

effect than when business activity is at a high level, even though the imports be of a lower relative magnitude.

"With regard to apparel, the increasing level of imports in recent years reflects in great part the active efforts of both retail and wholesale institutions in the United States to broaden the variety of their product lines and the price ranges at which they are sold. A large but unknown portion of this merchandise is comparable to the domestic product both in terms of price and quality. A substantial proportion of the total volume and value of the imported merchandise appears to be made up of products which are of low price and are marketed principally in retail outlets which promotes and sell these products mainly on the basis of price; such products appear to be sold principally to lower income groups or to others for whom cost is a major consideration. On the other hand, still other products are characteristically of high price and style, for which demand and the domestic output may be limited. Thus, the effects of the imports of apparel, like imports of fabrics, vary greatly. Imported cotton shirts selling for low prices may have a considerable impact upon a small concern whose output is limited to shirts of the same price range, but have little or no effect upon that of large, multiproduct producers whose shirts sell at substantially higher prices. The quantitative data respecting either the trend of imports or the relationship between imports and consumption overall fail to indicate the actual effects such imports have either on profits or on employment for particular producers . . .

"By quantity, about two-thirds of the actual increase in imports from 1961 to 1966 was composed of products (such as yarns and fabrics) for which further processing was required in the United States. Most of the remainder consisted of apparel products. Although the volume of imports in each of these broad categories was substantially larger in 1966 than in 1961, the actual increase in the volume of domestic production was of substantially greater magnitude over the same period."

Of particular significance in terms of the selective impact of imports may be the compilations of the Business and Defense Services Administration of the Department of Commerce, described as "Growth in Shipments by Classes of Manufactured Products 1958-1966," published in March 1968.

Altogether, 215 different textile products are specifically listed, some with several additional breakdowns.

In 149 of these product listings, an increase in the ratio of the value of shipments 1966 to 1958 was indicated. For 39 products, the necessary data was not available. For 27 products, the data was not computed.

In this rather detailed compilation, not a single textile product was listed as having decreased in the ratio of its value of shipment in the 11-year period 1958 to 1966.

Export perspective

Despite the lamentations of the American industry, United States exports of textiles have shown a general upward trend since 1960, both in dollars and pound terms.

While it is correct that American exports have not increased as substantially as imports, nevertheless this tendency toward increased exports is most remarkable when certain conditions are recalled.

By 1960 the World War II devastated textile industries of Europe and Japan had recovered and were concentrating on developing their export trade. By this time too, American aid to the less developed countries had resulted in the establishment of textile industries where none had previously existed. And, because Japan had imposed "voluntary" export quotas on its cotton textiles destined to the United States, American importers were inducing other countries to manufacture for export to this particular market.

And the United States textile complex was devoting its attention more to developing domestic markets, than in seeking foreign outlets.

According to a tabulation of the American Textile Manufacturers Institute (ATMI) for the Senate Finance Committee, October 20, 1967, the following records American textile exports, by fiber, from 1960 to 1966, with estimates for 1967.