

A few years ago, the Japanese mills developed a silk and worsted sharkskin for men's wear. This fabric requires a special weaving technique.

This particular material during the past several years has accounted for approximately 40 percent of all men's wear worsted material imports to the United States from Japan.

Again, for the record, we know of no American mill to date who is making and selling this silk and worsted sharkskin.

Please note, men's wear woolen and worsted imported materials are predominantly worsted fabrics. As a point of information, worsted materials can only be made from worsted yarns, which can only be spun from virgin wool.

In addition to the basic quality of these imported materials, and in many respects more important from a merchandising standpoint, is the very important style factor.

The mills in England, Italy, Japan, Korea, and other countries will make special items, such as the so-called classics and so-called fancy patterns, including special design and special colors, in limited quantities.

Without these so-called specials, the quality men's wear American wholesalers and retailers would, in my humble but qualified opinion, find it very difficult if not impossible to remain in the quality business.

Please note, when I say foreign mills will make specials in limited quantities, I mean specifically four-piece warps, four pieces of a pattern in a given color. Average total yardage for a four-piece warp would be approximately 300 yards, which would be sufficient for approximately 85 suits, or 150 sport coats, or 200 pairs of slacks, or 100 outercoats.

The smallest weaving warp any of the big three American mill combines are currently weaving, according to reputable market information sources, is a 27-piece warp. Average total yardage for a 27-piece warp would be approximately 2,160 yards, which would be sufficient for approximately 655 suits, or 1,147 sport coats, or 1,530 pairs of slacks, or 765 outercoats, of a pattern in one given shade.

My judgment of the market is that the average American price for worsted cloth runs from about \$2.80 to \$3.40 a yard. This is where the volume business is done by our domestic mills, with perhaps a very minute percentage of production at higher price levels. In contrast, there is very little, if any, worsted material brought in from Japan under \$4 per yard, the landed cost.

The Tariff Commission found the average landed value of Japanese worsteds was approximately \$4 per linear yard, which is believed to be higher than the average wholesale price of men's domestic wool worsteds. The Commission also found:

The British imports are usually high-styled, expensive fabrics averaging over \$5 per linear yard (duty-paid), and compete with a limited segment of the domestic production of wool apparel fabrics.

Whereas imports are confined primarily to the men's suit field, with some imports utilized for high-quality sport jackets, the domestic industry practically has to itself the much more rapidly growing men's slacks field and fabric for the women's trade.