

the late twenties imports had been 100 million pounds per year. By 1932 they were down to about 17 million, and they remained fairly low until 1939. The outbreak of World War II brought a demand for wool that was far in excess of the amounts the domestic sheep industry could supply. Between 1942 and 1946, wool imports were at unprecedented levels, and substantially in excess of the amounts produced domestically.³ Even in the postwar years, imports were larger than the amounts produced in the United States. The level of domestic production continued to be below the amounts required for domestic consumption into the 1950's.

THE U.S. WOOLGROWING INDUSTRY

Sheep are grown in all of the States, but the large-scale, range-type sheep production in the West is the principal source of the domestic wool supply.⁴ In large sections of the West, the rangeland is marginal for any use except for grazing sheep. The lamb and wool marketed from the Western States thus form an important share of the "harvest" from the vast acreage of grazing land. Many farm areas also carry sheep to utilize feed resources more efficiently. In irrigated areas, sheep offer a useful means of harvesting legumes planted to build up soil fertility, for example.

There is, however, general agreement that it would not be economically feasible for this country to become self-sufficient in wool production;⁵ nor does it appear practical to increase domestic wool production sufficiently to meet any emergency defense requirements that might arise. The desirable level of domestic sheep and wool production depends upon efficient utilization of domestic production resources, and upon the efficiencies reached in production, marketing, and processing, and distribution of domestic wool and its products.

One analysis of domestic sources of supply indicates that the grazing and feed resources of the United States would be sufficient for about 37 million head of stock sheep.⁶ Annual wool production from that number of sheep would be about 290 million pounds of shorn wool and 45 million pounds of pulled wool, the equivalent of about 160 million pounds scoured.⁷

Numbers of sheep have gone through several cycles since 1884, in response to price and feed conditions. The most drastic decline, however, took place between 1942 and 1950, when numbers of sheep and lambs fell from a near all-time high of over 49 million head to an all-time low of 26 million. The number of sheep has not appreciably increased since then.

³ Agricultural Statistics, 1953, p. 378. U.S. Agricultural Marketing Service, supplement for 1955 to "Wool Statistics and Related Data" (November 1955), p. 10.

⁴ "Range-sheep States" include the 11 Western States, Texas and South Dakota. "Native-sheep States" are all other States where sheep are produced mainly under farm conditions, usually incidental or supplemental to other enterprises. These States produce only slightly more than one-fourth of U.S. wool.

⁵ "Wool Study Group Report" (1953), p. 43.

⁶ U.S. Department of Agriculture, "Domestic Wool Requirements and Sources of Supply" (Washington, D.C., June 1950), p. 62.

⁷ According to a later analysis, using a different set of cost-price relationships, a balanced livestock population would include about 31 million head of stock sheep, with an annual production of about 260 million pounds of shorn wool, and about 40 million pounds of pulled wool, the equivalent of about 144 million pounds of scoured wool. U.S. Department of Agriculture, "Agriculture's Capacity To Produce" (Washington, D.C., June 1952). [Cited in "Wool Study Group Report," p. 43.] Maximum U.S. production capacity may thus be considered to lie between 260 and 290 million pounds per year, given a continuation of the price supports and other types of subsidies in force at the time the estimates were made.