	906	4,358	4.81
700.5585	For children	141	292	2.07
	All other	278	690	2.48
	Other footwear, total or average	798	4,214	5.28
	Of wood:			
700.7065	For women	403	1,652	4.10
	Other:			
700.8565	For women	214	1,563	7.30
	All other	181	999	5.52

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

Table 9.--Nonrubber footwear: U.S. imports for consumption from Brazil, by selected TSUSA items, 1974

TSUSA item	Description	Quantity	Value	Unit value
		1,000 pairs	1,000 dollars	Per pair
	All nonrubber footwear, total or average	21,324	88,696	$4.16
	Footwear of leather, total or average	20,345	86,289	4.26
	Other:			
	For men, youths, and boys:			
	Other:			
	With soles vulcanized to uppers or with soles simultaneously molded and attached to uppers:			
700.3540	For men	124	732	5.90
	Cement footwear:			
700.3550	For men	2,525	18,280	7.24
	Other:			
700.3575	For men	524	3,817	7.28
	For other persons:			
	Other:			
	Valued not over $2.50 per pair:			
	Casual footwear:			
700.4310	For women	488	742	1.52
	Other:			
	Cement footwear:			
700.4340	For women	2,742	4,462	1.63
700.4350	For children	143	224	1.57
	Other:			
700.4360	For women	153	219	1.43
	Valued over $2.50 per pair:			
	Casual footwear:			
700.4510	For women	4,460	20,411	4.58
	Other:			
	Cement footwear:			
700.4540	For women	7,923	32,004	4.04
700.4550	For children	109	390	3.58
	Other:			
700.4560	For women	575	2,311	4.02
	All other	579	2,697	4.66
	Footwear of rubber or plastics, total or average	140	77	.55
	Other nonrubber footwear, total or average	839	2,330	2.78
	Of wood:			
700.8330	For women	706	1,975	2.80
	All other	133	355	2.67

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

Table 10.--Nonrubber footwear (including zoris and paper slippers): U.S. imports for consumption, by types, 1969-74, January-September 1974, and January-September 1975

Type	1969	1970	1971	1972	1973	1974	January-September--	
							1974	1975
	Quantity (1,000 pairs)							
Footwear of leather (except footwear with uppers of fibers)	96,851	119,969	130,183	143,656	140,325	127,889	98,364	112,908
Certain footwear of rubber or plastics	121,681	135,535	148,811	159,823	165,949	138,309	114,379	102,501
Other nonrubber footwear	8,448	12,329	12,336	18,647	32,682	51,823	36,452	40,996
Total	226,980	267,833	291,330	322,126	338,956	318,021	249,195	256,405
	Value (1,000 dollars)							
Footwear of leather (except footwear with uppers of fibers)	345,040	428,381	509,525	638,143	718,474	706,415	530,313	641,897
Certain footwear of rubber or plastics	84,237	116,646	160,121	177,038	220,954	230,482	187,444	172,790
Other nonrubber footwear	9,772	17,571	11,897	23,336	40,794	52,258	38,442	37,730
Total	439,049	562,598	681,543	838,517	980,222	989,155	756,199	852,417
	Unit value (per pair)							
Footwear of leather (except footwear with uppers of fibers)	$3.56	$3.57	$3.91	$4.44	$5.12	$5.52	$5.39	$5.69
Certain footwear of rubber or plastics	.69	.86	1.08	1.11	1.34	1.67	1.64	1.69
Other nonrubber footwear	1.16	1.43	.96	1.25	1.23	1.01	1.05	.92
Average	1.93	2.10	2.34	2.60	2.97	3.11	3.03	3.32
	Percent of total quantity							
Footwear of leather (except footwear with uppers of fibers)	43	45	45	45	41	40	39	44
Certain footwear of rubber or plastics	53	50	51	49	49	44	46	40
Other nonrubber footwear	4	5	4	6	10	16	15	16
Total	100	100	100	100	100	100	100	100

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

Table 10a.--Nonrubber footwear (excluding zoris and paper slippers): U.S. imports for consumption, by types, 1969-74, January-September 1974, and January-September 1975

Type	1969	1970	1971	1972	1973	1974	January-September-- 1974	January-September-- 1975
	Quantity (1,000 pairs)							
Footwear of leather (except footwear with uppers of fibers)	96,851	119,969	130,183	143,656	140,325	127,889	98,364	112,908
Certain footwear of rubber or plastics	96,909	109,362	126,106	134,400	142,687	114,765	95,730	85,369
Other nonrubber footwear	8,448	12,329	12,336	18,647	24,537	23,769	18,705	14,476
Total	202,208	241,660	268,625	296,703	307,549	266,423	212,799	212,753
	Value (1,000 dollars)							
Footwear of leather (except footwear with uppers of fibers)	345,040	428,388	509,545	638,143	718,474	706,415	530,313	641,897
Certain footwear of rubber or plastics	81,158	113,399	156,960	173,527	216,912	224,255	182,544	167,595
Other nonrubber footwear	9,772	17,571	11,897	23,336	40,098	49,997	36,875	35,288
Total	435,970	559,358	678,402	835,006	975,484	980,667	749,732	844,780
	Unit value (per pair)							
Footwear of leather (except footwear with uppers of fibers)	$3.56	$3.57	$3.91	$4.44	$5.12	$5.52	5.39	5.69
Certain footwear of rubber or plastics	.84	1.04	1.24	1.29	1.52	1.95	1.91	1.96
Other nonrubber footwear	1.16	1.43	.96	1.25	1.63	2.10	1.97	2.44
Average	2.16	2.31	2.53	2.81	3.17	3.68	3.52	3.97
	Percent of total quantity							
Footwear of leather (except footwear with uppers of fibers)	48	50	48	49	46	48	46	53
Certain footwear of rubber or plastics	48	45	47	45	46	43	45	40
Other nonrubber footwear	4	5	5	6	8	9	9	7
Total	100	100	100	100	100	100	100	100

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

Table 11.--Nonrubber footwear (including zoris and paper slippers): U.S. imports for consumption, by selected TSUS items, 1971-74, January-September 1974, and January-September 1975

TSUS item	Description	1971	1972	1973	1974	January-September-- 1974	January-September-- 1975
		Quantity (1,000 pairs)					
	Total, all nonrubber footwear	291,330	322,126	338,956	318,021	249,195	256,405
	Footwear of leather (except footwear with uppers of fibers), total	130,183	143,656	140,325	127,889	98,364	112,908
700.05	Huaraches	126	422	248	93	91	46
700.10	McKay-sewed footwear	28	25	30	32	19	16
700.15	Moccasins	387	259	187	221	168	142
700.20	Turn or turned footwear	1,671	1,627	1,217	828	581	502
	Welt footwear:						
700.25	Valued not over $2 per pair	65	44	19	1	1/	11
700.26	Valued over $2 but not over $5 per pair	2,109	1,998	2,399	1,838	1,667	828
700.27	Valued over $5 but not over $6.80 per pair	766	673	1,344	2,194	1,730	1,266
	Valued over $6.80 per pair:						
700.28	Ski boots	56	19	9	4	3	1/
700.29	Other	2,837	2,475	2,241	1,912	1,545	1,194
700.30	Footwear with molded soles laced to uppers	663	316	19	51	51	6
700.32	Slippers	206	100	85	65	25	33
	Other:						
700.35	For men, youths, and boys	34,571	38,232	38,176	37,843	27,907	38,577
	For other persons:						
700.41	Sandals of buffalo leather	1,252	1,946	1,607	1,111	804	976
	Other:						
700.43	Valued not over $2.50 per pair	40,150	31,972	21,563	14,673	11,803	10,364
700.45	Valued over $2.50 per pair	45,296	63,548	71,181	67,023	51,969	58,947
700.55	Footwear having uppers of plastics, total	148,811	159,823	165,949	138,309	114,379	102,501
	Other nonrubber footwear, total	12,336	18,647	32,682	51,823	36,452	40,996
	Footwear with uppers of fibers:						
	With soles of leather:						
700.66	Valued not over $2.50 per pair	298	242	281	73	57	84
700.68	Valued over $2.50 per pair	78	64	76	98	68	65
	With soles of material other than leather:						
700.70	With uppers of vegetable fibers	2,651	3,291	4,158	5,662	4,298	3,743
700.75	With soles and uppers of wool felt	2,953	4,819	2,303	2,291	1,813	1,855
700.80	Other	2,806	2,893	6,972	4,358	3,776	1,597
	Other footwear:						
700.83	Of wood	1,097	3,533	6,790	6,876	5,262	4,516
700.85	Other	2,453	3,805	12,102	32,465	21,179	29,136

1/ Less than 500 pairs.

Table 11.--Nonrubber footwear (including zoris and paper slippers): U.S. imports for consumption, by selected TSUS items, 1971-74, January-September 1974, and January-September 1975--Continued

TSUS item	Description	1971	1972	1973	1974	January-September-- 1974	January-September-- 1975
		Value (1,000 dollars)					
	Total, all nonrubber footwear	681,563	838,517	980,222	989,155	756,199	852,416
	Footwear of leather (except footwear with uppers of fibers), total	509,545	638,143	718,474	706,415	530,312	641,897
700.05	Huaraches	114	561	274	139	132	111
700.10	McKay-sewed footwear	195	213	249	205	142	113
700.15	Moccasins	504	407	432	507	363	238
700.20	Turn or turned footwear	10,134	9,570	7,212	4,859	3,335	3,197
	Welt footwear:						
700.25	Valued not over $2 per pair	115	66	30	1	1	18
700.26	Valued over $2 but not over $5 per pair	7,944	7,437	9,960	8,001	7,239	3,713
700.27	Valued over $5 but not over $6.80 per pair	4,519	3,875	7,645	12,891	10,172	7,427
	Valued over $6.80 per pair:						
700.28	Ski boots	930	319	132	78	63	6
700.29	Other	29,659	28,904	28,270	26,616	20,797	18,649
700.30	Footwear with molded soles laced to uppers	875	498	123	337	337	116
700.32	Slippers	549	288	246	250	78	103
	Other:						
700.35	For men, youths, and boys	161,216	218,155	256,589	259,800	186,306	253,400
	For other persons:						
700.41	Sandals of buffalo leather	1,434	2,096	1,833	1,574	1,096	1,545
	Other:						
700.43	Valued not over $2.50 per pair	64,312	51,425	36,611	25,515	20,687	18,471
700.45	Valued over $2.50 per pair	227,045	314,329	368,868	365,642	279,564	334,790
700.55	Footwear having uppers of plastics, total	160,121	177,038	220,954	230,482	187,444	172,790
	Other nonrubber footwear, total	11,897	23,336	40,794	52,258	38,443	37,729
	Footwear with uppers of fibers:						
	With soles of leather:						
700.66	Valued not over $2.50 per pair	238	192	166	77	57	83
700.68	Valued over $2.50 per pair	576	398	609	702	397	536
	With soles of material other than leather:						
700.70	With uppers of vegetable fibers	858	1,619	4,618	9,371	6,961	6,355
700.75	With soles and uppers of wool felt	4,626	6,095	3,466	4,287	3,238	3,083
700.80	Other	1,118	1,023	3,398	5,038	4,240	1,926
	Other footwear:						
700.83	Of wood	2,941	10,703	21,620	23,086	16,839	18,186
700.85	Other	1,540	3,306	6,917	9,697	6,711	7,561

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

Table 12.--Nonrubber footwear (including zoris and paper slippers): U.S. imports for consumption, by types and TSUSA items, 1974, January-September 1974, and January-September 1975

TSUSA item	Description	Quantity			Value			Unit value		
		1974	Jan.-Sept.		1974	Jan.-Sept.		1974	Jan.-Sept.	
			1974	1975		1974	1975		1974	1975
		1,000 pairs	1,000 pairs	1,000 pairs	1,000 dollars	1,000 dollars	1,000 dollars	Per pair	Per pair	Per pair
	Total, all nonrubber footwear	318,021	249,195	256,405	989,155	756,199	852,417	$3.11	$3.03	$3.32
	Footwear, of leather, total	127,889	98,364	112,908	706,415	530,313	641,897	5.52	5.39	5.69
700.0500	Huaraches	93	90	45	139	132	111	1.49	1.47	2.47
700.1000	McKay-sewed footwear	32	19	16	205	142	113	6.41	7.47	7.06
700.1500	Moccasins	221	168	142	507	363	238	2.29	2.16	1.68
	Turn or turned footwear:									
700.2020	*For men, youths, and boys*	27	12	22	211	94	179	7.81	7.83	8.14
700.2045	*For women*	785	552	476	4,589	3,183	3,003	5.85	5.77	6.31
700.2050	*For misses*	14	14	3	52	52	11	3.71	3.71	3.67
700.2060	*For children and infants*	2	2	1	7	7	5	3.50	3.50	5.00
	Welt footwear:									
700.2500	Valued not over $2 per pair	1	1/	11	1	1	18	1.00	2/	1.64
	Valued over $2 but not over $5 per pair									
700.2610	*Work footwear*	1,061	954	417	4,643	4,165	1,899	4.38	4.37	4.55
	Other:									
700.2630	*For men*	689	632	382	2,983	2,732	1,692	4.33	4.32	4.43
700.2650	*Other*	88	80	28	375	342	122	4.26	4.28	4.36
	Valued over $5 but not over $6.80 per pair									
700.2718	*Work footwear*	1,334	1,115	649	7,655	6,406	3,771	5.74	5.75	5.81
	Other:									
700.2738	*For men*	788	554	594	4,745	3,331	3,529	6.02	6.01	5.94
700.2748	*Other*	72	62	23	491	434	127	6.82	7.00	5.52
	Valued over $6.80 per pair:									
700.2800	*Ski boots*	4	3	1/	78	63	6	19.50	21.00	2/
	Other:									
700.2920	*Athletic footwear other than ski boots.*	128	107	79	2,670	2,237	1,665	20.86	20.91	21.08
700.2940	*Work footwear*	386	356	290	3,328	3,024	2,559	8.62	8.49	8.82
	Other:									
700.2960	*For men*	1,213	939	714	17,744	13,278	12,461	14.63	14.14	17.45
700.2980	*Other*	185	144	111	2,874	2,258	1,964	15.54	15.68	17.69
700.3000	Footwear with molded soles laced to uppers	51	51	6	337	337	116	6.61	6.61	19.33
700.3200	Slippers	65	25	33	250	78	103	3.85	3.12	3.12
	Other:									
	For men, youths, and boys									
	Athletic footwear:									
700.3505	*Ski boots*	124	80	122	1,604	1,035	1,635	12.94	12.94	13.40
700.3515	*Other athletic footwear*	7,534	5,106	10,964	53,825	36,353	78,833	7.14	7.12	7.19
	Work footwear:									
700.3527	*For men*	450	361	317	3,599	2,730	2,850	8.00	7.56	8.99
700.3529	*For youths and boys*	36	32	25	126	107	118	3.50	3.34	4.72
	Soled "moccasins":									
700.3530	*For men*	871	673	335	6,982	5,076	2,305	8.02	7.54	6.88
700.3535	*For youths and boys*	124	83	135	453	335	464	3.65	4.04	3.44
	Other:									
	With soles vulcanized to uppers or with soles simultaneously molded and attached to uppers:									
700.3540	*For men*	1,782	1,369	1,523	11,724	8,419	10,498	6.58	6.15	6.89
700.3545	*For youths and boys*	244	197	181	795	610	603	3.26	3.10	3.33
	Cement footwear:									
700.3550	*For men*	19,620	14,749	16,499	140,275	102,373	115,300	7.15	6.94	6.99
700.3555	*For youths and boys*	1,793	1,416	2,792	5,919	4,545	9,717	3.30	3.21	3.48
	Other:									
700.3575	*For men*	4,753	3,466	4,772	32,610	23,363	27,854	6.86	6.74	5.84
700.3580	*For youths and boys*	512	375	912	1,888	1,362	3,222	3.69	3.63	3.53
	For other persons:									
	Sandals of buffalo leather, the uppers of which consist primarily of straps across the instep and big toe									
700.4110	*For women*	1,063	764	937	1,497	1,043	1,441	1.41	1.37	1.54
700.4120	*For misses*	30	28	15	42	47	47	1.40	1.25	3.13
700.4130	*For children*	13	9	21	16	50	50	1.23	1.22	2.38
700.4140	*For infants*	5	4	3	19	9	8	3.80	2.25	2.67

1/ Less than 500 pairs.
2/ Not available.

Table 12.--Nonrubber footwear (including zoris and paper slippers): U.S. imports for consumption, by types and TSUSA items, 1974, January-September 1974 and January-September 1975--Continued

TSUSA item	Description	Quantity			Value			Unit value		
		1974	Jan.-Sept.		1974	Jan.-Sept.		1974	Jan.-Sept.	
			1974	1975		1974	1975		1974	1975
		1,000 pairs	1,000 pairs	1,000 pairs	1,000 dollars	1,000 dollars	1,000 dollars	Per pair	Per pair	Per pair
	Footwear, of leather, etc. (con.):									
	Other (con.):									
	For other persons (con.):									
	Other:									
	Valued not over $2.50 per pair									
700.4305	*Athletic footwear*	22	22	70	46	46	137	$2.09	$2.09	$1.
	Casual footwear:									
700.4310	*For women*	1,180	997	519	1,934	1,621	960	1.64	1.63	1.
700.4315	*Other*	500	375	243	830	604	435	1.66	1.61	1.
	Soled "moccasins":									
700.4320	*For women*	73	51	26	90	64	34	1.23	1.25	1.
700.4325	*Other*	5	5	4	5	5	4	1.00	1.00	1.
	Other:									
	With soles vulcanized to uppers or with soles simultaneously molded and attached to uppers:									
700.4330	*For women*	49	47	11	79	74	18	1.61	1.57	1.
700.4335	*Other*	37	28	48	67	52	88	1.81	1.86	1.
	Cement footwear:									
700.4340	*For women*	8,120	6,559	4,869	14,578	11,933	8,907	1.80	1.82	1.
700.4345	*For misses*	460	402	494	864	763	915	1.88	1.90	1.
700.4350	*For children*	1,790	1,422	1,809	3,078	2,439	3,212	1.72	1.72	1.
700.4355	*For infants*	1,041	805	1,053	1,678	1,286	1,730	1.61	1.60	1.
	Other:									
700.4360	*For women*	807	668	541	1,367	1,165	989	1.69	1.74	1.
700.4365	*For misses*	47	44	35	86	79	66	1.83	1.80	1.
700.4370	*For children*	438	285	417	668	426	643	1.53	1.49	1.
700.4375	*For infants*	104	93	226	145	131	333	1.39	1.41	1.
	Valued over $2.50 per pair									
700.4505	*Athletic footwear*	531	343	597	4,392	2,841	4,954	8.27	8.28	8.
	Casual footwear:									
700.4510	*For women*	7,733	6,119	6,988	36,600	28,593	34,612	4.73	4.67	4.
700.4515	*Other*	135	124	167	518	459	601	3.84	3.70	3.
	Soled "moccasins":									
700.4520	*For women*	282	200	44	2,326	1,612	427	8.25	8.06	9.
700.4525	*Other*	13	13	5	92	92	25	7.08	7.08	5.
	Other:									
	With soles vulcanized to uppers or with soles simultaneously molded and attached to uppers:									
	For women	643	485	601	2,670	1,972	2,619	4.15	4.07	4
700.4535	*Other*	139	70	73	867	269	604	6.24	3.84	8
	Cement footwear:									
700.4540	*For women*	51,692	40,182	45,073	290,170	223,005	265,903	5.61	5.55	5
700.4545	*For misses*	243	192	479	1,292	1,004	2,065	5.32	5.23	4
700.4550	*For children*	1,095	847	1,494	4,449	3,396	5,839	4.06	4.01	3
700.4555	*For infants*	322	221	178	1,170	809	694	3.63	3.66	3
	Other:									
700.4560	*For women*	3,881	2,977	2,969	19,664	14,712	15,337	5.07	4.94	5
700.4565	*For misses*	76	46	84	429	247	400	5.64	5.37	4
700.4570	*For children*	176	137	171	691	509	614	3.93	3.72	3
700.4575	*For infants*	62	14	25	312	42	95	5.03	3.00	3

able 12.--Nonrubber footwear (including zoris and paper slippers): U.S. imports for consumption, by types and TSUSA items, 1974, January-September 1974 and January-September 1975--Continued

SUSA item	Description	Quantity			Value			Unit value		
		1974	Jan.-Sept.		1974	Jan.-Sept.		1974	Jan.-Sept.	
			1974	1975		1974	1975		1974	1975
		1,000 pairs	1,000 pairs	1,000 pairs	1,000 dollars	1,000 dollars	1,000 dollars	Per pair	Per pair	Per pair
	Certain footwear of rubber or plastics, total	138,309	114,379	102,501	230,482	187,444	172,790	$1.67	$1.64	$1.69
.5520	Zories or thonged sandals	23,544	18,649	17,132	6,227	4,900	5,195	.26	.26	.30
.5523	*Soft sole footwear*	1,334	969	376	1,497	1,182	334	1.12	1.22	.89
	Footwear having supported vinyl upper									
.5537	*For men*	9,454	8,103	6,533	28,118	22,908	20,411	2.97	2.83	3.12
.5539	*For youths and boys*	3,501	3,008	2,782	6,335	5,445	5,320	1.81	1.81	1.91
.5547	*For women*	70,446	58,692	52,505	127,598	103,553	95,957	1.81	1.76	1.83
.5549	*For misses*	5,267	4,620	3,016	7,991	6,939	5,074	1.52	1.50	1.68
.5557	*For children*	6,162	5,261	3,189	8,675	7,285	4,823	1.41	1.38	1.51
.5559	*For infants*	1,653	1,459	1,326	1,807	1,521	1,483	1.09	1.04	1.12
	Other:									
.5577	*For men*	2,328	1,871	1,969	10,837	8,708	6,939	4.66	4.65	3.52
.5579	*For youths and boys*	450	329	379	887	611	802	1.97	1.86	2.12
.5581	*For women*	11,844	9,520	11,563	27,562	22,044	24,570	2.33	2.32	2.12
.5583	*For misses*	736	554	583	1,130	881	837	1.54	1.59	1.44
.5585	*For children*	1,183	998	717	1,447	1,180	694	1.22	1.18	.97
.5587	*For infants*	407	346	431	371	287	351	.91	.83	.81

Table 12.--Nonrubber footwear (including zoris and paper slippers): U.S. imports for consumption, by types and TSUSA items, 1974, January-September 1974, and January-September 1975--Continued

TSUSA item	Description	Quantity			Value			Unit value		
		1974	Jan.-Sept.		1974	Jan.-Sept.		1974	Jan.-Sept.	
			1974	1975		1974	1975		1974	1975
		1,000 pairs	1,000 pairs	1,000 pairs	1,000 dollars	1,000 dollars	1,000 dollars	Per pair	Per pair	Per pair
	Other nonrubber footwear, total	51,823	36,452	40,996	52,258	38,442	37,730	$1.01	$1.05	$0.92
	Footwear, with uppers of fibers:									
	With soles of leather:									
	Valued not over $2.50 per pair:									
700.6620	*Slipper socks*	14	12	32	13	11	32	.93	.92	1.00
	Other:									
700.6640	*For men, youths, and boys*	11	7	17	13	8	19	1.18	1.14	1.12
700.6660	*Other*	48	37	36	51	38	32	1.06	1.03	.89
	Valued over $2.50 per pair:									
700.6820	*Slipper socks*	6	5	4	24	20	15	4.00	4.00	3.75
	Other:									
700.6840	*For men, youths, and boys*	6	4	6	54	24	77	9.00	6.00	12.83
700.6860	*Other*	86	59	54	624	353	444	7.26	5.98	8.22
	With soles of material other than leather:									
	With uppers of vegetable fibers:									
700.7020	*For men, youths, and boys*	107	69	102	183	141	189	1.71	2.04	1.85
700.7065	*For women*	3,455	2,767	1,948	8,237	6,105	5,274	2.38	2.21	2.71
700.7070	*For misses*	118	116	77	180	178	203	1.53	1.53	2.64
700.7075	*For children*	33	32	98	50	46	113	1.52	1.44	1.15
700.7080	*For infants*	1,949	1,313	1,519	721	490	576	.37	.37	.38
	With soles and uppers of wool felt:									
700.7510	*For men*	1,506	1,175	1,152	3,221	2,386	2,220	2.14	2.03	1.93
700.7520	*For youths and boys*	368	313	417	548	450	551	1.49	1.44	1.32
700.7530	*For women*	98	87	85	143	126	119	1.46	1.45	1.40
700.7540	*For misses*	92	60	62	129	88	80	1.40	1.47	1.29
700.7550	*For children*	211	171	109	225	180	91	1.07	1.05	.83
700.7560	*For infants*	16	7	31	21	8	21	1.31	1.14	.68
	Other:									
700.8020	*For men, youths, and boys*	1,219	1,049	308	1,852	1,671	328	1.52	1.59	1.06
700.8065	*For women*	1,607	1,405	660	2,235	1,822	1,269	1.39	1.30	1.92
700.8070	*For misses*	204	178	65	276	180	84	1.35	1.01	1.29
700.8075	*For children*	475	447	55	333	301	59	.70	.67	1.07
700.8080	*For infants*	853	697	508	342	266	185	.40	.38	.36
	Other footwear:									
	Of wood:									
700.8310	*For men*	89	75	51	329	256	281	3.70	3.41	5.51
700.8320	*For youths and boys*	19	18	37	66	62	142	3.47	3.44	3.84
700.8330	*For women*	6,557	4,974	4,303	22,219	16,089	17,445	3.39	3.23	4.05
700.8340	*For misses*	113	108	93	308	299	251	2.73	2.77	2.70
700.8350	*For children*	77	67	30	149	118	64	1.94	1.76	2.13
700.8360	*For infants*	21	21	1	15	15	4	.71	.71	4.00
	Other:									
700.8520	*For men, youths, and boys*	20,880	13,768	18,977	2,473	1,746	2,074	.12	.13	.11
700.8565	*For women*	10,778	6,893	9,717	6,671	4,519	5,076	.62	.66	.52
700.8570	*For misses*	130	123	125	170	150	156	1.31	1.22	1.25
700.8575	*For children*	366	357	168	277	257	156	.76	.72	.93
700.8580	*For infants*	311	38	149	106	39	100	.34	1.03	.67

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

Table 13.--Nonrubber footwear for women and misses (other than athletic and work and including paper slippers): U.S. production, imports for consumption, and apparent consumption, 1968-74, January-September 1974, and January-September 1975 1/

Period	Production	Imports 2/	Apparent consumption 3/	Ratio of imports to--	
				Consumption	Production
	Million pairs	Million pairs	Million pairs	Percent	Percent
1968------------	317	133	450	30	42
1969------------	266	140	406	34	53
1970------------	253	166	419	40	66
1971------------	232	181	413	44	78
1972------------	218	199	417	48	91
1973------------	197	215	412	52	109
1974------------	183	191	374	51	104
Jan.-Sept.--					
1974----------	136	151	287	53	111
1975----------	135	150	285	53	111

1/ Data on imports include paper slippers; however, they do not include data on imports of zoris, which are not reported by sex.

2/ A small part is estimated from official statistics of the U.S. Department of Commerce.

3/ Production plus imports without an allowance for exports, which in 1974 amounted to 1.3 million pairs.

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

Table 13a.--Nonrubber footwear for women and misses (other than athletic and work): U.S. production, imports for consumption, and apparent consumption, 1968-74, January-September 1974, and January-September 1975 1/

Period	Production	Imports 2/	Apparent consumption 3/	Ratio of imports to-- Consumption	Production
	Million pairs	Million pairs	Million pairs	Percent	Percent
1968	317	133	450	30	42
1969	266	140	406	34	53
1970	253	166	419	40	66
1971	232	181	413	44	78
1972	218	199	417	48	91
1973	197	210	407	52	107
1974	183	183	366	50	100
Jan.-Sept.--					
1974	136	147	283	52	108
1975	135	142	277	51	105

1/ Data on imports do not include imports of zoris or paper slippers.
2/ A small part is estimated from official statistics of the U.S. Department of Commerce.
3/ Production plus imports without an allowance for exports, which in 1974 amounted to 1.3 million pairs.

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

Table 14.--Nonrubber footwear for men, youths, and boys (other than athletic and work and including paper slippers): U.S. production, imports for consumption, and apparent consumption, 1968-74, January-September 1974, and January-September 1975 1/

Period	Produc- tion	Imports 2/	Apparent consump- tion 3/	Ratio of imports to--	
				Consump- tion	Produc- tion
	Million pairs	Million pairs	Million pairs	Percent	Percent
1968	114	31	145	21	27
1969	105	38	143	27	36
1970	106	48	154	31	45
1971	102	57	159	36	56
1972	115	62	177	35	54
1973	112	66	178	37	59
1974	101	73	174	42	72
Jan.-Sept.--					
1974	81	54	135	40	67
1975	73	62	135	46	85

1/ Data on imports include paper slippers; however, they do not include data on imports of zoris, which are not reported by sex.
2/ A small part is estimated from official statistics of the U.S. Department of Commerce.
3/ Production plus imports without an allowance for exports, which in 1974 amounted to about 1 million pairs.

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

Table 14a.--Nonrubber footwear for men, youths, and boys (other than athletic and work): U.S. production, imports for consumption, and apparent consumption, 1968-74, January-September 1974, and January-September 1975 1/.

Period	Production	Imports 2/	Apparent consumption 3/	Ratio of imports to-- Consumption	Ratio of imports to-- Production
	Million pairs	Million pairs	Million pairs	Percent	Percent
1968	114	31	145	21	27
1969	105	38	143	27	36
1970	106	48	154	31	45
1971	102	57	159	36	56
1972	115	62	177	35	54
1973	112	63	175	36	56
1974	101	53	154	34	52
Jan.-Sept.--					
1974	81	41	122	34	51
1975	73	43	116	37	59

1/ Data on imports do not include imports of zoris or paper slippers.
2/ A small part is estimated from official statistics of the U.S. Department of Commerce.
3/ Production plus imports without an allowance for exports, which in 1974 amounted to about 1 million pairs.

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

Table 15.--Nonrubber footwear for children and infants (other than athletic and work): U.S. production, imports for consumption, and apparent consumption, 1968-74, January-September 1974, and January-September 1975

Period	Production	Imports 1/	Apparent consumption 2/	Ratio of imports to-- Consumption	Production
	Million pairs	Million pairs	Million pairs	Percent	Percent
1968-------------	60	14	74	19	23
1969-------------	56	19	75	25	34
1970-------------	55	21	76	28	38
1971-------------	54	22	76	29	41
1972-------------	50	27	77	35	54
1973-------------	49	26	75	35	53
1974-------------	44	19	63	30	43
Jan.-Sept.--					
1974-----------	33	15	48	31	45
1975-----------	29	14	43	33	48

1/ A small part is estimated from official statistics of the U.S. Department of Commerce.
2/ Production plus imports without an allowance for exports, which in 1974 amounted to 372,000 pairs.

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

Table 16.--Work footwear: U.S. production, imports for consumption, and apparent consumption, 1968-74, January-September 1974, and January-September 1975

Period	Production	Imports	Apparent consumption 1/	Ratio of imports to-- Consumption	Ratio of imports to-- Production
	Million pairs	Million pairs	Million pairs	Percent	Percent
1968	36	2	38	5	6
1969	35	2	37	5	6
1970	38	2	40	5	5
1971	38	2	40	5	5
1972	35	2	37	5	6
1973	2/ 29	3	32	9	10
1974	2/ 27	3	30	10	11
January-September--					
1974	2/ 21	3	24	13	14
1975	2/ 17	2	19	11	12

1/ Production plus imports without an allowance for exports, which are believed to be negligible.

2/ The data reported for years prior to 1973 include all "work shoes" regardless of ankle height; those for 1973 and subsequent years include only such shoes of ankle height or higher. (In 1972, production of work shoes less than 6 inches high amounted to 8 million pairs.)

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

Table 17.--Athletic footwear: U.S. production, imports for consumption, and apparent consumption, 1968-74, January-September 1974, and January-September 1975

Period	Production	Imports	Apparent consumption 1/	Ratio of imports to-- Consumption	Ratio of imports to-- Production
	Million pairs	Million pairs	Million pairs	Percent	Percent
1968	8	2	10	20	25
1969	9	2	11	18	22
1970	9	4	13	31	44
1971	8	5	13	38	63
1972	9	6	15	40	67
1973	10	6	16	38	60
1974	10	8	18	44	80
January-September--					
1974	7	6	13	46	86
1975	8	12	20	60	150

1/ Production plus imports without an allowance for exports, which in 1974 amounted to 201,000 pairs.

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

Table 17a.--Nonrubber footwear: Imports by respondents to importers' questionnaire, by types, 1970-74, January-June 1974, and January-June 1975

(In thousands of pairs)

Type	1970	1971	1972	1973	1974	Jan.-June-- 1974	Jan.-June-- 1975
For men:							
Athletic	114	112	166	296	469	104	1,164
Work	198	1,373	1,186	2,107	2,304	1,315	458
House slippers	449	1,251	671	840	934	458	307
Other:							
Boots:							
Fashion	316	377	440	432	338	135	207
Other	917	1,023	1,201	1,323	1,108	464	440
Casuals							
Wood bottoms	46	56	78	103	134	59	92
Clogs	7	8	18	70	13	7	9
Sandals	1,153	1,181	1,176	1,525	1,706	1,272	1,285
Dress	3,611	3,862	5,383	5,255	4,422	2,137	2,272
All other	2,716	3,047	3,643	3,610	4,085	2,473	2,683
Total	9,527	12,290	13,962	15,561	15,513	8,424	8,917
Total men's pairs with an importers' net selling price of less than $6 a pair	3,367	5,734	6,204	7,032	3,269	3,751	4,391
For youths and boys:							
Athletic	234	31	65	73	59	44	339
Work	277	308	46	113	178	40	157
House slippers	5	4	14	52	20	10	18
Other:							
Boots:							
Fashion	19	13	18	46	31	1	33
Other	331	354	406	445	280	108	142
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	-	-
Sandals	364	483	648	701	663	593	577
Dress	365	209	258	391	337	210	67
All other	156	203	280	336	399	185	281
Total	1,751	1,605	1,736	2,157	1,967	1,191	1,614
Total youths' and boys' pairs with an importers' net selling price of less than $6 a pair	1,534	1,327	678	1,786	1,517	966	1,221
For women:							
Athletic	15	28	56	94	84	50	98
House slippers	3,675	3,597	4,737	6,590	7,143	4,586	5,414
Other:							
Boots:							
Fashion	1,998	2,427	3,594	3,538	714	241	181
Other	208	296	535	676	782	306	140
Casuals:							
Wood bottoms	208	263	455	1,087	2,644	2,134	1,133
Clogs	746	476	1,432	3,113	1,959	1,419	733
Sandals	12,959	16,397	21,146	26,158	27,785	18,867	20,312
Sport types:							
Crepe-sole types	1,599	2,612	3,802	5,100	6,889	2,641	2,719
Hard-sole types	3,143	2,881	5,085	3,982	3,416	1,422	1,886
Dress	4,845	6,324	8,153	10,394	10,650	5,131	5,336
All other	3,295	3,816	4,220	3,592	4,707	3,019	2,781
Total	32,691	39,117	53,215	64,324	66,773	39,816	40,933
Total women's pairs with an importers' net selling price of less than $4 a pair	13,746	15,209	18,432	26,050	25,000	17,835	17,420

Table 17a.--Nonrubber footwear: Imports by respondents to importers' questionnaire, by types, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Type	1970	1971	1972	1973	1974	Jan.-June-- 1974	Jan.-June-- 1975
For misses:							
Athletic	2	2	3	3	3	2	38
House slippers	6	33	34	39	43	15	28
Other:							
Boots:							
Fashion	263	362	618	41	17	4	35
Other	10	6	41	81	161	21	33
Casuals:							
Wood bottoms	50	50	75	112	189	148	178
Clogs	-	-	21	281	535	510	25
Sandals	1,143	1,151	1,519	2,078	2,042	1,944	1,749
Sport types:							
Crepe-sole types	-	2	28	73	174	106	209
Hard-sole types	655	128	305	177	151	130	183
Dress	27	20	26	155	204	204	152
All other	103	135	318	368	302	239	344
Total	2,259	1,889	2,988	3,408	3,821	3,323	2,974
Total misses' pairs with an importers' net selling price of less than $4 a pair	2,101	1,688	2,621	2,912	3,247	2,947	2,389
For children and infants:							
Athletic	14	15	16	13	10	7	34
House slippers	302	300	421	253	259	21	94
Other:							
Boots:							
Fashion	8	592	361	41	57	28	12
Other	15	20	54	16	20	9	8
Casuals:							
Wood bottoms	10	10	10	28	58	52	29
Clogs	-	-	4	83	273	249	1
Sandals	971	1,063	1,478	1,835	1,597	1,485	1,618
Sport types:							
Crepe-sole types	15	25	65	89	157	70	141
Hard-sole types	44	36	60	64	118	84	64
Dress	59	38	80	274	203	61	217
All other	610	670	924	784	1,067	751	1,026
Total	2,048	2,769	3,473	3,480	3,819	2,817	3,244
Total children's and infants' pairs with an importers' net selling price of less than $4 a pair	1,654	2,306	2,844	2,922	2,929	2,413	2,532

Source: Compiled by the U.S. International Trade Commission from data supplied by respondents to the importers' questionnaire on nonrubber footwear.

Note.--Individual items may not add to totals shown because of the inability of some firms to disaggregate their production by type of footwear.

Table 17b.--Nonrubber footwear: Imports by respondents to producers' questionnaire, by types, 1970-74, January-June 1974, and January-June 1975

(In thousands of pairs)

Type	1970	1971	1972	1973	1974	Jan.-June -- 1974	Jan.-June -- 1975
For men:							
Athletic	28	18	20	96	173	69	209
Work	373	718	1,041	1,983	2,202	1,418	878
House slippers	-	-	-	-	-	-	4
Other:							
Boots:							
Fashion	323	564	610	448	438	198	197
Other	59	67	85	217	239	139	76
Casuals:							
Wood bottoms	219	231	256	294	257	121	132
Clogs	26	29	37	49	64	32	16
Sandals	331	391	344	600	422	178	214
Dress	2,647	2,678	3,352	3,607	3,370	1,940	1,645
All other	51	52	96	186	215	113	122
Total	4,060	4,699	5,841	7,480	7,380	4,210	3,438
Total men's pairs with an importers' net selling price of less than $6 a pair	439	554	560	2,017	504	284	407
For youths and boys:							
Athletic	16	69	244	426	327	162	203
Work	-	-	18	47	85	39	48
House slippers	-	-	-	-	-	-	-
Other:							
Boots:							
Fashion	-	-	-	-	7	4	-
Other	-	-	6	8	39	18	9
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	-	-
Sandals	50	119	91	63	64	31	59
Dress	4	-	-	4	1	-	-
All other	-	97	83	101	48	19	7
Total	70	285	442	649	571	273	326
Total youths' and boys' pairs with an importers' net selling price of less than $6 a pair	54	138	321	505	351	166	202
For women:							
Athletic	42	39	46	46	23	16	90
House slippers	-	17	529	1,053	1,817	795	1,169
Other:							
Boots:							
Fashion	549	1,131	1,250	338	157	67	24
Other	50	71	129	189	77	10	9
Casuals:							
Wood bottoms	79	83	108	121	137	96	90
Clogs	21	53	336	476	284	45	444
Sandals	9,578	12,999	12,415	12,046	10,239	5,689	4,850
Sport types:							
Crepe-sole types	376	447	977	1,096	1,047	562	536
Hard-sole types	258	275	1,219	1,455	1,326	651	613
Dress	678	785	1,315	1,653	1,359	667	745
All other	4	6	21	45	12	6	9
Total	11,980	14,335	18,883	19,057	17,803	9,140	9,007
Total women's pairs with an importers' net selling price of less than $4 a pair	5,023	5,950	6,678	5,243	4,004	2,269	1,874

Table 17b.--Nonrubber footwear: Imports by respondents to producers' questionnaire, by types, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Type	1970	1971	1972	1973	1974	Jan.-June-- 1974	Jan.-June-- 1975
For misses:							
Athletic	14	4	-	88	152	83	73
House slippers	-	-	-	-	-	-	-
Other:							
Boots:							
Fashion	3	42	51	11	3	1	1
Other	-	-	4	-	2	-	-
Casuals:							
Wood bottoms	-	-	-	-	-	-	2
Clogs	-	-	5	13	17	16	106
Sandals	490	966	1,149	1,157	933	510	449
Sport types:							
Crepe-sole types	1	4	3	33	56	31	22
Hard-sole types	-	-	3	7	-	-	3
Dress	13	4	6	52	17	9	
All other	-	-	-	-	10	5	-
Total	521	1,020	1,221	1,360	1,244	655	628
Total misses' pairs with an importers' net selling price of less than $4 a pair	475	895	926	1,069	812	422	387
For children and infants:							
Athletic	98	77	157	66	319	69	28
House slippers	-	-	-	-	-	-	-
Other:							
Boots:							
Fashion	-	-	3	-	-	-	-
Other	-	1	4	-	-	-	-
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	-	1
Sandals	235	466	644	460	434	208	199
Sport types:							
Crepe-sole types	-	-	-	12	21	10	9
Hard-sole types	-	-	-	-	-	-	1
Dress	8	-	1	32	10	5	1
All other	10	12	15	15	140	8	258
Total	351	556	824	585	924	300	625
Total children's and infants' pairs with an importers' net selling price of less than $4 a pair	339	536	797	564	748	272	350

Source: Compiled by the U.S. International Trade Commission from data supplied by respondents to the producers' questionnaire on nonrubber footwear.

Note.--Individual items may not add to totals shown because of the inability of some firms to disaggregate their production by type of footwear.

Table 18.--Nonrubber footwear: Annual production in selected countries and areas, 1/ 1954, 1960, and 1963-74

(In millions of pairs)

Country or area	1954 2/	1960 2/	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974	Percentage increase or (decrease) in 1973 over 1954 3/	Percentage increase or (decrease) in 1973 over 1968 3/
North America:																
United States	530	600	604	613	626	642	600	642	577	562	536	527	490	453	(8)	(24)
Canada	37	34	51	46	50	51	50	54	50	35	45	44	42	4/	14	(22)
Mexico	4/	5/ 37	47	49	5/ 45	5/ 55	80	4/	4/	4/	5/ 88	4/	4/	4/	4/	4/
Europe:																
European Community 6/	7/ 389	581	679	692	725	8/ 746	8/ 730	823	887	852	876	880	829	4/	113	1
Italy	9/ 23	9/ 80	9/ 105	9/ 100	9/ 148	9/ 176	9/ 200	9/ 238	285	295	304	313	288	4/	1,152	21
France	115	152	195	195	176	187	186	185	9/ 196	9/ 176	9/ 194	9/ 210	9/ 202	4/	76	9
West Germany	89	141	153	156	163	159	135	153	161	145	140	134	10/ 119	4/	34	(22)
Netherlands	20	27	9/ 29	9/ 31	9/ 31	9/ 31	9/ 29	9/ 27	11/ 28	11/ 23	11/ 22	11/ 16	11/ 12/ 14	4/	(30)	(48)
Belgium-Luxemburg	14	19	25	24	9/ 23	24	22	22	20	17	17	17	14	4/	-	(36)
Denmark	6	7	8	9	9/ 9	4/	4/	8	8	7	7	7	6	4/	-	(25)
Ireland	4/	9/ 10/ 5	9/ 6	9/ 8	9/ 8	9	9	8	9	10/ 9	8	8	10/ 8	4/	4/	-
United Kingdom	122	150	158	169	167	160	149	10/ 13/ 182	180	180	184	175	178	4/	46	(2)
Other, non-Communist	68	111	143	148	155	162	168	167	182	167	190	202	230	4/	228	38
Austria	9/ 7	9/ 11	9/ 15	9/ 17	9/ 17	9/ 17	9/ 15	9/ 17	9/ 17	9/ 17	9/ 19	9/ 20	9/ 20	4/	186	18
Finland	6	8	10	10	10	11	11	10	11	11	10	9/ 12/ 9	9/ 12/ 9	4/	4/	4/
Greece 5/ 12/	4/	8	10	10	10	12	12	14	15	7	9	4/	4/	4/	4/	4/
Norway 9/	6	5	5	5	5	5	5	4	4	5	4	4	4	4/	(33)	-
Portugal	9/ 3	9/ 8	9/ 9	9/ 11	9/ 12	9/ 13	9/ 14	9/ 16	9/ 12/ 16	9/ 12/ 16	9/ 12/ 16	14/ 15	14/ 15	4/	400	(6)
Spain	9/ 15/ 24	9/ 43	71	9/ 68	9/ 75	9/ 81	9/ 90	84	93	87	9/ 108	113	143	4/	496	70
Sweden	11	15	12	15	14	11	10	10	11	11	10	11	11	4/	-	10
Switzerland	9/ 14/ 11	9/ 14/ 13	9/ 14/ 11	9/ 14/ 12	9/ 14/ 12	9/ 14/ 12	9/ 14/ 11	9/ 12	9/ 13	9/ 11	9/ 11	9/ 10	9/ 8	4/	(27)	(33)
Turkey	4/	4/	4/	4/	4/	4/	4/	4/	9/ 12/ 2	9/ 12/ 14/ 2	3	20	20	4/	4/	4/
Other, Communist	377	625	692	720	773	812	871	933	989	1,045	1,062	1,047	5/ 847	5/ 865	16/ 178	17/ 12
U.S.S.R. 5/	15/ 271	419	463	475	486	522	561	598	636	676	679	647	12/ 666	12/ 684	152	14
Poland	12/ 25	59	5/ 71	5/ 82	5/ 87	5/ 84	87	94	103	108	109	119	5/ 12/ 70	5/ 12/ 65	16/ 376	17/ 27
Czechoslovakia	5/ 18/ 31	58	60	61	87	88	90	95	99	103	107	110	5/ 12/ 61	5/ 12/ 61	16/ 255	17/ 16
Romania	10	22	24	26	31	35	44	49	50	52	56	62	5/ 12/ 50	5/ 12/ 55	16/ 520	17/ 27
Yugoslavia	4/	15	21	31	31	30	30	31	33	32	36	43	4/	4/	4/	17/ 39
German Democratic Republic 5/	18/ 30	36	35	37	41	39	39	42	47	50	52	49	4/	4/	16/ 63	17/ 17
Hungary	18/ 10	22	26	27	28	39	33	36	36	39	40	39	4/	4/	16/ 290	17/ 8
Bulgaria 5/	4/	14/ 9	13	12	13	15	17	19	18	17	19	21	4/	4/	4/	17/ 11
Other:																
Australia 19/	18/ 27	37	39	41	57	42	43	42	41	32	27	26	9/ 12/ 37	4/	16/ (4)	17/ (39)
Japan	15/ 16	135	131	162	153	140	137	157	158	131	137	142	142	4/	788	(10)
New Zealand	18/ 4	5	6	6	6	7	7	6	6	7	8	8	9/ 12/ 7	4/	16/ 100	17/ 33
Brazil	5/ 15/ 47	5/ 50	5/ 70	4/	5/ 75	4/	4/	80	103	4/	90	103	12/ 116	12/ 140	147	45
Taiwan	4/	4/	4/	4/	4/	4	4/	4/	12/ 41	12/ 64	12/ 90	12/ 128	12/ 191	12/ 160	4/	4/
South Africa	4/	23	26	29	51	30	32	34	37	35	35	36	4/	4/	4/	17/ 6
Iran	4/	4/	4/	4/	4/	4/	15	16	17	18	20	22	4/	4/	4/	17/ 38
Egypt 5/	4/	4/	11	12	12	13	12	14	15	17	17	4/	4/	4/	4/	4/
Malaysia 20/	4/	9	21/ 9	21/ 11	21/ 10	21/ 11	21/ 11	21/ 11	21/ 12	21/ 12	21/ 13	21/ 15	4/	4/	4/	17/ 36
India	6	9	13	14	16	17	18	18	16	15	16	14	4/	4/	16/ 133	17/ (22)
Sudan	4/	1	4/	4	7	8	10	11	9	13	14	4/	4/	4/	4/	4/
Nigeria	4/	4/	4/	3	6	8	9	8	11	17	17	13	4/	4/	4/	17/ 63
Colombia	4/	13	15	15	16	17	13	13	11	4/	4/	4/	4/	4/	4/	4/

1/ The data are not fully comparable because the types of nonrubber footwear for which statistics are available differ from country to country.
2/ The 1954 and 1960 statistics (except for the 1960 data for West Germany) do not include plastic footwear (vinyl and others); output of such footwear, however, was small in those years.
3/ Does not cover 1974, because of the general lack of data for that year.
4/ Not available.
5/ Leather footwear only.
6/ For the purpose of this table, the European Community is listed according to its current membership.
7/ Does not include figure for Ireland.
8/ Does not include figure for Denmark.
9/ Does not include footwear made of plastic materials.
10/ Partially estimated.
11/ Includes footwear with uppers made of plastic materials, except molded footwear.
12/ Estimated.
13/ Includes footwear with uppers made of plastic material.
14/ Does not include slippers and other house shoes.
15/ Data for 1955.
16/ 1954-72 time period used because it encompasses best data available.
17/ 1968-72 time period used because it encompasses best data available.
18/ Data for 1953.
19/ 12 months ending June 30 of year stated.
20/ Data for West Malaysia only.
21/ Includes canvas shoes with rubber soles.

Source: Compiled from official statistics of the individual countries and from The Footwear, Raw Hides and Skins, and Leather Industry in OECD Countries, 1955-74.

Table 19.--Footwear: U.S. production, by geographic areas, 1965-73 1/

(In thousands of pairs)

Geographic area	1965	1966	1967	1968	1969	1970	1971	1972	1973		
									Quantity	Percentage share of total	Percentage decrease, 1973 from 1965
United States, total	626,227	641,696	599,964	642,422	576,961	562,318	535,777	526,655	488,326	100	22
New England, total	200,515	202,972	189,494	198,436	167,795	166,043	147,266	125,820	107,632	22	46
Maine	62,048	62,854	57,499	58,364	50,406	51,128	40,258	33,055	31,741	6	49
New Hampshire	45,442	46,052	44,698	46,364	38,618	36,990	36,736	31,216	25,364	5	44
Massachusetts	83,639	85,368	79,190	85,210	71,167	71,668	64,972	56,216	48,073	10	43
Other States 2/	9,386	8,698	8,107	8,498	7,604	6,257	5,300	5,333	2,454	1	74
Middle Atlantic, total	177,723	179,293	163,077	178,067	156,201	152,408	144,190	144,162	131,856	27	26
New York	74,326	74,101	66,366	76,598	62,627	64,091	58,406	56,546	50,928	10	31
New Jersey	15,846	16,355	16,508	16,386	15,529	15,276	14,184	15,602	14,565	3	8
Pennsylvania	87,551	88,837	80,203	85,083	78,045	73,041	71,600	72,014	66,363	14	24
East North Central, total	70,042	69,836	64,017	63,287	65,131	62,823	57,710	61,139	59,527	12	15
Ohio	19,068	19,716	19,453	16,920	17,916	17,255	16,333	16,710	15,662	3	18
Illinois	23,655	22,967	19,164	19,393	19,271	18,466	16,737	18,793	18,616	4	21
Wisconsin	14,057	14,695	13,859	14,250	14,303	15,527	14,577	15,078	14,779	3	5
Indiana and Michigan	13,262	12,458	11,541	12,724	13,641	11,575	10,063	10,558	10,470	2	21
Other divisions, total	177,947	189,595	183,376	202,632	187,834	181,044	186,611	195,534	189,311	39	6
Missouri	53,643	54,227	50,572	56,528	49,525	46,549	46,286	52,164	49,410	10	8
Tennessee	37,645	41,641	39,539	40,857	38,432	39,998	42,565	41,833	38,198	8	1
Arkansas	20,454	21,641	20,929	21,180	19,402	19,497	18,507	21,143	20,249	4	1
Other States 2/	66,205	72,086	72,336	84,067	80,475	75,000	79,253	80,394	81,454	17	23

1/ Data for 1974 are not available.
2/ No further enumeration of States is provided in official statistics for the later years of the table.

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

Table 20.--Nonrubber footwear: Number of entries, exits, and plants, 1953-74

Year	Number of entries	Number of exits	Number of plants	Net decrease (entries minus exits), based on 5-year moving average 1/
1953	38	82	858	22
1954	50	60	840	18
1955	44	49	820	17
1956	43	46	796	12
1957	17	39	774	14
1958	22	41	755	11
1959	27	49	733	9
1960	48	39	742	8
1961	46	36	752	6
1962	35	52	735	3
1963	42	51	726	5
1964	32	40	718	5
1965	24	24	718	5
1966	35	27	726	5
1967	27	43	710	14
1968	13	23	700	25
1969	20	72	648	32
1970	31	86	593	36
1971	24	51	566	38
1972	29	66	529	36
1973	33	51	511	2/
1974	32	76	467	2/

1/ A 5-year moving average is a series of averages of 5 consecutive values, each average being placed at the chronological center of these consecutive values. Thus, the 5-year moving average for 1963 is computed by averaging net changes for the years 1961-65. The advantage of a moving average is that random fluctuations are partially absorbed to reveal long-term trends.

2/ Cannot be computed because data for subsequent years are unavailable.

Source: American Footwear Industries Association and National Footwear Manufacturers Association.

Table 21.--Nonrubber footwear: Utilization of plant capacity, 1953-74

Year	Plant capacity	Actual production	Utilization of capacity
	Million pairs	Million pairs 1/	
1953	679	532	78.4
1954	700	530	75.7
1955	743	585	78.7
1956	760	592	77.9
1957	764	598	78.3
1958	759	587	77.3
1959	756	637	84.3
1960	781	600	76.8
1961	779	593	76.1
1962	789	598	75.8
1963	781	591	75.7
1964	2/	612	2/
1965	765	626	81.8
1966	2/	642	2/
1967	2/	600	2/
1968	776	642	82.7
1969	742	577	77.8
1970	739	562	76.1
1971	696	535	77.9
1972	673	527	78.3
1973	653	488	74.7
1974	618	444	71.8

1/ Actual production figures supplied by the U.S. Bureau of the Census differ from those listed above as follows: 633 million pairs in 1962, 604 million pairs in 1963, 490 million pairs in 1973, and 453 million pairs in 1974.

2/ Not provided in petition by American Footwear Industries Association.

Source: American Footwear Industries Association and National Footwear Manufacturers Association.

Table 22.--Nonrubber footwear: Utilization of capacity, by types of footwear, 1968-74, January-May 1974, and January-May 1975 1/

(In percent)

Year	Men's shoes	Women's shoes	All other shoes	Total shoes	Slippers	Total Footwear
1968----------	86.1	85.8	74.5	82.8	80.7	82.7
1969----------	84.6	75.5	77.6	78.1	76.4	77.8
1970----------	87.8	72.9	74.6	76.7	73.6	76.1
1971----------	87.6	71.3	76.9	76.6	79.1	77.0
1972----------	89.3	73.4	78.6	78.9	75.7	78.2
1973----------	82.8	73.2	74.6	76.2	70.2	75.0
1974----------	79.4	72.7	67.1	73.2	66.9	71.9
January-May--						
1974--------	86.1	83.5	72.8	81.3	67.8	78.5
1975--------	68.7	65.1	64.4	66.0	49.5	62.5

1/ Total effective capacity is the sum of monthly production peaks for each type of footwear over a 36-month period ending Dec. 31 of the years involved.

Source: American Footwear Industries Association.

Table 23.--Nonrubber footwear: Number of U.S. producing companies and their aggregate output, by SIC product classes and by size of output, 1967

SIC product class	Total	Companies producing in 1967-- Less than 200,000 pairs	200,000 to 499,999 pairs	500,000 to 999,999 pairs	1,000,000 to 1,999,999 pairs	2,000,000 to 3,999,999 pairs	4,000,000 or more pairs
	Number of companies						
Shoes and slippers, except rubber	675	226	170	121	100	42	16
Shoes, total	569	188	151	97	85	34	14
Athletic 1/	91	45	21	11	6	2	6
Other than athletic:							
Men's work	94	27	24	14	14	6	9
Men's (except work)	135	33	32	27	23	9	11
Youths' and boys'	101	15	23	21	23	8	12
Women's	324	89	78	57	61	25	14
Misses'	110	13	25	22	23	14	13
Children's	126	22	35	24	23	10	12
Infants' and babies'	113	27	34	20	13	10	9
Slippers	169	62	28	38	24	12	5
	Aggregate output (1,000 pairs)						
Shoes and slippers, except rubber	599,964	14,468	57,428	85,057	144,032	112,521	186,458
Shoes, total	504,344	11,383	49,734	65,579	115,559	2/	2/
Athletic 1/	8,964	1,878	3,528	2,325	152	2/	2/
Other than athletic:							
Men's work	38,696	560	4,373	4,831	9,622	8,902	10,408
Men's (except work)	85,024	1,287	6,014	9,728	14,891	8,804	44,300
Youths' and boys'	25,341	316	2,391	2,692	5,200	2,696	12,046
Women's	257,991	5,231	21,921	31,477	69,358	47,981	82,023
Misses'	27,592	477	2,471	3,800	5,715	5,297	9,832
Children's	30,745	519	3,662	4,294	6,972	5,303	9,995
Infants' and babies'	29,991	1,115	5,374	6,432	3,649	2/	2/
Slippers	95,620	3,085	7,694	19,478	28,473	2/	2/
	Percent of total aggregate output						
Shoes and slippers, except rubber	100	2	10	14	24	19	31
Shoes, total	100	2	10	13	23	2/	2/
Athletic 1/	100	21	39	26	2	2/	2/
Other than athletic:							
Men's work	100	1	11	13	25	23	27
Men's (except work)	100	2	7	11	18	10	52
Youths' and boys'	100	1	9	11	20	11	48
Women's	100	2	8	12	27	19	32
Misses'	100	1	9	14	21	19	36
Children's	100	2	12	14	23	17	32
Infants' and babies'	100	4	18	21	12	2/	2/
Slippers	100	3	8	20	30	2/	2/

1/ Includes miscellaneous footwear reported under SIC class 3141798.
2/ Data withheld by the U.S. Bureau of the Census to avoid disclosing the operations of individual companies.

Source: Compiled by the U.S. Bureau of the Census.

Note.--The sum of the number of companies shown for each SIC product class is greater than the total number of companies because a miltiproduct company was counted as a producer under more than 1 class of footwear.

Table 23a.--Nonrubber footwear: Number of U.S. producing companies and their aggregate output, by SIC product classes and by size of output, 1969

SIC product class	Total	Companies producing in 1969: Less than 200,000 pairs	200,000 to 499,999 pairs	500,000 to 999,999 pairs	1,000,000 to 1,999,999 pairs	2,000,000 to 3,999,999 pairs	4,000,000 or more pairs
	Number of companies						
Shoes and slippers, except rubber	597	192	146	113	93	32	21
Shoes, total	503	158	130	91	81	26	17
Athletic 1/	81	36	21	8	8	2	6
Other than athletic:							
Men's work	79	25	15	14	13	3	9
Men's (except work)	122	29	28	22	23	8	12
Youths' and boys'	80	14	19	13	15	8	11
Women's	283	65	72	56	54	21	15
Misses'	86	12	27	10	15	8	14
Children's	109	21	35	15	16	8	14
Infants' and babies	98	30	29	10	13	5	11
Slippers	147	58	21	33	20	7	8
	Aggregate output (1,000 pairs)						
Shoes and slippers, except rubber	576,961	12,971	47,926	79,194	134,676	89,141	213,053
Shoes, total	476,018	10,026	42,016	60,152	109,398	70,003	184,423
Athletic 1/	12,630	1,537	3,875	2,845	2/	2/	1,122
Other than athletic:							
Men's work	35,559	970	2,625	4,663	2/	2/	11,781
Men's (except work)	81,604	1,265	4,800	10,815	13,071	8,138	43,515
Youth's and boys'	23,123	484	1,432	2,221	3,571	4,644	10,771
Women's	238,273	3,495	18,854	31,687	63,282	38,650	82,305
Misses'	29,109	261	2,747	1,731	6,408	6,037	11,925
Children's	28,318	448	3,404	2,588	4,033	4,915	12,930
Infants' and babies	27,402	1,566	4,279	3,602	5,589	2,292	10,074
Slippers	100,943	2,945	5,910	19,042	25,278	19,138	28,630
	Percent of total aggregate output						
Shoes and slippers, except rubber	100	2	8	14	23	16	37
Shoes, total	100	2	9	12	23	15	39
Athletic 1/	100	12	28	23	2/	2/	9
Other than athletic:							
Men's work	100	3	7	13	2/	2/	33
Men's (except work)	100	2	6	13	16	10	53
Youths' and boys'	100	2	6	10	15	20	47
Women's	100	1	8	13	27	16	35
Misses'	100	1	9	6	22	21	41
Children's	100	2	12	9	14	17	46
Infants' and babies	100	6	16	13	20	8	37
Slippers	100	3	6	19	25	19	28

1/ Includes miscellaneous footwear reported under SIC class 3141798.
2/ Data withheld by the U.S. Bureau of the Census to avoid disclosing the operations of individual companies.

Source: Compiled by the U.S. Bureau of the Census.

Note.--The sum of the number of companies for each SIC product class is greater than the total number of companies because a multiproduct company was counted as a producer under more than 1 class of footwear.

Table 23b.--Nonrubber footwear: Number of U.S. producing companies and their aggregate output, by SIC product classes and by size of output, 1974

SIC product class	Total	Companies producing in 1974: Less than 200,000 pairs	200,000 to 499,999 pairs	500,000 to 999,999 pairs	1,000,000 to 1,999,999 pairs	2,000,000 to 3,999,999 pairs	4,000,000 or more pairs
	Number of companies						
Shoes and slippers, except rubber	409	139	105	65	57	22	21
Shoes, total	358	122	92	58	49	19	18
Athletic 1/	67	29	13	10	3	5	7
Other than athletic:							
Men's work	54	11	12	7	7	5	12
Men's (except work)	119	37	23	18	14	11	16
Youths' and boys'	63	12	12	9	9	6	15
Women's	214	61	53	33	38	11	18
Misses'	58	8	12	8	12	5	13
Children's	81	14	22	13	14	4	14
Infants' and babies'	75	22	19	14	7	3	10
Slippers	86	33	16	15	10	3	9
	Aggregate output (1,000 pairs)						
Shoes and slippers, except rubber	452,955	9,646	33,846	47,331	78,480	59,474	224,178
Shoes, total	367,453	7,840	28,926	38,307	66,171	50,237	175,972
Athletic 1/	12,306	1,101	2,833	5,061	2/	2/	857
Other than athletic:							
Men's work	27,185	167	2,260	1,973	6,382	3,837	12,566
Men's (except work)	82,773	1,135	3,977	6,344	5,172	13,136	53,009
Youths' and boys'	17,956	188	1,210	925	2,884	1,702	11,047
Women's	167,055	3,530	13,190	17,491	39,495	23,172	70,177
Misses'	15,793	128	876	630	3,602	2,258	8,299
Children's	20,588	249	2,122	2,018	3,223	2,282	10,694
Infants' and babies'	23,797	1,342	2,458	3,865	2/	2/	9,323
Slippers	85,502	1,806	4,920	9,024	12,309	9,237	48,206
	Percent of total aggregate output						
Shoes and slippers, except rubber	100	2	8	10	17	13	50
Shoes, total	100	2	8	10	18	14	48
Athletic 1/	100	9	23	41	2/	2/	7
Other than athletic:							
Men's work	100	1	8	7	24	14	46
Men's (except work)	100	1	5	8	6	16	64
Youths' and boys'	100	1	7	5	16	9	62
Women's	100	2	8	10	24	14	42
Misses'	100	1	5	4	23	14	53
Children's	100	1	10	10	16	11	52
Infants' and babies'	100	6	10	16	2/	2/	39
Slippers	100	2	6	11	14	11	56

1/ Includes miscellaneous footwear reported under SIC class 3149400.
2/ Data withheld by the U.S. Bureau of the Census to avoid disclosing the operations of individual companies.

Source: Compiled by the U.S. Bureau of the Census.

Note.--The sum of the companies for each SIC product class is greater than the total number of companies because a multiproduct was counted as a producer under more than 1 class of footwear.

Table 24.--U.S. companies producing nonrubber footwear, total value of shipments, and percentage distribution by selected groups, selected years 1947 to 1972

Product and year	Companies	Shipments 1/				
		Total value	Percent of total accounted for by--			
			4 largest companies	8 largest companies	20 largest companies	50 largest companies
	Number	Million dollars				
Footwear, except house slippers and rubber: 2/						
1947	1,077	1,726	28	35	45	3/
1954	970	1,790	30	36	45	3/
1958	871	2,026	27	34	43	55
1963	784	2,249	25	32	43	57
1966	3/	2,650	26	34	3/	3/
1967	676	2,780	27	34	46	61
1970	3/	2,973	28	36	3/	3/
Men's footwear, except athletic: 4/						
1972	118	1,289	34	51	74	95
Women's footwear, except athletic: 4/						
1972	294	1,346	32	42	56	76
Footwear, except rubber, n.e.c.: 4/						
1972	153	486	30	42	65	87
House slippers: 5/						
1947	3/	67	3/	3/	3/	3/
1954	170	90	19	31	54	3/
1958	159	111	18	30	56	83
1963	149	124	20	34	58	84
1966	3/	162	18	31	3/	3/
1967	125	181	22	37	63	88
1970	3/	175	28	44	3/	3/
1972	83	151	39	58	80	97

1/ The value figures shown here may differ slightly from the "value of shipments" figures shown elsewhere in this report.
2/ 1967 SIC industry No. 3141.
3/ Not available.
4/ For 1972, SIC industry No. 3141 was split to form new SIC industry Nos. 3143, 3144, and 3149.
5/ SIC industry No. 3142.

Source: U.S. Department of Commerce.

Table 25.--Footwear: U.S. sales, by principal types of retail outlet, 1963, 1967, and 1972 1/

Type of retail outlet 2/	Sales 1963	Sales 1967	Sales 1972	Increase or (decrease), 1972 over 1963
	Million dollars	Million dollars	Million dollars	Percent
General merchandise group (53)	1,305	1,800	2,692	106.3
Department stores (531)	986	1,432	2,256	128.8
Variety stores (533)	132	153	191	44.7
Miscellaneous general merchandise stores (539)	187	214	245	31.0
Apparel group (56)	2,730	3,366	4,634	69.7
Men's and boy's clothing	130	156	287	120.8
Women's specialty	152	187	262	72.4
Family clothing	258	293	406	57.4
Other specialty	11	12	10	(9.1)
Shoe stores (566)	2,179	2,718	3,669	68.4
Men's	180	246	416	131.1
Women's	530	679	838	58.1
Juvenile	55	84	97	76.4
Family	1,414	1,709	2,318	63.9
Mail-order (5961)	103	93	142	37.9
All other outlets	61	82	205	236.1
Total or average	4,199	5,341	7,673	82.7

Type of retail outlet 2/	Percent of sales 1963	Percent of sales 1967	Percent of sales 1972
General merchandise group (53)	31.1	33.7	35.1
Department stores (531)	23.5	26.8	29.4
Variety stores (533)	3.1	2.9	2.5
Miscellaneous general merchandise stores (539)	4.5	4.0	3.2
Apparel group (56)	65.0	63.0	60.4
Men's and boy's clothing	3.1	2.9	3.7
Women's specialty	3.6	3.5	3.4
Family clothing	6.1	5.5	5.3
Other specialty	0.3	0.2	0.1
Shoe stores (566)	51.9	50.9	47.8
Men's	4.3	4.6	5.4
Women's	12.6	12.7	10.9
Juvenile	1.3	1.6	1.3
Family	33.7	32.0	30.2
Mail-order (5961)	2.5	1.7	1.9
All other outlets	1.5	1.5	2.7
Total 3/	100.0	100.0	100.0

1/ Only stores with payrolls.

2/ Identified in parentheses by code number of the major group or subgroup of the Standard Industrial Classification.

3/ Because of rounding, figures may not add to totals shown.

Source: U.S. Bureau of the Census, 1972 Census of Retail Trade, merchandise line sales.

Table 25a.--Number of establishments retailing footwear in the United States, by principal types of retail outlet, 1963, 1967, and 1972 1/

Type of retail outlet 2/	Number of establishments			
	1963	1967	1972	Increase or (decrease) 1972 over 1963
General merchandise group (53)	28,159	31,726	32,753	16.3
Department stores (531)	4,035	5,365	7,492	85.7
Variety stores (533)	13,235	15,096	9,936	(24.9)
Miscellaneous general merchandise stores (539)	10,847	11,153	15,325	41.3
Apparel group (56)	40,565	40,382	45,014	11.0
Shoe stores (566)	21,450	21,110	23,290	8.6
Other	19,115	19,272	21,624	13.1
Mail-order (5961)	1,873	2,842	3,376	80.2
All other outlets	11,682	10,854	12,442	6.5
Total	82,279	85,804	93,565	13.7
	Percent of total			
	1963	1967	1972	
General merchandise group (53)	34.2	37.0	35.0	
Department stores (531)	4.9	6.3	8.0	
Variety stores (533)	16.1	17.6	10.6	
Miscellaneous general merchandise stores (539)	13.2	13.0	16.4	
Apparel group (56)	49.3	47.1	48.1	
Shoe stores (566)	26.1	24.6	24.9	
Other	23.2	22.5	23.1	
Mail-order (5961)	2.3	3.3	3.6	
All other outlets	14.2	12.6	13.3	
Total 3/	100.0	100.0	100.0	

1/ Only stores with payrolls.
2/ Identified in parentheses by code number of the major group or subgroup of the Standard Industrial Classification.
3/ Because of rounding, figures may not add to totals shown.

Source: U.S. Bureau of the Census, 1972 Census of Retail Trade.

Table 25b. --Retail sales of footwear in the United States, by types of retail outlet, 1963, 1967, and 1972 1/

Type of retail outlet 2/	Retail sales			Percentage increase or (decrease), 1972 over 1963	Share of the market		
	1963	1967	1972		1963	1967	1972
	Million dollars	Million dollars	Million dollars		Percent	Percent	Percent
Total, all outlets	4,199	5,341	7,673	82.7	100.0	100.0	100.0
Shoe stores, total	2,179	2,718	3,669	68.4	51.9	50.9	47.8
Chains	968	1,322	1,648	70.2	23.1	24.9	21.5
Others	1,211	1,396	2,021	66.9	28.8	26.1	26.3
Department stores, total	986	1,432	2,256	128.8	23.5	26.8	29.4
Chains	694	1,112	1,990	186.7	16.5	20.8	25.9
Others	292	320	266	(8.9)	7.0	6.0	3.5
Apparel stores, total	551	648	965	75.1	13.1	12.1	12.6
Chains	154	222	231	50.0	3.7	4.2	3.0
Others	397	426	734	84.9	9.5	8.0	9.6
General merchandise stores, total	187	214	245	31.0	4.5	4.0	3.2
Chains	123	156	196	59.3	2.9	2.9	2.6
Others	64	58	49	(23.4)	1.5	1.1	0.6
Limited price variety stores, total	132	153	191	44.7	3.1	2.9	2.5
Chains	104	118	151	45.2	2.5	2.2	2.0
Others	28	35	40	42.9	0.7	0.7	0.5
Mail order	103	93	142	37.9	2.5	1.7	1.9
Miscellaneous other outlets	61	82	205	236.1	1.5	1.5	2.7
Recapitulation:							
Total	4,199	5,341	7,673	82.7	100.0	100.0	100.0
Chains	2,043	2,930	4,216	106.4	48.7	54.9	54.9
Others	1,992	2,235	3,110	56.1	47.4	41.8	40.5
Mail order and miscellaneous	164	175	347	111.6	3.9	3.3	4.5

1/ Only stores with payrolls.
2/ Chains are defined as firms owning or leasing 11 or more retail outlets.

Source: U.S. Bureau of the Census, 1963, 1967, and 1972 Census of Retail Trade.

Table 26.--Footwear: Leading parent companies 1/ operating shoe retail outlets, 1971, 1972, and 1975

Parent company	1971 Number of outlets	1971 Percent of total	1972 Number of outlets	1972 Percent of total	1975 Number of outlets	1975 Percent of total	Percentage increase or (decrease), 1975 over 1971
Melville Shoe Corp	1,650	12.5	1,775	12.9	2,063	15.0	25.0
Kinney Shoe Corp	975	7.4	1,012	7.4	1,225	8.9	25.6
Brown Shoe Co. 2/	3/ 1,100	8.4	3/ 1,100	8.0	3/ 1,146	8.3	4.2
General Shoe Co. 4/	1,371	10.4	1,458	10.6	1,076	7.8	(21.5)
Edison Brothers Stores, Inc	670	5.1	775	5.6	800	5.8	19.4
Interco, Inc. 5/	844	6.4	790	5.8	3/ 780	5.7	(7.6)
Endicott-Johnson Retail Sales Division	665	5.1	595	4.3	700	5.1	5.3
Shoe Corp. of America 6/	874	6.6	910	6.6	673	4.9	(23.0)
Morse Shoe, Inc	700	5.3	724	5.3	662	4.8	(5.4)
United States Shoe Corp	3/ 643	4.9	668	4.9	621	4.5	(3.4)
Volume Shoe Corp	360	2.7	387	2.8	500	3.6	38.9
National Shoes, Inc	326	2.5	375	2.7	435	3.2	33.4
Zale Corp	293	2.2	360	2.6	358	2.6	22.2
Morton's Shoe Stores, Inc	304	2.3	320	2.3	350	2.5	15.1
Kayser-Roth Shoes, Inc 7/	270	2.1	356	2.6	315	2.3	16.7
Pic 'N Pay Stores, Inc	120	.9	150	1.1	260	1.9	116.7
Sheppard & Myers, Inc	152	1.2	157	1.1	200	1.5	31.6
Karl's Shoe Stores, Ltd	280	2.1	300	2.2	160	1.2	(42.9)
Nunn-Bush Shoe Co 8/	135	1.0	154	1.1	154	1.1	14.1
Spencer Companies	160	1.2	200	1.5	150	1.1	(6.2)
Scholl, Inc	130	1.0	130	.9	130	.9	0
Felsway Corp	78	.6	99	.7	126	.9	61.5
Ideal Shoe Co	91	.7	121	.9	121	.9	33.0
Stride Rite Retail Corp	9/	9/	9/	9/	118	.9	-
CT & R Shoe Corp. 10/	86	.7	119	.9	110	.8	27.9
Epko Shoes, Inc	95	.7	110	.8	108	.8	13.7
KB Marketing Systems, Inc 11/	102	.8	99	.7	102	.7	0
Wiener Corp	50	.4	69	.5	102	.7	104.0
Cannon Shoe Co	132	1.0	164	1.2	63	.5	(52.3)
Gilbert Shoe Stores	136	1.0	105	.8	57	.4	(58.1)
Triangle Shoe Co	128	1.0	135	1.0	50	.4	(60.9)
Beck Industries	246	1.9	9/	9/	36	.3	(85.4)
Total or average	13,166	12/ 100.0	13,717	12/ 100.0	13,751	12/ 100.0	4.4

1/ Those with 100 or more outlets.
2/ Member of Brown Group, Inc.
3/ Estimated.
4/ Division of Genesco, Inc.
5/ Formerly International Retail Shoe Co.
6/ Division of Scoa Industries, Inc.
7/ Division of Kayser-Roth Corp.
8/ Division of Weyenberg Shoe Manufacturing Co.
9/ Not available.
10/ Formerly Craddock-Terry Shoe Corp.
11/ Data for 1971 and 1972 reported under KB Marketing Systems, Inc., Subsidiary, Kobacker Shoe Co.
12/ Because of rounding, figures may not add to totals shown.

Source: Rumpf Publishing Co., Leather & Shoes, Shoe Chain Store Directory for 1971, 1972, and 1975.

Table 27.--Footwear: Leading shoe chains, 1/ operating chain stores and leased shoe departments, 1971, 1972, and 1975

Company	1971 Number of units	1971 Percent of total	1972 Number of units	1972 Percent of total	1975 Number of units	1975 Percent of total	Percentage increase or (decrease), 1975 over 1971
Kinney Shoe Corp	975	7.1	1,012	7.2	1,225	8.7	25.6
Thom McAn Shoe Co. 2/	900	6.5	979	6.9	1,082	7.7	20.2
Wohl Shoe Co. 3/	4/ 940	6.8	900	6.4	4/ 900	6.4	(4.3)
Meldisco Division 2/	450	3.3	542	3.8	827	5.9	83.8
Edison Brothers Stores, Inc	670	4.9	775	5.5	800	5.7	19.4
Shoe Corp. of America 5/	874	6.3	910	6.4	673	4.8	(23.0)
Morse Shoe, Inc	700	5.1	724	5.1	662	4.7	(5.4)
Volume Shoe Corp	360	2.6	387	2.7	500	3.5	38.9
Florsheim Shoe Shops 6/	429	3.1	4/ 429	3.0	4/ 490	3.5	14.2
Endicott-Johnson Retail Stores Division	491	3.6	415	2.9	435	3.1	(11.4)
Morton's Shoe Stores, Inc	304	2.2	320	2.3	350	2.5	15.1
Kayser-Roth Shoes, Inc. 7/	270	2.0	356	2.5	315	2.2	16.7
Senack Shoes, Inc. 6/		8/	9/ 250	1.8	290	2.1	-
Interco, Inc. 10/	415	3.0	361	2.6	11/ 0	0	-
Pic 'N Pay Stores	120	.9	150	1.1	260	1.8	116.7
Freeman Shoe Stores 12/	350	2.5	293	2.1	253	1.8	(27.7)
National Shoes, Inc	220	1.6	250	1.8	250	1.8	13.6
Regal Shoe Shops 3/	160	1.2	200	1.4	246	1.7	53.8
Flagg Brothers Shoe Stores 13/	210	1.5	250	1.8	240	1.7	14.3
Butler's Shoe 14/	233	1.7	233	1.7	234	1.7	.4
Hardy Shoe Stores 13/	185	1.3	200	1.4	225	1.6	21.6
Miles Shoes 2/	300	2.2	238	1.7	204	1.4	(32.0)
Nobil Shoe Co. 15/	174	1.3	180	1.3	203	1.4	16.7
Sheppard & Myers, Inc	152	1.1	157	1.1	200	1.4	31.6
Baker, J., Inc. 16/	106	.8	125	.9	185	1.3	74.5
Cincinnati Shoe Corp. 12/	4/ 170	1.2	215	1.5	175	1.2	2.9
Karl's Shoe Stores, Ltd	280	2.0	300	2.1	160	1.1	(42.9)
Nunn-Bush Shoe Co. 17/	135	1.0	154	1.1	154	1.1	14.1
Spencer Companies, Inc	160	1.2	200	1.4	150	1.1	(6.2)
Scholl, Inc	130	.9	130	.9	130	.9	0
Felsway Corp	82	.6	99	.7	126	.9	53.7
Jarman Retail Co. 13/	110	.8	125	.9	125	.9	13.6
Ideal Shoe Co	91	.7	121	.9	121	.9	33.0
Stride Rite Retail Corp	8/	8/	8/	8/	118	.8	-
CT & R Shoe Corp. 18/	86	.6	119	.8	110	.8	27.9
Murphy Retail Co. 13/	117	.8	109	.8	108	.8	(7.7)
Epko Shoes, Inc	95	.7	110	.8	108	.8	13.7
KB Marketing Systems, Inc. 19/	102	.7	99	.7	102	.7	0
Wiener Corp	50	.4	69	.5	102	.7	104.0
Louis Ostrov, Shoe Co	90	.7	4/ 90	.6	90	.6	0
Wm. Hahn & Co. 12/	4/ 60	.4	74	.5	90	.6	50.0
Zale Corp., Discount Shoe Division	60	.4	80	.6	80	.6	33.3
Childs Corp	74	.5	79	.6	75	.5	1.4
Fashion Thimble Shoe Co	75	.5	68	.5	75	.5	0
Brown's Shoe Fit Co	60	.4	65	.5	71	.5	18.3
Weiss & Neuman Shoe Co	70	.5	70	.5	70	.5	0
Cannon Shoe Co	132	1.0	164	1.2	63	.4	(52.3)

See footnotes at end of table.

Table 27.--Footwear: Leading shoe chains 1/ operating chain stores and leased shoe departments, 1971, 1972, and 1975--Continued

Company	1971		1972		1975		Percentage increase or (decrease), 1975 over 1971
	Number of units	Percent of total	Number of units	Percent of total	Number of units	Percent of total	
Bell Brothers Shoes 13/	75	0.5	70	0.5	63	0.4	(16.0)
Nettleton Shops, Inc. 15/	77	.6	4/ 77	.5	62	.4	(19.5)
St. Louis Shoe Corp	78	.6	75	.5	60	.4	(23.1)
Holiday Shoe Co. 13/	8/	8/	8/	8/	60	.4	-
Wilkerson Shoe Co	8/	8/	8/	8/	59	.4	-
Leeds Shoes, Inc	68	.5	65	.5	58	.4	(14.7)
Gilbert Shoe Stores, Inc	136	1.0	105	.7	57	.4	(58.1)
Interstate Shoe Co. 13/	150	1.1	206	1.5	55	.4	(63.3)
Marty's Shoes 20/	8/	8/	54	.4	54	.4	-
Triangle Shoe Co	128	.9	135	1.0	50	.4	(60.9)
Wexner Brothers	28	.2	46	.3	50	.4	78.6
Dial Shoe Co., Inc	53	.4	53	.4	25	.2	(52.8)
Geo. E. Keith, Co	55	.4	5	0 [illegible]	5	0.[illegible]	(90.9)
TNT Shoe Co. 13/	135	1.0	130	.9	8/	8/	-
Denny Shoe Div. 21/	58	.4	58	.4	8/	8/	-
Tredwell Shoe Corp	56	.4	57	.4	8/	8/	-
Berland Shoe Co. 13/	354	2.6	55	.4	8/	8/	-
Beck Shoe Stores Corp	140	1.0	8/	8/	8/	8/	-
Total	13,808	22/ 100.0	14,117	22/ 100.0	14,110	22/ 100.0	2.2

1/ Those operating 50 or more chain stores and leased shoe departments.
2/ Subsidiary of Melville Shoe Corp.
3/ Member of Brown Group, Inc.
4/ Estimated.
5/ Division of Scoa Industries, Inc.
6/ Subsidiary of Interco, Inc.
7/ Division of Kayser Roth Corp.
8/ Not available.
9/ These units are included in the 1972 data for International Retail Shoe Co.
10/ Formerly International Retail Shoe Co.
11/ All retail operations transferred to subsidiaries, Florsheim Shoe Shops and Senack Shoes, Inc.
12/ Subsidiary of United States Shoe Corp.
13/ Subsidiary of General Shoe Co., a division of Genesco, Inc.
14/ Division of Zale Corp.
15/ Subsidiary of Endicott-Johnson.
16/ Subsidiary of National Shoes, Inc.
17/ Division of Weyenberg Shoe Manufacturing Co.
18/ Formerly Craddock-Terry Shoe Corp.; 1971 and 1972 data reported under its subsidiary, Midland Shoe Co.
19/ Formerly Kobacker Shoe Co.
20/ Formerly Perry's Shoes.
21/ Division of Beck Industries.
22/ Because of rounding, figures may not add to totals shown.

Source: Rumpf Publishing Co., Leather & Shoes, Shoe Chain Store Directory for 1971, 1972, and 1975.

Table 27a.--Nonrubber footwear: Percentage distribution of sales by respondents to importers' questionnaire, by types of market outlet, 1970-74 1/

(In percent)

Type of market outlet	1970	1971	1972	1973	1974
Retail stores: 2/					
Owned or leased by firm or parent firm	46.2	52.6	55.2	56.9	60.3
Owned or leased by other firms	43.1	37.8	34.3	30.0	30.0
Jobbers or wholesalers	7.2	6.0	6.9	7.0	6.7
Other	3.5	3.6	3.6	6.1	3.0
Total 3/	100.0	100.0	100.0	100.0	100.0

1/ Sample data.
2/ Including shoe departments of chain stores and department stores.
3/ Because of rounding, figures may not add to totals shown.

Source: Calculated by the U.S. International Trade Commission from data supplied by importers of nonrubber footwear.

Table 27b.--Nonrubber footwear: Percentage distribution of sales by respondents to producers' questionnaire, by types of market outlet, 1970-74 1/

(In percent)

Type of market outlet	1970	1971	1972	1973	1974
Retail stores: 2/					
Owned or leased by firm or parent firm	12.9	13.2	14.6	14.8	14.0
Owned or leased by other firms	73.8	73.7	71.2	72.6	72.5
Jobbers or wholesalers	10.6	10.9	11.5	10.0	10.6
Other	2.7	2.2	2.7	2.7	2.9
Total 3/	100.0	100.0	100.0	100.0	100.0

1/ Sample data
2/ Including shoe departments of chain stores and department stores.
3/ Because of rounding, figures may not add to totals shown.

Source: Calculated by the U.S. International Trade Commission from data supplied by domestic producers of nonrubber footwear.

'able 27c.--Nonrubber footwear: Percentage distribution of U.S. producers' sales, by size of output and type of market outlet, 1970, 1972, and 1974

(In percent)

Year and size-of-output group	Retail outlets: Owned or leased by firm or parent firm	Retail outlets: Owned or leased by other firms	Jobbers or wholesalers	Other outlets	Total 1/
1970					
ess than 200,000 pairs each	2.5	59.2	26.6	11.7	100.0
0,000 to 499,999 pairs each	.3	69.1	22.7	7.9	100.0
0,000 to 999,999 pairs each	4.8	68.2	22.0	5.0	100.0
,000,000 to 1,999,999 pairs each	5.0	74.8	19.3	1.0	100.0
,000,000 to 3,999,999 pairs each	4.3	86.2	1.3	8.1	100.0
,000,000 pairs or more each	15.5	73.6	8.7	2.2	100.0
Average	12.9	73.8	10.6	2.7	100.0
1972					
ess than 200,000 pairs each	2.8	57.1	34.3	5.8	100.0
0,000 to 499,999 pairs each	.8	68.7	23.7	6.8	100.0
0,000 to 999,999 pairs each	3.6	67.9	23.1	5.4	100.0
000,000 to 1,999,999 pairs each	7.9	71.6	19.7	.8	100.0
000,000 to 3,999,999 pairs each	3.1	76.9	11.4	8.6	100.0
000,000 pairs or more each	17.8	71.0	9.2	1.9	100.0
Average	14.6	71.2	11.5	2.7	100.0
1974					
ss than 200,000 pairs each	3.1	47.3	28.7	21.0	100.0
0,000 to 499,999 pairs each	4.6	69.9	25.1	.4	100.0
0,000 to 999,999 pairs each	4.7	64.9	20.8	9.6	100.0
000,000 to 1,999,999 pairs each	6.3	72.4	20.4	.9	100.0
000,000 to 2,999,999 pairs each	8.3	71.2	12.9	7.6	100.0
000,000 pairs or more each	17.0	73.5	7.5	2.1	100.0
Average	14.0	72.5	10.6	2.9	100.0

1/ Because of rounding, figures may not add to totals shown.

Source: Calculated by the U.S. International Trade Commission from data supplied by mestic producers of nonrubber footwear.

Table 27d.--Nonrubber footwear: Number of retail outlets owned or leased by firms or their subsidiaries responding to importers' questionnaire, on Jan. 31 of 1971-75

Date	Number of outlets
Jan. 31--	
1971	9,121
1972	9,441
1973	9,686
1974	9,850
1975	9,870

Source: Compiled by the U.S. International Trade Commission from data supplied by respondents to importers' questionnaire on nonrubber footwear.

Table 27e.--Nonrubber footwear: Number of retail outlets owned or leased by U.S. producers and their subsidiaries, by size of output, on Jan. 31 of 1971, 1973, and 1975

Size-of-outpr group	Number of retail outlets on Jan. 31--		
	1971	1973	1975
Less than 200,000 pairs each	2	3	5
200,000 to 499,999 pairs each	6	59	3
500,000 to 999,999 pairs each	51	2	70
1,000,000 to 1,999,999 pairs each	327	385	382
2,000,000 to 3,999,999 pairs each	192	204	1,073
4,000,000 pairs or more each	6,580	6,527	5,734
Total	7,158	7,180	7,267

Source: Compiled by the U.S. International Trade Commission from data supplied by domestic producers of nonrubber footwear.

Table 28.--Nonrubber footwear: U.S. production and shipments, 1960-74, January-September 1974, and January-September 1975

Period	Production	Shipments		
		Quantity	Value	Unit value
	Million pairs	Million pairs	Million dollars	Per pair
1960	600.0	597.5	2,236.9	$3.74
1961	592.9	594.9	2,221.6	3.73
1962	633.2	635.1	2,327.5	3.66
1963	604.3	600.8	2,321.9	3.86
1964	612.3	618.1	2,446.7	3.96
1965	626.2	636.3	2,537.5	3.99
1966	641.7	639.0	2,775.4	4.34
1967	600.0	604.2	2,764.5	4.58
1968	642.4	639.2	3,011.1	4.71
1969	577.0	584.2	2,888.2	4.94
1970	562.3	569.0	2,942.7	5.17
1971	535.8	552.1	2,919.5	5.29
1972	526.7	553.9	3,079.5	5.56
1973	490.0	488.2	3,047.5	6.24
1974	453.0	453.1	3,173.2	7.00
January-September--				
1974	346.0	354.5	2,422.5	6.83
1975	313.7	324.0	2,246.2	6.93

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

Table 29.--Nonrubber footwear: Shipments from Puerto Rico to the United States, by types, 1965-74, January-May 1974, and January-May 1975

Type	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974	January-May-- 1974	January-May-- 1975
	Quantity (1,000 pairs)											
Men's, youths', and boys'	2,899	3,458	4,226	5,334	3,939	3,553	2,282	2,332	2,383	2,089	736	768
Women's and misses'	2,803	2,818	4,307	5,491	5,469	6,957	3,804	4,061	5,066	3,978	1,427	1,142
Children's and infants'	908	871	1,366	1,137	1,235	1,675	1,395	1,317	1,606	1,922	602	871
House slipers	455	615	719	1,160	1,405	1,038	1,681	1,231	1,893	1,810	553	1,024
Other nonrubber footwear	384	213	300	526	995	1,124	815	1,030	767	1,007	471	670
Total	7,449	7,975	10,918	13,648	13,043	14,347	9,977	9,970	11,715	10,806	3,788	4,475
	Value (1,000 dollars)											
Men's, youths', and boys'	10,932	16,445	21,343	24,785	17,468	14,160	9,387	9,936	12,316	11,197	3,911	4,019
Women's and misses'	9,026	9,448	14,738	19,785	20,573	24,709	13,739	15,772	19,585	16,930	5,669	5,139
Children's and infants'	3,110	3,043	4,993	4,158	4,300	5,723	5,537	5,422	7,081	8,823	2,758	3,842
House slippers	1,158	1,156	1,304	2,440	2,434	2,715	3,116	3,150	5,332	3,665	1,190	1,930
Other nonrubber footwear	1,379	1,074	1,352	1,833	3,138	4,361	3,025	3,818	3,571	4,547	1,970	2,784
Total	25,605	31,166	43,730	53,001	47,913	51,668	34,804	38,098	47,885	45,162	15,498	17,714

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

Table 29a.--Nonrubber footwear: U.S. production, by types, 1968-74, January-September 1974, and January-September 1975

Type	1968	1969	1970	1971	1972	1973	1974	January-September--	
								1974	1975
	Quantity (million pairs)								
Total	642	577	562	536	527	490	453	346	314
Athletic	8	9	9	8	9	10	10	7	8
Slippers	105	101	96	98	98	91	86	66	50
Work 1/	36	35	38	38	35	29	27	21	17
All other:									
Men's	90	82	82	80	91	90	83	67	59
Youths' and boys'	24	23	24	22	24	22	18	14	14
Women's	284	238	230	207	193	179	167	125	124
Misses'	33	28	23	25	25	18	16	11	11
Children's	31	28	26	26	23	24	20	15	12
Infants'	29	28	29	28	27	25	24	18	17
Not specified by kind	2	4	5	4	2	2	2	2	2
	Percent of total								
Total	100	100	100	100	100	100	100	100	100
Athletic	1	2	2	1	2	2	2	2	3
Slippers	16	18	17	18	19	19	19	19	16
Work 1/	6	6	7	7	7	6	6	6	5
All other:									
Men's	14	14	15	15	17	18	18	19	19
Youths' and boys'	4	4	4	4	5	4	4	4	4
Women's	44	41	41	39	37	37	37	37	39
Misses'	5	5	4	5	5	4	4	3	4
Children's	5	5	5	5	4	4	4	4	4
Infants'	5	5	5	5	5	5	5	5	5
Not specified by kind	2/	1	1	1	2/	2/	2/	1	1

1/ The data reported for years prior to 1973 include all "work shoes" regardless of ankle height; data for 1973 and subsequent years include only such shoes of ankle height or higher. (In 1972, work shoes less than 6 inches high amounted to 8 million pairs.)

2/ Less than 0.5 percent.

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

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

Table 30.--Nonrubber footwear: U.S. production of shoes and slippers, by types of upper, 1969-74, January-September 1974, and January-September 1975

Type of upper	1969	1970	1971	1972	1973	1974	January-September--	
							1974	1975
	Quantity (1,000 pairs)							
All leather and part leather	414,018	388,734	361,648	360,809	213,939	220,012	173,338	150,124
Nonleather 1/	162,943	173,584	174,129	165,846	-	-	-	-
Plastic (vinyl) 1/	-	-	-	-	118,748	135,935	105,356	91,718
All other specified 1/	-	-	-	-	81,814	76,541	58,715	50,028
Not specified by kind 1/	-	-	-	-	75,532	20,467	15,326	21,572
Total	576,961	562,318	535,777	526,655	490,033	452,955	2/352,735	2/313,442
	Percent of total							
All leather and part leather	72	69	67	69	44	49	49	48
Nonleather 1/	28	31	33	31	-	-	-	
Plastic (vinyl) 1/	-	-	-	-	24	30	30	29
All other specified 1/	-	-	-	-	17	17	17	16
Not specified by kind 1/	-	-	-	-	15	4	4	7
Total	100	100	100	100	100	100	100	100

1/ In 1973, nonleather footwear uppers were broken out into plastic (vinyl), all other specified, and uppers not specified by kind.

2/ Preliminary figures for this period which are not the same as other figures used elsewhere in this report.

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

Table 30a.--Nonrubber footwear: U.S. production, by size of output and type of footwear produced, 1974

Size-of-output group	Athletic footwear	Work footwear	House Slippers	Other than athletic or work footwear or slippers: For men, youths, and boys	Other than athletic or work footwear or slippers: For women and misses	Other than athletic or work footwear or slippers: For children and infants	Total
	Quantity (1,000 pairs)						
Less than 200,000 pairs each	125	143	334	700	721	104	2,127
200,000 to 499,999 pairs each	778	970	2,041	1,494	2,659	1,805	9,747
500,000 to 999,999 pairs each	1,439	942	2,712	2,794	4,848	1,707	15,059
1,000,000 to 1,999,999 pairs each	536	2,027	4,656	5,100	14,878	5,631	32,828
2,000,000 to 3,999,999 pairs each	357	3,322	3,708	9,662	11,397	2,194	30,640
4,000,000 pairs or more each	871	9,867	13,092	58,699	83,043	19,129	183,701
Total	4,106	17,271	26,543	78,449	117,546	30,570	274,102
	Percent of total						
Less than 200,000 pairs each	3	1	1	1	1	3	1
200,000 to 499,999 pairs each	19	6	8	2	2	5	4
500,000 to 999,999 pairs each	35	5	10	4	4	5	6
1,000,000 to 1,999,999 pairs each	13	12	18	6	13	18	11
2,000,000 to 3,999,999 pairs each	9	19	14	12	10	7	11
4,000,000 pairs or more each	21	57	49	75	70	62	67
Total	100	100	100	100	100	100	100

Source: Calculated by U.S. International Trade Commission from data supplied by domestic producers of nonrubber footwear.

Note.--Individual items may not add across to totals because of the inability of some firms to disaggregate their production by type of footwear.

Table 30b.--Nonrubber footwear: Percentage distribution of U.S. production, by size of output and type of footwear produced, 1974

(In percent)

Size-of-output group	Athletic footwear	Work foot-wear	House slippers	Other than athletic or work footwear, or slippers: For men, youths, and boys	Other than athletic or work footwear, or slippers: For women and misses	Other than athletic or work footwear, or slippers: For children and infants	Total
Less than 200,000 pairs each	6	7	16	33	34	4	100
200,000 to 499,999 pairs each	8	10	21	15	27	19	100
500,000 to 999,999 pairs each	10	6	18	19	32	11	100
1,000,000 to 1,999,999 pairs each	2	6	14	16	45	17	100
2,000,000 to 3,999,999 pairs each	1	11	12	32	37	7	100
4,000,000 pairs or more each	1	5	7	32	45	10	100
Average	1	6	10	29	43	11	100

Source: Calculated by the U.S. International Trade Commission from data supplied by domestic producers of nonrubber footwear.

Note.--Individual items may not add across to totals because of rounding and the inability of some firms to disaggregate their production by type of footwear.

Table 30c.--Nonrubber footwear: U.S. production of women's footwear, by types and size of outpu
1970-74, January-June 1974, and January-June 1975

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Tota
1970							
Athletic	70	68	-	-	34	234	
House slippers	74	826	565	2,816	-	23,933	2
Other:							
Boots:							
Fashion	125	292	125	103	-	1,115	
Other	1	38	45	-	-	199	
Casuals:							
Wood bottoms	-	-	-	-	-	79	
Clogs	-	-	-	-	-	10	
Sandals	159	22	480	-	1,475	2,074	
Sport types:							
Crepe-sole types	5	180	-	3,024	97	3,169	
Hard-sole types	-	-	-	3,088	224	1,835	
Dress	160	338	1,282	4,635	-	58,313	6
All other	42	125	-	975	2,189	18,813	2
Total	636	1,889	3,192	19,325	4,019	115,250	14
Total women's pairs with a wholesale value of less than $4 a pair	100	948	920	3,736	2,189	27,854	3
Total women's "make-up" footwear 1/	147	357	1,822	8,033	2,941	40,465	5
1971							
Athletic	79	146	260	-	35	142	
House slippers	143	1,103	1,180	3,116	1,102	26,633	3
Other:							
Boots:							
Fashion	100	461	-	124	-	1,635	
Other	2	40	58	-	-	184	
Casuals:							
Wood bottoms	-	-	-	-	-	25	
Clogs	-	-	-	124	-	43	
Sandals	217	77	410	-	-	3,514	
Sport types:							
Crepe-sole types	34	45	931	1,408	86	3,096	
Hard-sole types	-	-	-	2,576	256	1,989	
Dress	174	848	4,064	2,533	181	54,994	6
All other	57	124	-	81	3,144	18,036	2
Total	806	3,268	8,167	11,546	8,189	115,738	14
Total women's pairs with a wholesale value of less than $4 a pair	163	1,373	2,273	2,600	4,427	28,215	3
Total women's "make-up" footwear 1/	183	514	3,915	3,138	4,978	40,672	5

See footnote at end of table.

Table 30c.--Nonrubber footwear: U.S. production of women's footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1972							
Athletic	102	166	260	72	32	135	767
House slippers	108	1,110	2,280	2,940	-	28,997	35,435
Other:							
Boots:							
Fashion	-	273	-	54	400	2,490	217
Other	2	48	98	-	-	186	334
Casuals:							
Wood bottoms	-	-	-	-	-	24	24
Clogs	73	-	-	41	-	2,913	3,027
Sandals	271	32		-	645	4,188	5,556
Sport types:							
Crepe-sole types	18	-	701	1,669	144	2,957	5,489
Hard-sole types	-	-	-	2,345	916		4,221
Dress	187	427	4,850	2,522	1,922	53,662	63,570
All other	143	-	-	1,027	2,312	15,078	18,560
Total	904	3.028	9,401	12,074	10,074	117,105	152,586
Total women's pairs with a wholesale value of less than $4 a pair	247	800	3,360	3,316	5,353	25,084	38,160
Total women's "make-up" footwear 1/	90	1,068	3,619	4,686	6,550	36,377	52,390
1973							
Athletic	38	289	260	121	68	166	942
House slippers	77	1,138	2,018	1,914	1010	30,389	36,546
Other:							
Boots:							
Fashion	-	88	-	12	279	1,387	1,766
Other	2	51	-	201	-	183	437
Casuals:							
Wood bottoms	-	-	-	-	-	20	20
Clogs	94	-	-	48	-	,210	4,352
Sandals	114	54	510	-	440	3,559	4,677
Sport types:							
Crepe-sole types	79	-	1,061	1,724	322	4,444	7,630
Hard-sole types	-	-	-	2,299	965	1,141	4,405
Dress	202	621	4,627	2,509	2,052	50,538	60,549
All other	116	-	-	2,132	1,085	13,842	17,175
Total	722	3,048	9,157	13,961	8,200	115,438	150,526
Total women's pairs with a wholesale value of less than $4 a pair	149	808	2,730	1,474	4,509	18,060	27,730
Total women's "make-up" footwear 1/	45	946	3,259	4,679	6,039	32,213	47,181

See footnote at end of table.

Table 30c.--Nonrubber footwear: U.S. production of women's footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1974							
Athletic	41	155	392	114	71	165	938
House slippers	64	1,453	869	3,153	2,943	30,728	39,210
Other:							
Boots:							
Fashion	-	135	-	13	21	1,512	1, 681
Other	4	16	-	67	-	195	282
Casuals:							
Wood bottoms	40	-	-	-	-	22	62
Clogs	5	-	-	300	4	2,670	2,979
Sandals	242	219	1	687	377	5,521	7,047
Sport types:							
Crepe-sole types	10	289	134	2,991	2,462	3,768	9,654
Hard-sole types	-	60	-	2,056	1,346	362	3,824
Dress	205	631	3,779	3,046	1 836	46,723	56,220
All other	114	90	197	2,830	145	9,403	12,779
Total	725	3,912	5,906	18,395	10,952	105,325	145,215
Total women's pairs with a wholesale value of less than $4 a pair	93	1,301	1,448	3,038	4,515	9,875	20,270
Total women's "make-up" footwear 1/	-	1,320	1,990	6,858	5,117	27,652	42,937
January-June 1974							
Athletic	23	82	197	78	24	94	498
House slippers	28	821	471	1,491	-	14,180	16,991
Other:							
Boots:							
Fashion	-	20	-	5	2	680	707
Other	1	10	-	36	-	104	151
Casuals:							
Wood bottoms	-	-	-	-	-	10	10
Clogs	-	-	-	-	3	1,980	1,983
Sandals	75	106	1	405	230	2,838	3,655
Sport types:							
Crepe-sole types	33	47	66	959	1,551	1,637	4,293
Hard-sole types	30	-	-	1,114	781	166	2,091
Dress	70	247	2,040	1,749	1,250	26,876	32,232
All other	115	-	84	1,717	25	4,581	6,522
Total	375	1,332	3,180	10,029	5,122	55,530	75,569
Total women's pairs with a wholesale value of less than $4 a pair	67	710	813	1,903	300	4,317	8,610
Total women's "make-up" footwear 1/	153	71	587	3,858	2,676	14,818	22,162

See footnote at end of table.

Table 30c.--Nonrubber footwear: U.S. production of women's footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
January-June 1975							
Athletic------------	25	64	44	198	22	138	491
House slippers------	22	787	400	1,042	-	12,101	14,352
Other:							
Boots:							
Fashion---------	-	9	-	15	3	546	573
Other-----------	2	10	-	47	-	97	156
Casuals:							
Wood bottoms----	-	18	-	-	-	12	30
Clogs-----------	-	12	-	-	-	2,155	2,167
Sandals---------	46	122	-	405	194	2,241	3,008
Sport types:							
Crepe-sole types---------	4	44	42	1,133	869	2,653	4,745
Hard-sole types---------	-	-	-	520	315	243	1,078
Dress-------------	342	9	1,763	1,575	536	16,843	21,068
All other---------	66	-	151	1,470	60	4,506	6,253
Total-----------	507	1,075	2,671	8,121	2,607	43,252	58,233
Total women's pairs with a wholesale value of less than $4 a pair---------	76	663	580	1,833	300	3,837	7,289
Total women's "make-up" footwear 1/---	3	105	661	3,507	1,670	12,215	18,161

1/ Footwear produced to customers' specifications.

Source: Compiled by the U.S. International Trade Commission from data supplied by domestic producers of nonrubber footwear.

Note.--Individual items may not add down to totals because of the inability of some firms to disaggregate their production by type of footwear.

Table 30d.--Nonrubber footwear: U.S. production of misses' footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 2,999,999 pairs each	4,000,000 pairs or more each	Total
1970							
Athletic	12	-	88	-	-	-	100
House slippers	-	114	150	-	-	1,520	1,784
Other:							
Boots:							
Fashion	-	-	-	-	-	607	607
Other	-	-	-	-	-	1	1
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	1	1
Sandals	-	58	-	-	-	322	380
Sport types:							
Crepe-sole types	-	-	6	-	-	570	576
Hard-sole types	-	-	72	45	-	1,540	1,657
Dress	-	-	-	884	833	7,821	9,538
All other	4	-	-	338	-	1,169	1,511
Total	16	172	316	1,267	833	13,551	16,155
Total misses' pairs with a wholesale value of less than $4 a pair	7	172	150	884	833	3,921	5,967
Total misses' "make-up" footwear 1/	4	19	46	884	-	1,896	2,849
1971							
Athletic	15	-	88	-	-	-	103
House slippers	14	92	109	-	-	1,287	1,502
Other:							
Boots:							
Fashion	-	-	-	-	-	895	895
Other	-	-	-	-	-	1	1
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	2	2
Sandals	-	72	-	-	-	365	437
Sport types:							
Crepe-sole types	-	-	12	-	-	811	823
Hard-sole types	-	-	64	75	-	1,582	1,721
Dress	-	-	-	911	1,523	7,473	9,907
All other	4	-	-	380	-	1,284	1,668
Total	33	164	273	1,366	1,523	13,700	17,059
Total misses' pairs with a wholesale value of less than $4 a pair	21	72	109	911	1,523	3,693	6,329
Total misses' "make-up" footwear 1/	18	-	50	911	-	2,109	3,088
1972							
Athletic	21	-	88	-	-	-	109
House slippers	-	107	109	-	-	1,362	1,578
Other:							
Boots:							
Fashion	-	-	-	-	-	1,006	1,006
Other	-	-	-	-	-	1	1
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	41	41
Sandals	-	81	-	-	-	415	496
Sport types:							
Crepe-sole types	-	-	10	-	-	679	689
Hard-sole types	-	-	57	49	-	1,671	1,777
Dress	-	-	-	962	1,592	6,784	9,338
All other	1	-	-	357	-	1,107	1,464
Total	22	188	264	1,367	1,592	13,071	16,504
Total misses' pairs with a wholesale value of less than $4 a pair	3	188	109	577	1,592	3,429	5,898
Total misses' "make-up" footwear 1/	1	9	37	962	-	1,963	2,972
1973							
Athletic	4	22	88	-	-	-	114
House slippers	40	22	85	-	-	1,320	1,467
Other:							
Boots:							
Fashion	-	-	-	-	415	232	647
Other	-	-	-	-	-	1	1
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	226	226
Sandals	-	93	-	-	-	461	554
Sport types:							
Crepe-sole types	-	-	28	-	-	1,386	1,414
Hard-sole types	-	-	56	52	-	1,664	1,772
Dress	-	-	-	940	750	4,971	6,661
All other	-	-	-	344	-	996	1,340
Total	44	137	257	1,336	1,165	11,257	14,196
Total misses' pairs with a wholesale value of less than $4 a pair	2	115	85	94	750	1,919	2,965
Total misses' "make-up" footwear 1/	-	22	36	940	-	1,861	2,859

See footnote at end of table.

Table 30d.--Nonrubber footwear: U.S. production of misses' footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1974							
Athletic	7	18	88	-	-	-	113
House slippers	40	40	82	-	-	1,324	1,486
Other:							
Boots:							
Fashion	-	-	-	-	40	423	463
Other	-	-	-	-	-	1	1
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	6	6
Sandals	-	89	3	-	-	581	673
Sport types:							
Crepe-sole types	-	-	51	-	136	799	986
Hard-sole types	-	-	51	51	30	1,218	1,350
Dress	-	-	-	804	966	3,919	5,689
All other	-	-	5	349	-	890	1,244
Total	47	147	280	1,204	1,172	9,161	12,011
Total misses' pairs with a wholesale value of less than $4 a pair	43	129	87	131	-	1,751	2,141
Total misses' "make-up" footwear 1/	-	40	13	804	-	1,296	2,153
January-June 1974							
Athletic	5	11	44	-	-	-	60
House slippers	-	18	37	-	-	501	556
Other:							
Boots:							
Fashion	-	-	-	-	-	166	166
Other	-	-	-	-	-	-	-
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	6	6
Sandals	-	50	2	-	-	189	241
Sport types:							
Crepe-sole types	-	-	27	-	101	407	535
Hard-sole types	-	-	17	29	22	820	888
Dress	-	-	-	474	625	1,744	2,843
All other	-	-	4	176	-	441	621
Total	5	79	131	679	748	4,274	5,916
Total misses' pairs with a wholesale value of less than $4 a pair	2	68	42	47	388	649	1,196
Total misses' "make-up" footwear 1/	-	18	2	474	-	637	1,131
January-June 1975							
Athletic	4	8	44	-	-	-	56
House slippers	-	12	25	-	-	369	406
Other:							
Boots:							
Fashion	-	-	-	-	-	322	322
Other	-	-	-	-	-	-	-
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	2	2
Sandals	-	53	1	-	-	399	453
Sport types:							
Crepe-sole types	-	-	23	-	30	480	533
Hard-sole types	-	-	29	21	20	359	429
Dress	-	-	-	198	510	1,513	2,221
All other	-	-	1	176	-	443	620
Total	4	73	123	395	560	3,887	5,042
Total misses' pairs with a wholesale value of less than $4 a pair	-	65	25	-	410	512	1,012
Total misses' "make-up" footwear 1/	-	12	2	198	30	480	722

1/ Footwear produced to customers' specifications.

Source: Compiled by the U.S. International Trade Commission from data supplied by domestic producers of nonrubber footwear.

Note.--Individual items may not add to totals because of the inability of some firms to disaggregate their production by type of footwear.

Table 30e.--Nonrubber footwear: U.S. production of children's and infants' footwear, by types, and by size of output, 1970-74, January-June 1974, and January-June 1975

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1970							
Athletic	2	-	-	-	-	-	2
House slippers	-	295	403	-	-	1,206	1,904
Other:							
Boots:							
Fashion	-	298	247	-	-	586	1,131
Other	-	-	-		178	-	178
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	-	-
Sandals	-	349	160	-		104	613
Sport types:							
Crepe-sole types	-	-	5	-	-	356	361
Hard-sole types	-	-	981	446	-	1,311	2,738
Dress	-	364	472	589	1,534	9,131	12,090
All other	111	241	825	2,994	-	8,457	12,628
Total	113	1,547	3,093	4,029	1,712	22,288	31,645
Total children's and infants' pairs with a wholesale value of less than $4 a pair	-	1,262	2,205	3,238	1,712	9,053	17,470
Total children's and infants' "make-up" footwear 1/	-	360	548	1,523	-	2,813	5,244
1971							
Athletic	2	-	-	-	-	-	
House slippers	57	249	313	-	-	1,469	2,138
Other:							
Boots:							
Fashion	-	380	129	-	-	709	1,218
Other	-	-	-	-	108	-	108
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	-	-
Sandals	-	434	8	-	-	328	770
Sport types:							
Crepe-sole types	-	-	11	-	-	417	428
Hard-sole types	-	-	919	395	-	1,388	2,702
Dress	-	426	403	1,406	1,580	8,881	12,696
All other	-	250	833	2,399	-	8,459	11,941
Total	144	1,743	2,616	4,200	1,688	22,528	32,919
Total children's and infants' pairs with a wholesale value of less than $4 a pair	57	1,234	2,096	3,392	1,688	9,219	17,686
Total children's and infants' "make-up" footwear 1/	57	514	169	1,674	1,688	2,997	7,099
1972							
Athletic	3	-	-	-	-	-	3
House slippers	-	372	127	-	-	1,449	1,998
Other:							
Boots:							
Fashion	-	-	109	-	-	883	992
Other	-	329	95	-		-	524
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	8	8
Sandals	72	359	7	-	-	328	766
Sport types:							
Crepe-sole types	-	-	9	-	-	496	505
Hard-sole types	-	-	877	398	1,974	1,389	4,638
Dress	-	419	332	641	-	9,098	10,490
All other	134		892	2,785	-	8,939	12,750
Total	209	1,484	2,448	3,824	2,074	23,213	33,252
Total children's and infants' pairs with a wholesale value of less than $4 a pair	32	1,151	1,807	2,653	2,074	9,232	16,948
Total children's and infants' "make-up" footwear 1/	72	392	142	1,614	2,074	2,916	7,210

See footnote at end of table.

Table 30e.--Nonrubber footwear: U.S. production of children's and infants' footwear, by types, and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1973							
Athletic	-	5	-	-	-	14	19
House slippers	92	251	123	-	-	1,527	1,993
Other:							
Boots:							
Fashion	-	309	77	-	513	26	926
Other	-	-	-	212	27	-	239
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	49	49
Sandals	-	406	-	-	-	506	912
Sport types:							
Crepe-sole types	-	-	27	-	-	729	756
Hard-sole types	-	247	451	610	-	1,342	2,650
Dress	-	626	-	627	1,643	7,124	10,020
All other	93	250	1,871	1,629	-	9,589	13,432
Total	185	2,094	2,558	3,078	2,183	21,670	31,768
Total children's and infants' pairs with a wholesale value of less than $4 a pair	185	1,612	2,080	1,345	1,670	7,949	14,841
Total children's and infants' "make-up" footwear 1/	116	403	112	1,708	1,670	2,858	6,867
1974							
Athletic	-	4	-	-	-	23	27
House slippers	92	193	100	-	5	1,698	2,088
Other:							
Boots:							
Fashion	-	313	275	-	-	698	1,286
Other	-	-	-	219	32	-	251
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	1	1
Sandals	-	411	4	23	-	634	1,072
Sport types:							
Crepe-sole types	-	-	56	-	-	748	804
Hard-sole types	-	135	414	792	-	1,043	2,384
Dress	-	534	-	534	1,369	6,539	8,976
All other	83	250	958	2,513	-	9,466	13,270
Total	175	1,840	1,807	4,099	1,406	20,850	30,177
Total children's and infants' pairs with a wholesale value of less than $4 a pair	118	1,475	1,331	2,491	1,406	7,206	14,027
Total children's and infants' "make-up" footwear 1/	-	399	303	1,765	1,403	2,561	6,431
January-June 1974							
Athletic	-	2	5	-	-	12	19
House slippers	-	110	49	-	-	705	864
Other:							
Boots:							
Fashion	-	172	26	-	-	279	477
Other	-	-	-	101	11	-	112
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	1	1
Sandals	-	149	2	-	-	233	384
Sport types:							
Crepe-sole types	-	-	30	-	-	439	469
Hard-sole types	-	90	234	426	-	488	1,238
Dress	-	277	-	315	782	3,745	5,119
All other	15	125	98	736	-	4,873	5,847
Total	15	925	444	1,585	1,144	10,775	14,888
Total children's and infants' pairs with a wholesale value of less than $4 a pair	15	650	177	755	792	3,691	6,080
Total children's and infants' "make-up" footwear 1/	-	195	35	955	793	1,417	3,395
January-June 1975							
Athletic	-	2	-	-	-	5	7
House slippers	-	103	50	-	-	632	785
Other:							
Boots:							
Fashion	-	170	84	-	-	493	747
Other	-	-	-	66	9	-	75
Casuals:							
Wood bottoms	-	-	-	-	-	-	-
Clogs	-	-	-	-	-	-	-
Sandals	-	152	-	13	-	322	487
Sport types:							
Crepe-sole types	-	-	31	1	-	385	417
Hard-sole types	-	44	212	234	-	344	834
Dress	-	235	-	133	557	2,613	3,538
All other	21	125	76	761	-	5,731	6,214
Total	21	831	453	1,218	1,329	10,025	13,877
Total children's and infants' pairs with a wholesale value of less than $4 a pair	20	637	208	516	631	3,706	5,718
Total children's and infants' "make-up" footwear 1/	-	194	88	578	643	1,403	2,906

1/ Footwear produced to customers' specifications.

Source: Compiled by the U.S. International Trade Commission from data supplied by domestic producers of nonrubber footwear.

Note.--Individual items may not add to totals because of the inability of some firms to disaggregate their production by type of footwear.

Table 30f.--Nonrubber footwear: U.S. production of men's footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1970							
Athletic	175	667	298	4	136	321	1,601
Work	16	663	537	1,944	1,236	8,564	12,960
House slippers	65	58	220	1,218	-	3,210	4,771
Other:							
Boots:							
Fashion	-	185	397	-	300	5,814	6,696
Other	3	708	447	-	1	298	1,457
Casuals:							
Wood bottoms	-	-	-	-	-	38	38
Clogs	-	-	-	-	-	91	91
Sandals	3	-	-	-	-	168	171
Dress	353	637	1,063	1,791	4,740	38,198	46,782
All other	133	38	550	420	-	3,944	5,085
Total	748	2,956	3,512	5,377	6,413	60,646	79,652
Total men's pairs with a wholesale value of less than $6 a pair	141	173	215	127	451	7,844	8,951
Total men's "make-up" footwear 1/	128	731	178	1,808	1,468	16,790	21,103
1971							
Athletic	145	726	353	6	138	432	1,800
Work	194	629	617	37	3,434	7,835	12,746
House slippers	109	11	202	1,216	-	2,459	3,997
Other:							
Boots:							
Fashion	-	212	924	-	299	6,301	7,736
Other	3	770	506	-	50	304	1,633
Casuals:							
Wood bottoms	-	-	-	-	-	47	47
Clogs	-	-	-	-	-	107	107
Sandals	3	-	-	-	-	174	177
Dress	336	615	1,543	1,365	4,803	39,016	47,678
All other	140	36	558	420	-	3,728	4,882
Total	930	2,999	4,703	3,044	8,724	60,403	80,803
Total men's pairs with a wholesale value of less than $6 a pair	190	199	198	105	412	6,865	7,969
Total men's "make-up" footwear 1/	185	728	1,148	-	2,884	16,129	21,074

See footnote at end of table.

Table 30f.--Nonrubber footwear: U.S. production of men's footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1972							
Athletic	157	742	298	233	125	365	1,920
Work	152	879	848	50	5,423	6,802	14,154
House slippers	50	44	217	1,213		2,768	4,292
Other:							
Boots:							
Fashion	1	245	426	670	318	7,263	8,923
Other	4	859	560	9	68	313	1,813
Casuals:							
Wood bottoms	-	-	-	-	-	53	53
Clogs	-	-	-	-	-	185	185
Sandals	2	-	-	-	-	146	148
Dress	406	505	1,135	1,449	5,584	37,902	46,981
All other	91	-	474	555	-	8,285	9,405
Total	863	3,274	3,958	4,179	11,518	64,082	87,874
Total men's pairs with a wholesale value of less than $6 a pair	85	115	210	88	818	9,547	10,863
Total men's "make-up" footwear 1/	64	793	183	1,367	3,186	18,932	24,525
1973							
Athletic	78	882	298	374	272	396	2,300
Work	190	1,101	798	1,994	3,545	9,232	16,860
House slippers	73	30	229	1,170		3,060	4,562
Other:							
Boots:							
Fashion	6	270	360	800	2,612	4,383	8,431
Other	3	415	528	332	90	472	1,840
Casuals:							
Wood bottoms	-	-	-	-	-	82	82
Clogs	-	-	-	-	-	164	164
Sandals	17	-	-	-	-	166	183
Dress	534	388	194	2,657	6,277	40,401	50,451
All other	86	-	450	412	-	7,043	7,991
Total	987	3,086	2,857	7,739	12,796	65,399	92,864
Total men's pairs with a wholesale value of less than $6 a pair	80	69	224	116	1,133	8,688	10,310
Total men's "make-up" footwear 1/	53	464	392	2,872	2,262	17,281	23,324

See footnote at end of table.

Table 30f.--Nonrubber footwear: U.S. production of men's footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1974							
Athletic	61	534	741	350	286	552	2,524
Work	143	835	942	2,027	3,322	9,634	15,903
House slippers	60	352	1,115	99	715	2,579	4,920
Other:							
Boots:							
Fashion	-	230	555	532	300	7,927	9,544
Other	4	453	576	537	70	564	2,204
Casuals:							
Wood bottoms	-	-	-	-	-	67	67
Clogs	-	-	-	-	-	159	159
Sandals	-	1	38	-	-	288	327
Dress	400	262	679	2,389	5,980	35,069	44,779
All other	80	20	3	319	-	6,223	6,645
Total	748	2,687	4,649	6,253	10,673	63,062	87,072
Total men's pairs with a wholesale value of less than $6 a pair	40	383	166	10	1,809	5,418	7,826
Total men's "make-up" footwear 1/	39	708	488	2,416	2,170	14,604	20,425
January-June 1974							
Athletic	35	261	374	240	97	305	1,312
Work	71	448	510	1,023	1,939	5,122	9,113
House slippers	46	167	423	48	-	888	1,572
Other:							
Boots:							
Fashion	-	116	279	212	150	3,742	4,499
Other	1	215	215	270	40	295	1,036
Casuals:							
Wood bottoms	-	-	-	-	-	28	28
Clogs	-	-	-	-	-	71	71
Sandals	-	1	24	-	-	82	107
Dress	141	124	316	1,366	3,325	19,086	24,358
All other	56	-	1	167	-	3,363	3,587
Total	350	1,332	2,142	3,326	5,551	32,982	45,683
Total men's pairs with a wholesale value of less than $6 a pair	27	183	78	5	704	2,576	3,573
Total men's "make-up" footwear 1/	38	331	212	1,379	1,277	7,688	10,925

See footnote at end of table.

Table 30f.--Nonrubber footwear: U.S. production of men's footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
January-June 1975							
Athletic	24	251	290	208	88	451	1,312
Work	62	412	447	1,046	1,257	4,097	7,321
House slippers	210	116	302	63		794	1,485
Other:							
Boots:							
Fashion	-	114	236	132	131	3,408	4,021
Other	2	209	300	273	60	192	1,036
Casuals:							
Wood bottoms	-	-	-	-	-	56	56
Clogs	-	-	-	-	-	90	90
Sandals	-	1	50	-	-	380	431
Dress	187	182	395	815	2,639	14,389	18,607
All other	49	-	-	95	-	3,016	3,160
Total	534	1,285	2,020	2,632	4,175	26,873	37,519
Total men's pairs with a wholesale value of less than $6 a pair	28	232	69	3	289	2,308	2,929
Total men's "make-up" footwear 1/	24	434	224	920	691	6,192	8,485

1/ Footwear produced to customers' specifications.

Source: Compiled by the U.S. International Trade Commission from data supplied by domestic producers of nonrubber footwear.

Note.--Individual items may not add to totals because of the inability of some firms to disaggregate their production by type of footwear.

Table 30g.--Nonrubber footwear: U.S. production of youths' and boys' footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1970							
Athletic	24	-	218	-	-	-	242
Work	-	-	-	-	-	130	130
House slippers	180	27	590	-	-	1,440	2,237
Other:							
Boots:							
Fashion	-	-	476	-	-	558	1,034
Other	-	-	94	-	-	62	156
Casuals:							
Wood bottoms	-	-	-	-	-	15	15
Clogs	-	-	-	-	-	3	3
Sandals	-	15	18	-	-	4	37
Dress	-	177	82	25	2,625	8,485	11,394
All other	19	5	803	63	-	1,995	2,885
Total	223	224	2,281	88	2,625	12,692	18,133
Total youths' and boys' pairs with a wholesale value of less than $6 a pair	26	205	1,342	-	2,518	3,789	7,880
Total youths' and boys' "make-up" footwear 1/	18	13	1,307	-	-	1,982	3,320
1971							
Athletic	32	54	218	-	-	-	304
Work	-	-	-	-	-	117	117
House slippers	188	477	44	-	-	1,455	2,164
Other:							
Boots:							
Fashion	-	-	516	-	-	646	1,162
Other	-	-	82	-	-	101	183
Casuals:							
Wood bottoms	-	-	-	-	-	17	17
Clogs	-	-	-	-	-	2	2
Sandals	-	15	18	-	-	1	34
Dress	-	208	1,034	23	2,117	7,591	10,973
All other	20	6	-	66	-	1,798	1,890
Total	240	760	1,912	89	2,117	11,728	16,846
Total youths' and boys' pairs with a wholesale value of less than $6 a pair	34	299	1,536	-	2,002	3,336	7,207
Total youths' and boys' "make-up" footwear 1/	27	-	1,502	-	-	1,866	3,395

See footnote at end of table.

Table 30g.--Nonrubber footwear: U.S. production of youths' and boys' footwear, by type and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1972							
Athletic	38	42	218	-	-	-	298
Work	-	-	-	-	-	140	140
House slippers	195	18	686	-	-	1,239	2,138
Other:							
Boots:							
Fashion	-	-	709	-	-	728	1,437
Other	-	-	59	-	-	384	443
Casuals:							
Wood bottoms	-	-	-	-	-	18	18
Clogs	-	-	-	-	-	1	1
Sandals	8	22	-	-	-	55	85
Dress	-	182	1,055	-	2,447	10,250	13,934
All other	7	-	-	66	-	1,781	1,854
Total	248	264	2,727	66	2,447	14,596	20,348
Total youths' and boys' pairs with a wholesale value of less than $6 a pair	30	283	1,742	-	2,327	3,288	7,670
Total youths' and boys' "make-up" footwear 1/	1	5	1,726	-	-	3,108	4,840
1973							
Athletic	16	75	218	-	-	87	396
Work	-	-	-	-	-	152	152
House slippers	200	-	563	-	-	1,188	1,951
Other:							
Boots:							
Fashion	-	-	565	-	305	68	938
Other	-	-	-	132	-	347	479
Casuals:							
Wood bottoms	-	-	-	-	-	16	16
Clogs	23	-	-	-	-	2	25
Sandals	12	18	-	-	-	3	33
Dress	-	171	58	1,038	2,308	7,525	11,100
All other	8	-	-	99	-	1,637	1,744
Total	259	264	1,404	1,269	2,613	11,025	16,834
Total youths' and boys' pairs with a wholesale value of less than $6 a pair	31	218	610	1,040	2,129	3,211	7,239
Total youths' and boys' "make-up" footwear 1/	3	-	605	1,040	-	2,080	3,728

See footnote at end of table

Table 30g--Nonrubber footwear: U.S. production of youths' and boys' footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
1974							
Athletic	14	67	218	64	-	131	494
Work	-	-	-	-	-	233	233
House slippers	174	3	546	-	5	1,303	2,031
Other:							
Boots:							
Fashion	-	-	497	-	-	749	1,246
Other	-	-	-	123	-	277	400
Casuals:							
Wood bottoms	-	-	-	-	-	18	18
Clogs	-	-	62	-	-	3	65
Sandals	-	19	31	-	-	103	153
Dress	-	149	44	1,088	2,572	5,765	9,618
All other	34	-	-	111	-	1,487	1,632
Total	222	238	1,398	1,386	2,577	10,069	15,890
Total youths' and boys' pairs with a wholesale value of less than $6 a pair	31	231	521	1,153	2,425	2,471	6,832
Total youths' and boys' "make-up" footwear 1/	1	3	512	1,092	2	1,857	3,467
January-June 1974							
Athletic	72	33	109	-	-	66	280
Work	-	-	-	-	-	142	142
House slippers	94	3	62	-	-	491	650
Other:							
Boots:							
Fashion	-	-	345	-	-	448	793
Other	-	-	-	69	-	182	251
Casuals:							
Wood bottoms	-	-	-	-	-	13	13
Clogs	-	-	37	-	-	1	38
Sandals	-	9	17	-	-	3	29
Dress	-	76	17	1,932	78	3,071	5,174
All other	16.5	-	-	61	-	624	701.5
Total	182.5	121	587	2,062	78	5,041	8,071.5
Total youths' and boys' pairs with a wholesale value of less than $6 a pair	76.5	113	363	1,932	-	1,174	3,658.5
Total youths' and boys' "make-up" footwear 1/	.5	3	352	610	-	968	1,933.5

See footnote at end of table.

Table 30g.--Nonrubber footwear: U.S. production of youths' and boys' footwear, by types and by size of output, 1970-74, January-June 1974, and January-June 1975--Continued

(In thousands of pairs)

Period and type	Less than 200,000 pairs each	200,000 to 499,999 pairs each	500,000 to 999,999 pairs each	1,000,000 to 1,999,999 pairs each	2,000,000 to 3,999,999 pairs each	4,000,000 pairs or more each	Total
January-June 1975							
hletic	7		109	-	-	43	186
rk	-		-	-	-	120	120
use slippers	51		136	-	-	359	548
her:							
Boots:							
Fashion	-		216	-	-	241	457
Other	-		-	14	-	204	218
Casuals:							
Wood bottoms	-	-	-	-	-	11	11
Clogs	-	-	14	-	-	2	16
Sandals	-	11	18	-	-	10	39
Dress	-	64	27	1,609	76	2,570	4,346
All other	22.5	-	-	33	-	795	851
Total	80.5	104	520	1,659	76	4,355	6,792
tal youths' and boys' pairs with a wholesale value of less than $6 a pair	17.5	94	230	1,613	-	875	2,830
tal youths' and boys' "make-up" footwear 1/	1.5	2	221	637	-	1,083	1,945

1/ Footwear produced to customers' specifications.

Source: Compiled by the U.S. International Trade Commission from data supplied by domestic producers nonrubber footwear.

Note.--Individual items may not add to totals because of the inability of some firms to disaggregate eir production by type of footwear.

Table 31.--Nonrubber footwear: U.S. exports of domestic merchandise, by types, 1970-75, January-September 1974, and January-September 1975

Type	1970	1971	1972	1973	1974	Jan.-Sept.-- 1974	Jan.-Sept.-- 1975
	Quantity (1,000 pairs)						
For men	432	395	468	688	776	586	600
For youths and boys	35	40	45	120	131	115	72
For women	776	849	731	970	1,102	834	698
For misses	58	92	113	227	214	186	144
For children	74	70	94	160	281	220	202
For infants	31	36	67	103	92	70	112
House slippers	198	211	240	239	289	135	418
Footwear, n.e.c. 1/	550	413	495	1,092	-	-	-
Athletic footwear 1/	-	-	-	-	201	117	275
Footwear, n.e.c. 1/	-	-	-	-	907	663	894
Total	2,154	2,106	2,253	3,599	3,993	2,926	3,415
	Value (1,000 dollars)						
For men	3,008	2,870	3,656	6,715	8,808	6,227	6,515
For youths and boys	87	87	96	367	424	365	215
For women	2,252	2,312	2,131	3,232	3,936	2,851	3,051
For misses	99	208	224	542	661	560	439
For children	145	148	160	353	751	622	508
For infants	69	81	116	209	210	150	247
House slippers	364	420	453	362	497	256	650
Footwear, n.e.c. 1/	2,611	2,301	2,758	5,711	-	-	-
Athletic footwear 1/	-	-	-	-	2,920	1,900	3,818
Footwear, n.e.c. 1/	-	-	-	-	5,068	3,579	5,930
Total	8,635	8,427	9,594	17,491	23,275	16,510	21,373

1/ Footwear, n.e.c., was broken out into athletic footwear and footwear, n.e.c., in 1974.

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

Table 31a.--Nonrubber footwear: U.S. exports of domestic merchandise, by principal markets, 1970-74

Market	1970	1971	1972	1973	1974
	Quantity (pair)				
Canada	280,729	336,812	362,408	710,645	999,840
Japan	67,280	73,980	123,212	335,708	325,501
Mexico	482,163	480,703	431,673	841,474	529,638
Republic of South Africa	21,516	19,334	35,726	142,951	132,761
Bahamas	227,884	249,131	267,435	266,895	270,885
Spain	27,736	51,562	41,295	50,763	76,786
Netherlands Antilles	138,975	115,909	154,230	113,804	161,820
Hong Kong	40,541	31,268	54,853	35,329	38,000
Bermuda	75,562	66,479	120,379	86,497	122,583
Panama	89,001	80,940	67,760	51,308	109,021
Australia	8,871	8,638	10,931	19,368	55,514
Libya	16,143	10,981	17,902	39,622	58,145
United Kingdom	26,762	24,655	38,401	58,892	73,595
West Germany	39,272	47,334	34,639	36,263	58,655
All other	611,639	508,141	491,778	809,798	980,227
Total	2,154,074	2,105,867	2,252,622	3,599,317	3,992,971
	Value				
Canada	$1,385,311	$1,585,294	$1,698,518	$2,976,514	$5,386,346
Japan	611,036	794,617	1,626,024	4,340,546	4,943,413
Mexico	1,056,311	1,057,560	1,042,220	2,054,934	1,596,743
Republic of South Africa	204,366	244,520	300,014	1,031,712	1,375,249
Bahamas	835,693	845,692	1,003,281	1,272,370	1,272,242
Spain	183,245	145,304	218,779	270,268	618,532
Netherlands Antilles	388,197	331,515	394,114	380,553	555,697
Hong Kong	319,843	235,765	290,797	382,921	536,959
Bermuda	281,721	291,277	378,580	333,704	532,773
Panama	373,926	315,667	290,003	262,838	469,067
Australia	74,395	69,385	92,540	115,523	444,442
Libya	100,546	87,930	114,762	274,583	399,179
United Kingdom	132,391	117,155	165,357	253,417	396,779
West Germany	145,018	151,124	160,270	137,704	308,010
All other	2,542,902	2,154,535	1,818,302	3,403,648	4,439,122
Total	8,634,901	8,427,340	9,593,561	17,491,235	23,274,553

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

Table 31b.--Nonrubber footwear: Inventories of U.S. producers on Dec. 31 of 1970-74, Mar. 31 and June 30, 1974, and Mar. 31 and June 30, 1975

Date	Quantity	Value
	1,000 pairs	1,000 dollars
Dec. 31, 1970	39,733	169,858
Dec. 31, 1971	39,579	183,430
Dec. 31, 1972	37,541	188,289
Dec. 31, 1973	35,996	190,646
Dec. 31, 1974	37,976	220,962
Mar. 31, 1974	32,368	178,213
June 30, 1974	44,754	221,756
Mar. 31, 1975	33,145	176,215
June 30, 1975	38,711	203,219

Source: Compiled by the U.S. International Trade Commission from producers' questionnaires.

Table 32.--Total U.S. employment in all manufacturing and average number of all employees, production workers, and women employees engaged in the production of nonrubber footwear, 5-year averages 1950-74, annual 1970-74, January-September 1974, and January-September 1975

Period	All manufacturing		Nonrubber footwear					
			All employees		Production workers		Women employees	
	All employees	Production workers	Number	Percent of all manufacturing employees	Number	Percent of all footwear employees	Number	Percent of all footwear employees
	(Thousands)	(Thousands)	(Thousands)		(Thousands)		(Thousands)	
Five-year average:								
1950-54	16,426	13,224	247	1.5	223	90.3	132	53.4
1955-59	16,784	12,903	245	1.5	220	89.8	136	55.7
1960-64	16,849	12,499	237	1.4	211	89.2	134	56.6
1965-69	19,327	14,264	233	1.2	205	88.0	142	60.8
1970-74	19,425	14,163	196	1.0	170	86.7	126	64.4
Annual:								
1970	19,349	14,020	214	1.1	186	86.8	135	63.2
1971	18,572	13,467	200	1.1	174	86.5	128	63.8
1972	19,090	13,957	198	1.0	172	86.9	127	64.3
1973	20,068	14,760	189	.9	164	86.9	123	64.9
1974	20,046	14,613	178	.9	154	86.6	118	66.0
January-September--								
1974	20,152	14,717	181	.9	157	86.6	1/ 121	65.7
1975	18,250	14,415	161	.9	139	86.5	1/ 106	65.5
Percentage increase (+) or decrease (-):								
1974 over 1950	+22.0	+16.7	-27.9	-	-30.8	-	-10.9	-
1974 over 1965	+11.0	+8.8	-23.9	-	-26.3	-	+13.5	-
1969 over 1965	+11.4	+9.9	3.0	-	-5.7	-	+4.6	-
1974 over 1970	+3.6	+4.2	-16.6	-	-16.8	-	-12.8	-
Jan.-Sept. 1975 over 1970	-5.6	+2.8	-25.7	-	-24.9	-	-19.3	-
Jan.-Sept. 1975 over Jan.-Sept. 1974	-9.4	-2.1	-11.0	-	-11.5	-	-12.4	-

1/ For the period January-June 1975.

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

Table 32a.--Total employment, production workers, and women employees engaged in the production of footwear, annual 1970-74, January-September 1974, and January-September 1975 1/

	Total employment		Production workers		Women employees	
	Number	Percent of all manufacturing employees	Number	Percent of all manufacturing employees	Number	Percent of all manufacturing employees
	Thousands		Thousands		Thousands	
1970	238	1.2	207	87.0	149	62.6
1971	226	1.2	196	86.7	143	63.3
1972	224	1.2	194	86.6	142	63.4
1973	216	1.1	188	87.0	139	64.4
1974	205	1.0	177	86.3	134	65.4
1974 (Jan.-Sept.)	208	1.0	181	87.0	137	65.9
1975 (Jan.-Sept.)	185	1.0	159	85.9	120	64.9
Percent increase (+) or decrease (-)						
1974 over 1970	-3.7	-	-3.8	-	-2.6	-
Jan.-Sept. 1975 over 1970	-5.1	-	-5.4	-	-4.5	-
Jan.-Sept. 1975 over Jan.-Sept. 1974	-16.7	-	-18.5	-	2/ -16.2	-

1/ SIC categories 314 and 302.
2/ July 1974-July 1975.

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

Table 32b.--Number of U.S. establishments 1/ producing nonrubber footwear, by number of employees, specified years 1969 to 1973 2/

Year	Size class (number of employees)								Total reporting units
	1-3	4-7	8-19	20-49	50-99	100-249	250-499	500 or more	
	Number of establishments								
1969	90	62	107	115	107	249	291	79	1,100
1972	80	55	81	99	101	209	246	65	936
1973	99	62	86	104	104	205	233	59	952
	Percent of total								
1969	8.2	5.6	9.7	10.5	9.7	22.6	26.5	7.2	100
1972	8.5	5.9	8.7	10.6	10.8	22.3	26.3	6.9	100
1973	10.4	6.5	9.0	10.9	10.9	21.5	24.5	6.2	100

1/ The statistics are tabulated in terms of "reporting units." Each manufacturing location of a company is counted as a separate reporting unit.

2/ Excludes Government employees, self-employed persons, and so forth. Size class 1-3 includes reporting units having a payroll during the first quarter but no employees during the mid-March pay period.

Source: U.S. Bureau of the Census, County Business Patterns.

Table 33.--U.S. employment in the production of nonrubber footwear and index of such employment, by principal producing States, 1965-74

Year	Massachusetts	Maine	New Hampshire	New York	Pennsylvania	Missouri	Illinois	Wisconsin	U.S. total
	Number of employees (thousands)								
1965	33.4	24.9	17.7	23.0	26.9	25.3	10.2	9.1	234.5
1966	32.8	26.3	18.2	22.3	27.3	25.6	9.9	9.1	241.5
1967	31.0	26.0	17.8	20.6	25.4	24.0	9.1	8.6	231.6
1968	31.1	26.9	17.8	20.5	25.1	24.1	8.9	8.6	236.5
1969	28.4	24.6	15.9	19.2	24.1	22.4	8.7	8.2	226.8
1970	23.9	22.1	13.8	17.9	23.2	20.8	7.8	8.1	213.6
1971	20.3	19.4	12.4	16.2	22.4	19.5	7.2	8.1	200.6
1972	19.5	16.9	11.8	15.7	21.6	20.9	6.9	8.1	198.1
1973	17.7	17.0	10.0	14.1	20.3	21.0	6.9	7.7	189.1
1974	16.3	15.3	8.5	12.9	18.0	20.4	6.7	7.4	178.1
	Index (1967=100)								
1965	107.7	95.8	99.4	111.7	105.9	105.4	112.1	105.8	101.3
1966	105.8	101.2	102.2	108.3	107.5	106.7	108.8	105.8	104.3
1967	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1968	100.3	103.5	100.0	99.5	98.8	100.4	97.8	100.0	102.1
1969	91.6	94.6	89.3	93.2	94.9	93.3	95.6	95.3	97.9
1970	77.1	85.0	77.5	86.9	91.3	86.7	85.7	94.2	92.2
1971	65.5	74.6	69.7	78.6	88.2	81.3	79.1	94.2	86.6
1972	62.9	65.0	66.3	76.2	85.0	87.1	75.8	94.2	85.5
1973	57.1	65.4	56.2	68.4	79.9	87.5	75.8	89.5	81.6
1974	52.6	58.8	47.8	62.6	70.9	85.0	73.6	86.0	76.9

Source: Compiled from official statistics of the U.S. Bureau of Labor Statistics.

Table 34.--Average hours, total and overtime, worked per week by production workers in all U.S. manufacturing and in the production of nondurable goods and nonrubber footwear, 5-year averages 1950-74, annual 1970-74, and January-September 1975

Period	Average total hours per week 1/			Average overtime hours per week		
	All manufacturing	Nondurable goods	Nonrubber footwear	All manufacturing	Nondurable goods	Nonrubber footwear
5-year averages:						
1950-54	40.4	39.5	36.9	2/	2/	2/
1955-59	40.1	39.4	37.0	2/	2/	2/
1960-64	40.2	39.5	37.1	2.7	2.7	1.2
1965-69	40.9	39.9	37.9	3.6	3.3	1.7
1970-74	40.2	39.4	37.5	3.3	3.1	1.8
Annual:						
1970	39.8	39.1	37.2	3.0	3.0	1.6
1971	39.9	39.3	37.5	2.9	3.0	1.8
1972	40.6	39.7	38.2	3.5	3.3	2.2
1973	40.7	39.6	37.9	3.8	3.4	2.0
1974	40.0	39.1	36.8	3.2	3.0	1.6
1975 (Jan.-Sept.)	39.1	38.4	36.1	3/ 2.3	3/ 2.2	3/ 1.1

1/ Includes overtime counted on a straight-time basis
2/ Not available.
3/ For the period January-June 1975.

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

Table 35.--Average hourly and weekly earnings of U.S. production workers in all manufacturing and in the production of nondurable goods and nonrubber footwear, 5-year averages 1950-74, annual 1970-74, and January-September 1975

Period	Average hourly earnings			Average weekly earnings		
	All manufacturing	Nondurable goods	Nonrubber footwear	All manufacturing	Nondurable goods	Nonrubber footwear
5-year averages:						
1950-54	$1.63	$1.50	$1.24	$65.96	$59.21	$45.65
1955-59	2.03	1.84	1.45	81.41	72.39	53.82
1960-64	2.39	2.17	1.68	96.24	85.61	62.17
1965-69	2.87	2.61	2.04	117.36	103.95	77.10
1970-74	3.85	3.50	2.64	154.66	137.01	99.19
Annual:						
1970	3.36	3.08	2.43	133.73	120.43	90.40
1971	3.57	3.26	2.53	142.44	128.12	94.88
1972	3.81	3.47	2.63	154.69	137.76	100.47
1973	4.08	3.68	2.72	166.06	145.73	103.09
1974	4.41	3.99	2.91	176.40	156.01	107.09
1975 (Jan.-Sept.)	4.76	4.31	3.05	186.26	165.28	110.37
Average annual percentage increase:						
1950-74	4.6	4.6	4.0	4.6	4.5	4.0
1965-74	6.0	6.0	5.4	5.7	5.7	5.0
1965-69	5.1	5.4	6.1	4.8	5.1	5.5
1970-74	7.0	6.7	4.6	7.2	6.7	4.3

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

Table 36.--Real hourly and weekly earnings of U.S. production workers in all manufacturing and in the production of nondurable goods and nonrubber footwear (using 1970 as base year), 1970-74 and January-September 1975

Period	Real hourly earnings			Real weekly earnings		
	All manufacturing	Nondurable goods	Nonrubber footwear	All manufacturing	Nondurable goods	Nonrubber footwear
1970	$3.36	$3.08	$2.43	$133.73	$120.43	$90.40
1971	3.42	3.12	2.43	136.57	122.84	90.97
1972	3.54	3.22	2.44	143.58	127.87	93.25
1973	3.57	3.22	2.38	145.10	127.34	90.08
1974	3.47	3.14	2.29	138.90	122.84	84.32
1975 (Jan.-Sept.)	3.46	3.14	2.22	135.56	120.29	80.33
Average annual percentage change, 1970-74	+0.81	+0.48	-1.47	+0.95	+0.50	-1.73

1/ Earnings are deflated by the Consumer Price Index after 1970 to show effect of price changes.

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

Table 37.--Hourly earnings of U.S. workers producing certain types of footwear, by sex, size of establishment, size of community, and type of shoe, 1/ March 1971

Item	Men's Goodyear-welt dress shoes		Women's cement process (conventional lasted) shoes	
	50-249 workers	250+ workers	50-249 workers	250+ workers
Male employees:				
Metropolitan	$2.95	$3.18	$3.30	$3.11
Nonmetropolitan	3.14	2.84	2.67	2.91
Female employees:				
Metropolitan	2.20	2.35	2.31	2.40
Nonmetropolitan	2.25	2.30	2.09	2.34

1/ Straight-time hourly earnings; excludes premium pay for overtime and for work on weekends, holidays, or late shifts.

Source: U.S. Bureau of Labor Statistics, Industry Wage Survey, March 1971.

Table 37a.--Hourly earnings of production workers and estimated total compensation per hour worked in specified industries related to footwear in 8 countries, 1970-75

(In U.S. dollars)

Country	Industry	1970	1971	1972	1973	1974	1975 1/
		Published averaged hourly earnings 2/					
Brazil	Clothing and footwear 3/ 4/	$0.30	$0.32	$0.34	$0.38	$0.43	$0.52
Hong Kong	Rubber footwear 5/	.32	.38	.43	.50	.55	6/ .54
Italy	Footwear 7/	.60	.80	.93	1.14	1.30	1.68
Japan	Leather and leather products 8/	.76	.86	1.21	1.57	1.92	2.12
Korea	Plastic products 3/ 9/	.20	.20	.18	.28	.36	.38
Spain	Clothing and footwear 3/ 10/	.38	.42	.53	.68	.86	1.11
Taiwan	Plastic products 9/	11/	11/	12/ .19	.26	.36	.39
United States	Footwear, excluding rubber	2.43	2.53	2.63	2.72	2.91	3.07
		Estimated compensation per hour worked 13/					
Brazil	Clothing and footwear 3/ 4/	$0.39-$0.42	$0.41-$0.45	$0.45-$0.48	$0.50-$0.54	$0.56-$0.60	$0.68-$0.73
Hong Kong	Rubber footwear 5/	.35- .37	.41- .43	.47- .50	.55- .58	.60- .63	.60- .62
Italy	Footwear 7/	1.09	1.48	1.74	2.13	2.43	3.18
Japan	Leather and leather products 8/	.85	.96	1.34	1.76	2.15	2.36
Korea	Plastic products 3/ 9/	.24- .26	.23- .26	.21- .23	.32- .36	.41- .47	.44- .49
Spain	Clothing and footwear 3/ 10/	.53- .58	.59- .64	.74- .80	.99- 1.06	1.20- 1.29	1.55- 1.67
Taiwan	Plastic products 9/	11/	11/	.22- .23	.30- .32	.41- .43	.45- .47
United States	Footwear, excluding rubber	2.91	3.05	3.18	3.36	3.78	3.89

1/ Preliminary estimates of mid-year average hourly earnings and compensation per hour worked converted to U.S. dollars on the basis of the January through November average daily exchange rate.

2/ Published earnings do not represent the same items of labor compensation in each country because of differences in the treatment of various supplementary benefits. Earnings generally refer to gross cash payments to wage workers before deductions for taxes and social security and include overtime pay, shift differentials, regular bonuses and premiums, and cost-of-living adjustments. Holiday, vacation, and sick leave pay, bonuses not paid regularly each pay period, and other supplementary benefits are included by some countries and excluded by others. The earnings data are per paid hour for some countries and per hour worked for other countries.

3/ All employees. In the developed countries, production worker earnings generally average 80 to 90 percent of all employee earnings.

4/ Wage adjustments in Brazil are governed by an official wage formula. The 1972 through 1975 earnings figures are estimated based on the average wage adjustments granted in the total private sector of the economy.

5/ Daily earnings converted to an hourly basis by assuming 9 hours of work per day.

6/ Converted to U.S. dollars on the basis of the Dec. 18, 1975, exchange rate.

7/ Data related to factory workers in establishments of 20 or more employees. In 1970, such workers accounted for nearly 2/3 of all

Footnotes for table 37a--Continued

footwear production workers, and homeworkers accounted for 8 to 9 percent of the total. Hourly compensation of all production workers in 1970, including homeworkers, has been estimated to be 90 percent or more of factory workers compensation in establishments of 20 or more employees.

8/ Shoes exported from Japan to the United States are made principally of plastics materials. Data for only the leather and leather products industry, which includes leather footwear, are shown in the table, however, because adequate data are not available for plastic footwear. In the Japanese industrial classification system, plastic footwear is combined with rubber products. In 1970, less than 1/5 of the factory workers in the rubber products industry group were in plastic footwear plants and they were paid at a lower rate than most workers in the rubber products portion of the industry. In addition, about half of the workers in the plastic footwear industry are homeworkers, who are paid at a lower rate than factory workers. Nearly half of the workers in the leather footwear industry are also homeworkers. Based on information for the year 1970, average hourly compensation of all production workers in leather footwear, including homeworkers, was approximately 80 percent of factory worker compensation in the leather products industry, and hourly compensation in plastic footwear, including homeworkers, approximately 70 percent.

9/ The shoes shipped from Korea and Taiwan to the United States are principally of plastics.

10/ Approximately 40 percent of the workers in the Spanish footwear industry are homeworkers, who are paid at a lower rate than the factory workers in the industry.

11/ Not available.

12/ July-December 1972.

13/ Compensation refers to all payments made by employers directly to their workers before deductions of any kind plus employer contributions to legally required insurance programs and private welfare plans for the benefits of employees. The figures on additional compensation per hour worked as a percentage of published earnings are the best estimates currently available to the Bureau of Labor Statistics.

Sources: Brazil--Industrias de Transformacao, 1971, Department of Industry, Trade and Services, Brazil; Hong Kong--Annual Department Report, 1970-73, Commissioner of Labour, Hong Kong, and Wage Statistics, various issues, Census and Statistics Department, Hong Kong; Italy--Rassegna di Statistiche del Lavoro, various issues, Confederazione General dell'Industria Italiana, Rome; Japan--Year Book of Labour Statistics, various issues, and Monthly Labour Statistics and Research Bulletin, various issues, Ministry of Labour, Tokyo; Korea--Monthly Statistics of Korea, various issues, Economic Planning Board, Seoul; Spain--Year Book of Labour Statistics, 1974, International Labour Office, Geneva, and Boletin Mensual de Estadistica, various issues, Instituto Nacional de Estadistica, Madrid; and Taiwan--Monthly Bulletin of Labor Statistics, various issues, Directorate-General of Budget, Accounting, and Statistics, Taipei. Conversion from the currencies of the foreign countries to U.S. dollars was made on the basis of average daily exchange rates.

Prepared by: U.S. Department of Labor, Bureau of Labor Statistics, Office of Productivity and Technology, Division of Foreign Labor Statistics and Trade, December 1975.

Table 37b.--Average monthly labor turnover rates per 100 employees in all U.S. manufacturing and in the production of nonrubber footwear, 1960-74

Year	All manufacturing					Nonrubber footwear				
	Total accessions	New hires	Total separations	Quits	Layoffs	Total accessions	New hires	Total separations	Quits	Layoffs
1960	3.8	2.2	4.3	1.3	2.4	4.6	2.8	4.7	2.3	1.7
1961	4.1	2.2	4.0	1.2	2.2	4.6	2.6	4.6	2.1	1.7
1962	4.1	2.5	4.1	1.4	2.0	4.5	2.9	4.7	2.4	1.5
1963	3.9	2.4	3.9	1.4	1.8	4.5	2.9	4.6	2.3	1.6
1964	4.0	2.6	3.9	1.5	1.7	4.7	3.2	4.6	2.5	1.4
1965	4.3	3.1	4.1	1.9	1.4	5.1	3.7	5.0	3.1	1.1
1966	5.0	3.8	4.6	2.6	1.2	6.0	4.6	6.0	4.2	1.0
1967	4.4	3.3	4.6	2.3	1.4	5.5	3.8	5.9	3.6	1.4
1968	4.6	3.5	4.6	2.5	1.2	6.1	4.5	5.9	3.9	1.0
1969	4.7	3.7	4.9	2.7	1.2	6.0	4.2	6.6	3.9	1.6
1970	4.0	2.8	4.8	2.1	1.8	5.6	4.0	6.3	3.5	1.7
1971	3.9	2.6	4.2	1.8	1.6	5.8	3.9	6.2	3.3	1.9
1972	4.4	3.3	4.2	2.2	1.1	6.7	4.9	6.9	4.3	1.6
1973	4.8	3.9	4.6	2.7	.9	7.7	5.9	8.0	5.4	1.4
1974	4.2	3.2	4.8	2.3	1.5	6.8	4.9	8.0	4.8	2.0

Source: Compiled from official statistics of the U.S. Bureau of Labor Statistics.

Table 37c.--Value added by manufacture per employee, in all U.S. manufacturing and in the production of nondurable goods and nonrubber footwear, and index of such value added, 1960-73

Year	Amount			Index (1967=100)		
	All manufacturing	Nondurable goods	Nonrubber footwear	All manufacturing	Nondurable goods	Nonrubber footwear
1960	$10,155	$10,325	$5,366	72	71	70
1961	10,444	10,699	5,447	74	73	71
1962	11,085	11,238	5,635	78	77	73
1963	11,833	11,917	6,015	84	82	78
1964	12,507	12,540	6,522	88	86	85
1965	13,156	13,100	6,525	93	90	85
1966	13,785	13,806	6,977	97	95	91
1967	14,167	14,568	7,674	100	100	100
1968	15,259	15,602	8,448	108	107	110
1969	15,893	16,246	8,543	112	112	111
1970	16,415	17,101	9,202	116	117	120
1971	18,027	18,519	9,684	127	127	126
1972	19,629	19,898	10,194	139	137	133
1973	21,443	21,872	10,926	151	150	142

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

Table 38.--Expenditures per production worker for new plant and equipment, in all U.S. manufacturing, and in the production of nondurable goods and nonrubber footwear, and index of such expenditures, 1960-73

Year	Amount			Index (1967=100)		
	All manu- facturing	Non- durable goods	Nonrubber footwear	All manu- facturing	Non- durable goods	Nonrubber footwear
1960------	$827	$857	$74	54	50	54
1961------	830	934	109	54	54	79
1962------	861	980	91	56	57	66
1963------	930	1,003	102	60	58	74
1964------	1,072	1,154	112	70	67	81
1965------	1,271	1,400	118	82	82	86
1966------	1,464	1,638	145	95	95	105
1967------	1,541	1,715	138	100	100	100
1968------	1,468	1,641	229	95	96	166
1969------	1,553	1,747	174	101	102	126
1970------	1,638	1,906	182	106	111	132
1971------	1,627	1,955	194	106	114	141
1972------	1,780	2,009	236	116	117	171
1973------	1,897	2,138	292	123	125	212

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

Table 38a.--Value of rented and owned assets per worker, U.S. and nonrubber footwear industry averages, 1968-72

Year	Value of rented assets per worker		Value of owned assets per worker		Value of rented and owned assets per worker	
	U.S. average	Nonrubber footwear industry average	U.S. average	Nonrubber footwear industry average	U.S. average	Nonrubber footwear industry average
1968	$943	$288	$8,758	$1,035	$9,701	$1,323
1969	1,066	352	9,094	1,220	10,160	1,572
1970	1,232	447	9,455	1,181	10,687	1,628
1971	1,437	513	10,979	1,266	12,416	1,779
1972	1,538	427	12,368	1,371	13,906	1,798
Percent increase, 1972 over 1968	63.1	48.3	41.2	32.5	43.3	35.9

IRS Source Book, 1968-72.

Table 39.--Number of insured unemployed persons in all U.S. manufacturing and in the production of nondurable goods and leather and leather products (SIC No. 31), total, percent distribution, and as a percent of insured unemployment (rate), by quarters, January 1970-March 1975, and April 1975

Year and quarter	Insured unemployed persons 1/								
	Number			Percent of total in--			Rate 3/		
	All manufacturing	Nondurable goods	Leather/ leather products	All manufacturing 2/	Nondurable goods 2/	Leather/ leather products 2/	All manufacturing	Nondurable goods	Leather/ leather products
	Thousands	Thousands	Thousands						
1970:									
January-March	817.0	372.0	24.6	43.9	45.5	3.0	4.1	4.5	6.6
April-June	884.1	392.5	24.1	52.5	44.4	2.7	4.3	4.7	6.5
July-September	919.5	370.3	24.9	53.8	40.3	2.7	4.5	4.4	6.9
October-December	1,052.2	407.9	26.6	53.7	38.7	2.5	5.1	4.8	7.6
1971:									
January-March	1,228.1	498.5	28.6	45.1	40.5	2.3	6.0	5.9	8.2
April-June	1,019.8	442.0	27.4	48.9	43.3	2.6	5.0	5.2	7.9
July-September	948.0	375.2	28.3	50.2	39.6	3.0	4.6	4.5	8.1
October-December	856.5	349.4	26.2	45.9	40.7	3.0	4.3	4.2	7.8
1972:									
January-March	964.5	432.2	24.8	39.2	44.8	2.5	4.9	5.2	7.5
April-June	731.4	362.5	20.5	40.3	49.6	2.8	3.7	4.4	6.2
July-September	682.0	329.2	23.9	42.1	48.4	3.5	3.6	4.0	7.5
October-December	553.6	285.9	22.8	37.4	51.6	4.1	2.9	3.5	7.4
1973:									
January-March	681.1	358.8	24.6	33.1	52.7	3.5	3.6	4.4	8.0
April-June	545.8	196.4	17.4	35.8	54.6	3.1	2.8	3.7	5.6
July-September	539.9	290.8	17.9	37.9	53.7	3.2	2.8	3.5	5.9
October-December	547.4	288.4	15.5	36.4	52.8	2.8	2.8	3.5	5.0
1974:									
January-March	963.0	426.2	22.9	37.4	44.3	2.3	4.9	5.2	7.5
April-June	799.7	375.9	16.4	39.4	47.0	2.0	4.0	4.5	5.4
July-September	766.0	373.7	23.5	40.3	48.7	3.0	3.8	4.5	7.7
October-December	1,066.0	485.9	28.6	42.9	45.8	2.7	5.2	5.8	9.5
1975:									
January-March	2,205.5	914.3	46.2	44.3	41.4	2.1	10.8	10.9	15.5
April	2,099.8	849.7	43.6	43.1	40.4	2.0	10.3	10.2	14.8
Average:									
1970	918.2	385.7	25.1	51.0	42.2	2.7	4.5	4.6	6.9
1971	1,013.1	416.3	27.6	47.5	41.0	2.7	5.0	5.0	8.0
1972	732.9	352.5	23.0	39.8	48.6	3.2	3.8	4.3	7.2
1973	578.6	283.6	18.8	35.8	53.5	3.2	3.0	3.8	6.1
1974	898.7	415.4	22.9	40.0	46.5	2.5	4.5	5.0	7.5
1975 4/	2,179.1	898.2	45.6	44.0	41.2	2.1	10.7	10.7	15.3

1/ Figures are for the week including the 12th of the month. Includes Puerto Rico.

2/ Manufacturing percent is derived using total insured unemployed as a 100-percent base, while nondurable goods and leather and leather products use manufacturing as a 100-percent base (total equals mining and contract construction, manufacturing, public utilities, wholesale and retail trade, finance/insurance/real estate, services, state and local government, and all other).

3/ Insured unemployment as a percent of average covered employment for a 12-month period, usually with a lag of 6 to 9 months from the week of reference.

4/ Only based on first 4 months.

Source: U.S. Department of Labor, Manpower Administration, Unemployment Insurance Statistics, 1970-75.

Table 39a.--Percent of unemployed persons in manufacturing and in the production of nondurable goods and leather and leather products (SIC No. 31) claiming under 5 and over 14 weeks of unemployment, by quarters, January 1970-March 1975, and April 1975

(In percent)

Period	Insured unemployed persons					
	All manufacturing		Nondurable goods		Leather, under 5 weeks	Leather products, over 14 weeks
	Under 5 weeks	Over 14 weeks	Under 5 weeks	Over 14 weeks		
1970:						
Jan.-Mar----------	44.1	14.2	44.4	14.0	46.4	15.5
Apr.-June---------	40.0	18.8	43.1	17.5	50.5	15.8
July-Sept---------	43.0	19.6	46.0	17.6	55.9	14.8
Oct.-Dec----------	39.5	19.1	44.8	16.5	44.1	14.6
1971:						
Jan.-Mar----------	32.1	23.3	37.2	19.6	39.1	21.9
Apr.-June---------	29.7	29.1	35.4	24.6	33.5	26.8
July-Sept---------	39.0	23.9	39.3	22.6	49.2	18.9
Oct.-Dec----------	35.4	23.1	41.3	20.6	39.1	18.6
1972:						
Jan.-Mar----------	32.6	23.9	37.2	19.8	36.7	23.6
Apr.-June---------	30.4	28.4	34.5	24.8	39.1	21.2
July-Sept---------	39.0	23.6	39.6	22.4	50.6	18.9
Oct.-Dec----------	37.0	22.8	40.0	21.5	41.4	17.9
1973:						
Jan.-Mar. 1/------	41.9	18.3	44.7	16.7	45.8	19.9
Apr.-June---------	32.3	25.5	34.8	23.7	37.9	25.4
July-Sept---------	39.2	22.5	41.0	21.2	51.4	18.7
Oct.-Dec----------	40.2	21.0	42.2	19.9	46.2	16.4
1974:						
Jan.-Mar----------	40.7	16.0	39.5	17.2	45.0	15.1
Apr.-June---------	29.9	27.0	34.4	23.5	37.2	23.1
July-Sept---------	39.2	23.6	39.5	22.3	54.3	14.2
Oct.-Dec----------	45.4	16.2	45.5	16.7	49.1	13.8
1975:						
Jan.-Mar----------	35.3	16.7	38.3	16.0	42.8	14.5
Apr---------------	26.3	26.7	29.4	25.3	31.7	21.7
Average:						
1970--------------	41.6	17.9	44.6	16.4	49.2	15.2
1971--------------	34.1	24.9	38.3	21.9	40.3	21.6
1972--------------	34.8	24.7	37.8	22.1	40.3	20.4
1973--------------	37.7	22.5	40.7	20.4	45.7	20.1
1974--------------	38.8	20.7	39.7	19.9	46.4	16.6
1975 2/-----------	33.1	19.2	36.1	18.3	40.0	16.3

1/ Data are for January 1973 only. Data for February and March 1973 are unavailable.
2/ Only based on first 4 months.

Source: U.S. Department of Labor, Manpower Administration, Unemployment Insurance Statistics, 1970-75.

Table 40.--Indexes of U.S. wholesale prices for footwear and other selected commodities, 1960-74

(1967=100)

Period	Footwear (BLS code 043)				All commodities	Nondurable manufactured goods	Wearing apparel	Leather
	Total	Women's and misses'	Men's and boys'	Children's and infants'				
1960----------	87.6	89.7	84.8	86.5	95.9	92.6	94.5	94.1
1961----------	88.0	90.2	84.8	86.8	95.5	92.4	94.5	95.9
1962----------	88.9	90.8	86.5	87.5	94.8	95.1	95.4	97.7
1963----------	88.7	90.8	86.5	87.5	94.5	94.8	95.4	92.3
1964----------	88.9	90.3	86.8	87.8	94.7	94.7	96.4	93.2
1965----------	90.7	91.6	89.4	90.1	96.6	96.8	97.3	97.7
1966----------	96.8	96.8	97.0	96.6	99.8	100.0	98.2	109.6
1967----------	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1968----------	104.8	109.3	103.6	107.4	102.5	101.5	103.2	101.9
1969----------	109.5	110.1	108.1	112.9	106.5	104.6	107.1	108.5
1970----------	113.3	114.1	111.7	117.0	110.4	108.2	111.0	107.7
1971----------	116.8	117.1	115.7	119.8	113.9	110.5	112.9	112.5
1972----------	124.5	123.3	125.9	126.1	119.1	114.7	114.8	140.3
1973----------	130.5	125.4	137.9	130.2	134.7	131.0	119.0	160.1
1974----------	140.0	132.8	140.0	138.5	160.1	159.5	129.5	154.3
Average annual growth rate:								
1960-74-------	3.41	2.84	3.65	3.72	3.73	3.96	2.28	2.31
1965-74-------	4.94	4.21	5.11	4.89	5.77	5.71	3.23	5.21
1965-69-------	4.82	4.71	4.86	5.80	2.47	1.96	2.43	2.66
1970-74-------	5.43	3.87	5.81	4.31	9.74	10.19	3.93	9.41

Source: Compiled from official statistics of the U.S. Bureau of Labor Statistics.

Table 41.--Indexes of U.S. consumer prices for footwear and other selected commodities, 1960-74, January-September 1974, and January-September 1975

(1967=100)

Period	All items	All commodities except food	Apparel except footwear	Footwear 1/
1960	88.5	93.6	91.8	85.1
1961	89.4	93.6	92.7	85.9
1962	90.3	94.5	92.7	87.1
1963	92.0	95.4	93.6	88.0
1964	92.9	95.4	94.6	88.4
1965	94.6	96.3	94.6	90.0
1966	97.1	97.2	96.4	95.3
1967	100.0	100.0	100.0	100.0
1968	104.0	103.7	106.4	105.3
1969	110.0	108.3	112.7	111.8
1970	116.3	116.7	116.4	117.7
1971	121.3	122.1	119.9	121.5
1972	125.3	125.8	122.3	124.9
1973	133.1	130.7	126.5	130.2
1974	147.7	143.6	135.7	138.1
January-September--				
1974	145.7	141.7	134.2	136.8
1975	159.8	155.8	140.2	143.8
Average annual growth rate:				
1974 over 1960	3.73	3.10	2.83	3.52
1974 over 1965	5.07	4.54	4.09	4.87
1969 over 1965	3.84	2.98	4.47	5.57
1974 over 1970	6.16	5.32	3.91	4.08
Jan.-Sept. 1975 over Jan.-Sept. 1974	9.68	9.95	4.47	5.13

1/ The Consumer Price Index for footwear includes items of both leather and nonleather.

Source: Compiled from official statistics of the U.S. Bureau of Labor Statistics.

Table 41a.--Wholesale price indexes for substitutes for leather--polyvinyl chloride, rubber heels and soles and synthetic rubber, 1970-74

Year	Polyvinyl chloride	Rubber heels and soles	Synthetic rubber
	Index, 1970=100		
1970	100.0	100.0	100.0
1971	100.2	104.3	100.0
1972	100.6	104.8	100.2
1973	103.8	106.5	100.9
1974	145.1	129.6	129.7
	Index, 1967=100		
1970	1/	104.9	100.8
1971	1/	109.4	100.8
1972	1/	109.9	101.0
1973	1/	111.7	101.7
1974	1/	136.0	130.7

1/ Not available

Source: Compiled from official statistics of the U.S. Bureau of Labor Statistics.

Table 42.--Wholesale price indexes for total footwear, women's and misses' domestic footwear, and women's and misses' imported footwear, 1970-74

(1970=100)

Period	Total footwear	Women's and misses' domestic footwear	Women's and misses' imported footwear 1/
1970	100.0	100.0	100.0
1971	103.1	102.7	105.0
1972	109.9	108.1	112.6
1973	115.2	109.9	119.1
1974	123.6	116.4	123.1
Average annual growth rate, 1974 over 1970	5.44	3.87	5.33

1/ However, this index is only based on prices of imported leather-upper dress pumps and leather-upper sandals from Italy.

Source: Compiled from official statistics of the U.S. Bureau of labor Statistics.

Table 43.--U.S. wholesale price indexes for nonrubber footwear, by sectors and by quarters, 1970-75

(January 1973=100)

Period	Sector								
	A	B	C	E	F	G	J	K	L
1970:									
Jan.-Mar----	88.86	* * *	85.34	88.51	89.54	* * *	* * *	* * *	* * *
Apr.-June---	88.92	* * *	85.86	89.07	90.22	* * *	* * *	* * *	* * *
July-Sept---	89.17	* * *	86.23	90.41	91.08	* * *	* * *	* * *	* * *
Oct.-Dec----	89.78	* * *	86.42	90.95	91.08	* * *	* * *	* * *	* * *
							* * *		
1971:									
Jan.-Mar----	90.01	* * *	86.42	90.95	92.70	* * *	* * *	* * *	* * *
Apr.-June---	91.23	* * *	87.75	92.47	93.89	90.51	* * *	* * *	* * *
July-Sept---	91.35	* * *	88.53	93.14	94.55	91.02	* * *	* * *	* * *
Oct.-Dec----	91.74	* * *	88.53	93.14	94.67	91.28	* * *	* * *	* * *
1972:									
Jan.-Mar----	93.28	* * *	90.53	93.14	95.59	93.67	* * *	* * *	* * *
Apr.-June---	95.07	* * *	93.06	94.15	97.57	97.36	* * *	* * *	* * *
July-Sept---	96.34	* * *	95.64	96.16	98.69	99.12	* * *	* * *	* * *
Oct.-Dec----	97.53	* * *	99.35	97.41	98.77	100.00	* * *	* * *	* * *
1973:									
Jan.-Mar----	102.53	* * *	100.43	103.59	102.75	103.56	* * *	* * *	* * *
Apr.-June---	104.16	* * *	100.96	105.82	104.43	105.97	* * *	* * *	* * *
July-Sept---	104.23	* * *	103.03	106.31	104.87	105.97	* * *	* * *	* * *
Oct.-Dec----	106.71	* * *	104.91	108.05	106.20	106.38	* * *	* * *	* * *
1974:									
Jan.-Mar----	110.30	* * *	107.92	110.90	108.14	109.90	* * *	* * *	* * *
Apr.-June---	113.04	* * *	111.17	112.96	110.84	113.27	* * *	* * *	* * *
July-Sept---	115.05	* * *	113.91	114.98	112.34	114.84	* * *	* * *	* * *
Oct.-Dec----	119.23	* * *	116.35	116.51	113.62	116.20	* * *	* * *	* * *
1975:									
Jan.-Mar----	120.05	* * *	115.80	117.85	116.79	116.47	* * *	* * *	* * *
Apr.-June---	117.71	* * *	114.79	119.95	116.93	116.61	* * *	* * *	* * *
July-Sept---	118.53	* * *	120.84	120.40	118.93	116.74	* * *	* * *	* * *
Oct.-Dec----	119.61	* * *	-	120.86	120.84	116.99	* * *	* * *	* * *

Source: Prepared from responses in price data questionnaire for U.S. producers of footwear.

Note.--The sectors are described as follows:

A. Men's dress and casual shoes.
B. Men's boots, dress and casual (not work), ankle height or higher.
C. Men's, youths', and boys' work shoes, ankle height or higher (including steel-toed shoes).
E. Women's flat shoes, 7/8 inch and down.
F. Women's low-heel shoes, 8/8-14/8 inch.
G. Women's medium-heel shoes, 15/8-19/8 inch.
J. Misses' shoes.
K. Children's shoes (including little boys').
L. Infants' and babies' shoes.

Table 44.--Import wholesale price indexes for nonrubber footwear, by sectors and by quarters, 1970-75

(January 1973=100)

Period	Sector											
	A	B	C	D	E	F	G	H	I	K	M	N
1970:												
Jan.-Mar----	85.73	-	-	-	95.78	* * *	-	-	* * *	-	-	* * *
Apr.-June---	85.73	-	-	-	95.78	88.20	-	-	* * *	-	-	* * *
July-Sept---	85.73	-	-	-	95.78	88.20	-	-	* * *	-	-	* * *
Oct.-Dec----	85.73	-	-	-	95.78	88.20	* * *		* * *	-	-	* * *
1971:												
Jan.-Mar----	88.04	-	-	-	95.78	88.20	* * *	-	85.30	-	* * *	* * *
Apr.-June---	88.04	-	-	-	96.00	88.38	* * *	-	85.30	-	* * *	* * *
July-Sept---	88.04	-	-	-	96.43	89.33	* * *	* * *	85.30	-	* * *	* * *
Oct.-Dec----	88.04	-	-	-	97.28	89.92	91.67	* * *	85.94	-	* * *	* * *
1972:												
Jan.-Mar----	91.50	-	91.74	-	95.11	90.76	95.32	* * *	85.94	-	* * *	* * *
Apr.-June---	92.52	-	91.74	-	95.27	92.33	97.14	* * *	90.39	-	* * *	* * *
July-Sept---	92.52	-	92.05	-	95.59	96.79	98.04	* * *	92.61	-	* * *	* * *
Oct.-Dec----	94.12	-	95.21	-	96.51	97.86	99.21	* * *	92.61	-	* * *	* * *
1973:												
Jan.-Mar----	100.00	100.00	100.00	100.00	100.70	100.00	100.00	* * *	100.00	* * *	100.00	100.00
Apr.-June---	100.59	100.24	100.00	100.00	104.03	100.44	101.93	* * *	103.81	* * *	100.00	100.00
July-Sept---	101.17	100.71	100.35	100.00	105.94	101.53	104.33	* * *	105.71	* * *	100.00	100.00
Oct.-Dec----	101.22	102.21	105.15	106.25	106.96	104.38	107.23	* * *	105.71	* * *	100.00	100.00
1974:												
Jan.-Mar----	106.97	106.93	112.90	115.42	109.74	108.49	110.18	* * *	111.09	* * *	115.17	100.00
Apr.-June---	109.44	111.01	112.99	118.31	110.90	108.27	112.31	* * *	116.90	* * *	117.99	100.00
July-Sept---	109.89	113.15	112.30	122.88	113.00	111.03	118.63	* * *	119.30	* * *	123.63	100.00
Oct.-Dec----	111.20	113.68	109.21	123.84	113.61	112.99	119.00	* * *	119.30	* * *	123.63	100.00
1975:												
Jan.-Mar----	117.27	116.75	113.96	129.74	117.79	113.67	120.94	* * *	122.26	* * *	123.63	103.97
Apr.-June---	117.48	122.89	114.77	130.26	119.87	114.85	124.32	* * *	124.14	* * *	123.63	105.95
July-Sept---	119.79	122.89	116.85	130.81	126.12	115.71	125.41	* * *	125.08	* * *	124.76	105.28
Oct.-Dec----	120.14	122.89	* * *	131.92	121.75	117.50	126.25	-	* * *	* * *	127.02	105.28

Source: Prepared from responses in price data questionnaire for U.S. importers of footwear.

Note.--The sectors are described as follows:

A. Men's dress and casual shoes.
B. Men's boots, dress and casual (not work), ankle height or higher.
C. Men's, youths', and boys' work shoes, ankle height or higher (including steel-toed shoes).
D. Youths' and boys' shoes (except work).
E. Women's flat shoes, 7/8 inch and down.
F. Women's low-heel shoes, 8/8-14/8 inch.
G. Women's medium-heel shoes, 15/8-19/8 inch.
H. Women's high-heel shoes, 20/8 inch and up.
I. Women's boots, ankle height or higher.
K. Children's shoes (including little boys').
M. Athletic shoes (except sneakers).
N. Slippers.

Table 45.--Wholesale price indexes for domestically produced nonrubber footwear, by quarters, 1970-75

(January-March 1970=100)

Period	Nonrubber footwear 1/	Women's, misses', children's, and infants' nonrubber footwear	Men's, youths', and boys' nonrubber footwear 2/
1970:			
Jan.-Mar	100.00	100.00	100.00
Apr.-June	100.47	100.76	100.06
July-Sept	101.11	101.65	100.30
Oct.-Dec	101.49	101.84	101.05
1971:			
Jan.-Mar	102.29	103.17	101.28
Apr.-June	103.64	104.56	102.51
July-Sept	104.13	105.22	102.63
Oct.-Dec	104.51	105.32	103.57
1972:			
Jan.-Mar	105.91	106.43	105.11
Apr.-June	107.99	108.49	106.92
July-Sept	109.58	110.03	108.19
Oct.-Dec	110.91	110.63	109.70
1973:			
Jan.-Mar	115.78	115.89	115.09
Apr.-June	117.69	118.16	116.85
July-Sept	118.21	118.55	116.98
Oct.-Dec	120.34	119.90	120.29
1974:			
Jan.-Mar	123.83	123.25	123.96
Apr.-June	126.84	126.28	126.72
July-Sept	129.07	127.98	129.48
Oct.-Dec	131.77	129.36	134.12
1975:			
Jan.-Mar	133.33	131.83	134.96
Apr.-June	132.91	132.84	132.59
July-Sept	134.65	134.02	133.54
Oct.-Dec	136.06	135.23	134.87

1/ Excludes athletic and slippers.
2/ Excludes work footwear.

Source: Prepared from responses in price data questionnaire for U.S. producers of footwear.

Table 46.--Wholesale price indexes for imported nonrubber footwear, by quarters, 1970-75

(January-March 1970=100)

Period	Nonrubber footwear 1/	Women's, misses', children's, and infants' nonrubber footwear	Men's, youths', and boys' nonrubber footwear 2/
1970:			
Jan.-Mar	100.00	100.00	100.00
Apr.-June	100.00	100.00	100.00
July-Sept	100.00	100.00	100.00
Oct.-Dec	100.00	100.00	100.00
1971:			
Jan.-Mar	100.57	100.00	102.69
Apr.-June	100.94	100.46	102.69
July-Sept	101.83	101.59	102.69
Oct.-Dec	102.87	102.92	102.69
1972:			
Jan.-Mar	103.86	103.11	106.73
Apr.-June	105.25	104.70	107.92
July-Sept	106.89	106.91	107.92
Oct.-Dec	108.30	107.97	109.79
1973:			
Jan.-Mar	112.59	111.49	116.65
Apr.-June	114.19	113.78	117.09
July-Sept	115.51	115.58	117.59
Oct.-Dec	117.69	117.53	119.63
1974:			
Jan.-Mar	123.17	121.85	126.96
Apr.-June	125.16	123.40	130.36
July-Sept	127.85	126.77	132.40
Oct.-Dec	128.61	127.76	133.63
1975:			
Jan.-Mar	133.34	131.78	139.88
Apr.-June	135.33	133.93	141.76
July-Sept	136.74	135.15	143.39
Oct.-Dec	137.77	136.14	143.91

1/ Excludes athletic and slippers.
2/ Excludes work footwear.

Source: Prepared from responses in price data questionnaire for U.S. importers of footwear.

Table 47.--Nonrubber footwear: Percentage distribution of domestic and imported footwear, by types and by price ranges, 1974

Type and price range	Percent of domestic production	Percent of imports
Total	100	100
Men's dress and casual shoes	15	11
Less than $6.00	1/ 13	26
$6.01-$10.00	40	25
$10.01-$14.00	28	20
$14.01-$18.00	1/ 8	13
Greater than $18.00	13	16
Total	100	100
Men's boots and dress and casual shoes (except work), ankle height or higher	3	1
Less than $6.00	2/ 3	6
$6.01-$10.00	6	36
$10.01-$14.00	32	11
$14.01-$18.00	28	20
Greater than $18.00	30	28
Total	100	100
Men's work shoes, ankle height or higher (including steel-toe)	6	2
Less than $6.00	1/ 5	67
$6.01-$9.00	16	29
$9.01-$12.00	35	4
$12.01-$15.00	21	0.3
Greater than $15.00	23	0.1
Total	100	100
Youths' and boys' shoes	4	2
Less than $4.00	2/ 23	76
$4.01-$6.00	40	9
$6.01-$8.00	22	6
$8.01-$10.00	12	5
Greater than $10.00	3	3
Total	100	100
Women's flat shoes, 7/8 inch and down	7	2
Less than $4.00	53	55
$4.01-$6.00	34	28
$6.01-$8.00	23	8
Greater than $8.00	16	8
Total	100	100
Women's shoes, 8/8 inch and up	29	52
Less than $4.00	1/ 8	31
$4.01-$7.00	1/ 45	28
$7.01-$10.00	1/ 25	13
$10.01-$13.00	15	18
Greater than $13.00	7	9
Total	100	100
Women's boots, ankle height or higher	1	2
Less than $7.00	2/ 5	22
$7.01-$10.00	2/ 48	25
$10.01-$13.00	8	14
$13.01-$16.00	20	11
Greater than $16.00	20	27
Total	100	100
Misses' shoes	3	4
Less than $3.00	23	62
$3.01-$5.00	33	33
$5.01-$7.00	23	3
$7.01-$9.00	15	1
Greater than $9.00	6	0.3
Total	100	100
Children's shoes (including little boys')	5	3
Less than $3.00	2/ 20	54
$3.01-$5.00	40	29
$5.01-$7.00	22	4
$7.01-$9.00	16	9
Greater than $9.00	2	3
Total	100	100
Infants' and babies' shoes	5	1
Less than $2.00	24	43
$2.01-$3.00	24	37
$3.01-$4.00	18	5
$4.01-$5.00	7	3
Greater than $5.00	26	14
Total	100	100
Athletic shoes (except sneakers)	2	-
Slippers	19	9
Less than $1.00	1/ 3	36
$1.01-$2.00	2/ 63	41
$2.01-$3.00	1/ 17	20
$3.01-$4.00	11	3
Greater than $4.00	5	0.8
Total	100	100
All other shoes and shippers, except those with sole vulcanized to fabric uppers	3/	-

1/ 25 to 40 percent of this item is estimated.
2/ More than 40 percent of this item is estimated.
3/ Negligible.

Source: Domestic data compiled from official statistics of the U.S. Department of Commerce; import data compiled by U.S. International Trade Commission from data submitted in responese to importers' questionnaires.

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

Table 48.--Nonrubber footwear (including zoris and paper slippers): U.S. production, imports for consumption, and apparent consumption by types, 1968-74, January-September 1974, and January-September 1975 1/

(Quantity in figures in millions of pairs)

Period and item	Athletic	Slippers 2/	Work	All other: For men, youths, and boys	All other: For women and misses	All other: For children and infants	All other: Not specified by kind	Total
1968:								
Production	8	105	36	114	317	60	2	642
Imports	2	3/	2	31	133	14	30	211
Apparent consumption	10	105	38	145	450	74	32	853
Ratio (percent) of imports to consumption	20	4/	5	21	30	19	94	25
Ratio (percent) of imports to production	25	4/	6	27	42	23	1,500	33
1969:								
Production	9	101	35	105	266	56	4	577
Imports	2	1	2	38	140	19	25	227
Apparent consumption	11	102	37	143	406	75	29	804
Ratio (percent) of imports to consumption	18	1	5	27	34	25	86	28
Ratio (percent) of imports to production	22	1	6	36	53	34	625	39
1970:								
Production	9	96	38	106	253	55	5	562
Imports	4	3/	2	48	166	21	26	268
Apparent consumption	13	96	40	155	419	76	31	830
Ratio (percent) of imports to consumption	31	4/	5	31	40	28	84	32
Ratio (percent) of imports to production	44	4/	5	45	66	38	520	48
1971:								
Production	8	98	38	102	232	54	4	536
Imports	5	3/	2	57	181	22	23	291
Apparent consumption	13	98	40	159	413	76	27	827
Ratio (percent) of imports to consumption	38	4/	5	36	44	29	85	35
Ratio (percent) of imports to production	63	4/	5	56	78	41	575	54
1972:								
Production	9	98	35	115	218	50	2	527
Imports	6	3/	2	62	199	27	25	322
Apparent consumption	15	98	37	177	417	77	27	849
Ratio (percent) of imports to consumption	40	4/	5	35	48	35	93	38
Ratio (percent) of imports to production	67	4/	6	54	91	54	1,250	61
1973:								
Production	10	91	4/ 29	112	197	49	2	490
Imports	6	3/	3	66	215	26	23	339
Apparent consumption	16	91	32	175	407	75	25	829
Ratio (percent) of imports to consumption	38	4/	9	36	52	35	92	41
Ratio (percent) of imports to production	60	4/	10	56	107	53	1,150	69
1974:								
Production	10	86	4/ 27	101	183	44	2	453
Imports	8	3/	3	73	191	19	24	318
Apparent Consumption	18	86	30	154	366	63	26	719
Ratio (percent) of imports to consumption	44	4/	10	34	50	30	92	41
Ratio (percent) of imports to production	80	4/	11	52	100	43	1,200	70
January-September--								
1974:								
Production	7	66	21	81	136	33	2	346
Imports	6	3/	3	54	151	15	19	249
Apparent consumption	13	66	24	122	283	48	21	595
Ratio (percent) of imports to consumption	46	4/	13	34	52	31	90	42
Ratio (percent) of imports to production	86	4/	14	51	108	45	950	72
1975:								
Production	8	50	17	73	135	29	2	314
Imports	12	3/	2	62	150	14	17	256
Apparent consumption	26	50	19	116	277	43	19	570
Ratio (percent) of imports to consumption	60	4/	11	37	51	33	89	45
Ratio (percent) of imports to production	150	4/	12	59	105	48	850	82

1/ Data on imports include all imports cited in the notice of investigation.
2/ Import data relate only to the type of leather slippers reported under TSUS item 700.32; imported slippers of other construction and material are included in the import figures relating to "All other" footwear.
3/ Less than 500,000 pairs.
4/ Less than 0.5 percent.

Source: Compiled from official statistics of the U.S. Department of Commerce and partly estimated by the U.S. International Trade Commission.

Note.--In this table apparent consumption figures represent production plus imports without an allowance for exports and therefore differ slightly from the apparent consumption figures shown in table 1. Ratios of imports to consumption, however, are the same in this table as in table 1. Beacuse of rounding, figures may not add to the total shown.

Table 48a.--Nonrubber footwear (excluding zoris and paper slippers): U.S. production, imports for consumption, and apparent consumption, by types, 1968-74, January-September 1974, and January-September 1975

(Quantity figures in millions of pairs)

Period and item	Athletic	Slippers 1/	Work	All other: For men, youths, and boys	All other: For women and misses	All other: For children and infants	All other: Not specified by kind	Total
1968:								
Production	8	105	36	114	317	60	2	642
Imports	2	2/	2	31	133	14	-	182
Apparent consumption	10	105	38	145	450	74	2	824
Ratio (percent) of imports to consumption	20	3/	5	21	30	19	-	22
Ratio (percent) of imports to production	25	3/	6	27	42	23	-	28
1969:								
Production	9	101	35	105	266	56	4	577
Imports	2	1	2	38	140	19	-	202
Apparent consumption	11	102	37	143	406	75	4	779
Ratio (percent) of imports to consumption	18	1	5	27	34	25	-	26
Ratio (percent) of imports to production	22	1	6	36	53	34	-	35
1970:								
Production	9	96	38	106	253	55	5	562
Imports	4	2/	2	48	166	21	-	242
Apparent consumption	13	96	40	155	419	76	5	804
Ratio (percent) of imports to consumption	31	3/	5	31	40	28	-	30
Ratio (percent) of imports to production	44	3/	5	45	66	38	-	43
1971:								
Production	8	98	38	102	232	54	4	536
Imports	5	2/	2	57	181	22	-	269
Apparent consumption	13	98	40	159	413	76	4	805
Ratio (percent) of imports to consumption	38	3/	5	36	44	29	-	33
Ratio (percent) of imports to production	63	3/	5	56	78	41	-	50
1972:								
Production	9	98	35	115	218	50	2	527
Imports	6	2/	2	62	199	27	-	297
Apparent consumption	15	98	37	177	417	77	2	824
Ratio (percent) of imports to consumption	40	3/	5	35	48	35	-	36
Ratio (percent) of imports to production	67	3/	6	54	91	54	-	56
1973:								
Production	10	91	4/29	112	197	49	2	490
Imports	6	2/	3	63	210	26	-	308
Apparent consumption	16	91	32	175	407	75	2	798
Ratio (percent) of imports to consumption	38	3/	9	36	52	35	-	39
Ratio (percent) of imports to production	60	3/	10	56	107	53	-	63
1974:								
Production	10	86	4/27	101	183	44	2	453
Imports	8	2/	3	53	183	19	-	266
Apparent consumption	18	86	30	154	366	63	2	719
Ratio (percent) of imports to consumption	44	3/	10	34	50	30	-	37
Ratio (percent) of imports to production	80	3/	11	52	100	43	-	59
January-September--								
1974:								
Production	7	66	21	81	136	33	2	346
Imports	6	2/	3	41	147	15	-	213
Apparent consumption	13	66	24	122	283	48	2	559
Ratio (percent) of imports to consumption	46	3/	13	34	52	31	-	38
Ratio (percent) of imports to production	86	3/	14	51	108	45	-	62
1975:								
Production	8	50	17	73	135	29	2	314
Imports	12	2/	2	43	142	14	-	213
Apparent consumption	26	50	19	116	277	43	2	527
Ratio (percent) of imports to consumption	60	3/	11	37	51	33	-	40
Ratio (percent) of imports to production	150	3/	12	59	105	48	-	68

1/ Import data relate only to the type of leather slippers reported under TSUS item 700.32; imported slippers of other construction and material are included in the import figures relating to "All other" footwear.
2/ Less than 500,000 pairs.
3/ Less than 0.5 percent.

Source: Compiled from official statistics of the U.S. Department of Commerce and partly estimated by the U.S. International Trade Commission.

Note.--In this table, apparent consumption figures represent production plus imports without an allowance for exports and therefore differ slightly from the apparent consumption figures shown in table 1a. Ratios of imports to consumption, however, are the same in this table as in table 1a. Because of rounding, figures may not add to the totals shown.

Table 49.--U.S. population and disposable personal income per capita, 1960-74

Period	Total U.S. population 1/	Disposable personal income per capita-- In current dollars	Disposable personal income per capita-- In constant (1958) dollars
	Thousands		
1960	181,265	$1,937	$1,883
1961	184,271	1,983	1,909
1962	187,140	2,064	1,968
1963	189,829	2,136	2,013
1964	192,464	2,280	2,123
1965	194,892	2,432	2,235
1966	197,122	2,599	2,331
1967	199,262	2,744	2,398
1968	201,253	2,945	2,486
1969	203,224	3,130	2,534
1970	205,358	3,376	2,610
1971	207,493	3,605	2,683
1972	209,262	3,843	2,779
1973	210,834	4,295	2,945
1974	212,326	4,623	2,845

1/ Annual data are estimates as of July 1 of each year.

Source: U.S. Department of Commerce, Current Population Reports, Series P-25, No. 545, April 1975, and Survey of Current Business, September 1975, July 1974.

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