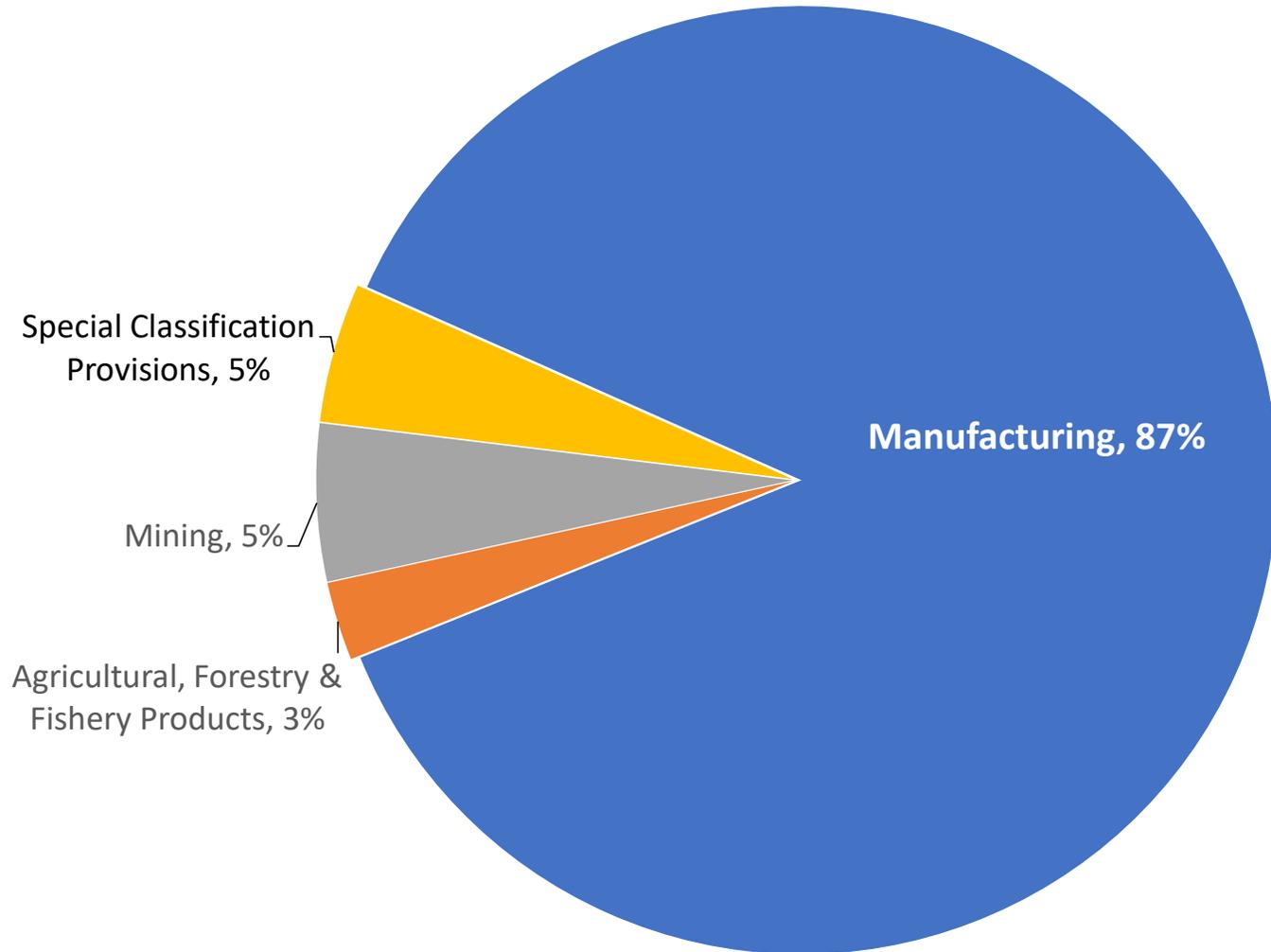


State of the Industry

May 7th, 2018

Miami, FL

2017: Total Imports for Consumption = \$2.33 trillion



<u>Textile And Fabrics</u>	<u>0.35%</u>
<u>Textile Mill Products</u>	<u>0.93%</u>
<u>Leather And Allied Products</u>	<u>1.62%</u>
<u>Apparel And Accessories</u>	<u>3.61%</u>
	6.51%

2017: Calculated Duty = \$33 billion

The Textile and Apparel sectors have the highest tariffs
\$17 billion generated from our industry

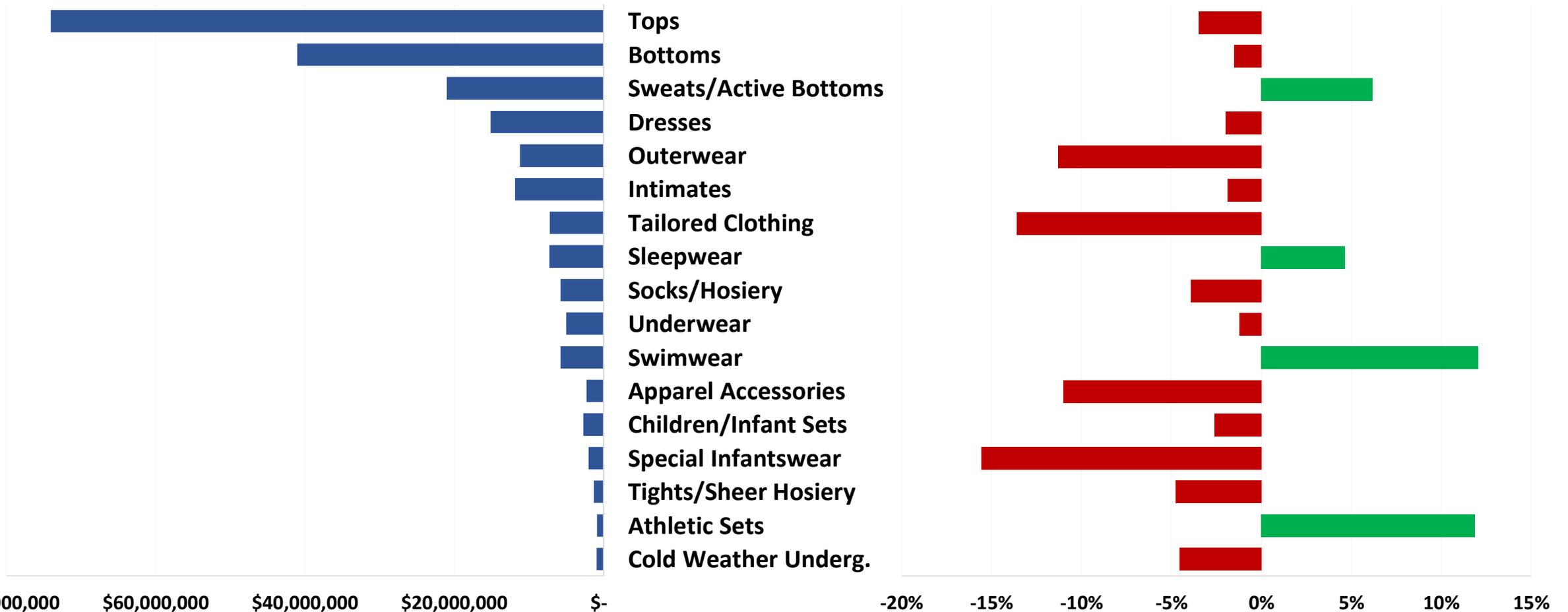
<u>Textile And Fabrics</u>	1.10%
<u>Textile Mill Products</u>	4.06%
<u>Leather And Allied Products</u>	12.41%
<u>Apparel And Accessories</u>	34.10%

51.67%

Total apparel -2.4% in 2017: most categories decreased

DOLLAR VOLUME (000)

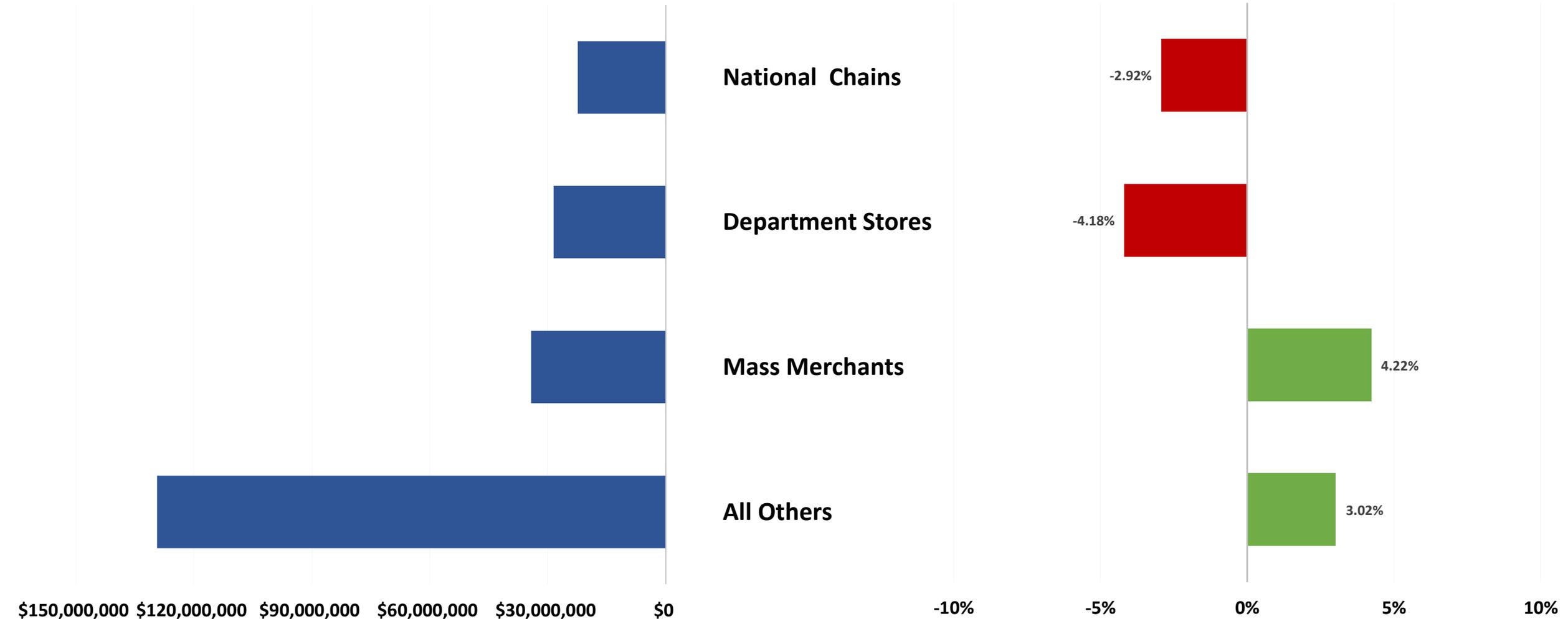
DOLLAR VOLUME CHANGE (2016 v. 2017)



2015: Channel Share is Shifting to Mass, Off Price, Online

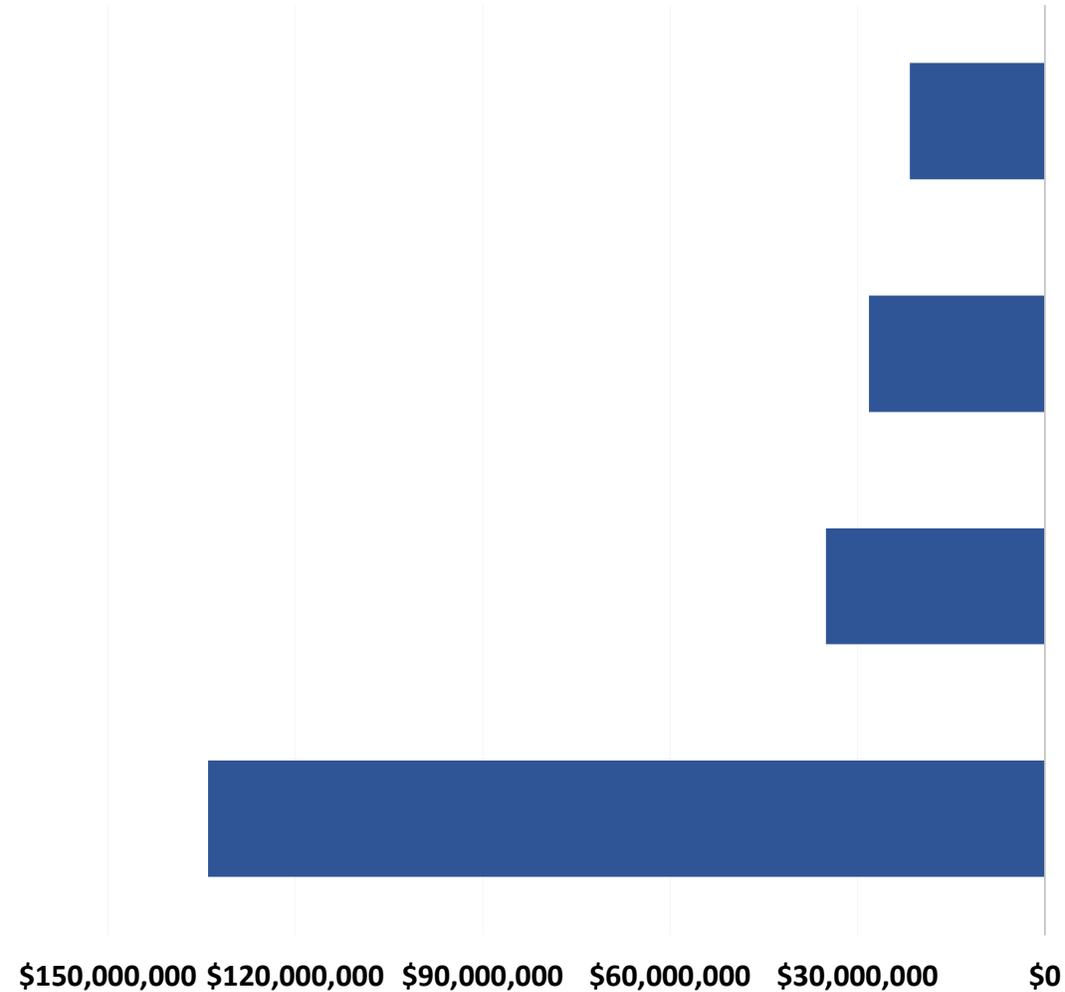
DOLLAR VOLUME (000)

DOLLAR VOLUME CHANGE v. 2014

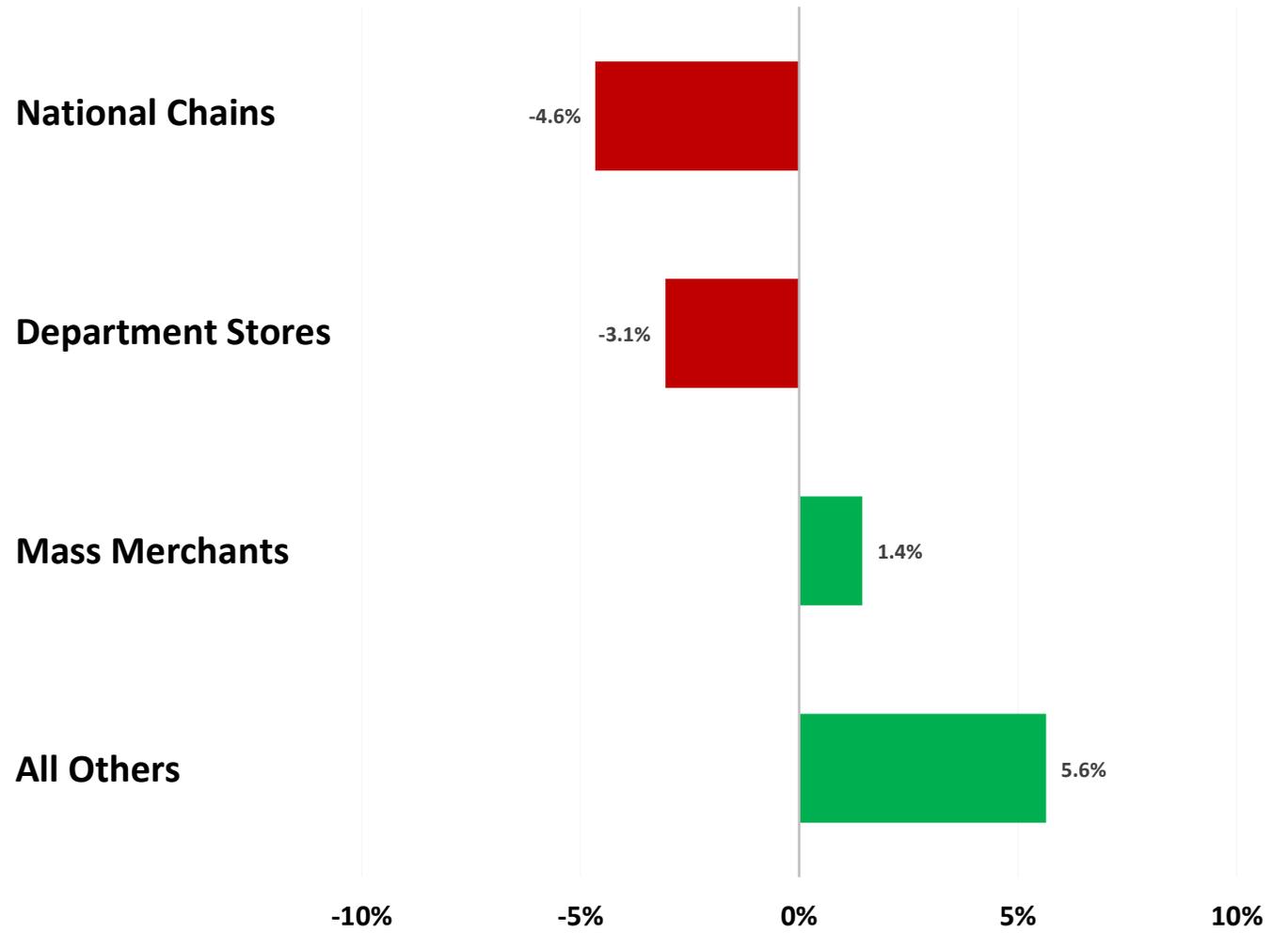


2016: Channel Share is Shifting to Mass, Off Price, Online

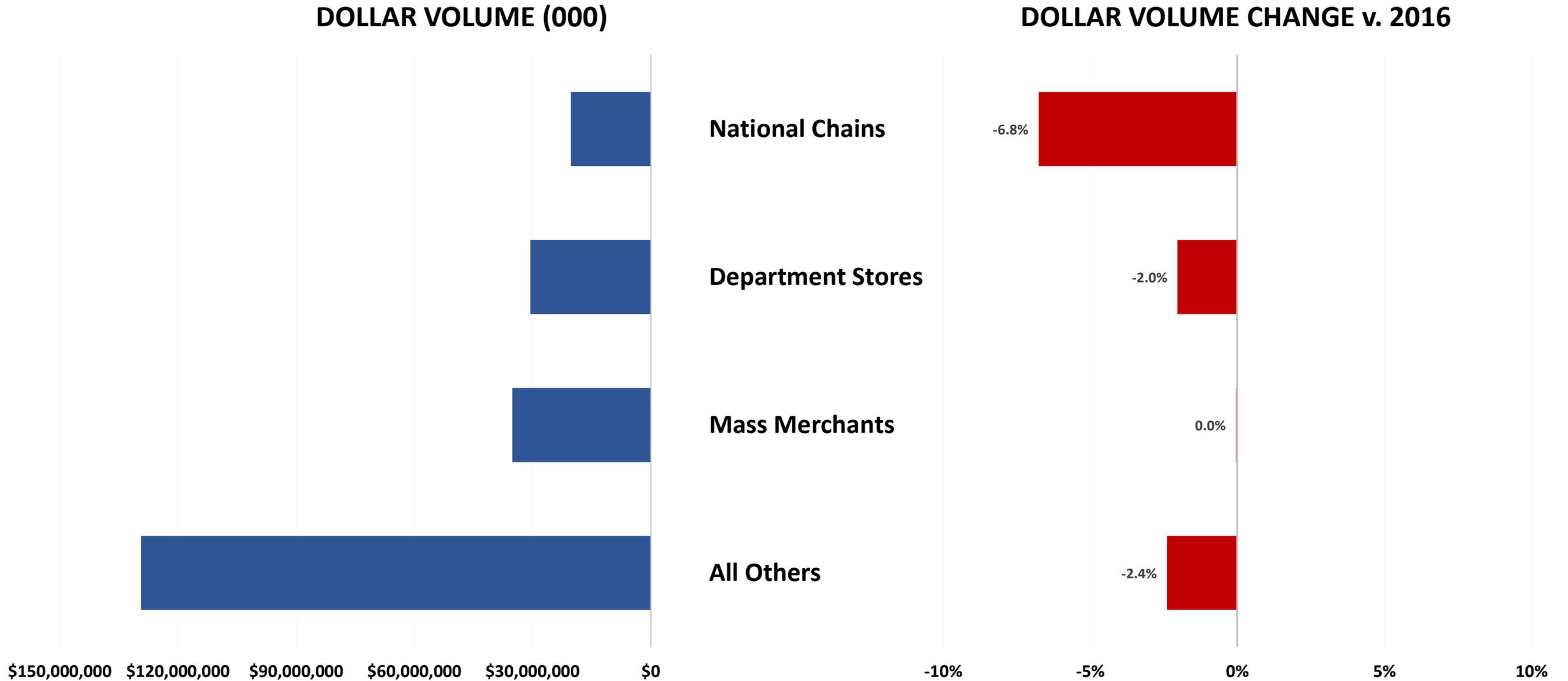
DOLLAR VOLUME (000)



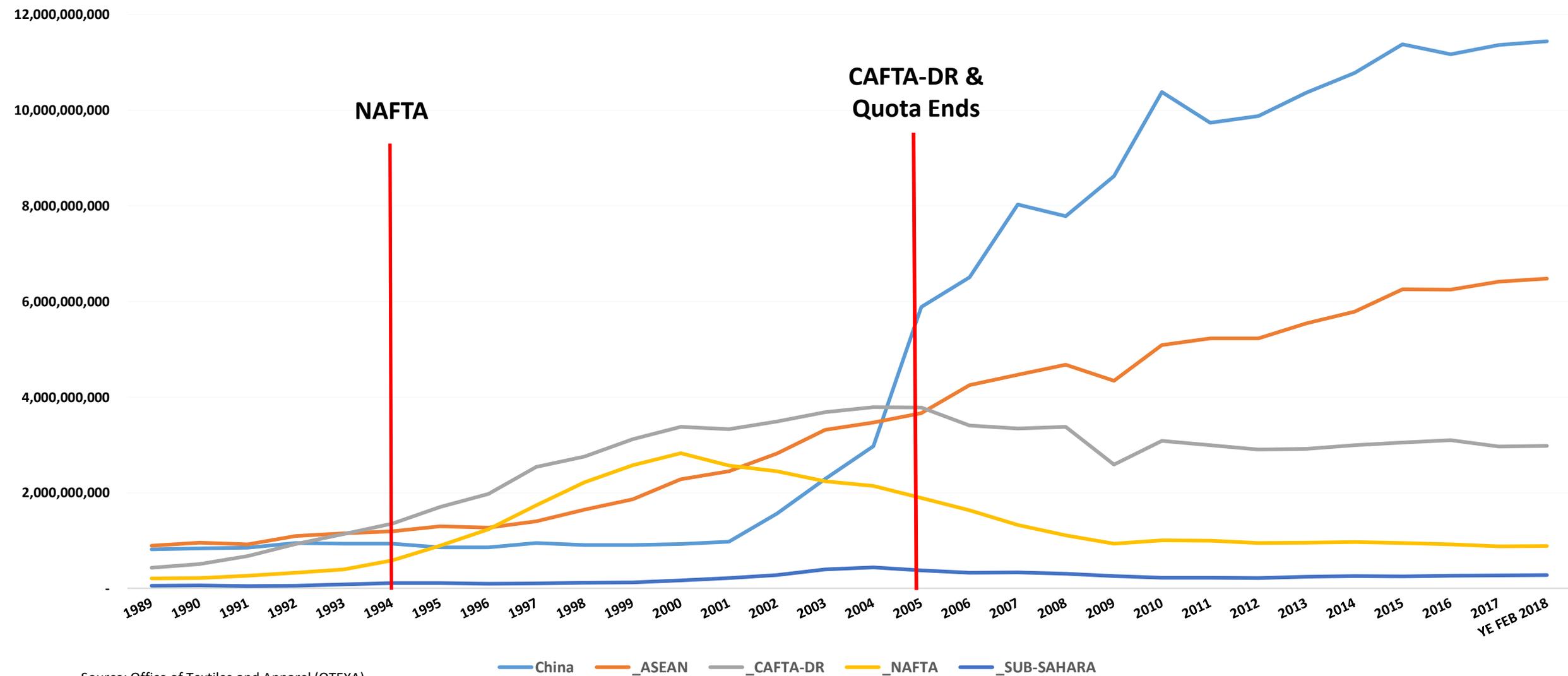
DOLLAR VOLUME CHANGE v. 2015



2017: Channel Share Continues to Shift



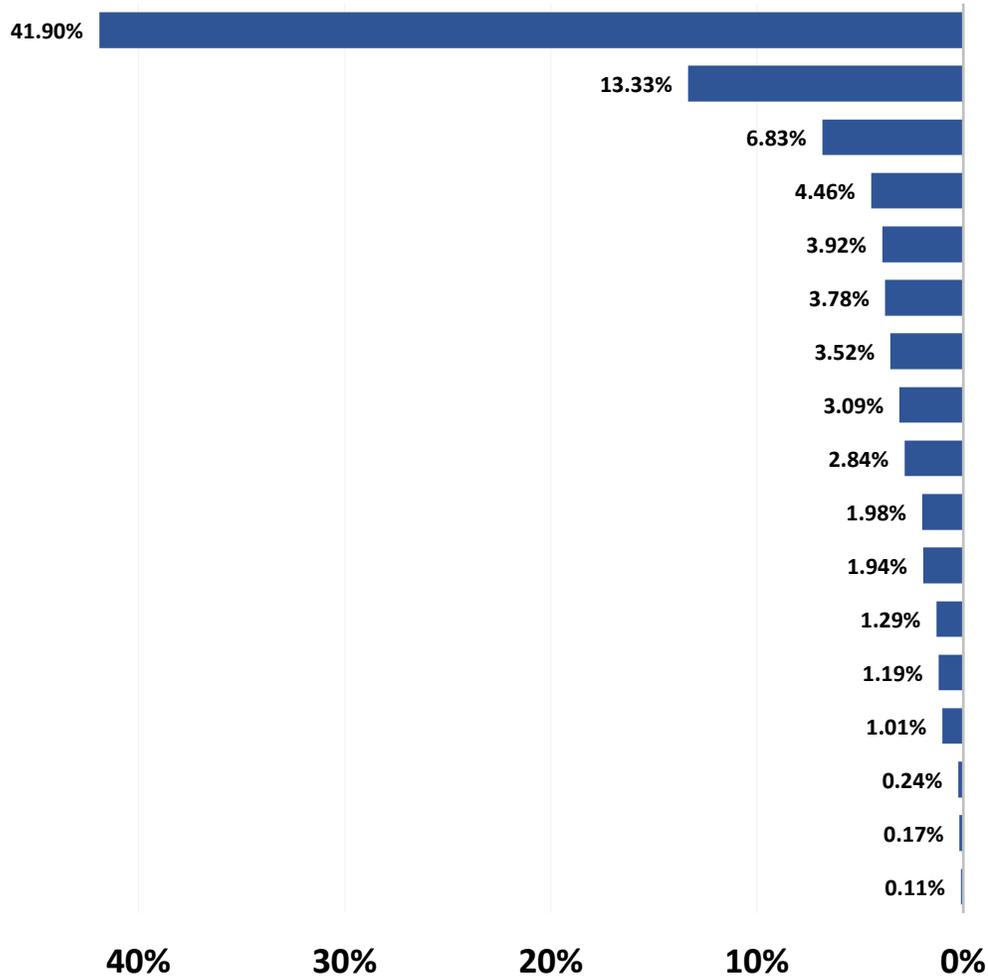
Total U.S. Apparel Imports (SME)



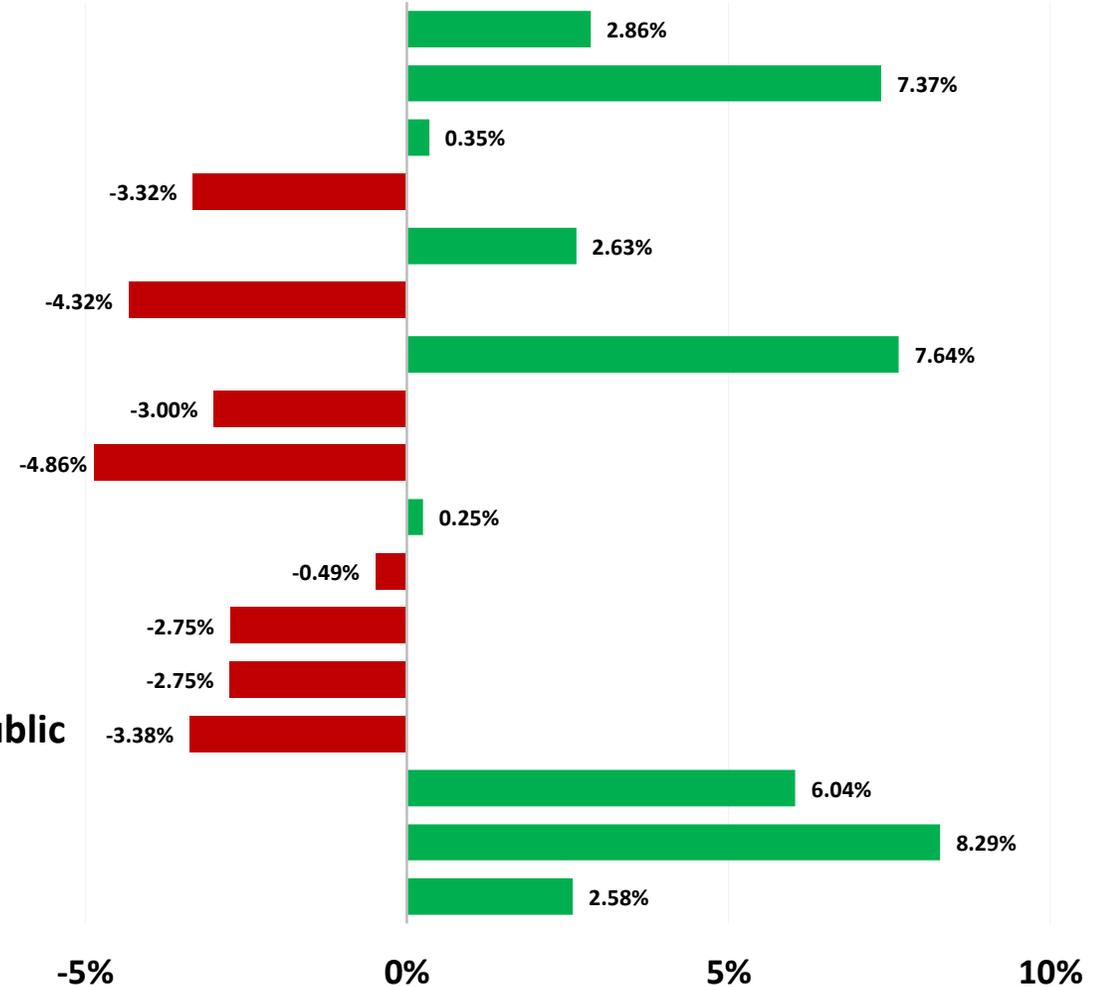
Source: Office of Textiles and Apparel (OTEXA)

Total U.S. Apparel Imports (SME)

% SHARE YE 2/2018

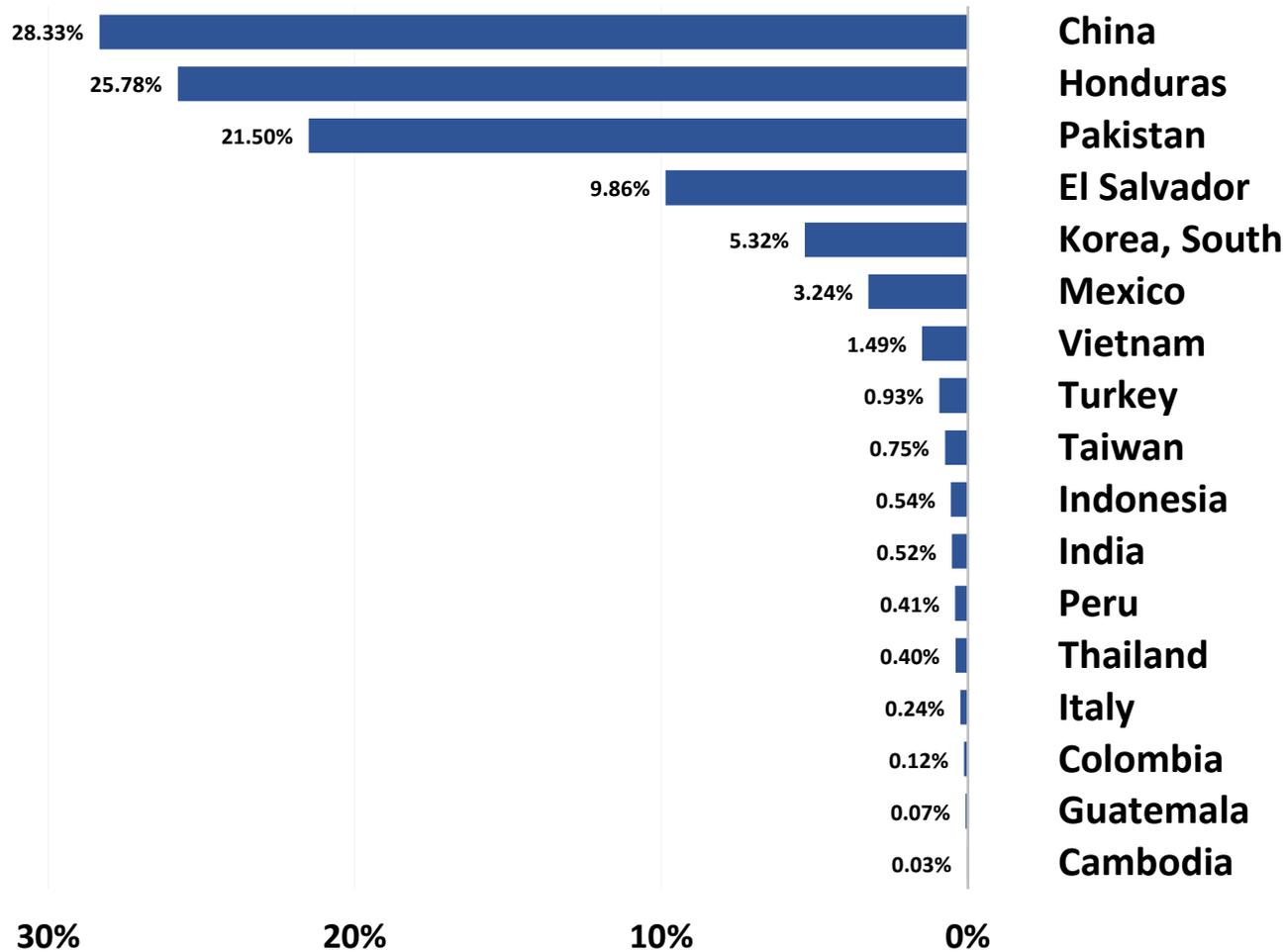


YE % CHANGE

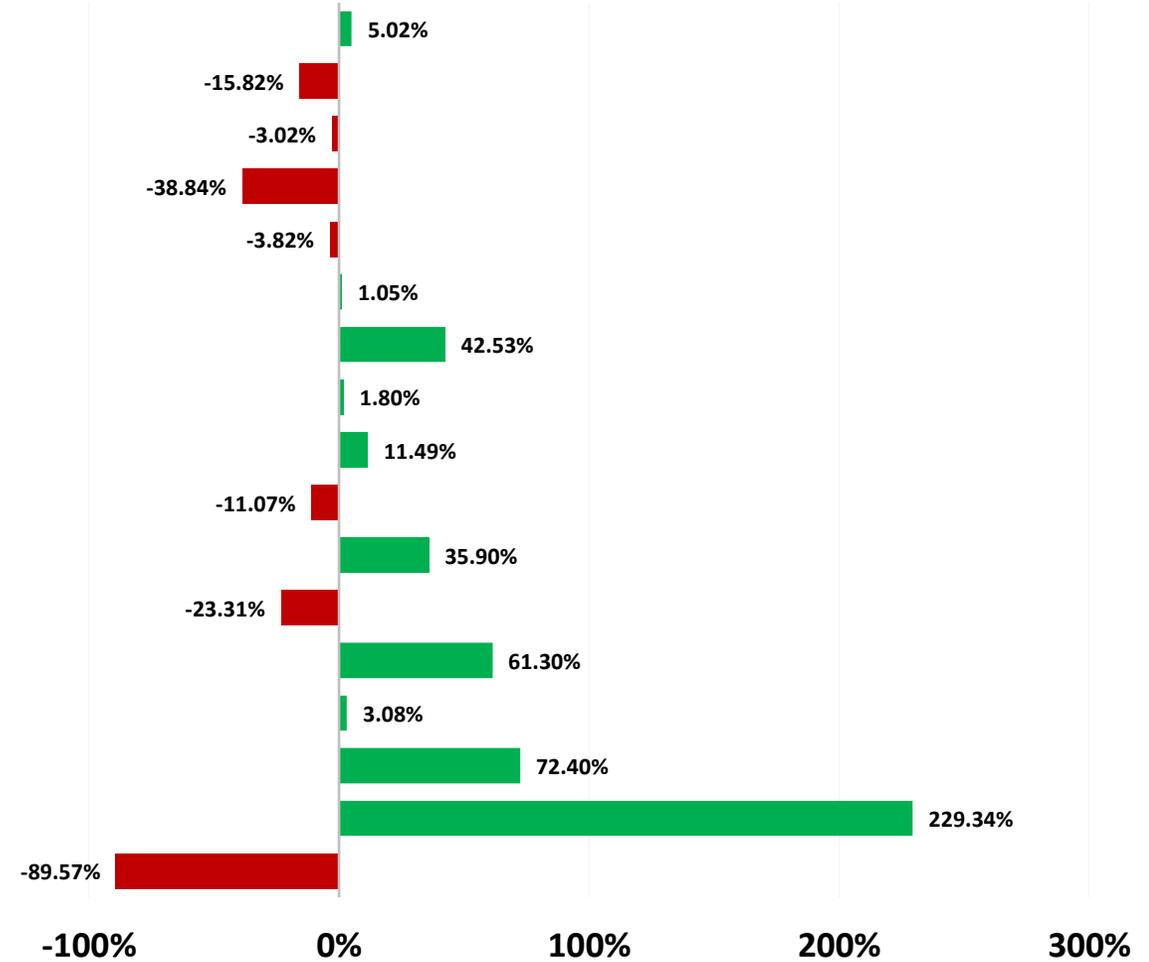


Cotton Hosiery

% SHARE YE 2/2018

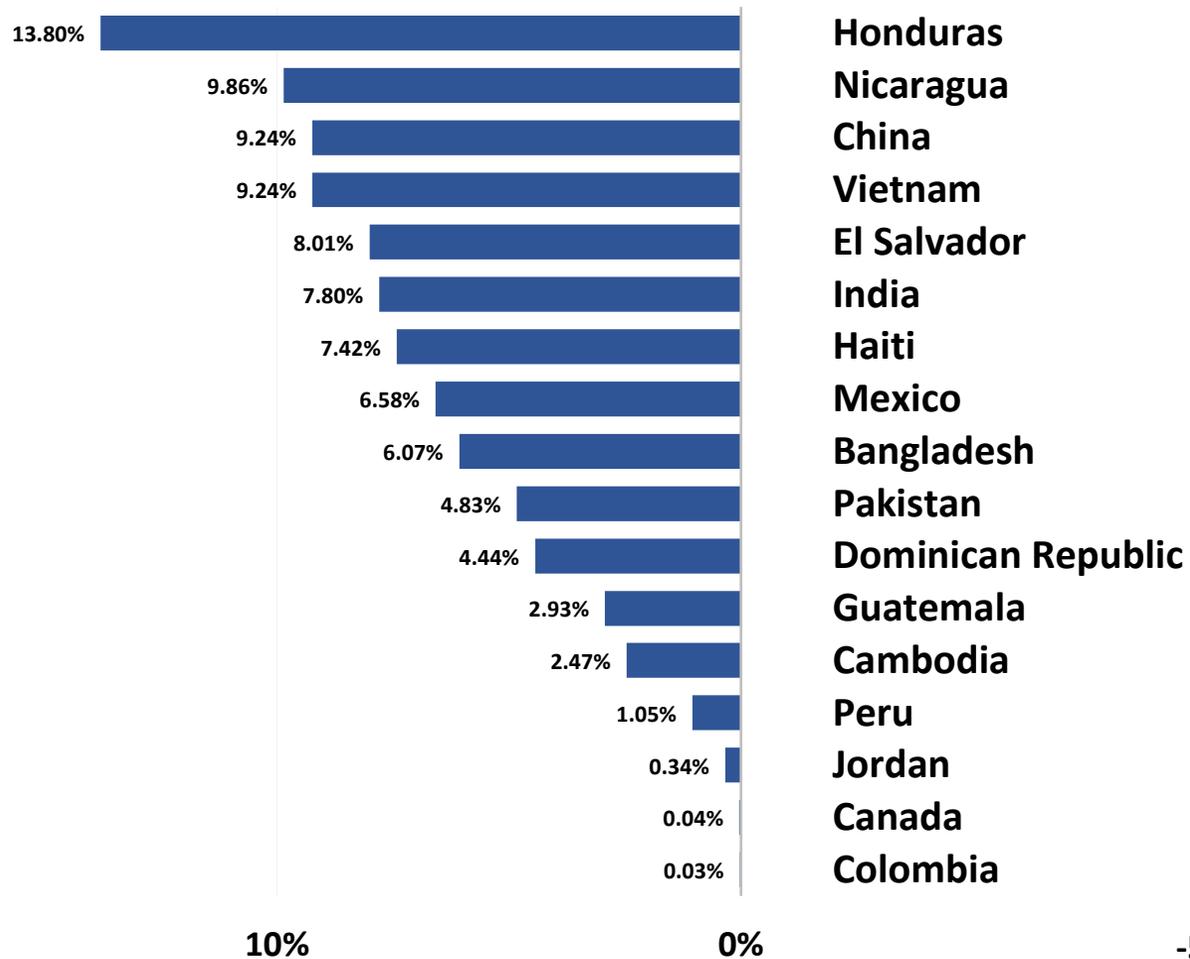


YE % CHANGE

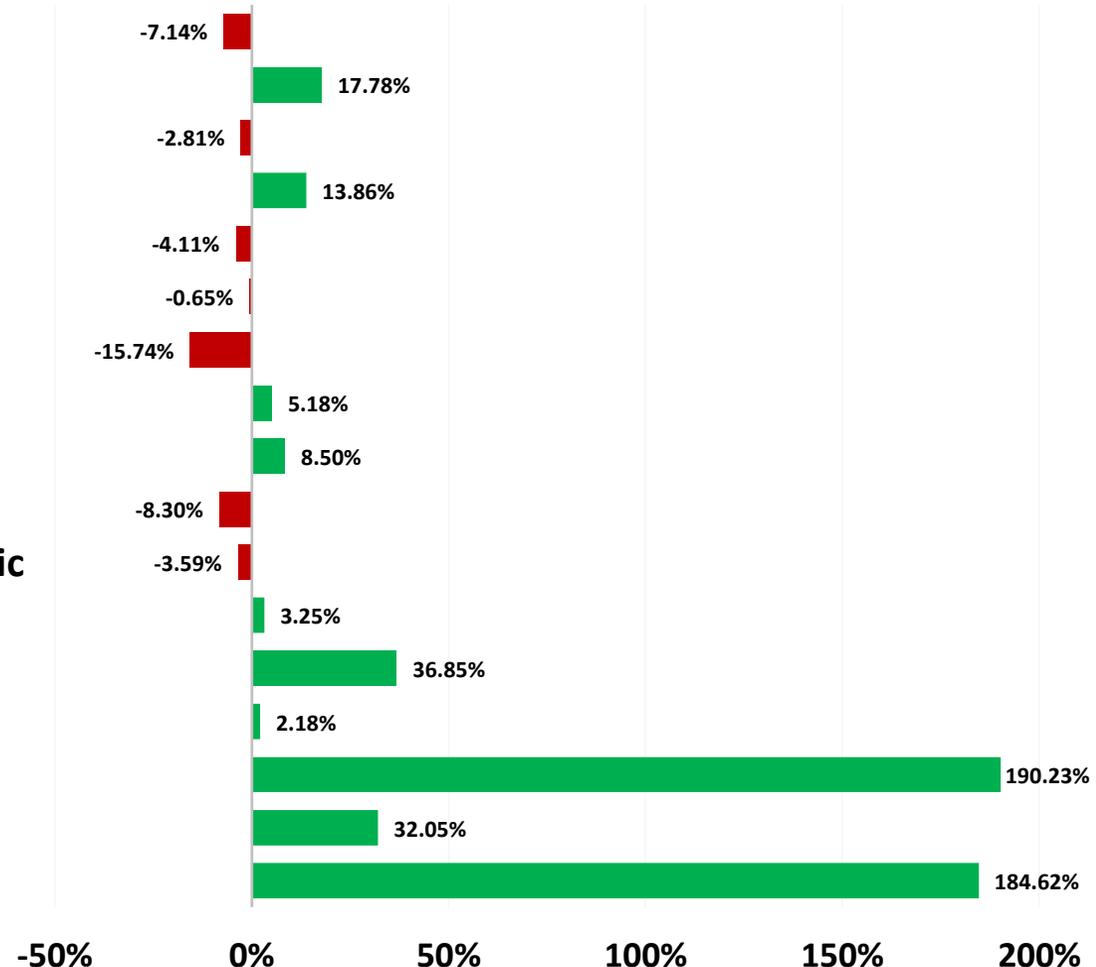


M/B Knit Shirts, Cotton

% SHARE YE 2/2018

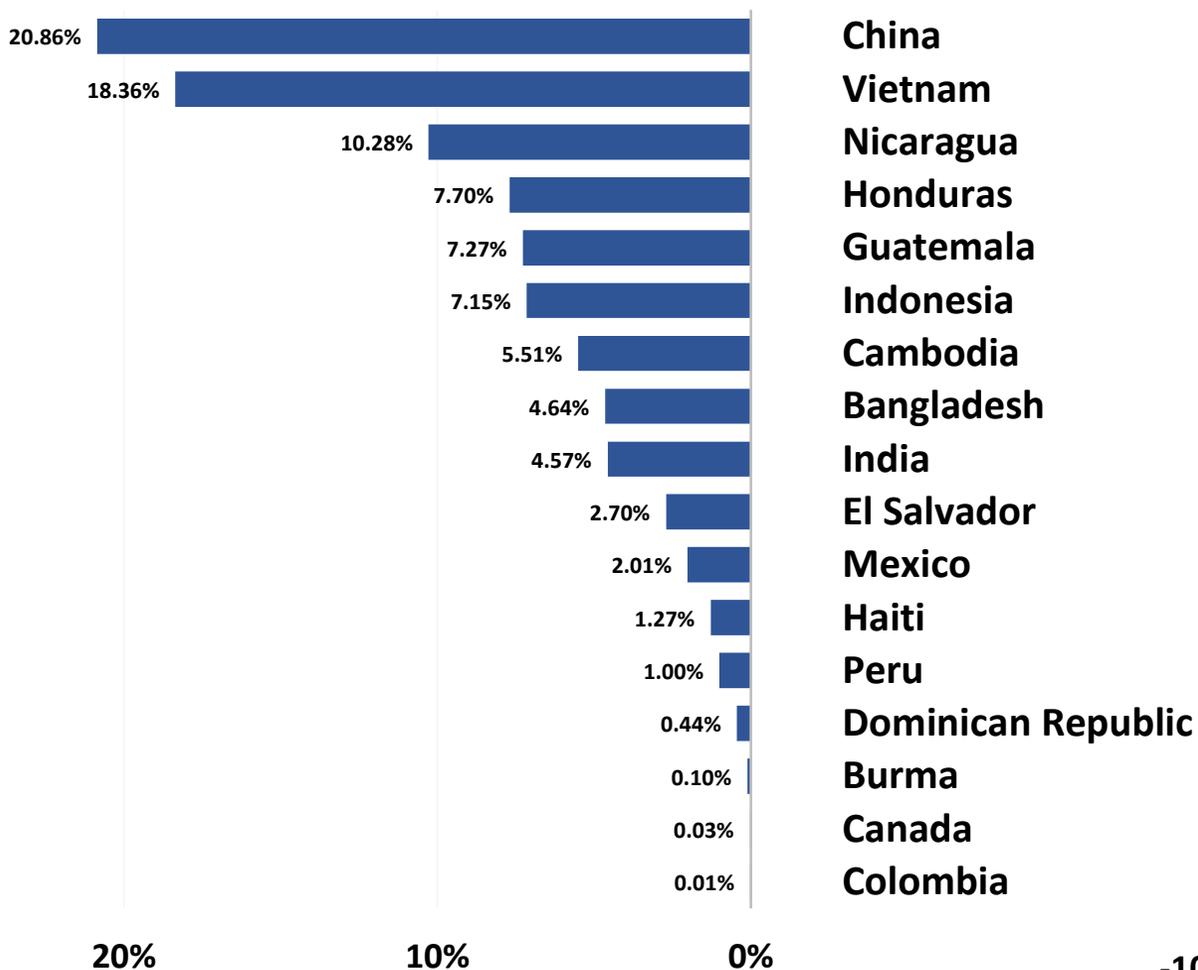


YE % CHANGE

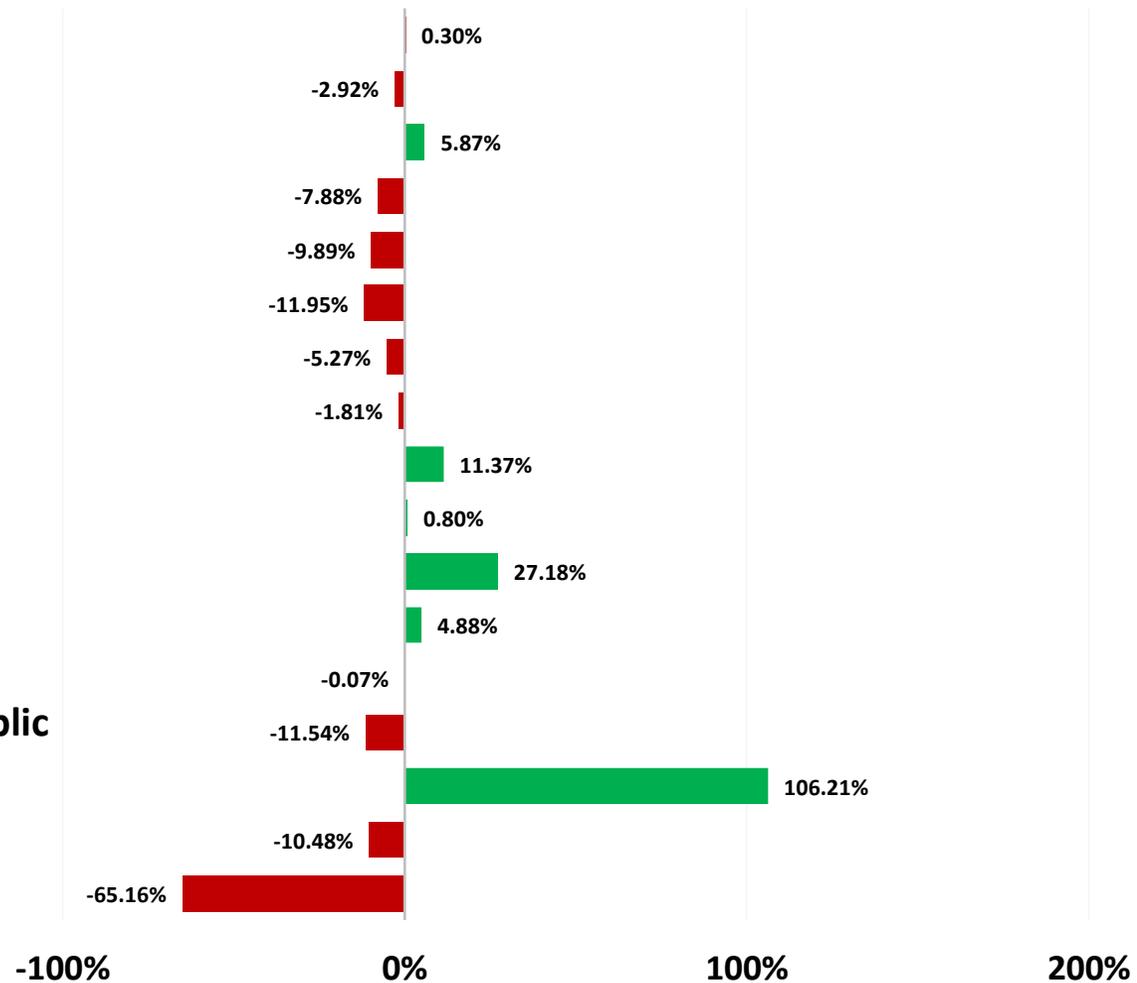


W/G Knit Shirts, Cotton

% SHARE YE 2/2018

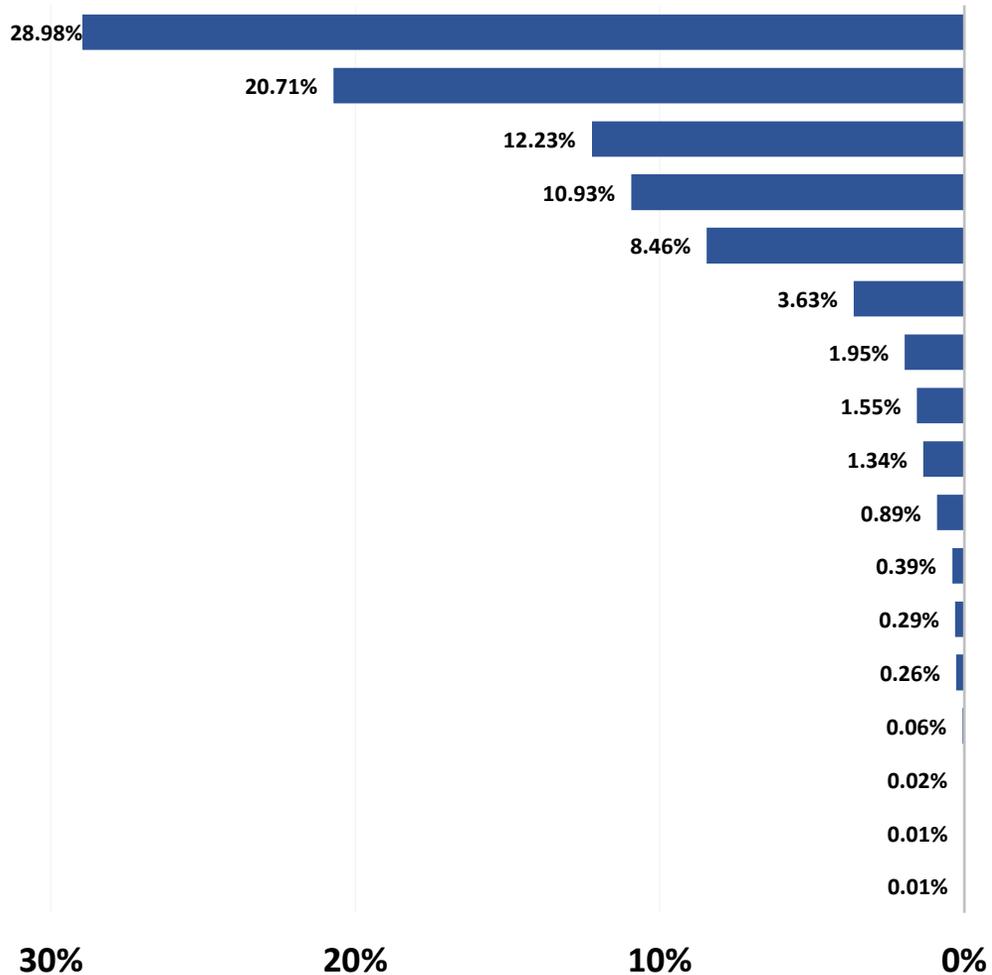


YE % CHANGE



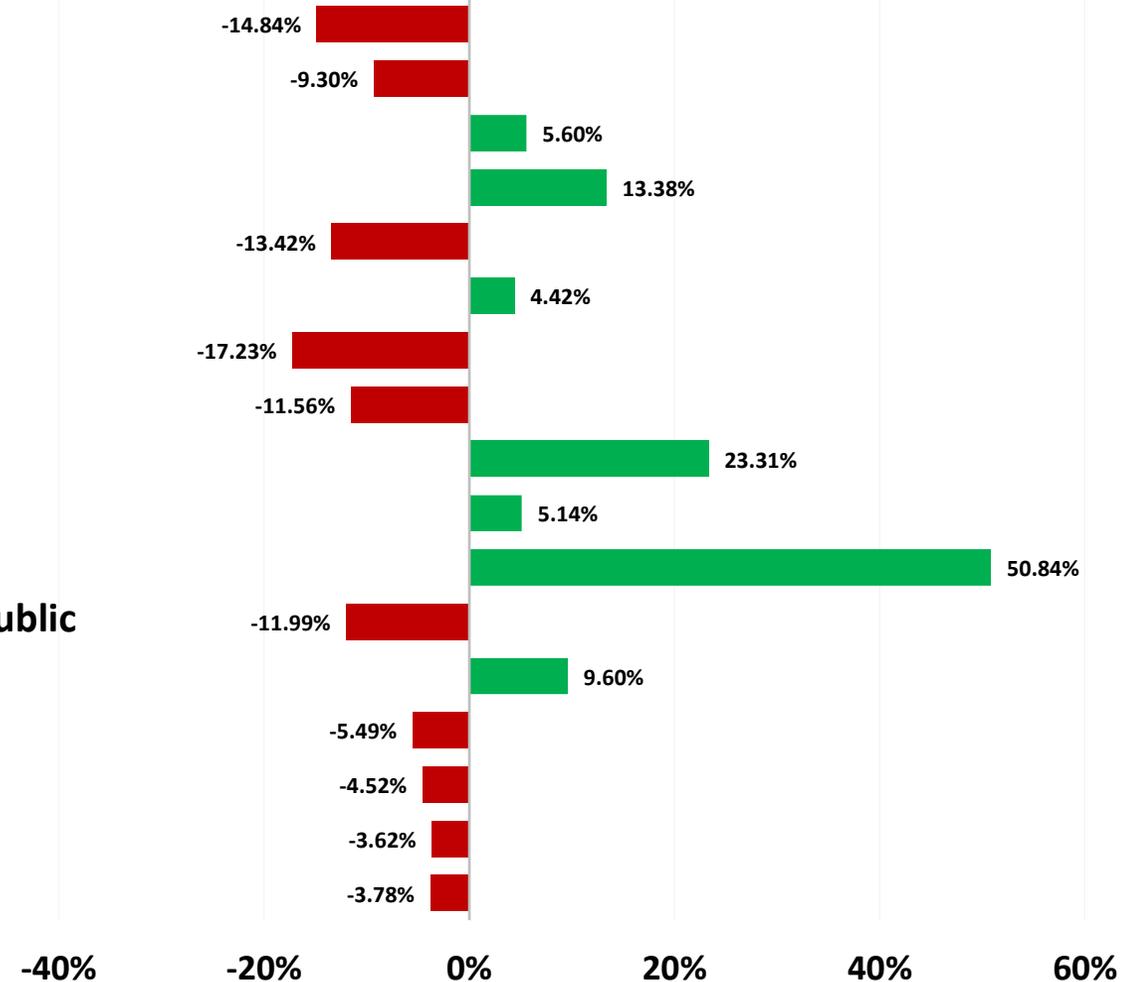
M/B Cotton Shirts, Not Knit

% SHARE YE 2/2018



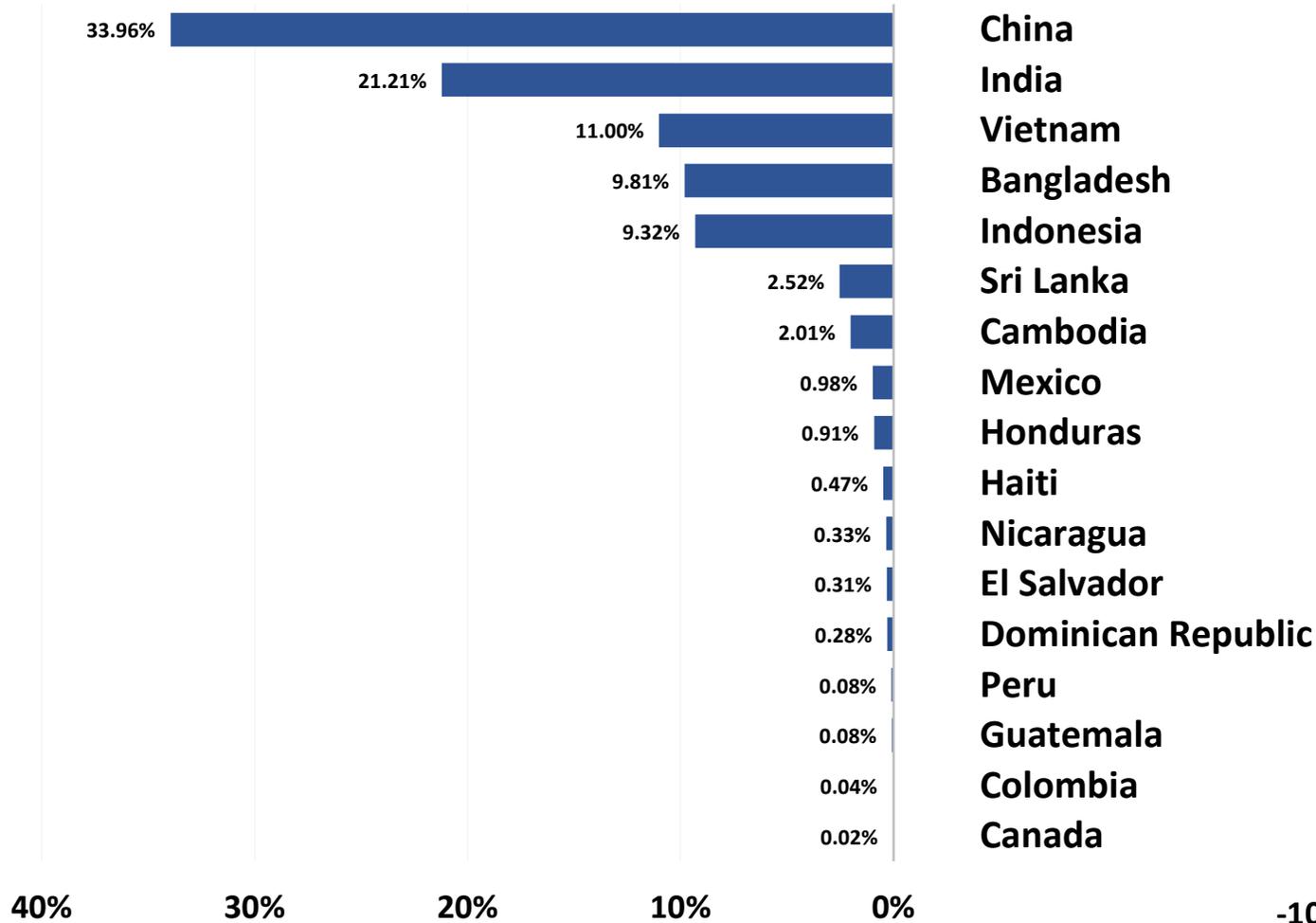
Bangladesh
China
Vietnam
India
Indonesia
Sri Lanka
El Salvador
Nicaragua
Mexico
Honduras
Cambodia
Dominican Republic
Haiti
Peru
Canada
Guatemala
Colombia

YE % CHANGE

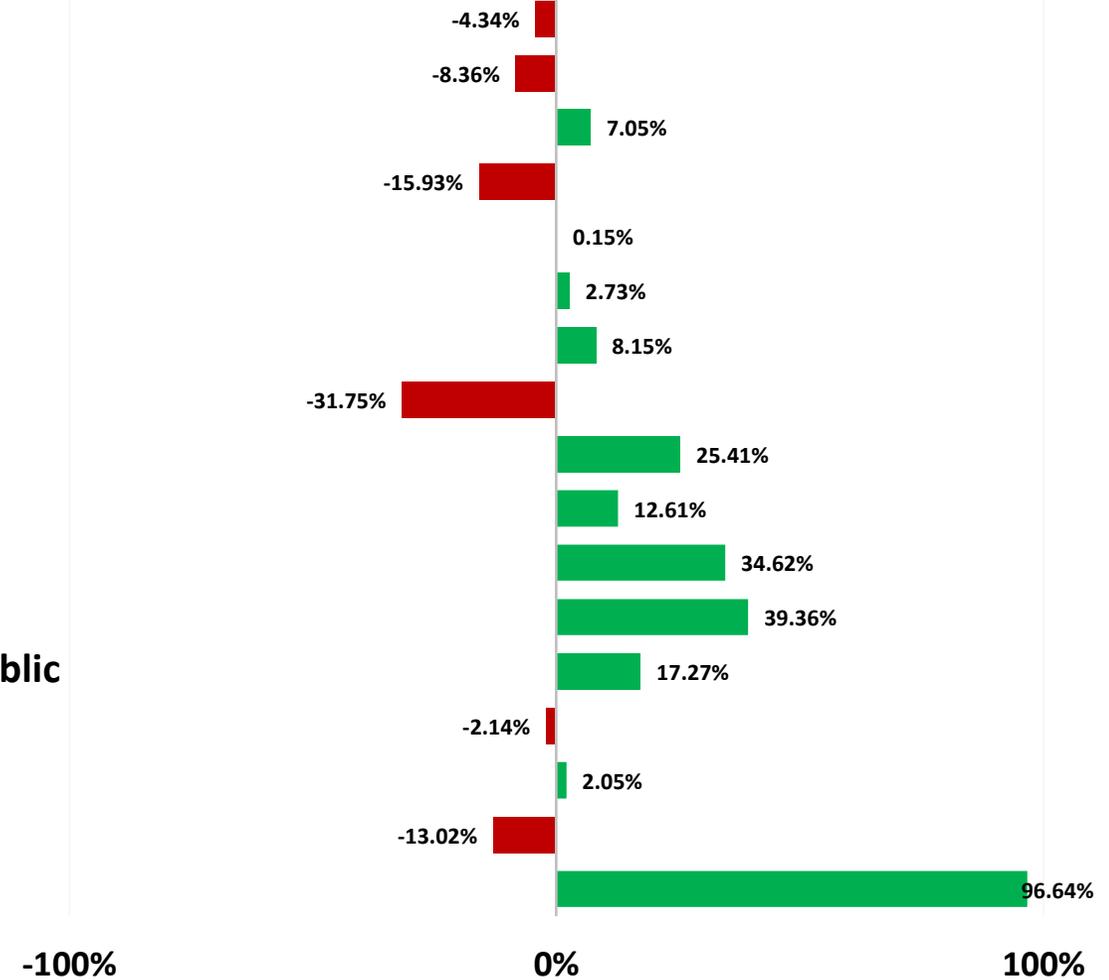


W/G Cotton Shirts, Not Knit

% SHARE YE 2/2018

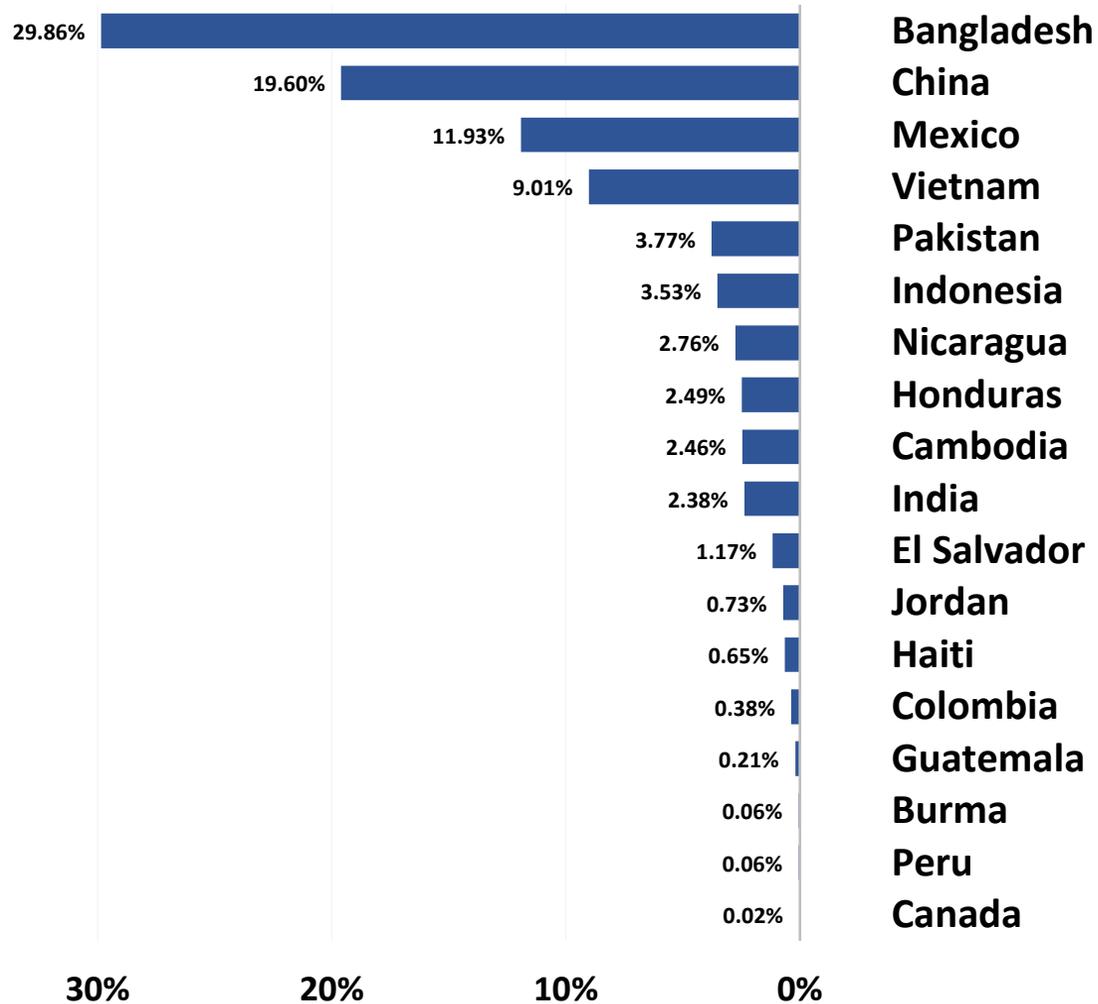


YE % CHANGE

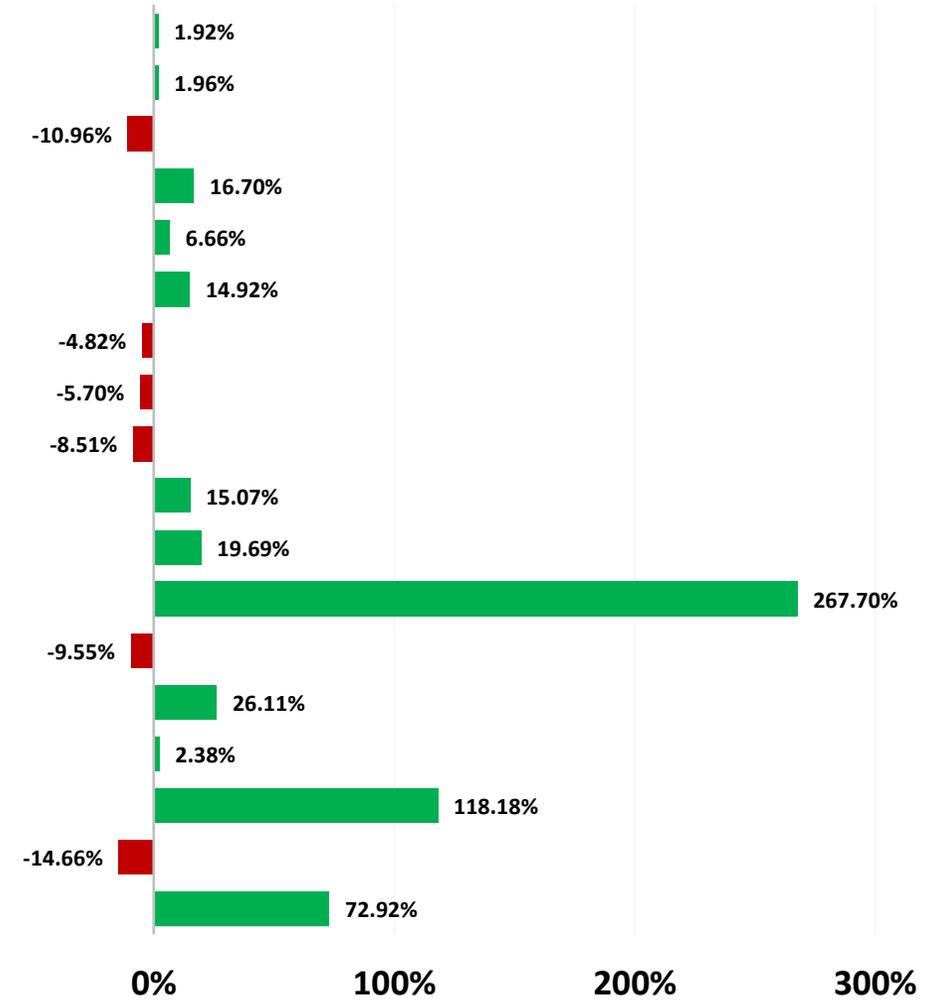


M/B Cotton Trousers/Breeches/Shorts

% SHARE YE 2/2018

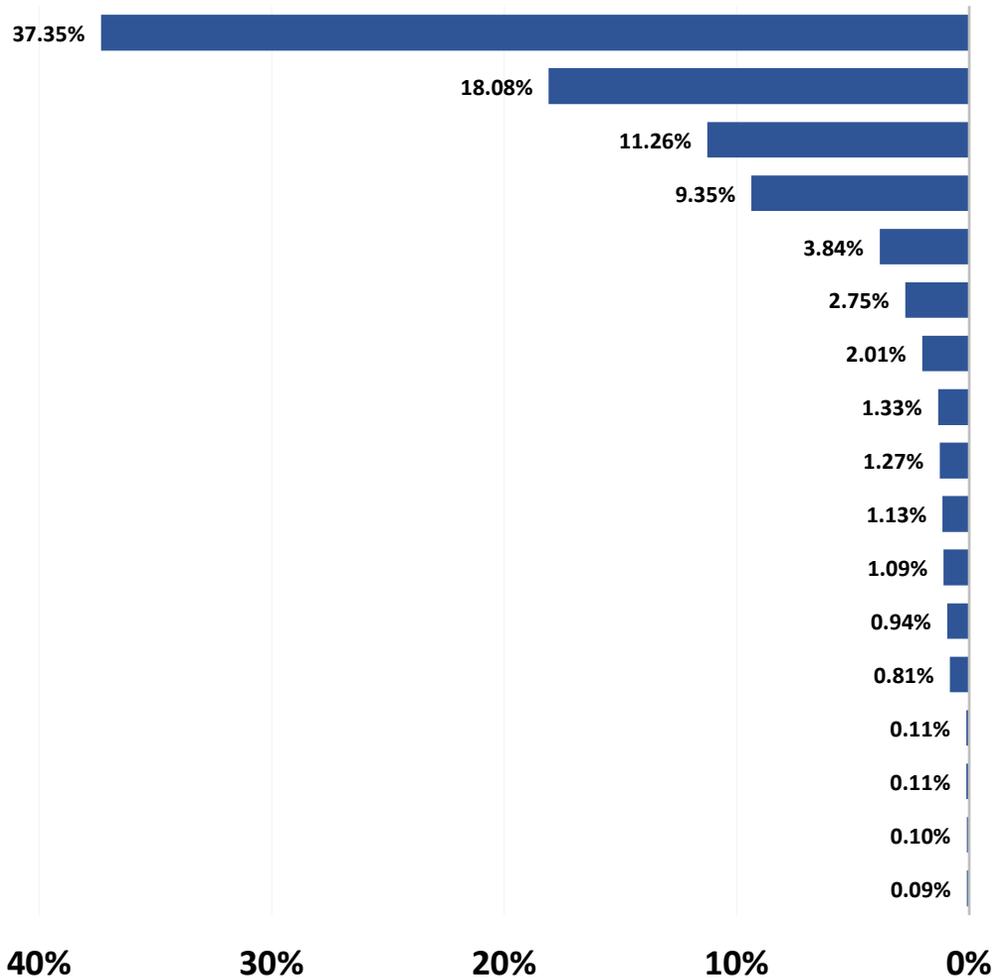


YE % CHANGE



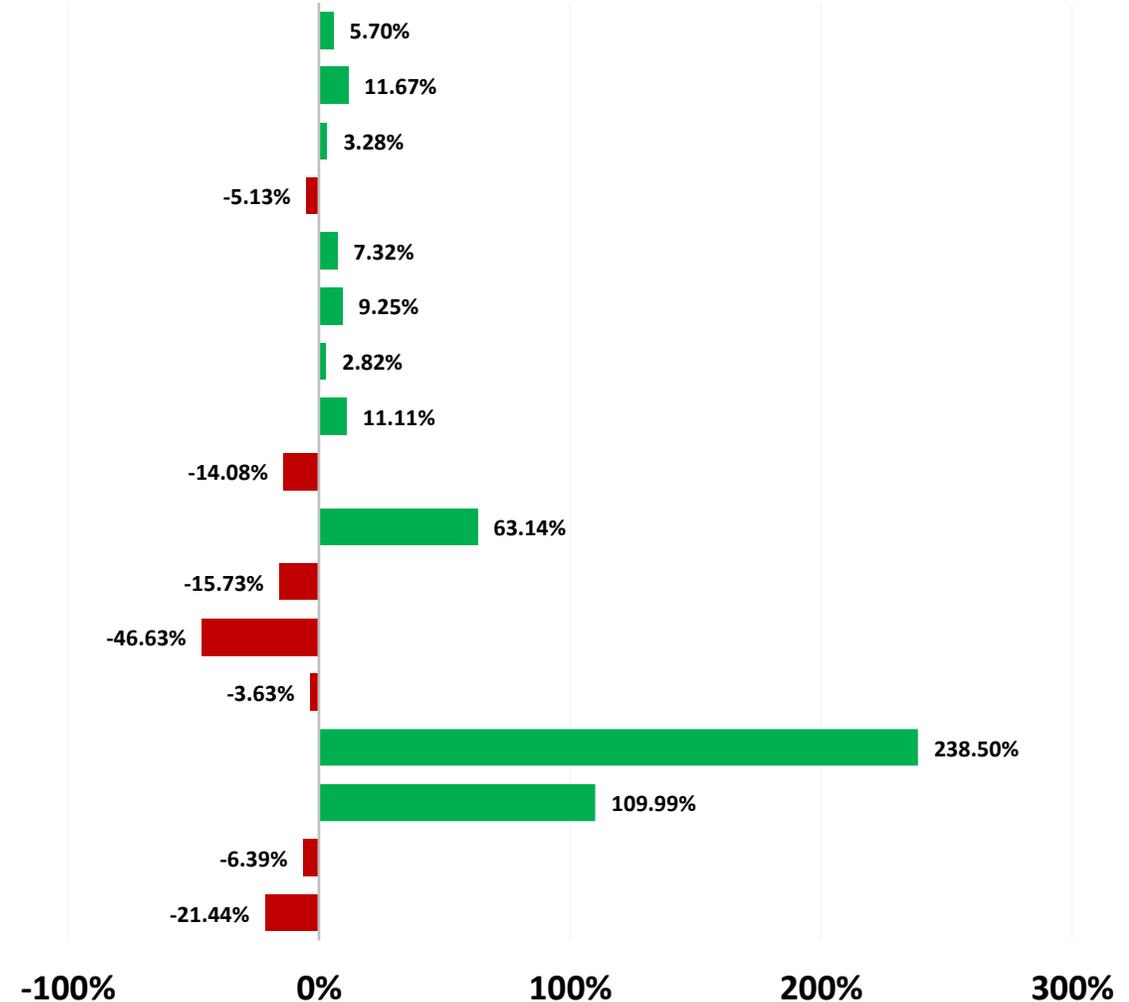
W/G Cotton Trousers/Slacks/Shorts

% SHARE YE 2/2018



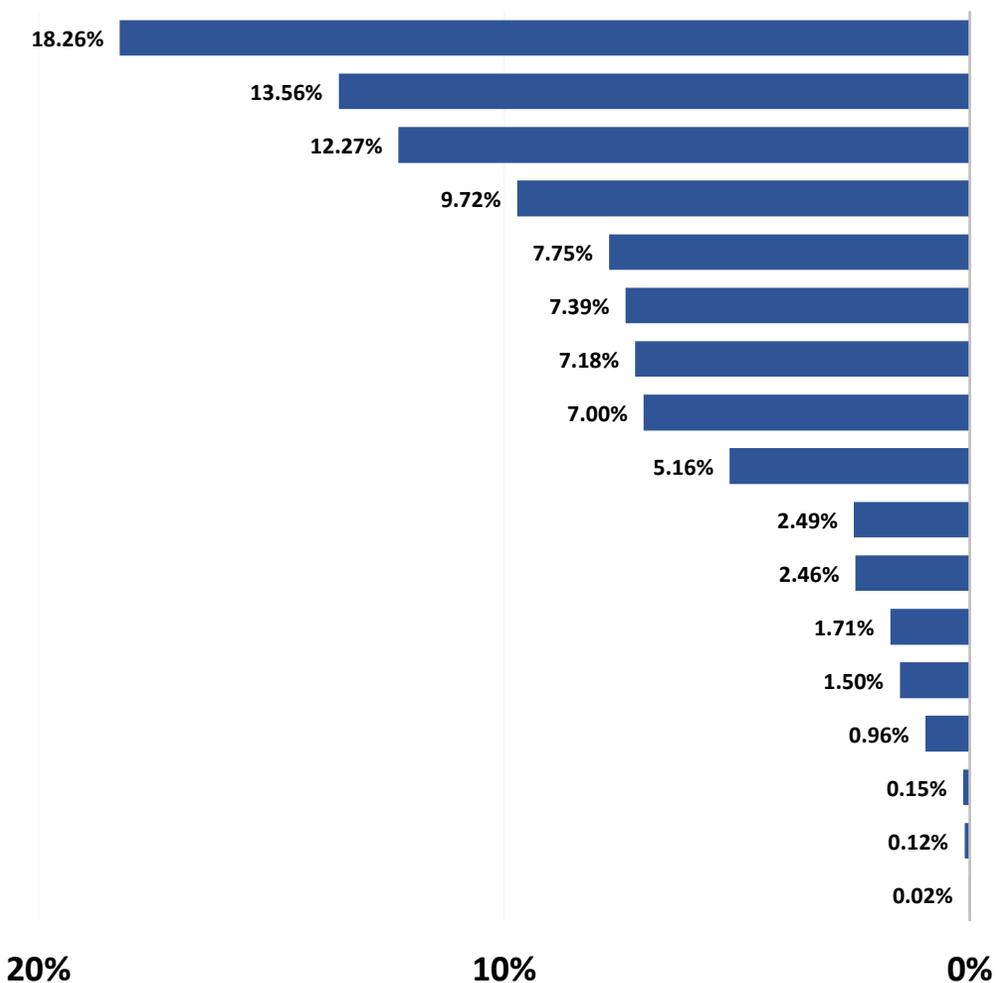
- China
- Vietnam
- Bangladesh
- Indonesia
- Cambodia
- Pakistan
- India
- El Salvador
- Haiti
- Honduras
- Mexico
- Nicaragua
- Guatemala
- Burma
- Ethiopia
- Colombia
- Peru

YE % CHANGE



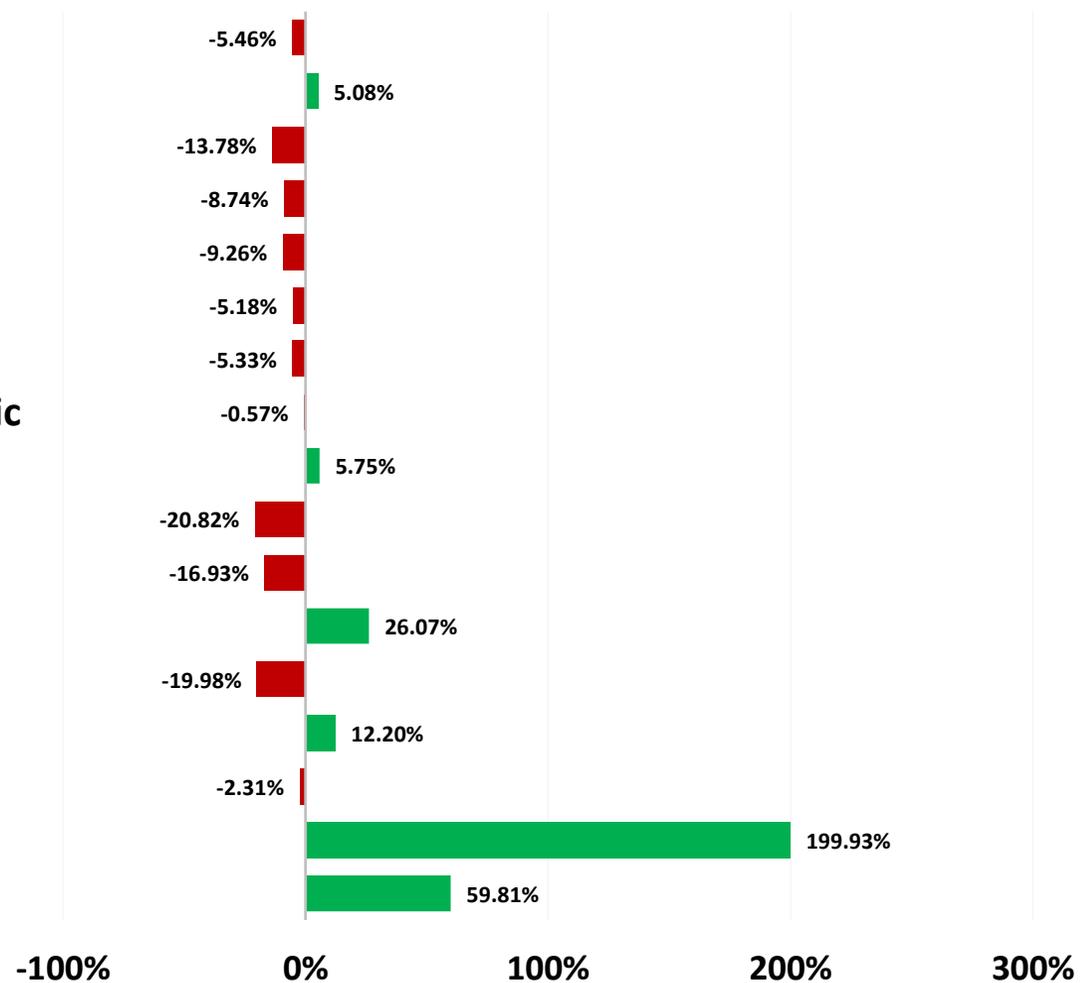
Cotton Underwear

% SHARE YE 2/2018



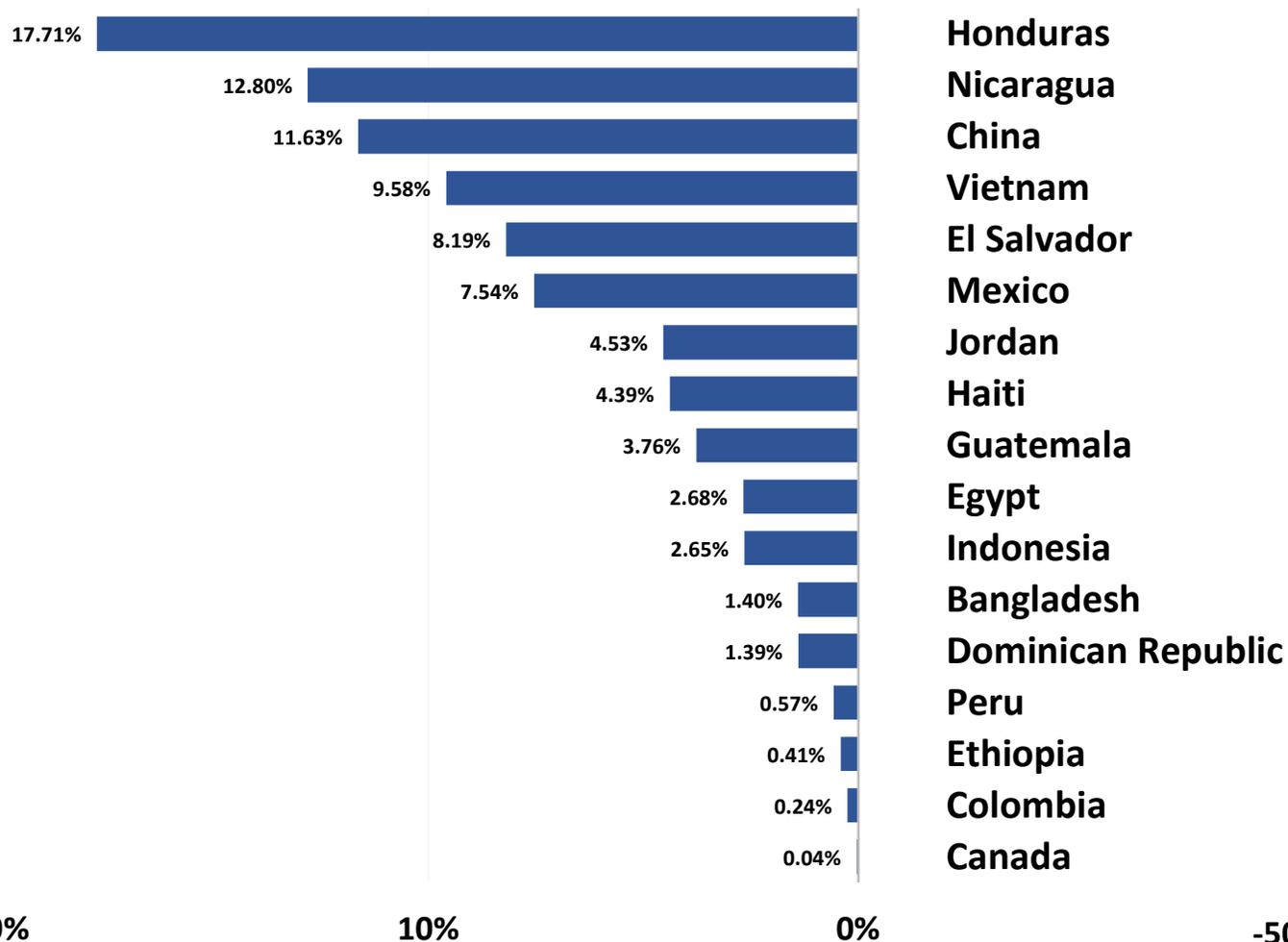
Vietnam
Bangladesh
El Salvador
Honduras
India
China
Thailand
Dominican Republic
Sri Lanka
Philippines
Haiti
Mexico
Pakistan
Nicaragua
Guatemala
Burma
Peru

YE % CHANGE

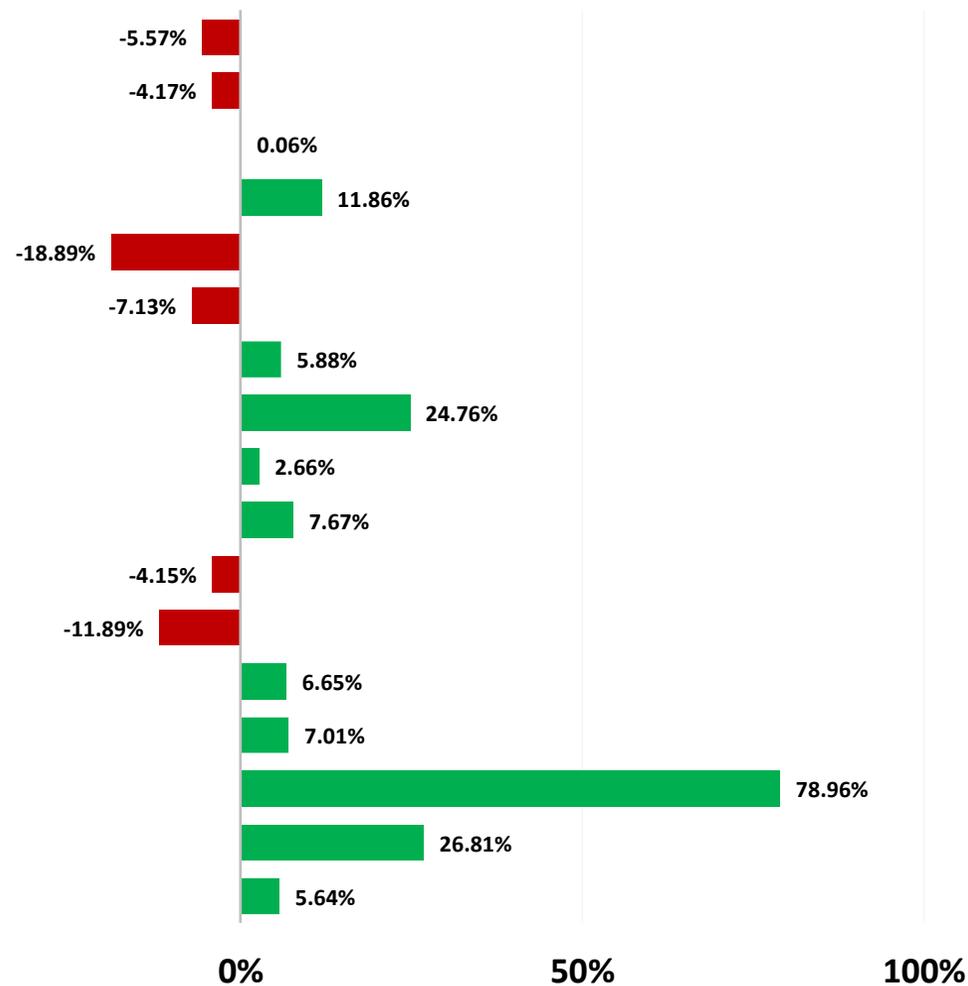


M/B MMF Knit Shirts

% SHARE YE 2/2018

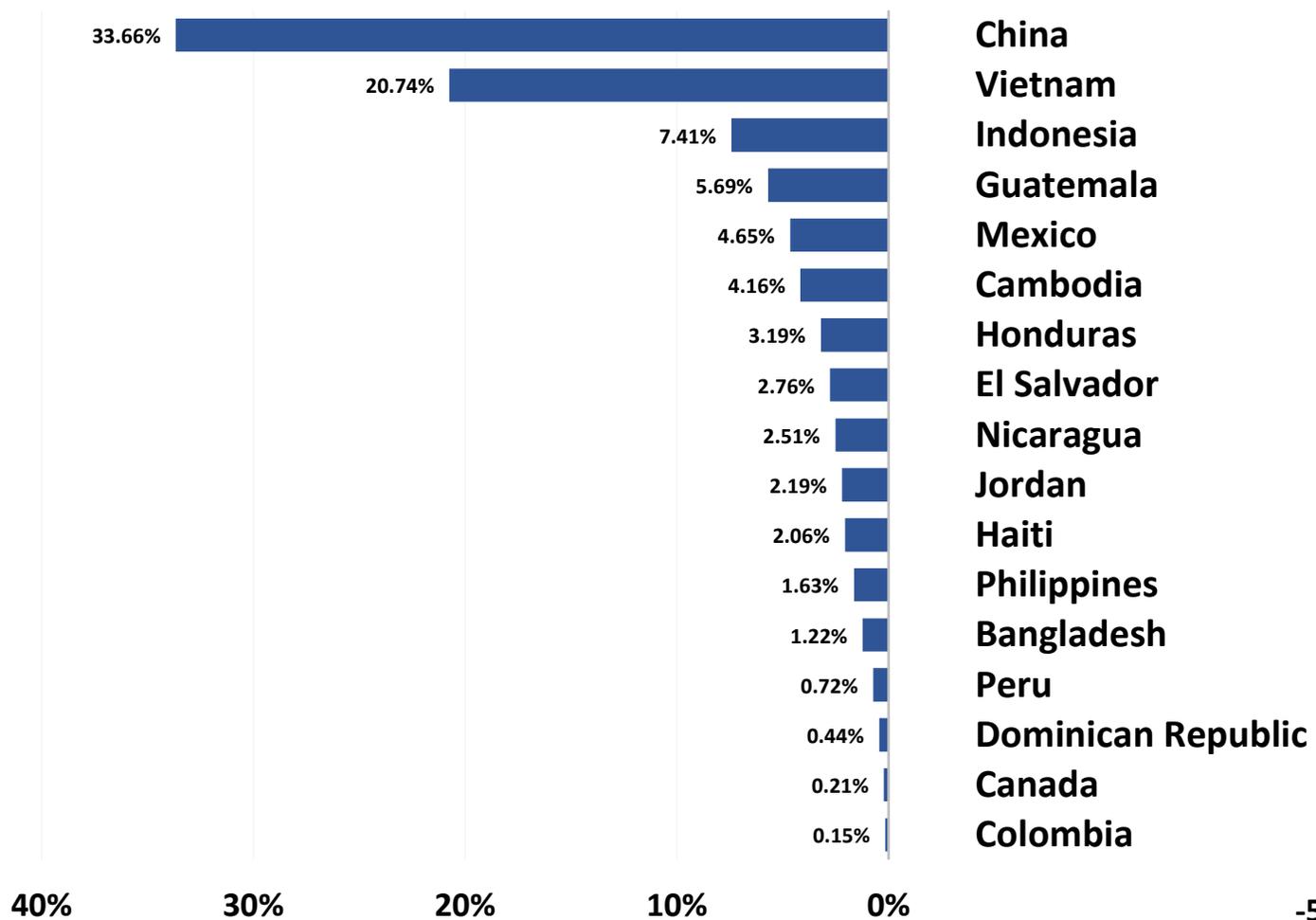


YE % CHANGE

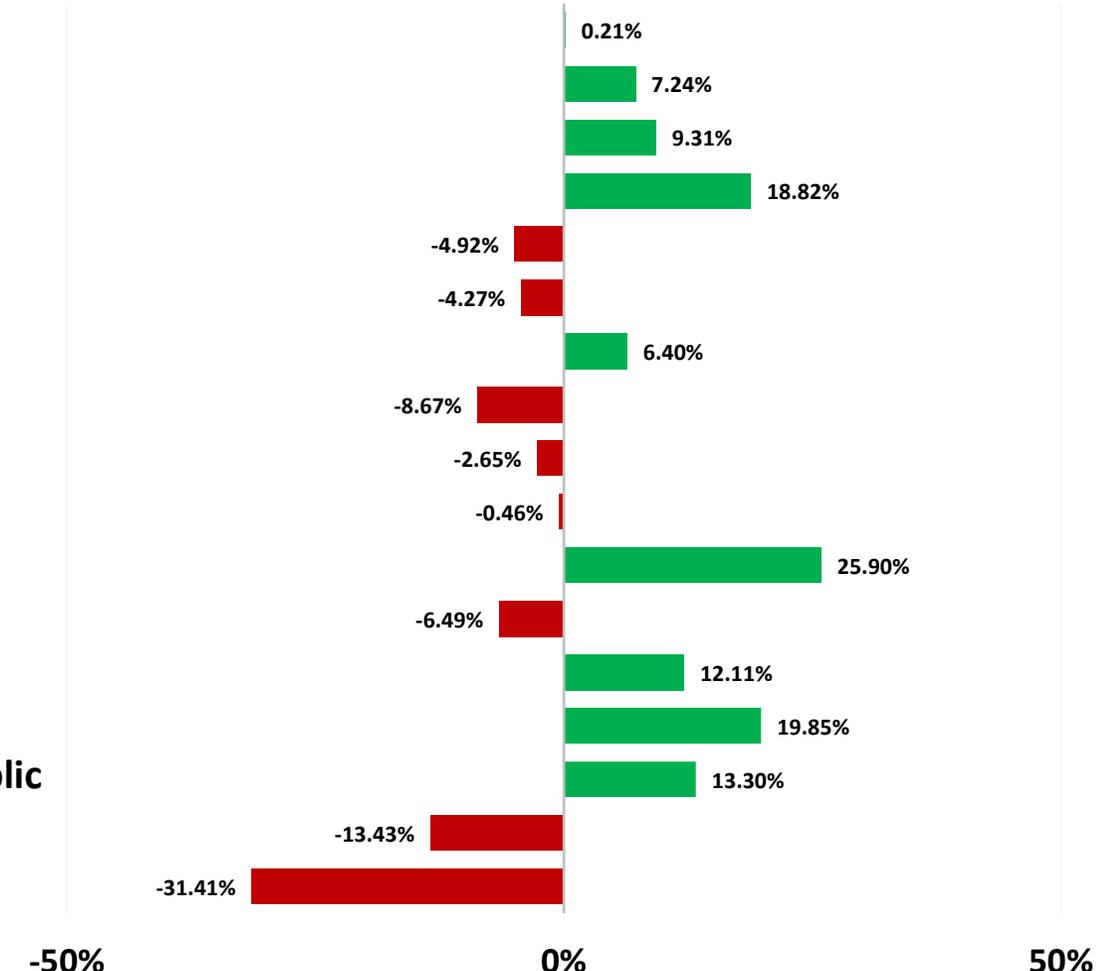


W/G MMF Knit Shirts/Blouses

% SHARE YE 2/2018

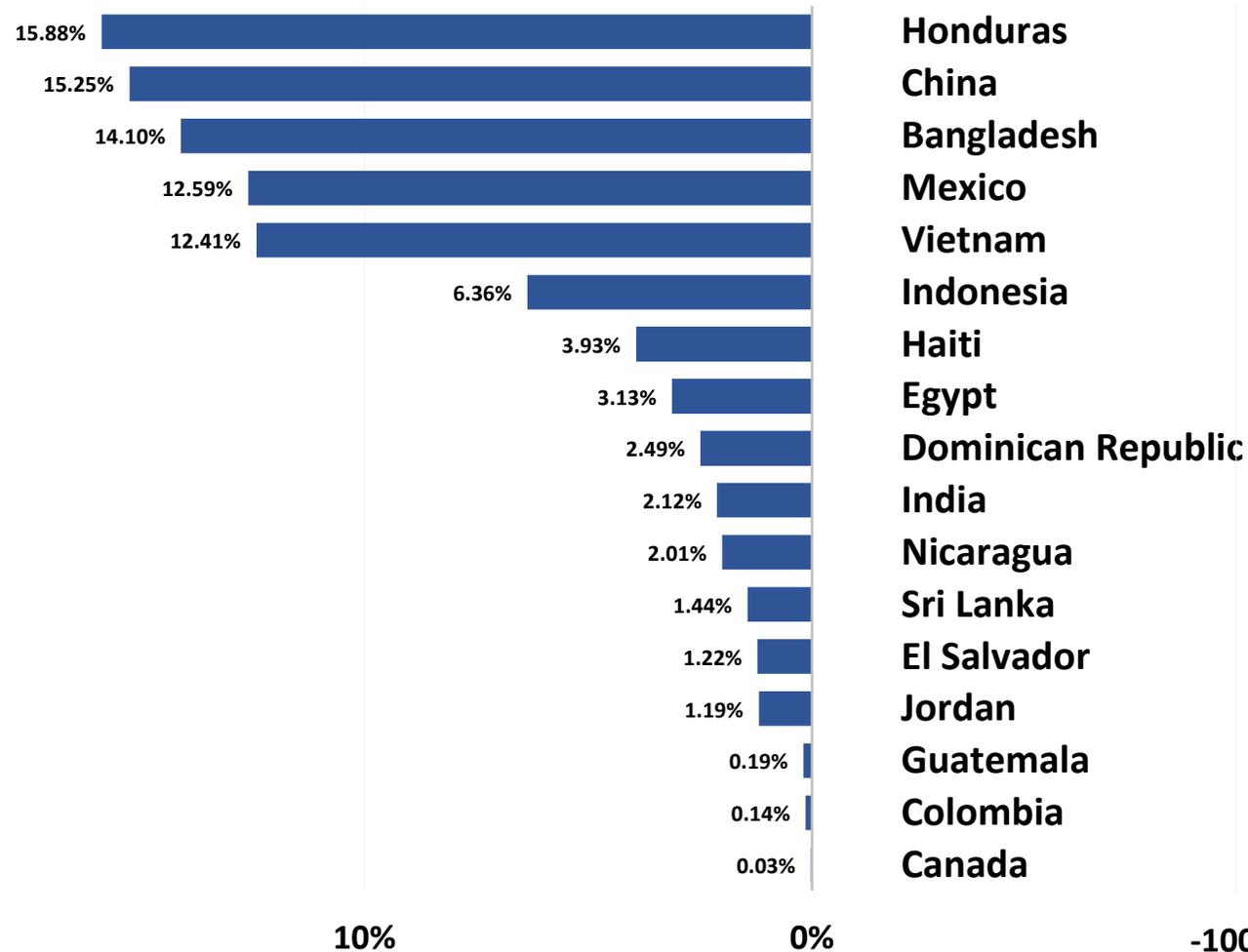


YE % CHANGE

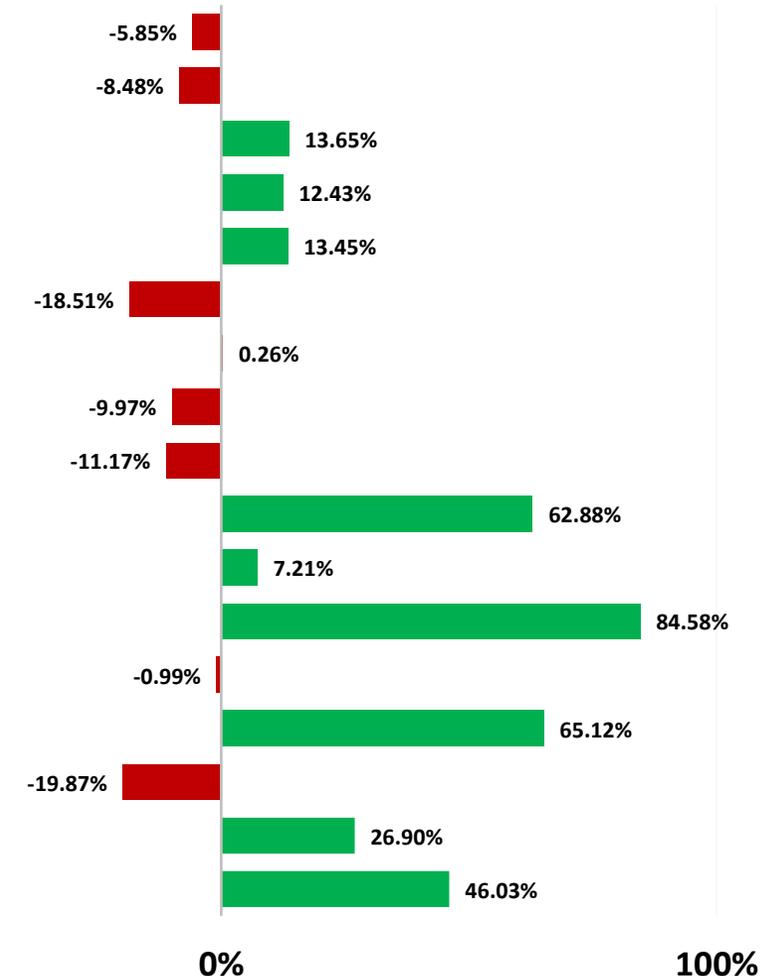


M/B Not-Knit MMF Shirts

% SHARE YE 2/2018

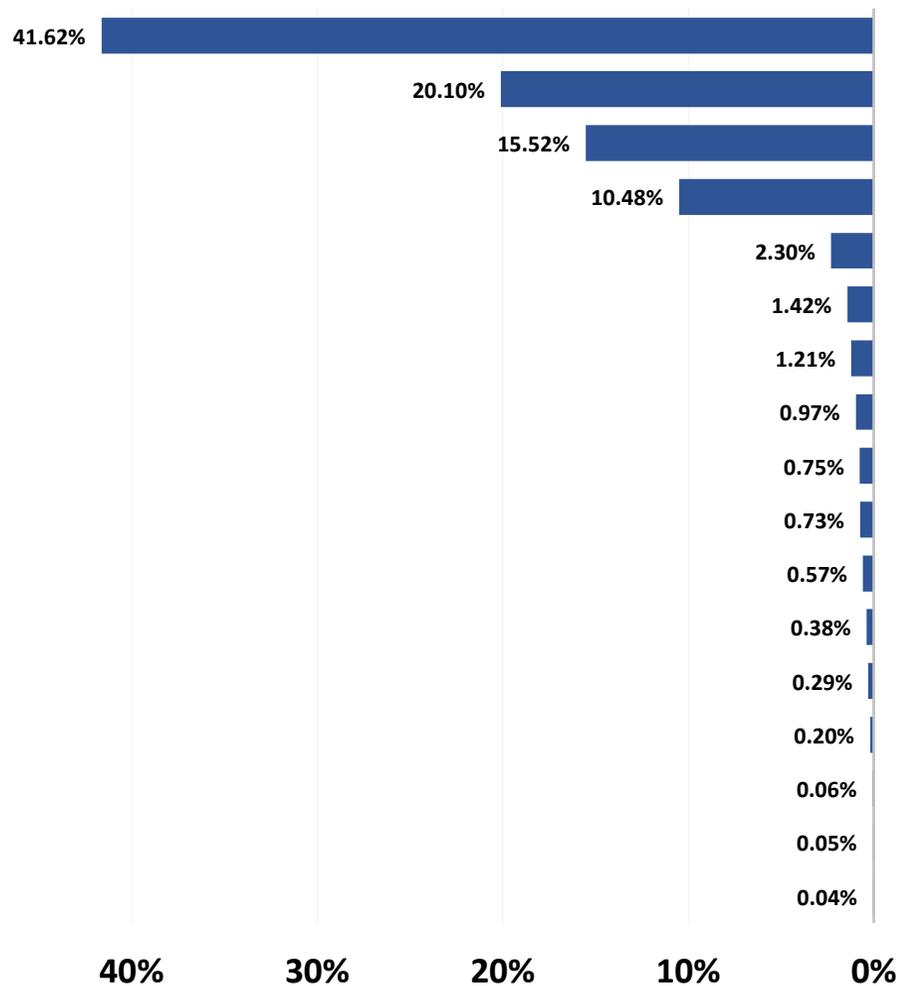


YE % CHANGE



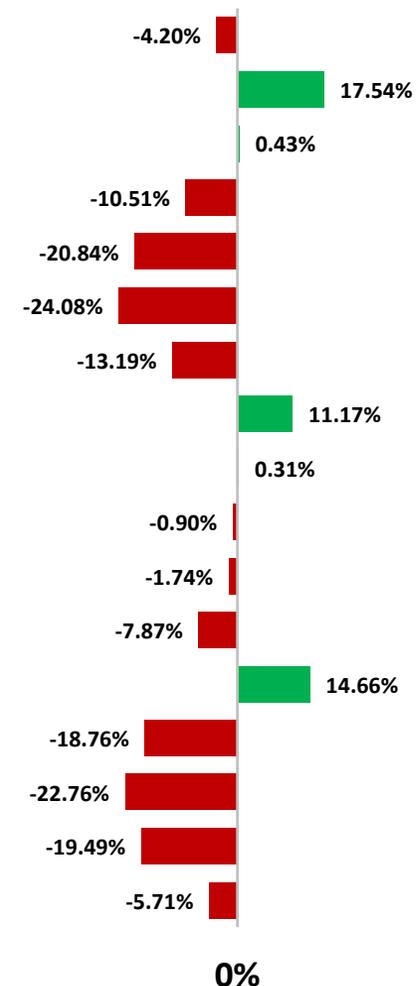
W/G Not-Knit MMF Shirts/Blouses

% SHARE YE 2/2018



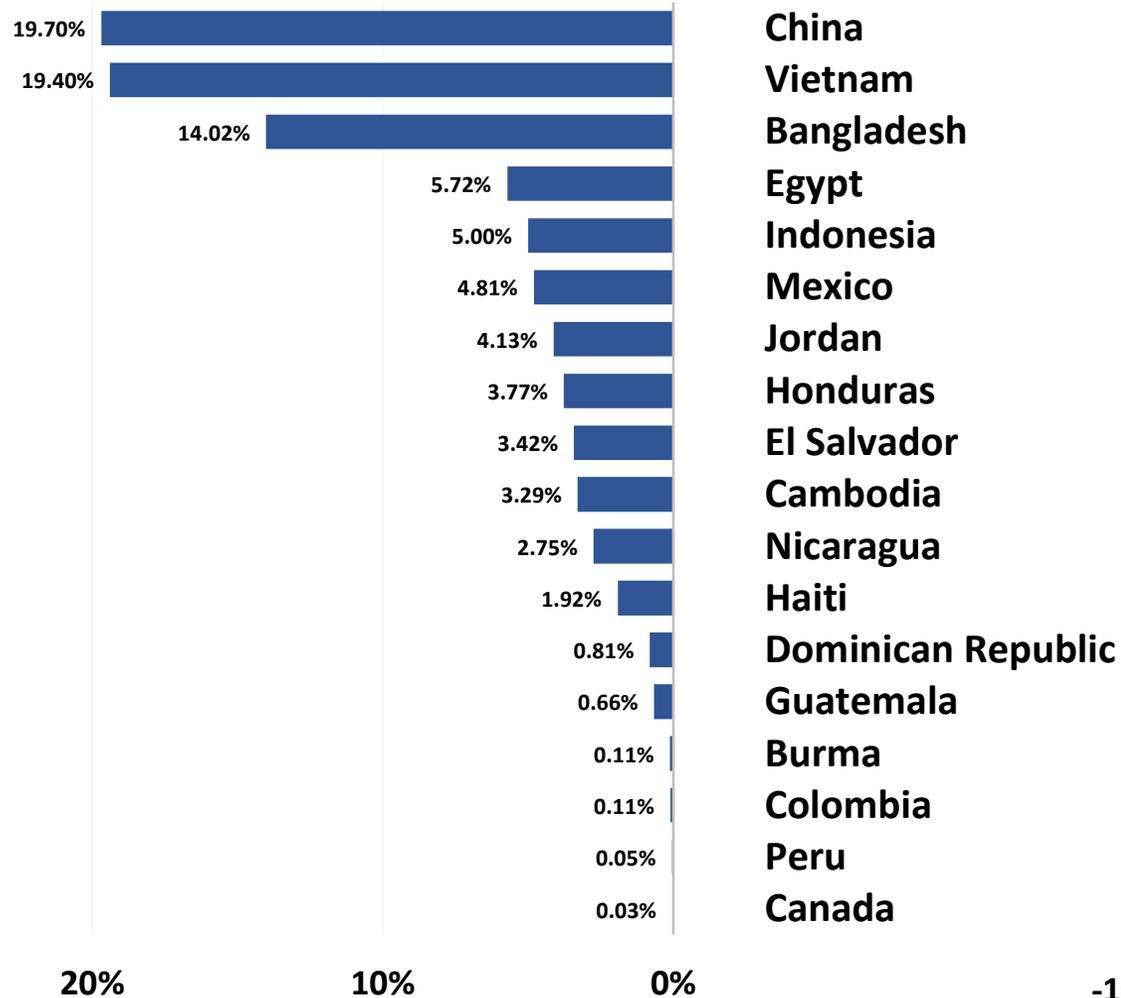
- China
- Vietnam
- Indonesia
- India
- Bangladesh
- Philippines
- Mexico
- Cambodia
- Haiti
- Egypt
- Guatemala
- Honduras
- Dominican Republic
- El Salvador
- Canada
- Nicaragua
- Colombia

YE % CHANGE

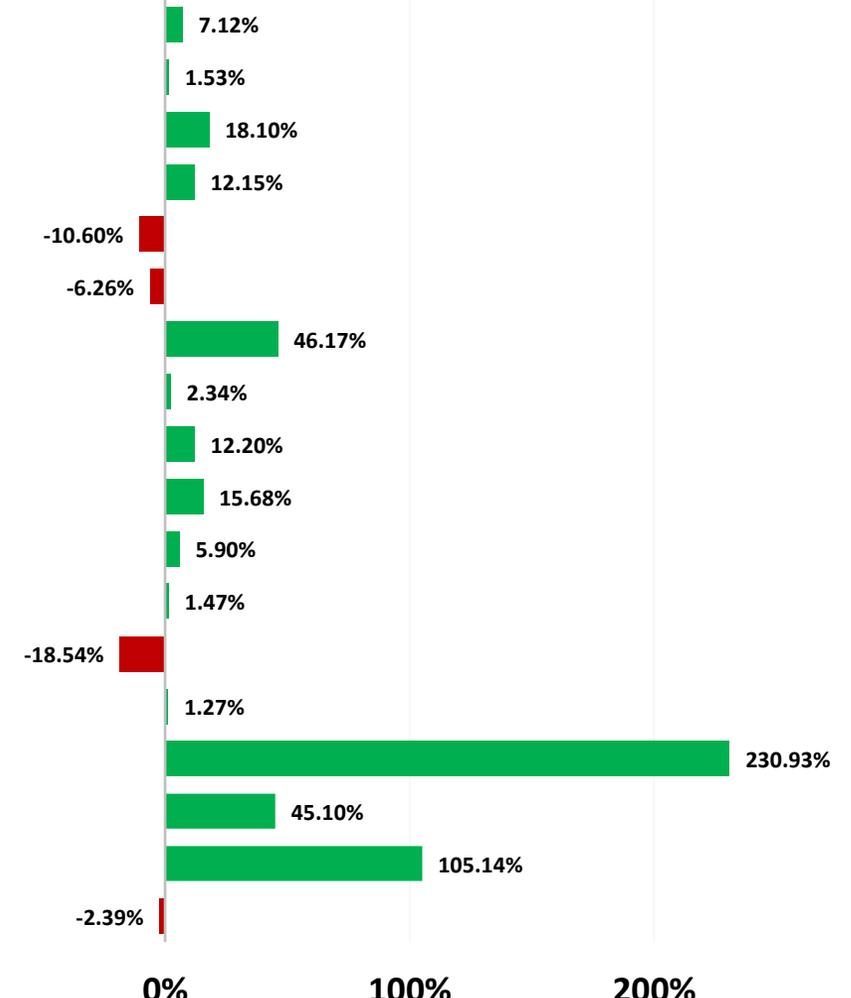


M/B MMF Trousers/Breeches/Shorts

% SHARE YE 2/2018

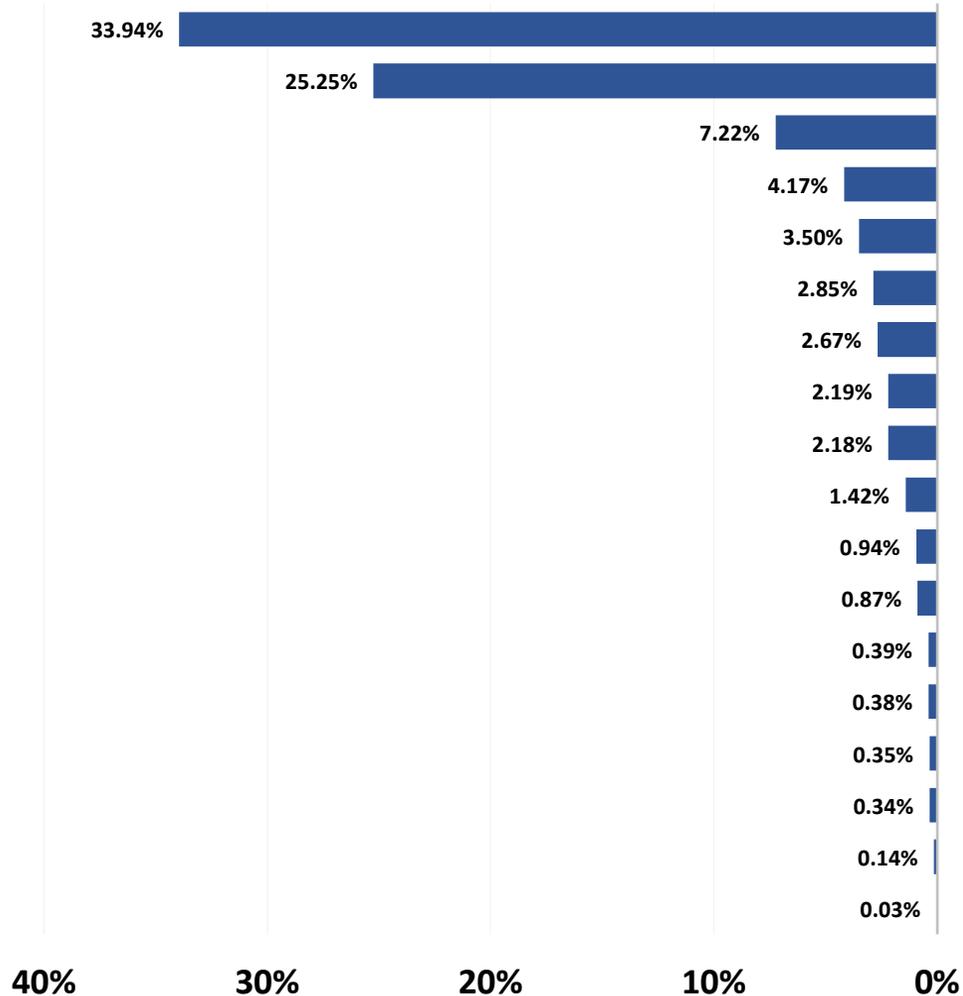


YE % CHANGE

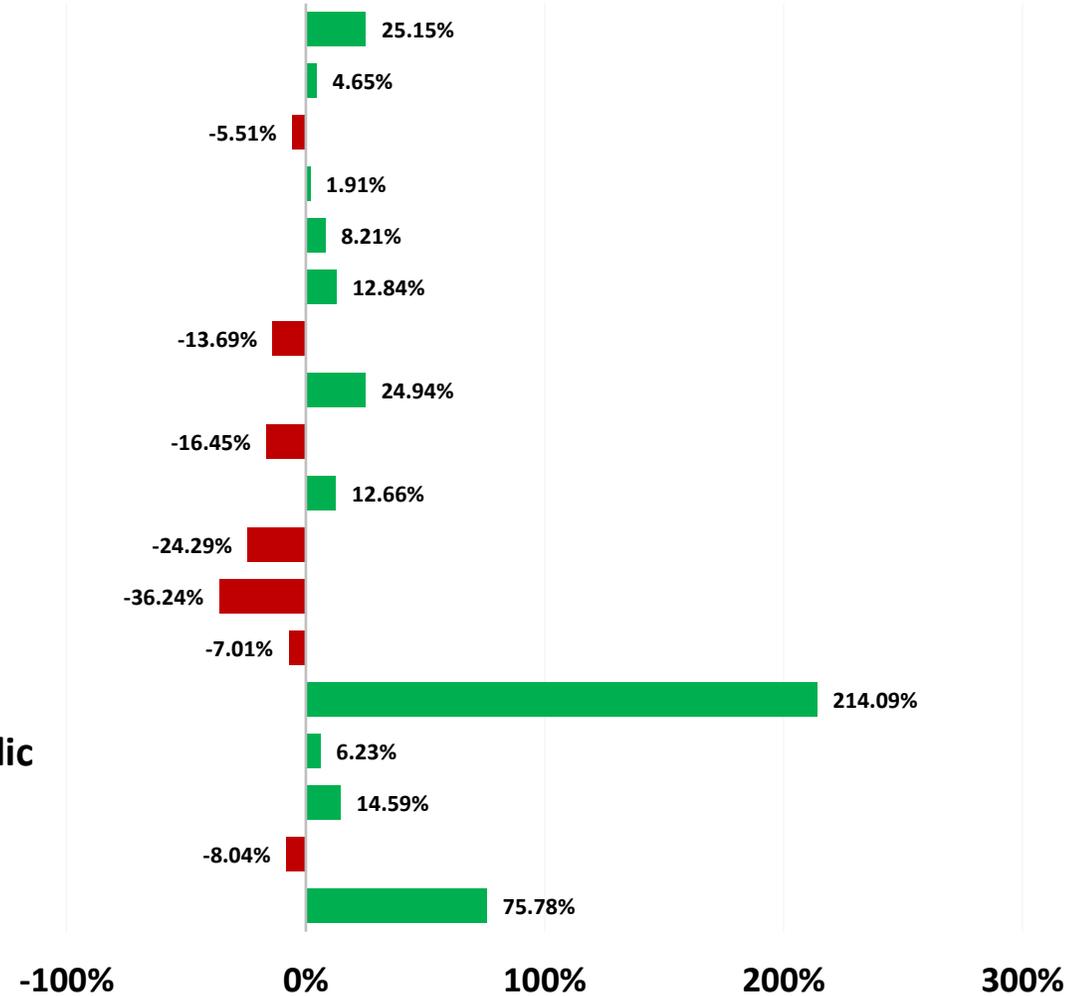


W/G MMF Slacks/Breeches/Shorts

% SHARE YE 2/2018



YE % CHANGE



Thank You!

Sources:

- The NPD Group, www.NPD.com
- OTEXA, Office of Textiles and Apparel, <http://otexa.trade.gov>
- U.S. Census Bureau, <https://www.census.gov/foreign-trade/Press-Release/2017pr/12/index.html>