

Efficiency of production is low, and does not counteract high labor costs: many sheep ranchers are still operating at about the level of efficiency of 1930-33. Technological advances of crop farmers and livestock farmers have not been paralleled in the semiarid range areas of the West.

COMPETITION FROM MANMADE FIBERS

Competition from manmade fibers has had a considerable impact on the wool industry. Beginning in the prewar period, its rise during the postwar period has been striking. Rayon and acetate fibers were the only manmade fibers entering into the wool manufacturing field before World War II. These have been supplemented by a variety of new fibers, some of which are especially well adapted for use either in wool mixtures or for making nonwool fabrics serving the same uses as wool. There has not been an absolute decline in the total consumption of apparel wool in the United States; in fact, wool consumption by 1955 was still substantially above the prewar level, although far below the high levels of the war and postwar years. But the per capita mill consumption of apparel wool, notwithstanding a large increase in consumer purchasing power, was only about what it was prior to the war—2.21 pounds in 1952, as compared with an average of 2.15 pounds for 1935-39. Per capita consumption of manmade fibers, on the other hand, increased from an average of 0.34 pound in 1935-39 to about 3.05 pounds in 1954.

Wool has failed to retain its position in the textile field largely due to the growing competition from manmade fibers, although influences like the trend toward lighter weight clothing were partly responsible too. Wool's future place in the textile field depends in part upon its price relative to the price of manmade fibers. This relationship has tended increasingly to favor the manmade fibers. The price index for fine wool, taking the average price for the period of 1935-39 as base, stood at 189 in 1952, for medium grade at 167. For viscose rayon, using the same base, the index in 1952 was 140, and for acetate 81. The spread has widened since then.

Synthetic fibers made considerable inroads in the men's clothing field in the early fifties. Since 1954, their importance has receded, however, and wool has regained some ground. Only in lightweight suits remain synthetics an important factor.

DOMESTIC WOOL PROGRAMS DURING AND AFTER WORLD WAR II

Domestic wool, after reaching about 40 cents in 1942—about 55 percent higher than average 1939 prices—saw its demand fall off in 1943. Military requirements were declining, and mill operators showed a marked preference for foreign wools because of their relative cheapness and because they required less labor on account of having been better prepared for the market before shipment.

To overcome the uncertainty with regard to outlets for domestic wool, the Secretary of Agriculture directed the Commodity Credit Corporation to purchase the entire domestic clip in 1943 at ceiling prices, and required that all domestic wool, with minor exceptions, be sold to the CCC. This procedure was extended year by year until April 1947.¹¹ The support prices thus maintained were favorable as

¹¹ Benedict and Stine, op. cit., p. 341.