

its ratio of spinning to weaving out of balance. Raeford is the only domestic mill producing any volume in this fine yarn count."

For the most part, United States production consists of single yarns, that is, one strand, not two as in the plied yarns, in both the warp and fill, or in single yarn in the warp and plied yarn in the fill. Yarn counts are lower than the 60's (metric) and higher utilized by the Japanese industry, with 30's Bradford (about 34's metric) predominating in the United States. These constructions are cheaper, coarser and although serviceable and widely accepted in the mass market, they are unacceptable for fashion or quality fabrics. These fabrics can, however, be mass produced with fewer production difficulties, fewer problems of mending and burling, on machinery run at relatively high speeds, and with fewer workers necessary to tend the looms.

They are produced in the United States in extremely long runs of staple items, with a minimum production run of about 40 pieces (one piece equals 70 to 80 linear yards); whereas in Japan, runs can be in as small as four pieces and usually are produced in quantities substantially less than 40 pieces.

Shorter runs and smaller minimum orders in the case of Japanese cloth mean the ability to create style diversification; whereas uniqueness, the hallmark of fashion, cannot be offered or will not be offered by an American industry seeking to maximize efficiency of production. Even with the move to more highly-styled fabrics by a small part of the United States industry, long runs and minimum orders of 40 pieces are still insisted upon, which largely dissipates the advantages of styled goods.

Domestic and Japanese cloths are also differentiated by specialty. A very large proportion of Japanese exports of worsted cloth to the United States are silk-worsted blends with 90% wool/10% silk composition predominating. These fabrics, which for the last three or four years have been the biggest selling item in men's clothing, cannot be produced by the American industry. Nobody else in the world has developed the technical know-how which exists in Japan for working with silk-worsted fabrics. Although attempts have been made, it simply cannot be produced in the United States or elsewhere. The problems of mending and burling are difficult. It is a burdensome, troublesome fabric to make. American mills, interested in long runs of simple staple cloth without production problems, simply will not, and probably cannot, manufacture this cloth.

In 1967 total worsted exports from Japan were 26.1 million linear yards. Of this 16.2 million worsteds other than silk blends, with silk blends accounting for 9.9 million square yards. Thus, the silk blends, a unique specialty of Japan; accounted for some 38% of total imports of worsteds from Japan. This has also been the fast growing item in the worsted trade from Japan and has accounted for a large part of the growth over the long run.

What all of these factors embody is the concept of style. Imports from Japan, highly designed and highly styled have revolutionized the men's clothing business. Before the imports, men were wearing plain serges, gabardines and flannels in solid colors. Japanese fabrics and fabrics from other exporting nations have lent color, lustre, and design to the men's suit field. This style impact has in the last two years stimulated the domestic industry into making style innovations of its own by the fabrication of cheaper imitations of quality Japanese fabric, such as the blends of worsted polyester and silk or blends of polyester, worsted and mohair in an attempt to achieve the lustrous look innovated by imports from Japan of silk worsted and mohair worsted fabrics. Such American imitations have found their way into lower end garments and light weight garments for summer. Imports from Japan have stimulated United States production of quality fabrics and the cheaper imitations of the lustre fabrics, which are doing quite well. According to the Daily News Record of November 13, 1967:

"Domestic mills have met the challenge of tough competition from fancy styling in Japanese worsted fabric lines.

"The American clothing industry is the beneficiary and has shown its appreciation in dollars and cents by booking most of these mills up to next May.

"Clothing producers are buying more domestic fabrics and fewer imports. It's a fancy season and the decline is in the staple Japanese worsted sharkskins which are no longer the fashion focus.

"Manufacturers want luster in fancies. Accordingly, they continue to buy Japanese worsted and silk blends and are also buying a new domestic lustrous Dacron/worsted blend using a triangular-formed Dacron now available for the first time in fall weight goods.