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Chairman, Committee for the Implementation of Textile Agreements.

## Market Statement—India Category 434—Men's and Boys' Wool Coats December 1994

Import Situation and Conclusion

U.S. imports of men's and boys' wool coats other than suit type, Category 434, from India reached 36,139 dozen for the year ending September 1994, nearly double the 19,007 dozen imported a year earlier. During the first nine months of 1994, imports from India were 29,097 dozen, more than double the 14,357 dozen imported during January-September 1993 and 36 percent above the 21,399 dozen imported during calendar year 1993. India is the largest supplier of men's and boys' wool coats other than suit type, Category 434, to the U.S., accounting for 22 percent of total Category 434 imports during the year ending September 1994.

The sharp and substantial increase in Category 434 imports from India is causing a real risk of disruption in the U.S. market for men's and boys' wool coats other than suit type.

Import Penetration and Market Share

Between 45 and 55 percent of U.S. production of men's and boys' wool coats other than suit type, Category 434, are produced in the first half of the year. First half production in 1994 was 13 percent below the first half 1993 level. Production for the year ending in June 1994 was 8 percent below the year ending June 1993 level. In contrast, a very large portion, between 80 and 90 percent, of men's and boys' wool coat other than suit type imports, Category 434, enter the U.S. in the second half of the year. Category 434 imports during the first half of 1994 were 28 percent above the January-June 1993 level. Category 434 imports during January-September 1994 were 34 percent above the January-September 1993 level and imports during the year ending September 1994 were 26 percent above their previous year level.

The ratio of imports to domestic production increased from 81 percent in 1992 to 85 percent in 1993, and reached 97 percent during the year ending June 1994. The domestic manufacturers share of the market for men's and boys' wool coats other than suit type, Category 434, declined from 55 percent in 1992 to 54 percent in 1993, and fell to 51 percent during the year ending June 1994.

Duty-Paid Value and U.S. Producers' Price Approximately 74 percent of Category 434 from India during the year ending

September 1994 entered under HTSUSA 6201.91.2011—Men's wool anoraks, windbreakers and similar articles. These coats entered the U.S. at landed dutypaid values substantially below U.S. producers' prices for comparable wool coats.

## Market Statement-India

Category 435-Women's and Girls' Wool

## December 1994

Import Situation and Conclusion

U.S. imports of women's and girls' wool coats, Category 435, from India reached 30,695 dozen for the year ending September 1994, over three times the 9,318 dozen imported a year earlier. During the first nine months of 1994, imports from the India were 27,843 dozen, over six times the 4,554 dozen imported during January-September 1993 and almost four times the 7,406 dozen imported during calendar vear 1993. India became the eleventh largest supplier of women's and girls' wool coats, Category 435, to the U.S. market, accounting for 2.8 percent of total Category 435 imports during January-September 1994. India was ranked twenty- ninth among the major suppliers in calendar year 1993, accounting for less than one percent of total Category 435 imports.

The sharp and substantial increase in Category 435 imports from India is causing a real risk of disruption in the U.S. market for women's and girls' wool coats.

Import Penetration and Market Share

U.S. production of women's and girls' wool coats, Category 435, declined from 981,000 dozen in 1992 to 922,000 dozen in 1993, a decline of 6 percent. U.S. production continued to decline in 1994, falling to 911,000 dozen produced in the year ending in June 1994, 1 percent below the 924,000 dozen produced in the same period a year earlier. In contrast, U.S. imports of Category 435 increased from 834,000 dozen in 1992 to 1,110,000 dozen in 1993, an increase of 33 percent. Category 435 imports continued to increase in 1994 reaching a record level 1,187,000 dozen during the year ending September 1994, 8 percent above the year ending September 1993 level.

The ratio of imports to domestic production increased from 85 percent in 1992 to 120 percent in 1993, and reached 126 percent during the year ending June 1994. The domestic manufacturers' share of the market for women's and girls' wool coats, Category 435, declined from 54 percent in 1992 to 45 percent in 1993, a decline of 9

percentage points, and fell to 44 percent during the year ending June 1994. Duty-Paid Value and U.S. Producers' Price

Approximately 79 percent of Category 435 imports from India during the year ending September 1994 entered under HTSUSA 6202.91.2011—Women's wool anoraks, windbreakers and simmilar articles; and HTSUSA 6204.31.2010-Women's wool suit-type coats, other than silk blend coats of 30% or more silk. These coats entered the U.S. at landed duty-paid values substantially below U.S. producers' prices for comparable wool coats.

## Market Statement—India Category 440-Wool Shirts and Blouses December 1994

Import Situation and Conclusion

U.S. imports of wool woven shirts and blouses, Category 440, from India reached 56,908 dozen for the year ending September 1994, eight times the 7,078 dozen imported a year earlier. During the first nine months of 1994, imports from India surged to 49,196 dozen, seven times the 7,075 dozen imported during January-September 1993 and over three times over the 14,787 dozen imported during calendar year 1993. India became the largest supplier of Category 440 imports to the U.S., accounting for 54 percent of total Category 440 imports during January-September 1994. A year earlier India was the third largest supplier accounting for 16 percent of total Category 440 imports.

India's year ending level, at 56,908 dozen, represents 35 percent of the U.S. wool woven shirt and blouse market for the year ending in June 1994; the U.S. producers' share of this market is 51 percent.

The sharp and substantial increase in Category 440 imports from India is causing a real risk of disruption in the U.S. market for wool woven shirts and blouses.

Import Penetration and Market Share

Between 45 and 55 percent of U.S. production of wool woven shirts and blouses are produced in the first half of the year. First half production during 1993 and 1994 remained relatively flat as did full year production in 1992 and 1993. Production for the year ending in June 1994 was six percent below the year-ending June 1993 level. In contrast, a very large portion, between 80 and 90 percent, of wool woven shirt and blouse imports, Category 440, enter in the second half of the year. Category 440 imports during the first half of 1994 were three times the January-June 1993 level; Calendar year 1993 imports were 63 percent above the 1992 level; and Category 440 imports during January-