

UNITED STATES TARIFF COMMISSION

FOOTWEAR FOR MEN, YOUTHS, BOYS, WOMEN,
MISSES, AND CHILDREN:
HADDAD SHOE CORP.
LANCASTER, PA.

Report to the President
on Firm Investigation No. TEA-F-66
Under Section 301(c)(1) of the Trade Expansion Act of 1962



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UNITED STATES TARIFF COMMISSION

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REPORT TO THE PRESIDENT

U.S. Tariff Commission,
December 30, 1974.

To the President:

In accordance with section 301 of the Trade Expansion Act of 1962 (TEA) (19 U.S.C. 1901), the U.S. Tariff Commission herein reports the results of investigation No. TEA-F-66 made under section 301(c)(1) of the act to determine whether, as a result in major part of concessions granted under trade agreements, articles like or directly competitive with footwear for men, youths, boys, women, misses, and children (of the types provided for in items 700.35, 700.43, 700.45, and 700.55 of the Tariff Schedules of the United States) produced by Haddad Shoe Corp., Lancaster, Pa., are being imported into the United States in such increased quantities as to cause, or threaten to cause, serious injury to such firm.

The investigation was instituted on November 6, 1974, on the basis of a petition for adjustment assistance filed under section 301(a)(2) of the act on behalf of the firm. The petition was received on October 30, 1974. Notice of the investigation was published in the Federal Register (39 F.R. 40336) on November 15, 1974. A public hearing was requested, and scheduled, but it was canceled at the request of the petitioner. Notice of the cancellation was published in the Federal Register (39 F.R. 41318) on November 26, 1974.

The information in this report was obtained principally from officials of Haddad Shoe Corp., customers of the firm, official Government statistics, and the Commission's files.

Finding of the Commission

On the basis of its investigation, the Commission finds (Commissioners Leonard and Ablondi dissenting) that articles like or directly competitive with footwear for men, youth, boys, women, misses, and children (of the types provided for in items 700.35, 700.43, 700.45, and 700.55 of the Tariff Schedules of the United States) produced by Haddad Shoe Corp., Lancaster, Pa., are, as a result in major part of concessions granted under trade agreements, being imported into the United States in such increased quantities as to threaten to cause serious injury to such firm.

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

This investigation relates to a petition filed on behalf of Haddad Shoe Corp., Lancaster, Pa., under section 301 of the Trade Expansion Act of 1962 (TEA) for a determination of its eligibility to apply for adjustment assistance. Haddad, which is still in operation, has one establishment and produces casual footwear in all sizes for both sexes. All but a very small part of such footwear retails in the range of \$7 to \$14 a pair.

As we have observed in previous cases, the Commission, in order to make an affirmative determination under section 301(c)(1) of the TEA must find that the following four criteria are met:

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

We find that each of these requirements has been met in the instant case; we have therefore made an affirmative determination.

Increased imports a result in major part of trade-agreement concessions

U.S. imports of all nonrubber footwear increased from 181 million pairs in 1968 to 316 million pairs in 1973. The share of U.S. consumption accounted for by such imports increased from 29 percent to 53

percent during the same period. In addition, U.S. imports of nonrubber footwear for youths, boys, children, and infants, the types of footwear which accounted for *** percent of Haddad's total sales in fiscal 1974, increased from 16 million pairs in 1968 to 27 million pairs in 1973. These imports represented 16 percent of U.S. consumption of footwear for youths, boys, children, and infants in 1968 and 30 percent in 1973.

More than * * * of Haddad's sales consist of children's, infants', and misses' leather-upper footwear which, if imported, would be principally dutiable under TSUS item 700.45. As a result of trade-agreement concessions, the rate of duty on item 700.45 was reduced in five stages from 20 percent ad valorem in 1967 to 10 percent in 1972, a 50-percent reduction. The duties on other imported leather-upper footwear like that produced by Haddad were reduced during 1968-72 by amounts ranging from 1.5 to 5 percentage points. The substantial increase in imports of footwear like that produced by Haddad coincided with the relevant trade-agreement concessions.

The firm is threatened with serious injury

The financial condition of Haddad Shoe has deteriorated in the past 4 years, and the firm is threatened with serious injury. Although net sales of the firm increased from * * * in fiscal year 1970 to * * * in 1974, they were less than the * * * recorded in fiscal 1971. The firm's profits declined from * * * in 1971 to a loss of * * * in 1973, and it made a profit of only * * * in 1974.

The ratios of net operating profit or loss to sales, total assets, and stockholders' equity declined rapidly from 1971 to 1974. Retained earnings declined by *** percent during the same period.

Employment at Haddad decreased from *** production and related workers in calendar year 1969 to *** in 1973.

In view of the foregoing trends, we believe the firm is threatened with serious injury.

Increased imports are the major factor threatening to cause serious injury to the firm

The evidence in this case shows that prior to the influx of concession-generated imports Haddad Shoe Corp. operated at a profit. Haddad experienced increasing financial difficulties, including substantially reduced profit margins as lower priced imports obtained an ever increasing share of the U.S. market for the types of footwear produced by the firm. In an effort to reduce its costs and to compete with imported footwear, Haddad turned to the production of some supported-vinyl-upper footwear. The firm also broadened its product line by commencing production of infants' footwear. Nonetheless, Haddad has been forced to sell some of its footwear at or below cost in order to compete with concession-generated imports and obtain a sufficient volume of business to keep its factory in operation.

A substantial proportion of Haddad's customers stated that although the firm provided high-quality footwear and good service, they switched

their purchases of such footwear from Haddad to firms supplying imported footwear in order to obtain lower prices.

Conclusion

On the basis of the foregoing considerations, we conclude that increased imports resulting in major part from trade-agreement concessions are the major factor threatening to cause serious injury to Haddad Shoe Corp., and therefore we have made an affirmative decision.

View of Commissioner Minchew

In response to the petition filed on behalf of Haddad Shoe Corp. (a manufacturer of footwear for men, youths, boys, women, misses, and children), Lancaster, Pa., for a determination of its eligibility to apply for adjustment assistance under sections 301(c)(1) and (3) of the Trade Expansion Act of 1962 (TEA), I have concluded that the statutory requirements set forth in sections 301(c)(1) and (3) of that act are met and, accordingly, I have made an affirmative determination.

The TEA sections 301(c)(1) and (3) state that--

(1) In the case of a petition by a firm for a determination of eligibility to apply for adjustment assistance under chapter 2, the Tariff Commission shall promptly make an investigation to determine whether, as a result in major part of concessions granted under trade agreements, an article like or directly competitive with an article produced by the firm is being imported into the United States in such increased quantities as to cause, or threaten to cause, serious injury to such firm. In making its determination under this paragraph, the Tariff Commission shall take into account all economic factors which it considers relevant, including idling of productive facilities of the firm, inability of the firm to operate at a level of reasonable profit, and unemployment or underemployment in the firm.

(3) For purposes of paragraphs (1) . . . , increased imports shall be considered to cause, or threaten to cause, serious injury to a firm or unemployment or underemployment, as the case may be, when the Tariff Commission finds that such increased imports have been the major factor in causing, or threatening to cause, such injury or unemployment or underemployment.

The relevant facts are as follows:

- (1) A petition was received by the Commission on behalf of the firm on October 30, 1974.
- (2) The Commission instituted an investigation on November 6, 1974.
- (3) The investigation indicated that the articles most nearly like those produced by the firm (i.e., footwear for men, youths, boys, women, misses, and children) are entered under TSUS items 700.35, 700.43, 700.45, and 700.55.
- (4) The investigation revealed that imports of these items increased significantly between 1968 and 1974. 1/
- (5) The investigation established that a five-stage trade-agreement tariff reduction for TSUS items 700.35, 700.43, 700.45, and 700.55 took place between 1968 and 1972 (i.e., the concessions negotiated in the Kennedy Round of multilateral tariff bargaining), reducing the tariff applicable on imports entered under TSUS items 700.35, 700.43, 700.45, and 700.55. 2/
- (6) The investigation indicated that imports increased as the tariff level was reduced.
- (7) The investigation established that Haddad profits have been declining. 3/
- (8) The investigation showed that customers frequently cited lower prices for the same quality and style of imported footwear as the reason for shifting from Haddad to a foreign supplier.

On the basis of the foregoing considerations, I have concluded that the statutory requirements are met for an affirmative determination in this case.

1/ Table numbers 2, 3, 4, 5, 6, 7, and 8 of Confidential Report to the President on Investigation TEA-F-66.

2/ Table number 1 of Confidential Report to the President on Investigation TEA-F-66.

3/ Table number 9 of Confidential Report to the President on Investigation TEA-F-66.

View of Commissioner Leonard 1/

My determination in the instant case is negative because one of the criteria has not been met, i.e., that the increase in imports of footwear like or directly competitive with that produced by Haddad Shoe Corp., Lancaster, Pa., is the result in major part of concessions granted under trade agreements. My reasoning in support of this determination is set forth in a statement of my views in an earlier Commission investigation under the Trade Expansion Act. 2/

1/ Commissioner Ablondi concurs in the result.

2/ Nonrubber Footwear: Report to the President on Investigation
No. TEA-I-18 . . . , TC Publication 359, 1971, pp. 31-47.

INFORMATION OBTAINED IN THE INVESTIGATION

Description of Articles Under Investigation

Haddad Shoe Corp., of Lancaster, Pa., operates one establishment, which produces footwear for both sexes in all sizes from infants' through adults'. The composition of the firm's output varies somewhat from year to year, but recent sales--based on quantity--can be broken down by sex and age groups as follows:

<u>Category of footwear</u>	<u>Percent of output</u>
Youths' and boys'-----	***
Children's-----	***
Infants'-----	***
Men's-----	***
Women's and misses'-----	***

Most of the shoes produced by Haddad have uppers of leather; the remainder, of vinyl. All but a small part are made in two basic types--chukka or desert boots of suede leather and "work-type" footwear of glove leather. Haddad produces both types in both oxford and above-the-ankle styles. Although the work-type footwear of the above-the-ankle type made by Haddad meets the definition for statistical purposes for work footwear in the TSUS, 1/ it is not as sturdy as most work boots generally worn by men. The footwear made by Haddad is sold at retail in the range of \$5.70 to \$20 a pair, with all but a very small part selling in the \$7-to-\$14 range. About *** percent of the footwear produced by Haddad is sold to State Side Shoe Manufacturing Co. for resale in Puerto Rico at retail for \$11 to \$20 a pair.

1/ For statistical purposes in the TSUS, 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. However, hereinafter Haddad's footwear will be referred to as work boots in conformance with the terminology used by the firm.

Such footwear, which includes types for all persons except infants, is made in various oxford and boot styles especially for the Puerto Rican market.

All of the footwear produced by Haddad is constructed by the stitchdown process. In this method, there are three basic classifications: single-, two-, and three-sole stitchdown. The most frequently used is the two-sole type, which is used extensively for both boys' and girls' footwear. The feature common to all three is the basic stitchdown construction principle of flanging the upper out over the top of the sole extension and fastening the sole to the upper by chainstitching through this outflanged margin. In the two-sole method, an outsole and a midsole are used, with the latter also serving as the insole. The midsole is chainstitched to the upper, and a precemented outsole is attached. A welt strip is then attached at the seam between the upper and the midsole by a Goodyear lockstitch which simultaneously fastens together the welt, the outflanged upper, the midsole, and the outsole. The three-sole type, which includes an insole in addition to the midsole and the outer sole, is often utilized on larger boys' and men's sizes. The single-sole type has an outsole only; it is used primarily on infants' shoes.

Youths', boys', children's, and infants' footwear

Youths' and boys' footwear now accounts for less than * * * of Haddad's sales. Sales of children's footwear comprise a * * * of total sales. Infants' footwear recently increased from * * * to * * * percent of total sales. Generally, the styling of footwear for youths,

boys, children, and infants follows the same trends as does that of footwear for adults but avoids the fashion extremes of the latter. Like footwear for adults, footwear for younger persons has tended to eliminate clear-cut distinctions between dress and casual styles.

(See the sections on men's and women's footwear below for a more complete description of trends of such footwear styles.) In infants' footwear, styling is less important than its functional purpose--to provide support to enable infants to learn to walk correctly.

Men's footwear

Men's footwear accounts for about a * * * of Haddad's total sales. Styles of men's footwear have changed markedly during the past decade. The American man is more fashion conscious than he has been in many years. Men are increasingly using a greater variety of footwear for leisure wear and dress occasions. Owing to the flexibility in men's fashions, the distinction between dress and casual shoes has almost disappeared.

According to industry sources, the trend in men's footwear has been toward more casual styling with emphasis on styles that have multiple uses. The casual influence, reflecting consumer demand for comfortable, relaxed fashion footwear, is evident in virtually all footwear types, including chukka boots, glove leather boots, and dressy-casual shoes produced by Haddad. Currently, the updated classics, such as the tie oxfords and slip-ons, are examples of men's so-called dress shoes. The major changes in men's footwear styles in recent years have been in the coloring, texture, and bottom (heel and

sole) treatments. There has been a shift from lightweight styling in "basic black or brown" to higher heels and more flamboyant colors and styling.

Women's footwear

Women's footwear accounts for a * * * of Haddad's total sales of footwear. The principal features of women's and misses' shoes that determine the occasion or activity for which a particular pair is suitable--and thus the trade designations such as "dress" or "casual"--are the cut of the uppers, the style and height of the heels, the material used for the uppers, the kind of ornamentation, and the material and construction of the soles. Women today wear shoes suitable to their lifestyles, and, with footwear becoming the most important accessory to fashion, footwear styles change rapidly. As changes have occurred in dress lengths and as trousers and other casual attire have become increasingly acceptable for almost every occasion, the distinction between dress and casual shoes has diminished.

Footwear material

The president of the American Footwear Industries (AFIA) has indicated that, as the prices of leather footwear increased, shoes made from sophisticated manmade materials--polyurethane, polymerics, and nylon velvets--gained a larger percentage of the U.S. market. Footwear of manmade materials lends itself not only to the multihued, new platform styles favored by young people, but also to the more conservative styles. The following AFIA data illustrate the changes in the shares of the nonrubber footwear market supplied by leather and by manmade materials.

Percentages of total U.S. output of nonrubber footwear accounted for by leather and by manmade materials, specified years 1950 to 1975

Year	Leather	Manmade materials
1950-----	85	15
1960-----	76	24
1972-----	60	40
1973-----	54	46
1975 <u>1</u> /-----	50	50

1/ Estimated.

Source: Compiled from data supplied by the American Footwear Industries Association.

Industry sources, however, report that, owing to recent and possibly worsening shortages of petrochemically derived materials, a reversal is possible in the trend indicated above.

U.S. Tariff Treatment

Applicable TSUS items

If imported, the footwear produced by Haddad Shoe Corp. would be dutiable under various TSUS items. Men's, youths', and boys' leather-upper footwear of cement, stitchdown, or certain other miscellaneous constructions is dutiable under TSUS item 700.35. Leather-upper footwear of the same constructions for women, misses, children, and infants is dutiable under TSUS items 700.43 and 700.45, depending upon the value. Supported-vinyl-upper footwear is dutiable under TSUS item 700.55.

Rates of duty

Men's, youths', and boys' footwear in chief value of leather, of the type produced by Haddad 1/ was originally dutiable in the Tariff Act of 1930 at 20 percent ad valorem under paragraph 1530(e). Effective June 6, 1951, the rate on leather footwear of stitchdown, cement, and certain miscellaneous construction (now TSUS item 700.35) was reduced to 10 percent ad valorem. It was further reduced to 9.5 percent ad valorem effective January 1, 1968, to 9 percent effective January 1, 1969, and finally to 8.5 percent on January 1, 1971.

In the Tariff Act of 1930, women's, misses', children's, and infants' footwear of the type produced by Haddad 2/ also was originally

1/ Presently youths' and boys' footwear accounts for *** percent of Haddad's sales, while men's accounts for *** percent.

2/ The * * * of such footwear sold by Haddad is for children.

dutiable under paragraph 1530(e) at 20 percent ad valorem. Such footwear is provided for in the TSUS under items 700.43 and 700.45. The rate of duty was reduced for the first time effective January 1, 1968, pursuant to concessions granted during the sixth (Kennedy Round) of trade negotiations. The current rate for item 700.43 is 15 percent, and that for item 700.45 is 10 percent.

In recent years Haddad has produced supported-vinyl-upper work boots for youths, boys, misses, and children. 1/ Supported vinyl was not used for uppers until the late 1940's or early 1950's. Prior to the effective date of the TSUS, imports of youths' and boys' supported-vinyl-upper footwear, which were dutiable under various provisions of the Tariff Act, were classified principally--

- (1) By similitude, at the rate of 10 percent ad valorem applicable to leather footwear provided for in paragraph 1530(e). 2/
- (2) Under paragraph 1537(b) as articles in chief value of rubber, at the trade-agreement rate of 12.5 percent ad valorem where the soles were of india rubber and constituted the chief value of the footwear in question.
- (3) Under paragraph 1539(b) at the reduced rate of 21 cents per pound plus 17 percent ad valorem where the footwear was in chief value of a product having a synthetic resin as the chief binding agent.

In the TSUS a rate of 12.5 percent ad valorem was established for item 700.55 as the trade-agreement rate to replace the wide range

1/ Supported-vinyl-upper footwear presently accounts for about * * * percent of Haddad's total sales by both quantity and value.

2/ Footwear with supported-vinyl-uppers for misses and children were dutiable by virtue of the similitude provision under par. 1530(e) at a rate of 20 percent ad valorem.

of rates previously applicable to the various types of footwear provided for in this item. 1/ The current rate on footwear with supported-vinyl uppers is 6 percent ad valorem, reflecting the final stage, effective January 1, 1972, of a five-stage concession granted in the Kennedy Round.

Table 1 in the appendix shows the reductions in rates of duty resulting from trade-agreement concessions granted under the GATT for footwear of the types now dutiable under items 700.35, 700.43, 700.45, and 700.55. Tables 2 through 7 show U.S. imports of footwear admitted under the TSUS items mentioned above and the applicable rates of duty.

1/ The col. 2 rate of duty for item 700.55 is 35 percent.

U.S. Consumption, Production, and Imports

Information concerning U.S. consumption, production, and imports of all nonrubber footwear is contained in appendix A, table 8.

Youths' and boys' footwear

During the period 1968-73, apparent annual U.S. consumption of youths' and boys' nonrubber footwear increased from an estimated 29 million pairs in 1968 to 33 million pairs in 1972 and then returned to 29 million pairs in 1973. Annual U.S. production of such footwear declined from 24 million pairs in 1968 to 21 million pairs in 1973. Annual imports doubled, rising from 5 million pairs in 1968 to 10 million pairs in 1972, and then declined to 8 million pairs in 1973. The share of the market supplied by imports increased from 17 percent in 1968 to 28 percent in 1973.

Apparent consumption, production, imports, and imports' share of the market all declined slightly during January-June 1974, compared with data for the corresponding period of 1973, as shown in the following table.

The principal source of youths' and boys' leather-upper footwear in 1973 was Spain; that of vinyl was Taiwan.

Youths' and boys' nonrubber footwear (other than work and athletic):
U.S. production, imports for consumption, and apparent consumption,
1968-73, January-June 1973, and January-June 1974

Period	Production	Imports <u>1/</u>	Apparent consumption <u>2/</u>	Ratio of imports to consumption
	Million pairs	Million pairs	Million pairs	Percent
1968-----	24	5	29	17
1969-----	23	6	29	21
1970-----	24	8	32	25
1971-----	22	9	31	29
1972-----	23	10	33	30
1973-----	21	8	29	28
January-June--				
1973-----	11	4	15	27
1974-----	<u>3/</u> 10	3	13	23

1/ Includes leather footwear entered under TSUS item 700.35 and an estimate of footwear having supported-vinyl uppers entered under item 700.55.

2/ Represents U.S. production plus imports without an allowance for exports, which in 1973 amounted to slightly more than 0.1 million pairs.

3/ Estimated.

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

Children's and infants' footwear

Estimated apparent annual U.S. consumption of children's and infants' nonrubber footwear declined from 71 million pairs in 1972 to 62 million pairs in 1973, although it had remained stable at about 71 million pairs for the 5 years prior to 1973. Annual U.S. production decreased steadily from 60 million pairs in 1968 to 43 million pairs in 1973. U.S. imports increased from 11 million pairs in 1968 to a peak of 22 million pairs in 1972 and then dropped to 19 million pairs in 1973. Imports' share of the market more than doubled between 1968 and 1973, increasing from 15 percent to 31 percent over that period.

For children's and infants' footwear, as for footwear for youths and boys, apparent U.S. consumption, production, imports, and imports' share of the market all showed slight declines during January-June 1974 from the figures for the corresponding period of 1973, as shown in the following table. The principal sources in 1973 for children's and infants' leather-upper footwear were Spain and Italy. Taiwan was the principal supplier of children's and infants' footwear with vinyl uppers.

Children's and infants' nonrubber footwear: U.S. production, imports for consumption, and apparent consumption, 1968-73, January-June 1973, and January-June 1974

Period	Production	Imports ^{1/}	Apparent consumption ^{2/}	Ratio of imports to consumption
	Million pairs	Million pairs	Million pairs	Percent
1968-----	60	11	71	15
1969-----	56	16	72	22
1970-----	55	17	72	24
1971-----	54	18	72	25
1972-----	49	22	71	31
1973-----	43	19	62	31
January-June--				
1973-----	23	12	35	34
1974-----	^{3/} 20	10	30	33

^{1/} Estimated; based principally on imports of leather footwear entered under TSUS items 700.43 and 700.45 and of footwear having supported-vinyl uppers entered under item 700.55.

^{2/} Represents U.S. production plus imports without an allowance for exports, which in 1973 amounted to less than 0.3 million pairs.

^{3/} Estimated.

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

Men's footwear

Estimated apparent annual consumption of men's footwear increased during the period 1968-73 from 115 million pairs in 1968 to 138 million pairs in 1973. Such consumption had peaked at 142 million pairs in 1972. U.S. annual production declined slightly from 89 million pairs in 1968 to 88 million pairs in 1973 after having peaked at 91 million pairs in 1972. Annual imports almost doubled between 1968 and 1973, increasing from 26 million pairs in 1968 to 50 million pairs in 1973. They peaked at 51 million pairs in 1972. The share of the market supplied by imports increased from 23 percent in 1968 to 36 percent in 1973.

For men's footwear, as for all other types of footwear, U.S. annual production, imports, apparent consumption, and imports' share of the market showed declines during January-June 1974 from the data for January-June 1973. During 1973, Italy and Spain were the principal sources of men's leather-upper footwear. Men's footwear with vinyl uppers was principally supplied by Taiwan.

Men's nonrubber footwear (other than work and athletic): U.S. production, imports for consumption, and apparent consumption, 1968-73, January-June 1973, and January-June 1974

Period	Production	Imports ^{1/}	Apparent consumption ^{2/}	Ratio of imports to consumption
	Million pairs	Million pairs	Million pairs	Percent
1968-----	89	26	115	23
1969-----	82	32	114	28
1970-----	82	41	123	33
1971-----	80	49	129	38
1972-----	91	51	142	36
1973-----	88	50	138	36
January-June--				
1973-----	45	26	71	37
1974-----	^{3/} 44	21	65	32

^{1/} Includes men's leather footwear (including a small amount of athletic footwear) entered under TSUS items 700.26, 700.27, 700.29, and 700.35, and men's, youths', and boys' footwear having supported-vinyl uppers (including a small amount of athletic and work footwear) entered under item 700.55.

^{2/} Represents U.S. production plus imports without an allowance for exports, which in 1973 amounted to less than 0.5 million pairs.

^{3/} Estimated.

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

Women's and misses' footwear

During the period 1965-73, apparent annual U.S. consumption of all women's and misses' nonrubber footwear rose from an estimated 386 million pairs in 1965 to a peak of 455 million pairs in 1968 and then declined to 402 million pairs in 1973. In January-June 1974, consumption amounted to only 208 million pairs, compared with 231 million pairs in the corresponding period of 1973. Annual U.S. production of such footwear declined from 319 million pairs in 1965 to 190 million pairs in 1973. The decline continued into 1974, when production amounted to 98 million pairs in January-June, compared with 104 million pairs in January-June 1973. Annual imports tripled during the period 1965-73, and their share of the market increased without interruption from 17 percent to 53 percent. However, as shown in the following table, imports declined from 127 million pairs during January-June 1973 to 110 million pairs in the corresponding period of 1974--or by 14 percent. Italy and Spain have been the principal suppliers of women's and misses' dress and casual footwear with leather uppers; the Republic of China (Taiwan) has been the principal supplier of such footwear made with vinyl uppers.

Nonrubber footwear for women and misses: U.S. production, imports for consumption, and apparent consumption, 1965-73, January-June 1973, and January-June 1974

Period	Production <u>1/</u>	Imports <u>2/</u>	Apparent consumption <u>3/</u>	Ratio of imports to consumption
	Million pairs	Million pairs	Million pairs	Percent
1965-----	319	67	386	17
1966-----	323	70	393	18
1967-----	290	96	386	25
1968-----	322	133	455	29
1969-----	271	139	410	34
1970-----	260	165	425	39
1971-----	237	180	417	43
1972-----	223	198	421	47
1973-----	190	212	402	53
January-June--				
1973-----	104	127	231	55
1974-----	98	110	208	53

1/ Production represents the output of women's and misses' footwear as reported by the U.S. Bureau of the Census, plus shipments to the U.S. mainland from Puerto Rico.

2/ Partly estimated from the official statistics for footwear of the kinds described in pt. 1, subpt. A, of schedule 7 of the TSUSA except imports described in items 700.32, 700.51, 700.52, 700.53, and 700.60 and except zoris (very inexpensive thonged sandals of rubber or plastics), dutiable under item 700.55. Includes imports of misses' footwear, which have been negligible compared with those of women's.

3/ Computed from U.S. production plus imports without an allowance for exports, which in 1973 amounted to about 1 million pairs.

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

Work footwear

The following table shows U.S. imports of work footwear in 1968-73, January-June 1973, and January-June 1974. Rumania, Canada, and the Republic of Korea were the principal sources of work shoes during 1973.

Work footwear: U.S. imports for consumption, 1969-73,
January-June 1973, and January-June 1974

Period	Quantity	Value	Unit value
	<u>1,000</u>	<u>1,000</u>	
	<u>pairs</u>	<u>dollars</u>	<u>Per pair</u>
1969-----	1,936	6,949	\$3.59
1970-----	1,768	7,491	4.24
1971-----	1,956	8,628	4.41
1972-----	2,346	11,297	4.82
1973-----	3,169	17,576	5.55
January-June--			
1973-----	1,325	7,288	5.50
1974-----	2,035	11,318	5.56

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

U.S. and Foreign Wage Rates

The table on the following page shows the average hourly earnings and the estimated compensation per hour received by shoe workers in eight countries in 1971-73. While of some use in comparing the labor costs of the shoe industries in the various countries listed, the table has several shortcomings that make such comparisons inexact. First, only in the United States, Italy, and Hong Kong is the industry definition limited exclusively to footwear. In the other countries the industry classifications are more encompassing. Second, as footnote 1 to the table indicates, published hourly earnings in the various countries differ in composition. Third, total compensation for workers includes varying factors in the eight countries.

Hourly earnings of production workers and estimated total compensation per hour worked in specified industries related to 8 countries, 1971-73

(In U.S. dollars)

Country	Industry	Published average hourly earnings 1/			Estimated compensation per hour worked 2/		
		1971	1972	1973	1971	1972	1973
Brazil-----	Clothing and footwear 3/ 4/--	\$0.32	\$0.34	\$0.38	\$0.41-\$0.45	\$0.45-\$0.48	\$0.49-\$0.53
Hong Kong-----	Rubber footwear 5/-----	.38	.43	.50	.41- .43	.47- .50	.55- .58
Italy-----	Footwear 6/-----	.80	.93	1.08	1.49	1.70	2.00
Japan-----	Rubber products, including plastic footwear. 7/	1.08	1.57	2.10	1.23	1.78	2.39
Korea-----	Plastic products 7/-----	.22	.20	.32	.25- .29	.25- .27	.38- .41
Spain-----	Clothing and footwear 3/-----	.42	.53	.70	.59- .64	.74- .80	.99- 1.06
Taiwan-----	Plastic products 7/-----	8/ .9/	.19	.26	8/	.22- .23	.30- .32
United States-----	Footwear, excluding rubber---	2.53	2.63	2.72	3.05	3.19	3.32

1/ Published earnings do not represent the same items of labor compensation in each country because of differences in the various 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.

2/ 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 benefit 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.

3/ All employees.

4/ Wage adjustments in Brazil are governed by an official wage formula. The 1972 and 1973 earnings figures are estimates 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/ Approximately 15 percent of the workers in the Italian shoe industry are home workers, who are paid at a lower wage rate than the factory workers in the industry.

7/ The shoes shipped from Japan, Korea, and Taiwan to the United States are principally of plastics. Approximately half of the workers in the Japanese plastics shoe industry are home workers, who are paid at a lower rate than the factory workers in that industry.

8/ Not available.

9/ For July-December 1972.

Source: Based on data provided by the U.S. Bureau of Labor Statistics from the following: Brazil--Industries de Transformacao, 1971, Department of Industry, Trade and Services, Brazil; Hong Kong--Annual Department Report, 1970-73, Commissioner of Labour, Hong Kong; Italy--Rassengna di Statistiche del Lavoro, various issues, Confederazione General dell'Industria Italiana, Rome; Japan--Year Book of Labour Statistics, various issues, Ministry of Labour, Tokyo; Korea--Monthly Statistics of Korea, various issues, Economic Planning Board, Seoul; Spain--Year Book of Labour Statistics, 1973, International Labour Office, Geneva; and Taiwan--Monthly Bulletin of Labor Statistics, June 1973, Directorate-General of Budget, Accounting, and Statistics, Taipei. Conversion from the currencies of the foreign countries in the table to U.S. dollars was made on the basis of average daily exchange rates.

Data Relating to Haddad Shoe Corp.

Corporate structure

Haddad Shoe Corp. was incorporated in Pennsylvania and established in Lancaster, Pa., as a producer of leather footwear in 1946. The firm's stock was originally owned by Anies T. Haddad, Sr., Charles Haddad, Earnest Haddad, and Harvey Haddad. Shortly after the founding of the company, Earnest and Harvey Haddad sold their stock to Anies T. Haddad, Sr. Upon the death of Anies T. Haddad, Sr., his widow, Bertha Haddad, inherited stock and took over as president of the company, the position she presently holds. She is also treasurer of the firm. Anies T. Haddad, Jr., serves as executive vice president, and Eli Haddad holds the position of secretary.

* * * * *

State Side Shoe Manufacturing Co., Inc.

Anies T. Haddad, Jr., and Barket Haddad are also stockholders in State Side Shoe Manufacturing Co., Inc., which was incorporated in Pennsylvania in 1954. These two serve as president and administrative officer of the corporation, respectively, and Joseph Crotti, Jr., holds the office of secretary-treasurer. State Side owns and leases to Haddad Shoe Corp. the building in which the latter houses its operations. State Side also purchases footwear from Haddad and sells it in Puerto Rico.

Barket Haddad formerly owned a shoe-manufacturing facility in Barbados. When this operation went bankrupt approximately 4 years ago, Barket Haddad returned to the United States and the employ of the Haddad Shoe Corp.

Plant and equipment

Haddad Shoe Corp. moved to its present location in 1971, having been forced out of its former facilities because of redevelopment programs. The present plant is a four-story structure of approximately 40,000 square feet and is well over 50 years old. Operations are carried out on all four floors. The corporation owns all the machinery and equipment employed in its operations. With the exception of a few, recently purchased, secondhand stitching machines, most of the machinery appears to be at least 30 years old; some machines are believed to be 50 years or more in age.

Product and prices

Haddad Shoe Corp. produces men's, youths' and boys', women's and misses', children's, and infants' casual footwear, entirely of stitch-down construction. Recently youths' and boys' footwear has accounted for about * * * of production, children's for about a * * * and men's for about a * * * and women's, misses', and infants' for the remainder. Almost all of the firm's output has been concentrated in two basic styles--maple glove Tyrolean leather and vinyl boots and shoes, which look much like work shoes used by construction workers, but are less sturdily made, and suede chukka or desert boots and shoes. The remainder consists of more dressy-casual leather shoes (in all sizes except infants') designed for State Side for sale exclusively in Puerto Rico. Most of Haddad's footwear have uppers of leather, but the proportion of vinyl upper footwear increased to about *** percent of sales in fiscal 1973. All the shoes sold by Haddad have unisoles (combination heels and soles) made principally of foam crepe but to a lesser extent of standard rubber.

In 1972 State Side imported a small amount of children's footwear of vinyl from Taiwan similar to the glove leather children's footwear Haddad produces. Neither State Side nor Haddad has imported footwear since that time.

Haddad presently imports foam crepe soles (about a * * * of all its sole requirements) for its glove leather and vinyl footwear. Company officials stated that they are unable to purchase these soles domestically in the quality required at competitive prices as only three companies produce such soles in the United States.

Prices of footwear sold by Haddad have increased at both the wholesale and retail levels in recent years. The following table shows the wholesale prices at which Haddad's footwear sold in March 1972 and in November 1974, by type of footwear and by age and sex groups of the intended buyers. Not included in the table are the dressy-casual leather shoes designed for sale in Puerto Rico. The shoes in Puerto Rico sold at wholesale prices from * * * * a pair in November 1974.

* * * * *

The graph on the following page shows the wholesale price indexes of leather and footwear during 1970-74. The prices of raw hides and skins increased greatly during 1970-73. The increases have been caused in part by export curbs that some of the major exporters (India, Brazil, and Argentina) have imposed in order to encourage a greater degree of processing within their borders. Concurrently, the domestic supply of hides and skins was severely affected by Government-imposed wage-price controls of the past several years.

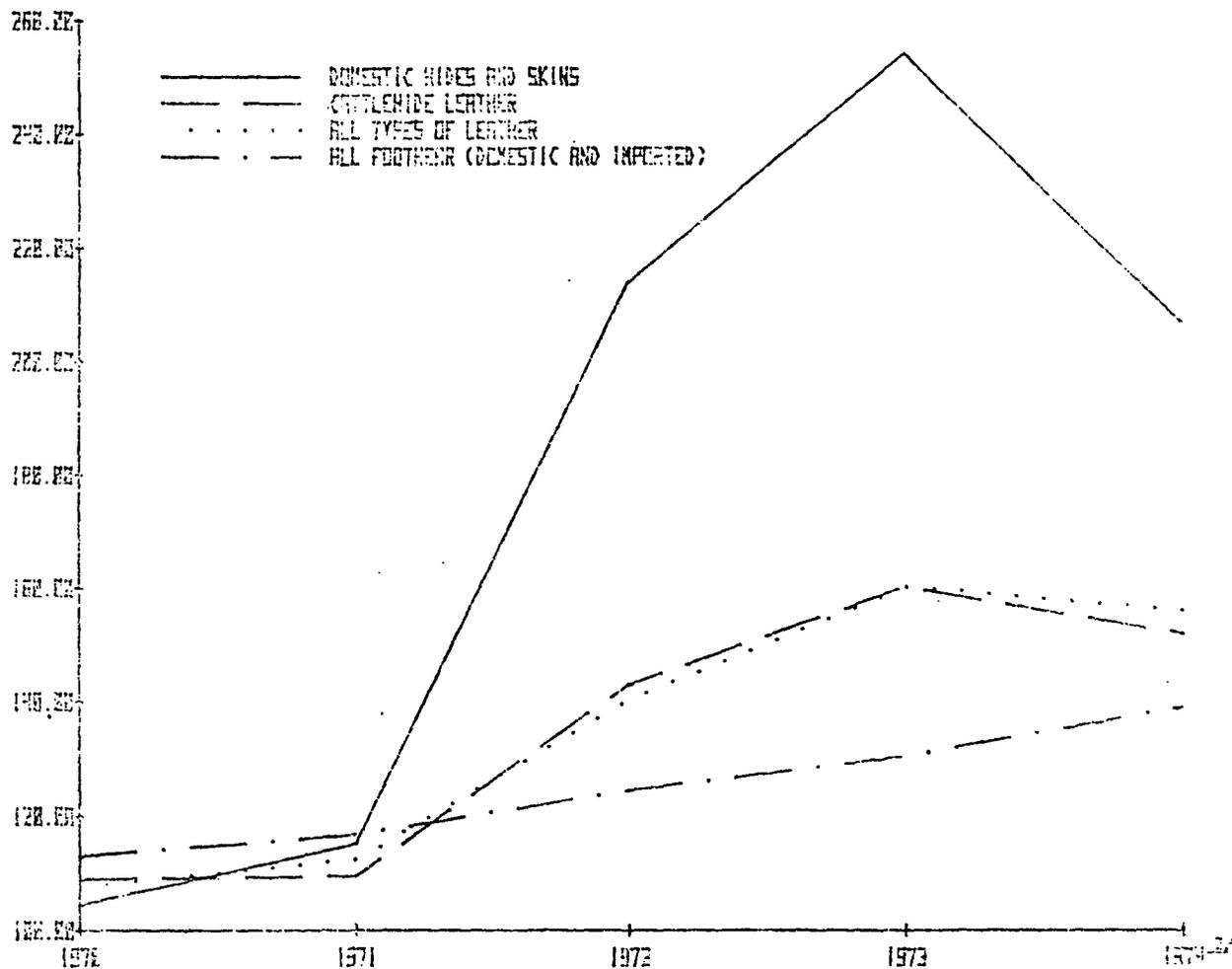
A downward trend in prices for the first 10 months of 1974 was revealed in domestic hides and skins, cattlehide leather, and all types of leather. The supply of raw hides and skins and cattlehide leather is dependent primarily on the demand for meat and meat products rather than the demand for leather and leather products. Tanners began purchasing only to meet their immediate needs. Consequently, leather prices declined as cattlehide leather quotations continued to weaken because of buyers' resistance to higher prices.

The graph depicts that the price index for footwear (both domestic and imported) showed the least fluctuation of all the categories. The upward advance in prices of footwear during 1970-74 reflects the rising costs of wages and materials as well as higher operating expenses.

Wholesale price indexes of domestic hides and skins, all types of leather, cattlehide leather, and all footwear (domestic and imported), yearly averages, 1970-74 ^{1/}

PRICE INDEX

(1967=100)



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^{1/} There is no statistical category for footwear which shows the wholesale price index for nonrubber footwear or for leather-upper footwear.

^{2/} Data available only for January-October of 1974.

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Data Relating to Haddad Shoe Corp.

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APPENDIX A
STATISTICAL TABLES

Table 1.--U.S. rates of duty applicable to certain footwear of the types provided for in specified TSUS items, July 1, 1934 and GATT concessions to Jan. 1, 1972

TSUS item No.	Abbreviated description	Rate of duty		
		July 1, 1934 ^{1/}	GATT concession ^{2/}	
			Rate	Effective date
		Percent ad val.	Percent ad val.	
	Leather footwear:			
	"Other" footwear (including cement process process):			
700.35	For men, youths, and boys-----	20	10	June 6, 1951-Dec. 31, 1967.
			9.5	Jan. 1-Dec. 31, 1968.
			9.0	Jan. 1, 1969-Dec. 31, 1970.
			8.5	Jan. 1, 1971.
	For other persons:			
	Other than sandals of buffalo leather:			
700.43	Valued not over \$2.50 per pair-----	20	19	Jan. 1-Dec. 31, 1968.
			18	Jan. 1-Dec. 31, 1969.
			17	Jan. 1-Dec. 31, 1970.
			16	Jan. 1-Dec. 31, 1971.
			15	Jan. 1, 1972.
700.45	Valued over \$2.50 per pair-----	20	18	Jan. 1-Dec. 31, 1968.
			16	Jan. 1-Dec. 31, 1969.
			14	Jan. 1-Dec. 31, 1970.
			12	Jan. 1-Dec. 31, 1971.
			10	Jan. 1, 1972.
700.55	Footwear having uppers of supported vinyl	Princi-	4/ 12.5	Aug. 31, 1963-Dec. 31, 1967.
		pally	11	Jan. 1-Dec. 31, 1968.
		20 ^{3/}	10	Jan. 1-Dec. 31, 1969.
			8.5	Jan. 1-Dec. 31, 1970.
			7	Jan. 1-Dec. 31, 1971.
			6	Jan. 1, 1972.

^{1/} Except as noted, the rate on July 1, 1934, was the same as the original rate in the Tariff Act of 1930, effective June 18, 1930.

^{2/} For concessions granted in the Kennedy Round, effective Jan. 1, 1968, the table shows staged rates that became effective up to and including Jan. 1, 1972.

^{3/} Supported-vinyl was not used for shoe uppers until the late 1940's or early 1950's. When footwear with supported-vinyl uppers was imported during the 1950's and early 1960's, it was generally dutiable, by virtue of the similitude provision of par. 1559, at the rate provided for "similar" leather footwear in par. 1530(e). The column 2 rate for item 700.55 is 35 percent.

^{4/} The trade-agreement rate established in the TSUS, effective Aug. 31, 1963, under authority of the Tariff Classification Act of 1962 (Public Law 87-456) to replace the wide range of rates previously applicable to the various types of footwear provided for in this TSUS item.

Table 2.--Footwear of leather for youths and boys, other than work and athletic (item 700.35): U.S. rates of duty and imports for consumption, 1968-73, January-June 1973, and January-June 1974

Period	Rate of duty	Quantity	Value	Unit value
	<u>Percent</u> <u>ad valorem</u>	<u>1,000</u> <u>pairs</u>	<u>1,000</u> <u>dollars</u>	<u>Per pair</u>
1968-----	9.5	2,727	4,424	\$1.62
1969-----	9	3,305	5,874	1.78
1970-----	9	3,734	6,709	1.80
1971-----	8.5	4,061	8,618	2.12
1972-----	8.5	4,321	11,957	2.77
1973-----	8.5	3,672	12,180	3.32
January-June--				
1973-----	8.5	1,825	5,471	3.00
1974-----	8.5	1,392	4,320	3.10

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

Table 3.--Footwear of leather for men, other than work and athletic (item 700.35): U.S. rates of duty and imports for consumption, 1968-73, January-June 1973, and January-June 1974

Period	Rate of duty	Quantity	Value	Unit value
	Percent ad valorem	<u>1,000</u> pairs	<u>1,000</u> dollars	Per pair
1968-----	9.5	15,171	56,539	\$3.73
1969-----	9	18,729	78,925	4.21
1970-----	9	21,801	97,558	4.47
1971-----	8.5	24,729	122,795	4.97
1972-----	8.5	27,297	167,025	6.12
1973-----	8.5	28,190	197,141	6.99
January-June--				
1973-----	8.5	14,835	99,531	6.71
1974-----	8.5	13,525	90,504	6.69

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

Table 4.--Footwear of leather for misses, children, and infants, except athletic (items 700.43 and 700.45): U.S. rates of duty and imports for consumption, 1968-73, January-June 1973, and January-June 1974

Period	Rate of duty		Imports	
	Item	Item	Item	Item
	700.43	700.45	700.43	700.45
	Percent	Percent	1,000	1,000
	ad valorem	ad valorem	pairs	pairs
1968-----	19	18	2,926	547
1969-----	18	16	4,690	774
1970-----	17	14	6,210	928
1971-----	16	12	7,043	1,265
1972-----	15	10	7,057	2,127
1973-----	15	10	4,825	2,353
January-June--				
1973-----	15	10	3,744	1,178
1974-----	15	10	2,774	809

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

Table 5.--Footwear of leather for women, except athletic (items 700.43 and 700.45): U.S. rates of duty and imports for consumption, 1968-73, January-June 1973, and January-June 1974

Period	Rate of duty		Imports	
	Item	Item	Item	Item
	700.43	700.45	700.43	700.45
	Percent	Percent	1,000	1,000
	ad valorem	ad valorem	pairs	pairs
1968-----	19	18	32,819	19,448
1969-----	18	16	27,704	26,745
1970-----	17	14	35,800	34,163
1971-----	16	12	31,844	43,725
1972-----	15	10	24,028	60,912
1973-----	15	10	15,752	68,248
January-June--	:	:	:	:
1973-----	15	10	12,753	40,450
1974-----	15	10	6,957	33,056

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

Table 6.--Footwear having supported-vinyl uppers for children and infants (item 700.5555): ^{1/} U.S. rates of duty and imports for consumption, 1966-73, January-June 1973, and January-June 1974

Period	Rate of duty	Quantity	Value	Unit value
	Percent ad valorem	<u>1,000</u> pairs	<u>1,000</u> dollars	<u>Per pair</u>
1966-----	12.5	4,490	2,479	\$0.55
1967-----	12.5	5,548	3,507	.63
1968-----	11	6,256	4,086	.65
1969-----	10	8,111	5,753	.71
1970-----	8.5	8,347	6,835	.82
1971-----	7	8,795	8,058	.92
1972-----	6	12,216	12,208	1.00
1973-----	6	10,641	10,616	1.00
January-June--				
1973-----	6	6,176	4,962	.80
1974-----	6	5,558	6,890	1.24

^{1/} Effective Jan. 1, 1974, item 700.5555 was replaced by items 700.5557 (for children) and 700.5559 (for infants).

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

Table 7.--Footwear having supported-vinyl uppers for men, youths, and boys (item 700.5535): 1/ U.S. rates of duty and imports for consumption, 1964-73, January-June 1973, and January-June 1974

Period	Rate of duty	Quantity	Value	Unit value
	<u>Percent</u> <u>ad valorem</u>	<u>1,000</u> <u>pairs</u>	<u>1,000</u> <u>dollars</u>	<u>Per pair</u>
1964-----	<u>2/</u> 12.5	<u>3/</u> 6,217	<u>3/</u> 4,183	\$0.67
1965-----	12.5	<u>3/</u> 7,753	<u>3/</u> 4,835	.62
1966-----	12.5	5,915	5,285	.89
1967-----	12.5	6,531	6,025	.92
1968-----	11	7,696	7,681	1.00
1969-----	10	9,744	12,294	1.26
1970-----	8.5	16,264	21,590	1.33
1971-----	7	20,478	29,362	1.43
1972-----	6	20,780	34,553	1.66
1973-----	6	18,654	40,244	2.16
January-June--				
1973-----	6	9,597	15,462	1.61
1974-----	6	8,157	17,173	2.11

1/ TSUSA item 700.5535 changed to 700.5537 (for men) and 700.5539 (for youths and boys), effective Jan. 1, 1974.

2/ Rate established in the TSUS, effective Aug. 31, 1963.

3/ Partly estimated.

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

Note.--Data are not available on U.S. imports of footwear with upported-vinyl uppers for the years prior to 1964. Such imports were probably negligible in the mid-1950's. During the period before the TSUS became effective, footwear with supported-vinyl uppers (with soles other than india rubber) for men, youths, and boys was generally dutiable by virtue of the similitude provision of par. 1559 of the Tariff Act of 1930, at a rate provided for similar leather footwear in par. 1530(e), principally 10 percent ad valorem. The column 2 rate for item 700.55 is 35 percent.

Table 8.--Nonrubber footwear: U.S. production and trade, 1968-73,
January-June 1973, and January-June 1974

Period	Production	Imports ^{1/}	Exports	Apparent consumption	Ratio of imports to consumption
	Million pairs	Million pairs	Million pairs	Million pairs	Percent
1968-----	642	181	2	821	22
1969-----	577	202	2	777	26
1970-----	562	242	2	802	30
1971-----	536	269	2	803	33
1972-----	527	297	2	822	36
1973-----	488	316	4	800	39
January-June--					
1973-----	255	178	2	431	41
1974-----	235	164	2	397	41

^{1/} Data on zoris, thonged sandals of rubber or plastics, which are provided for in TSUSA item 700.5520, are excluded.

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

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