

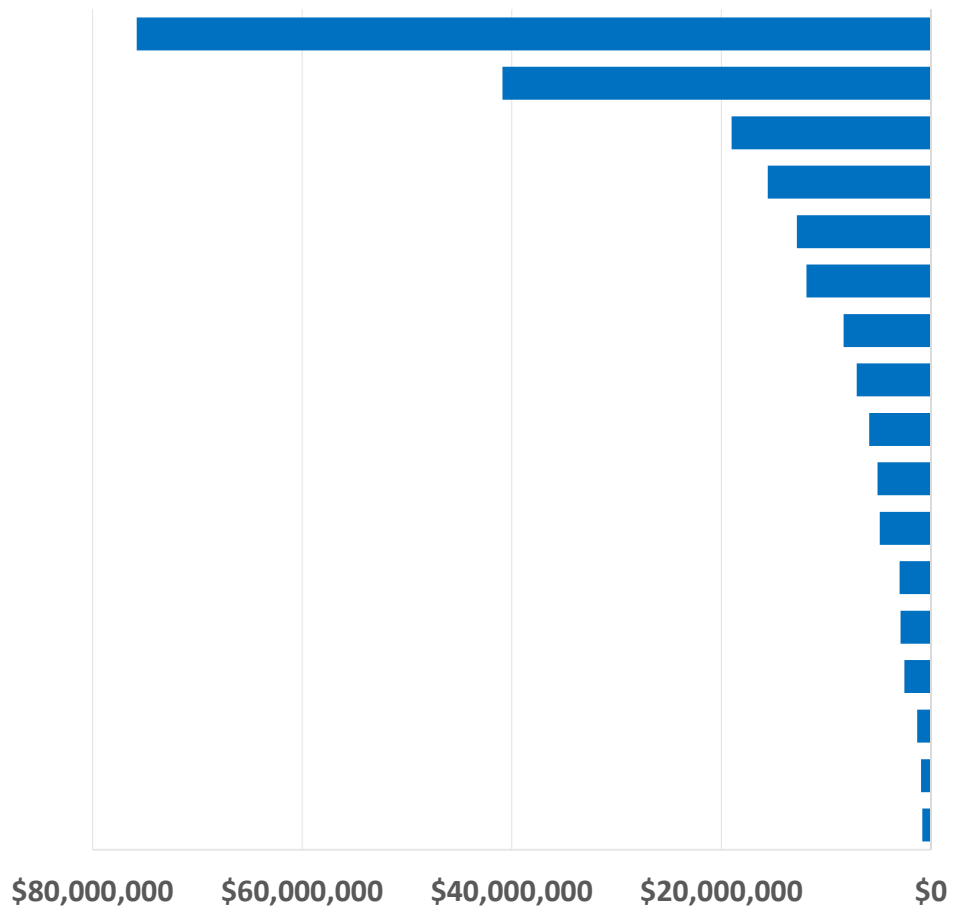
State of the Industry

May 16, 2017

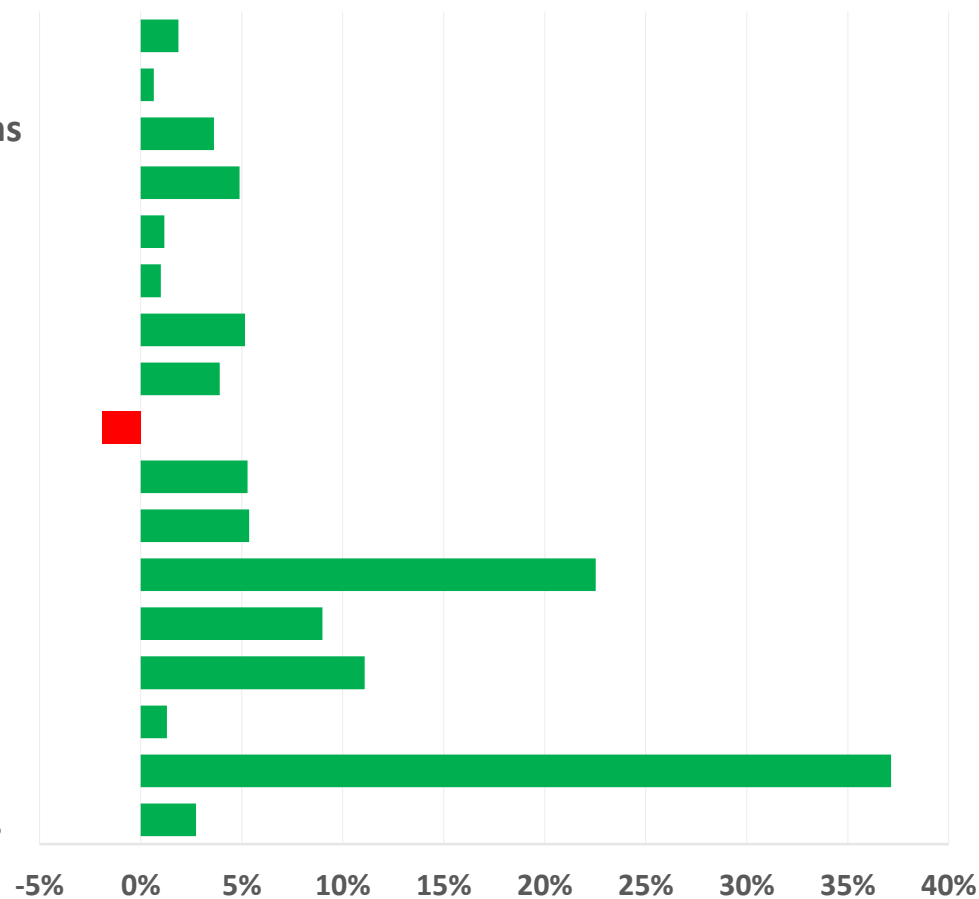
Miami, FL

Total apparel +2.7% in 2016: most categories grew

DOLLAR VOLUME (000)



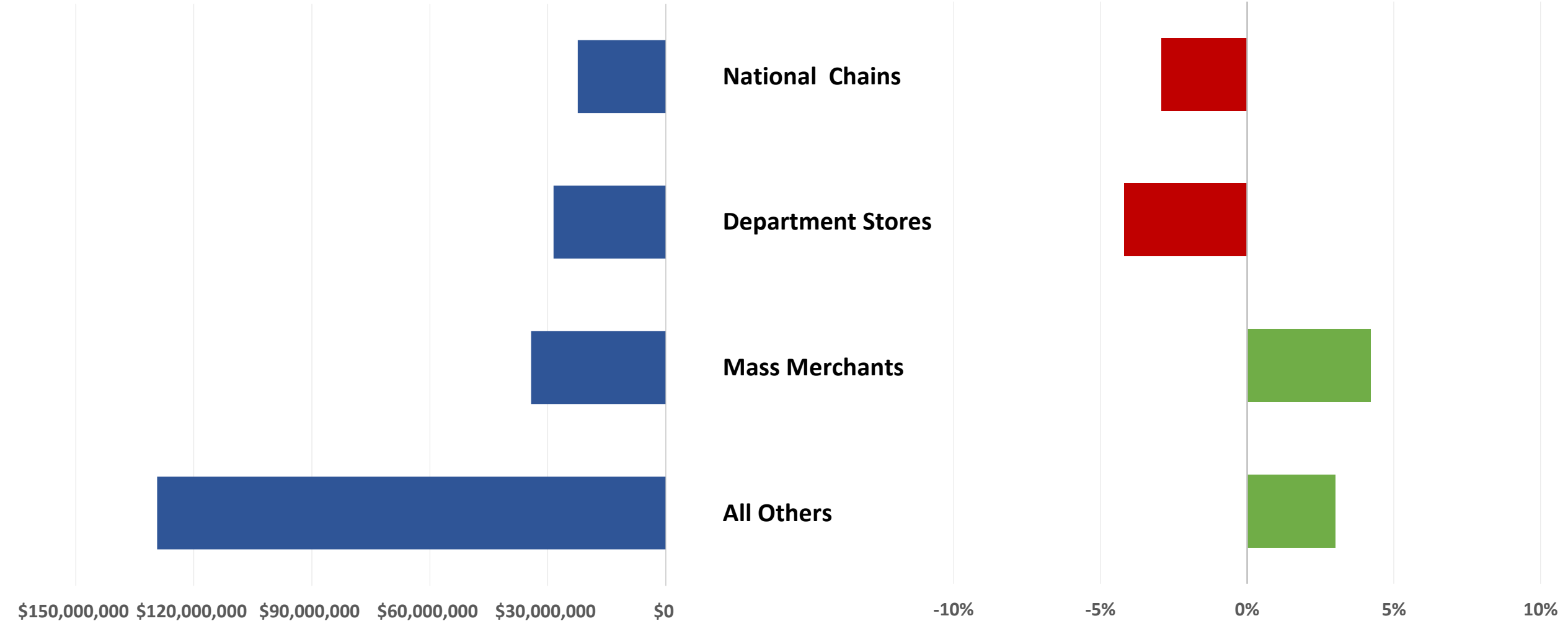
DOLLAR VOLUME CHANGE (2015 v. 2016)



Channel Share is Shifting to Mass, Off Price, Online.

DOLLAR VOLUME (000)

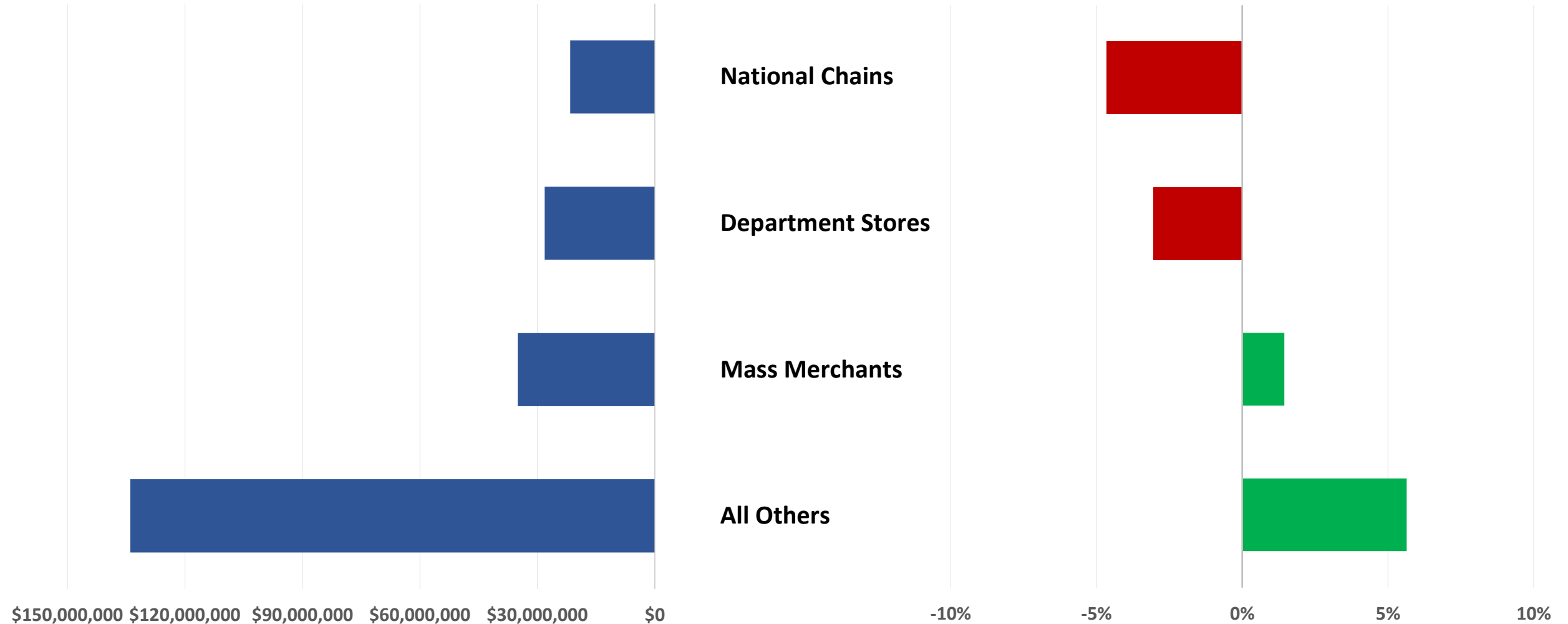
DOLLAR VOLUME CHANGE (2014 v. 2015)



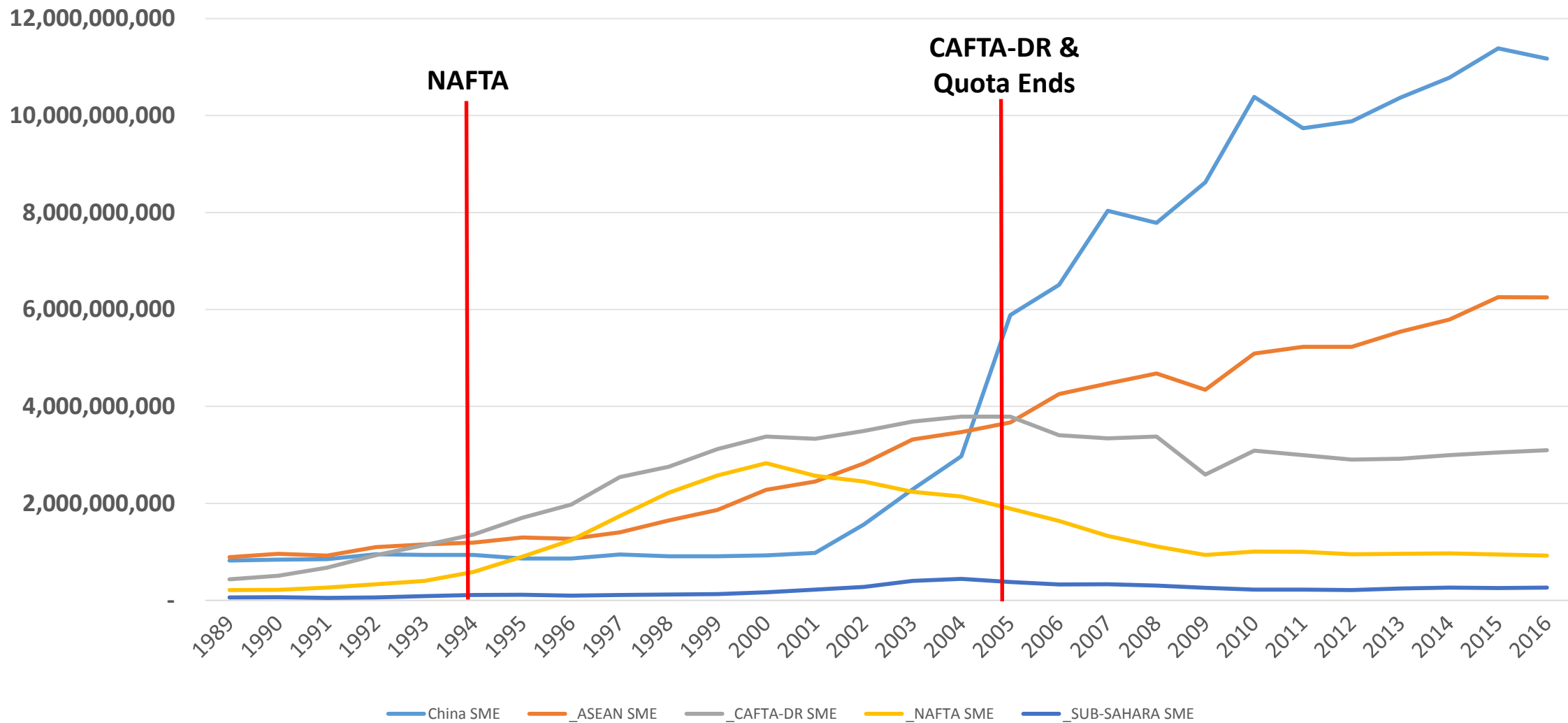
Channel Share is Shifting to Mass, Off Price, Online

DOLLAR VOLUME (000)

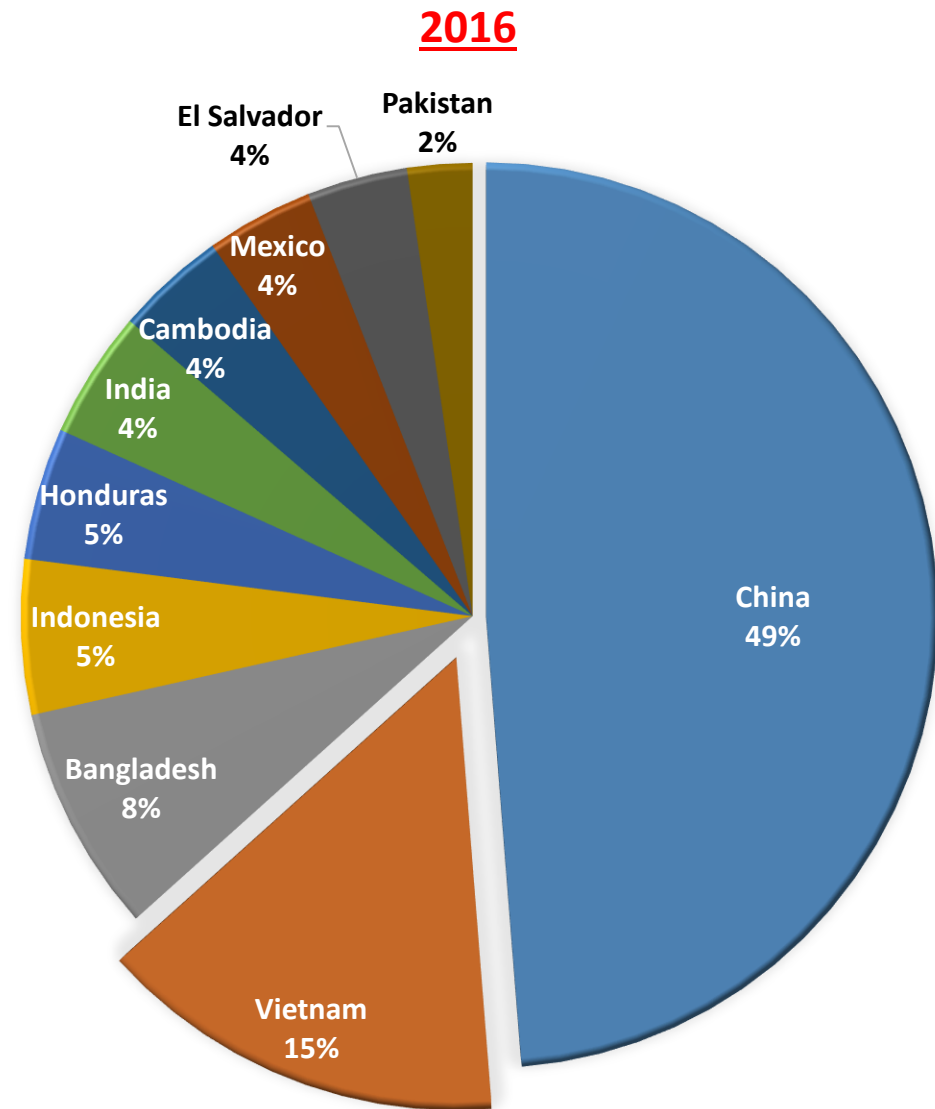
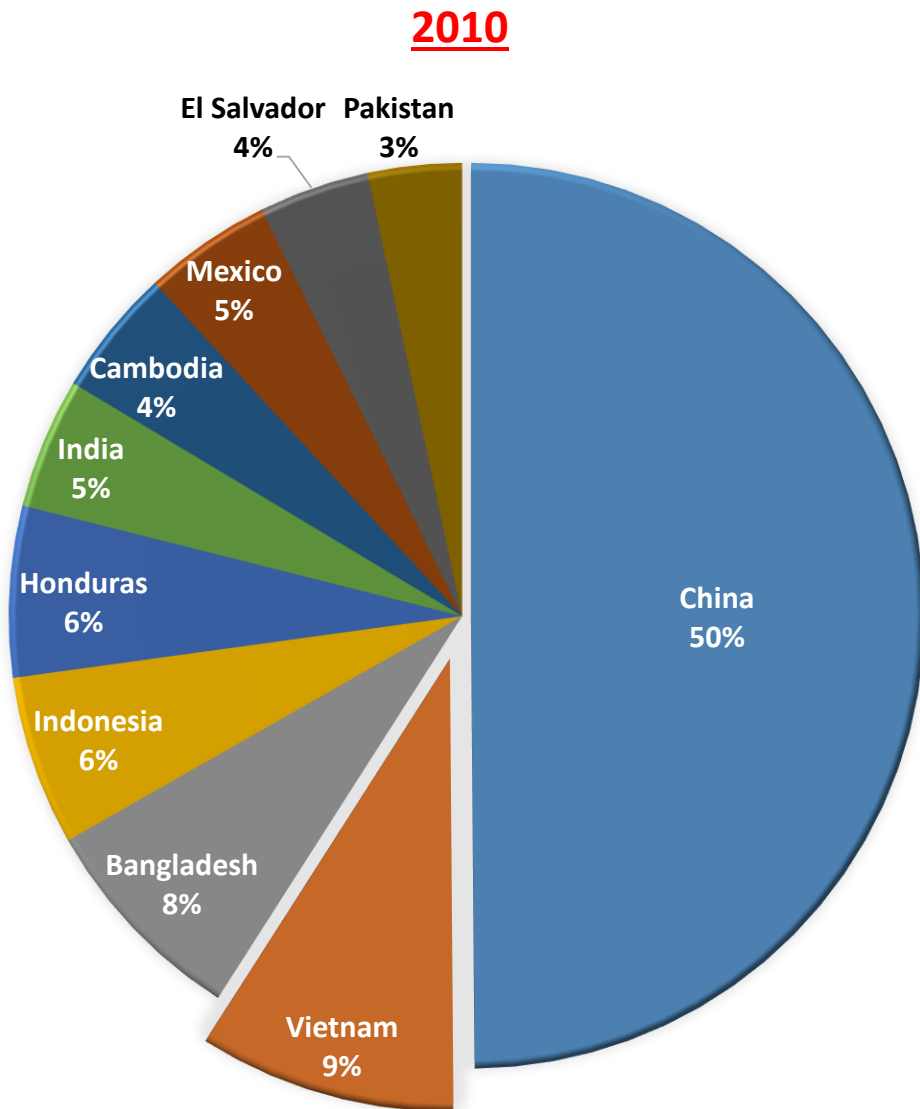
DOLLAR VOLUME CHANGE (2015 v. 2016)



U.S. Apparel Imports (SME)



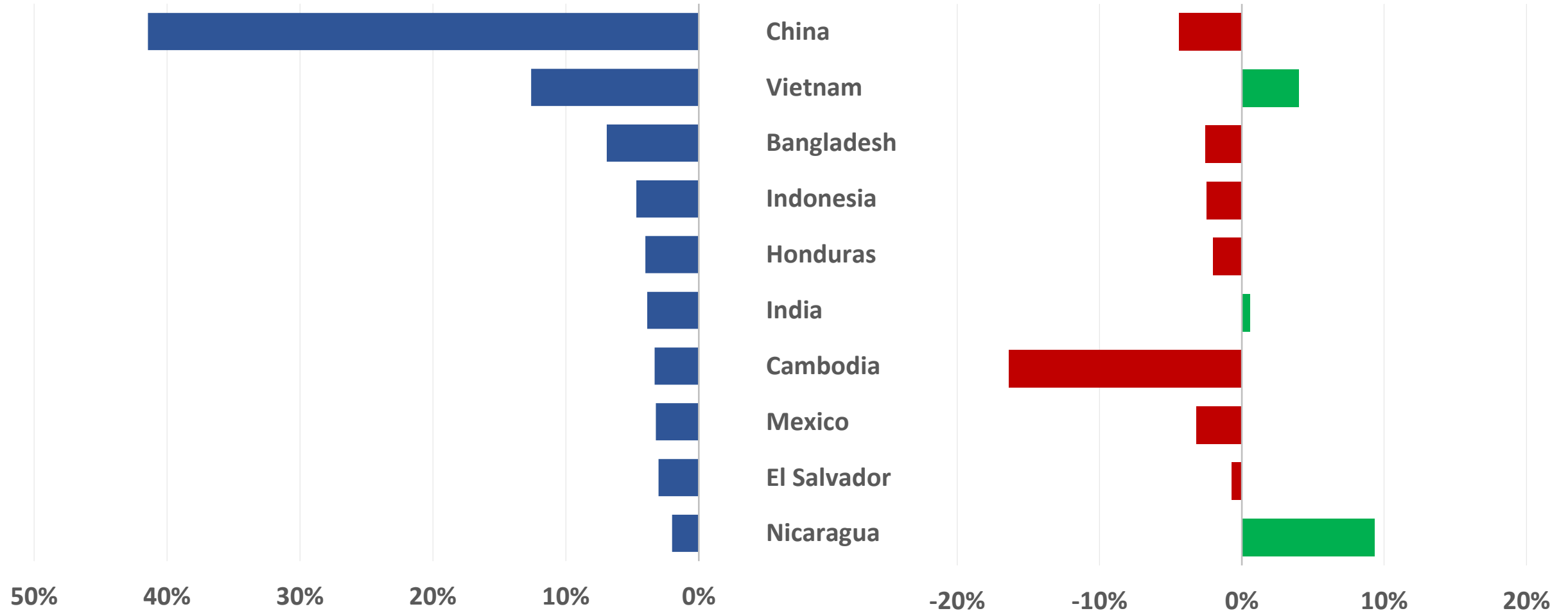
U.S. Apparel Imports (SME) Top 10 Suppliers



Total Apparel Imports (SME)

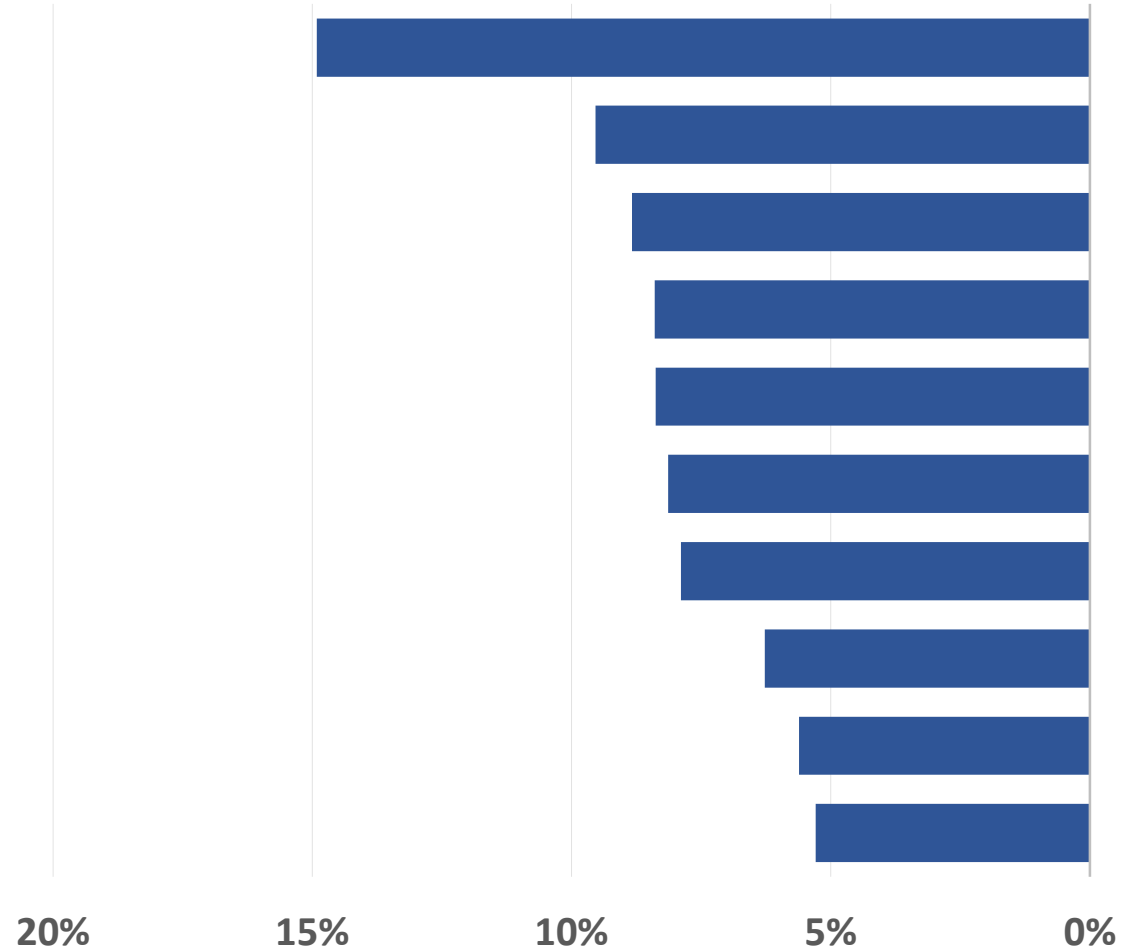
PERCENT SHARE FEB 2017

PERCENT CHANGE V. FEB 2016

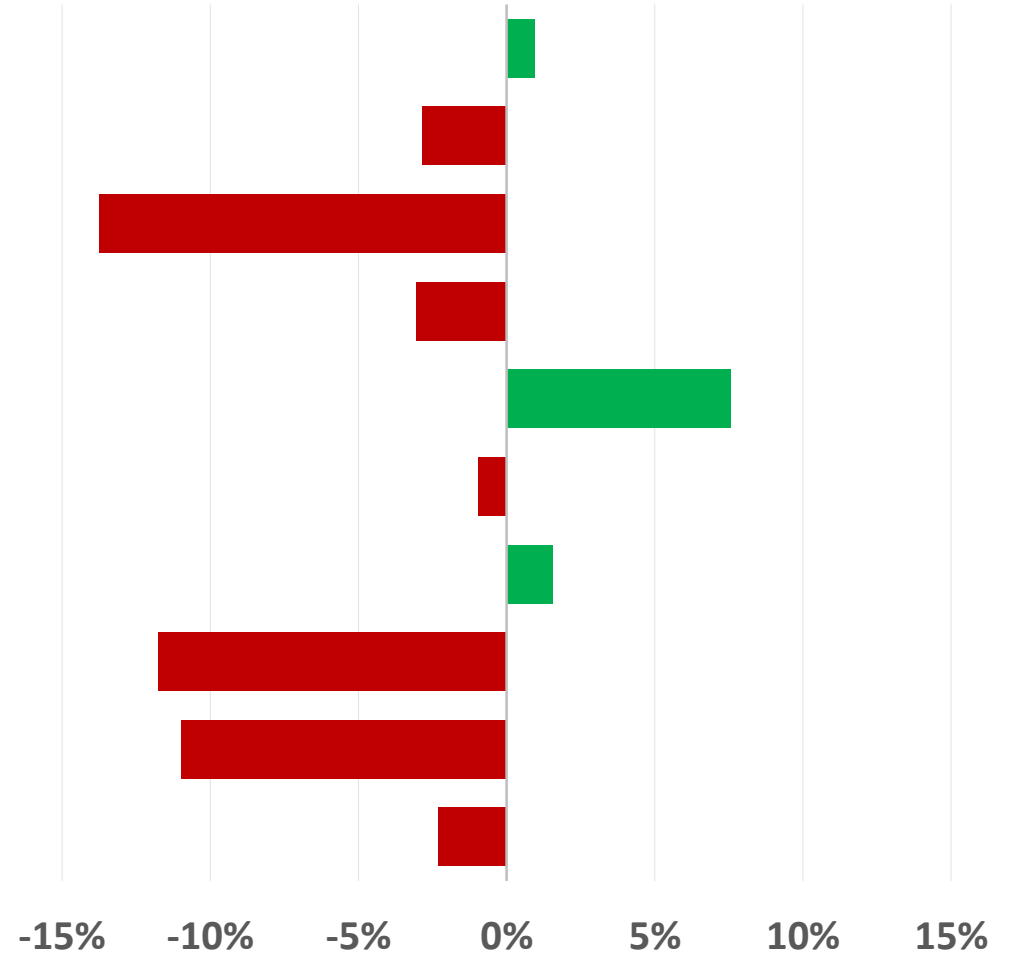


M/B Knit Shirts, Cotton

PERCENT SHARE FEB 2017

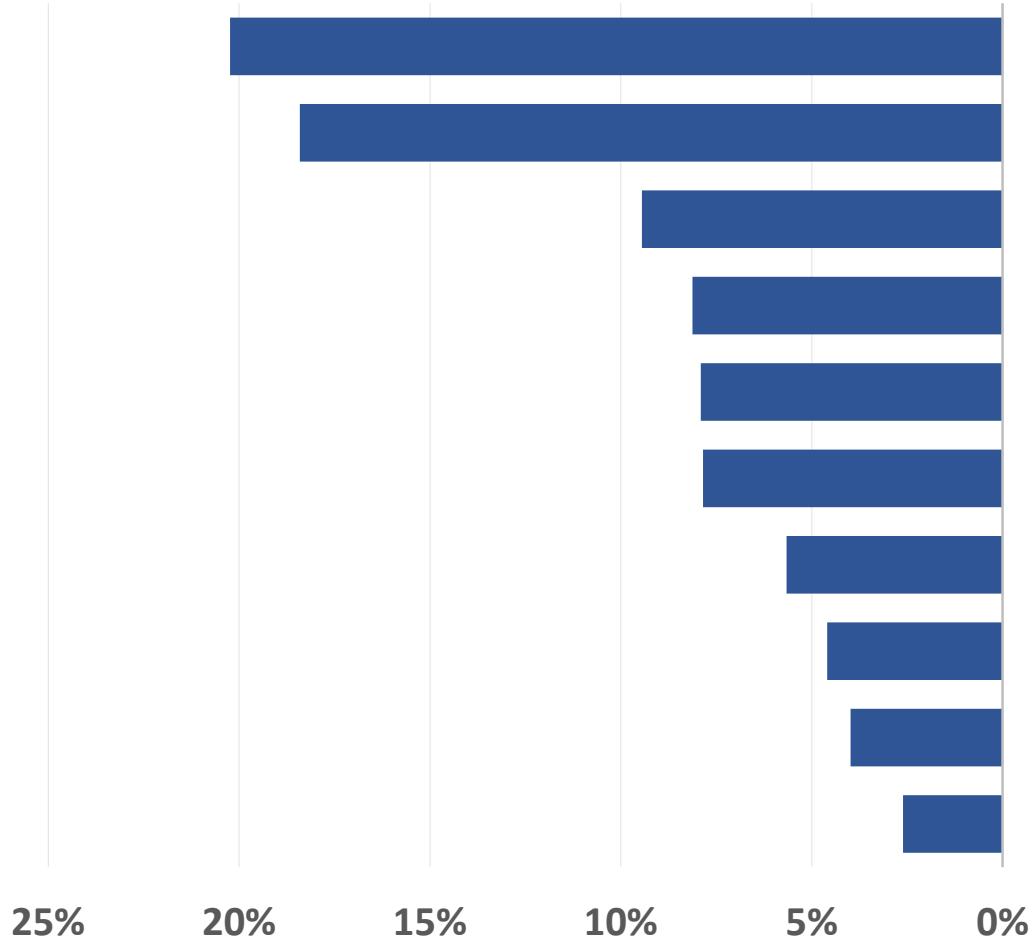


PERCENT CHANGE V. FEB 2016

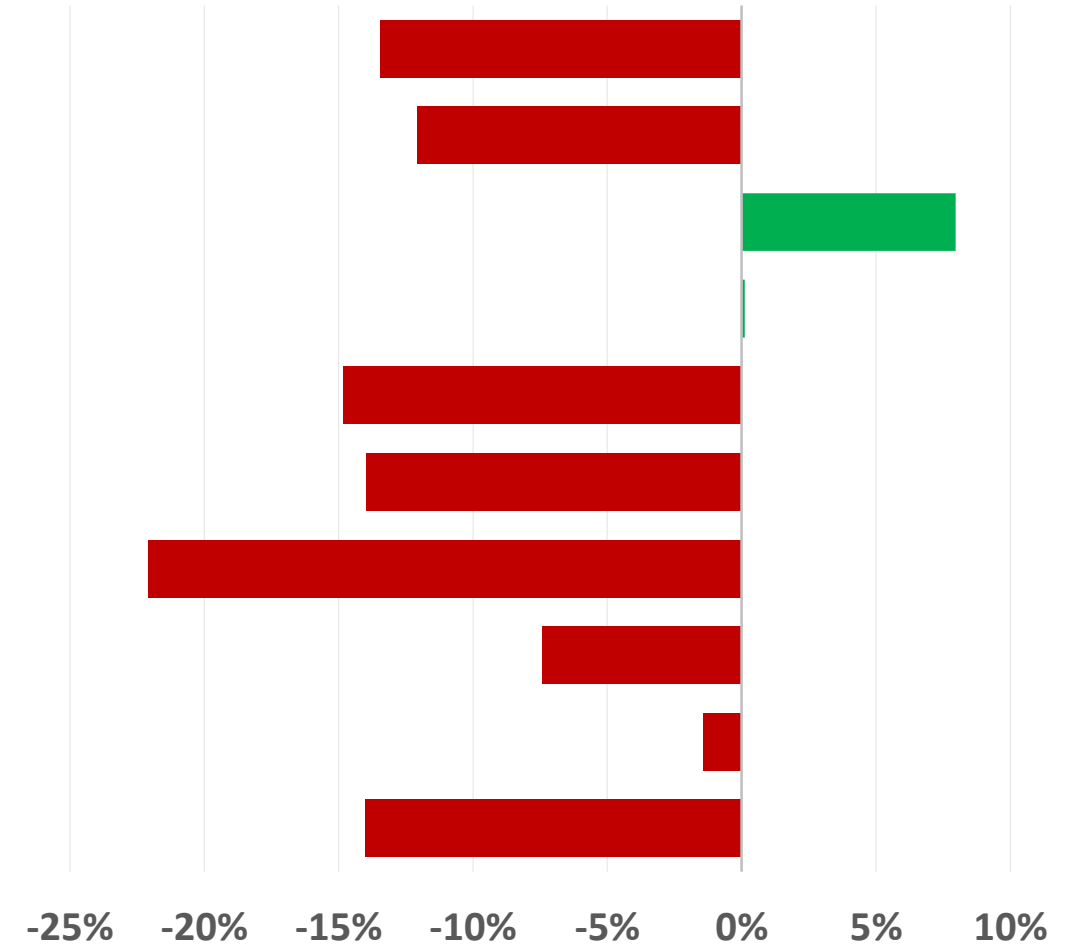


W/G Knit Shirts, Cotton

PERCENT SHARE FEB 2017

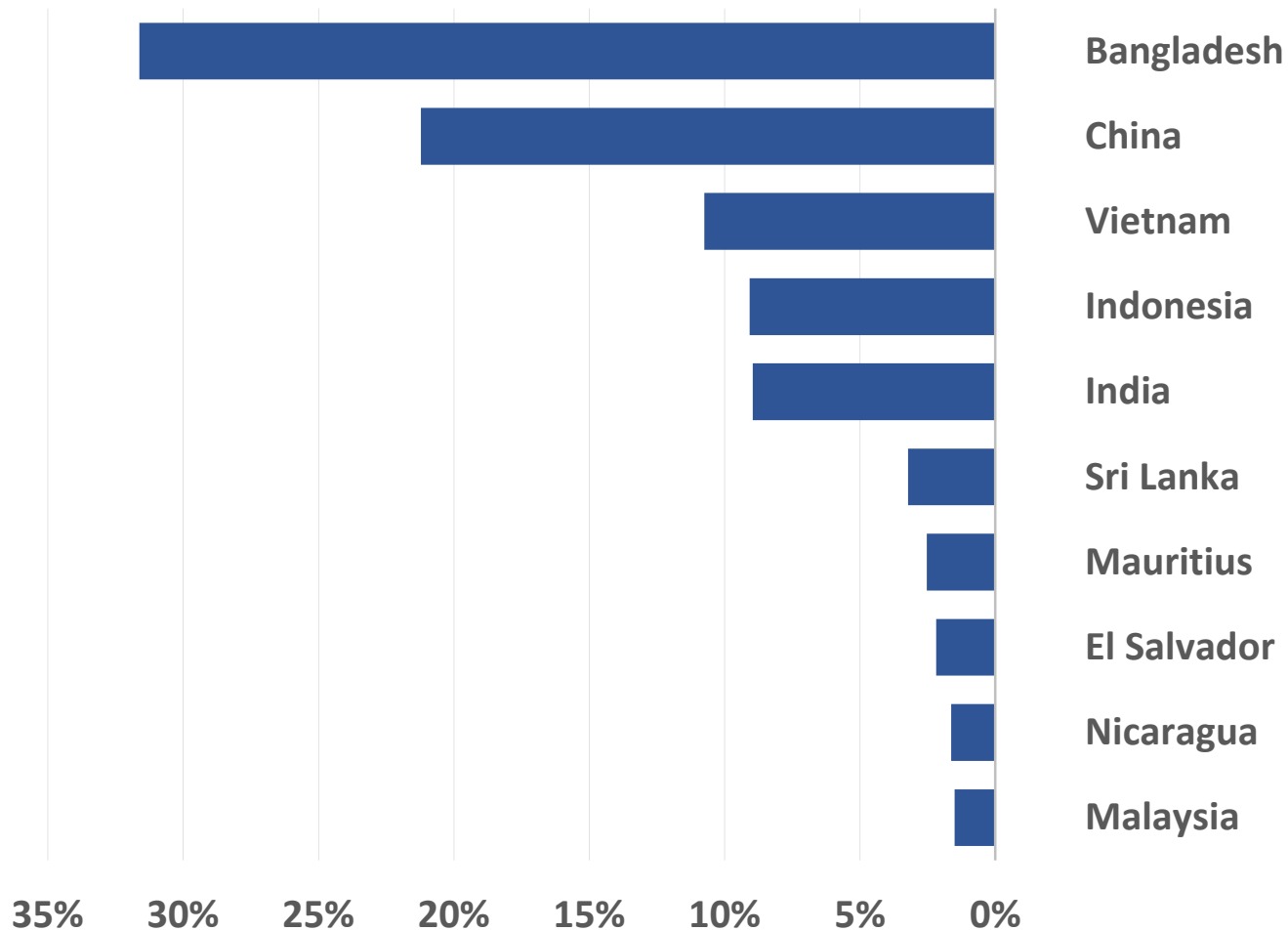


PERCENT CHANGE V. FEB 2016

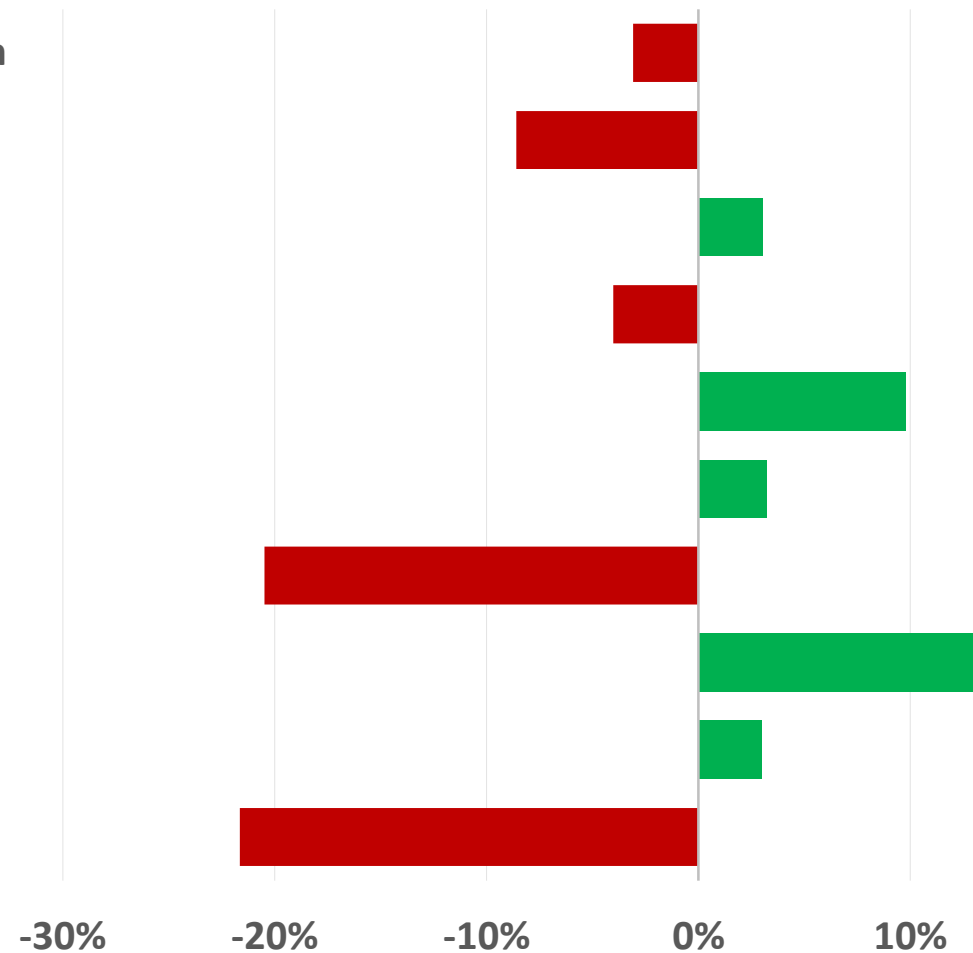


M/B Cotton Shirts, Not Knit

PERCENT SHARE FEB 2017

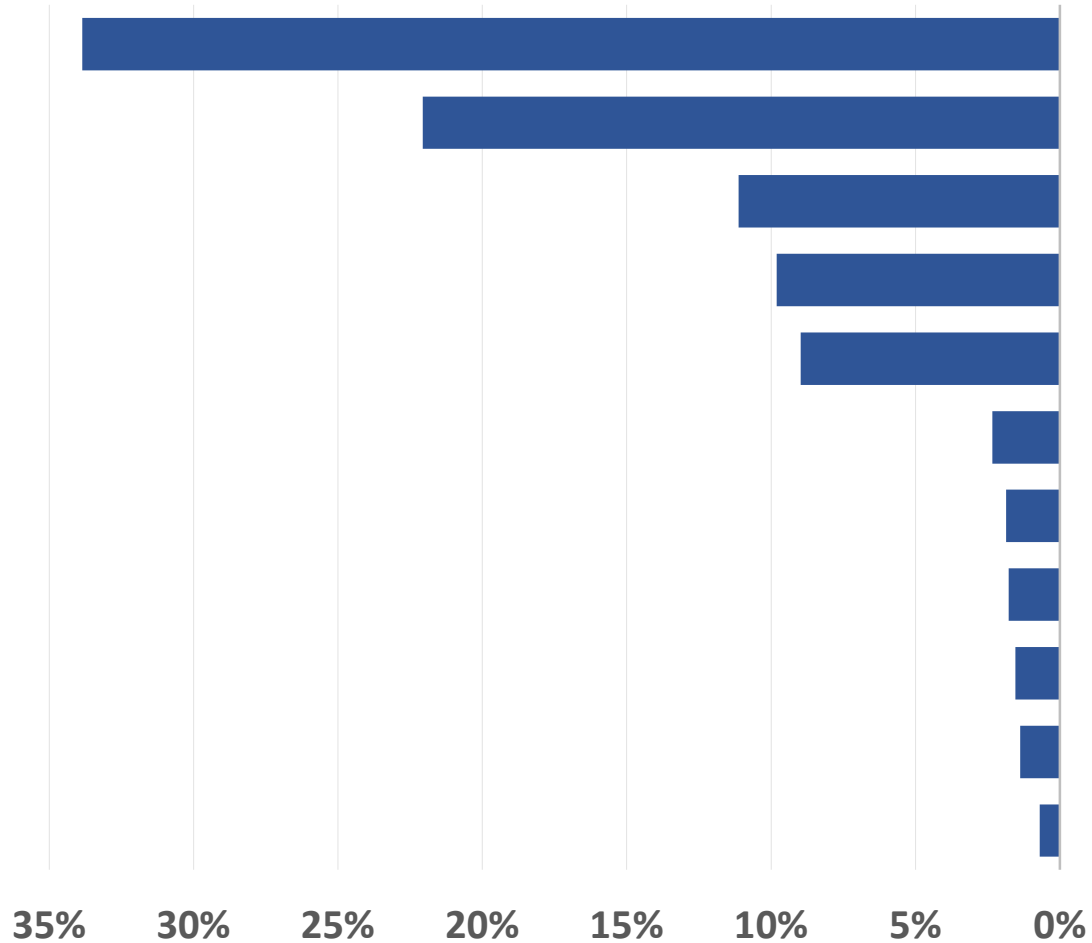


PERCENT CHANGE V. FEB 2016

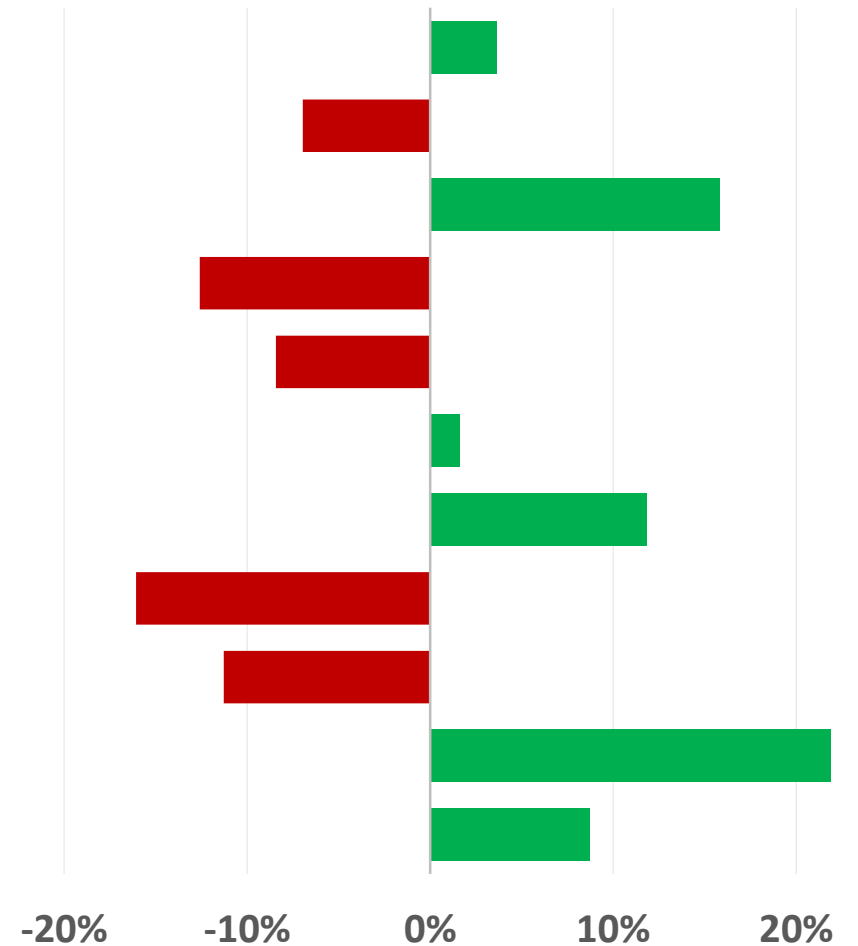


W/G Cotton Shirts, Not Knit

PERCENT SHARE FEB 2017

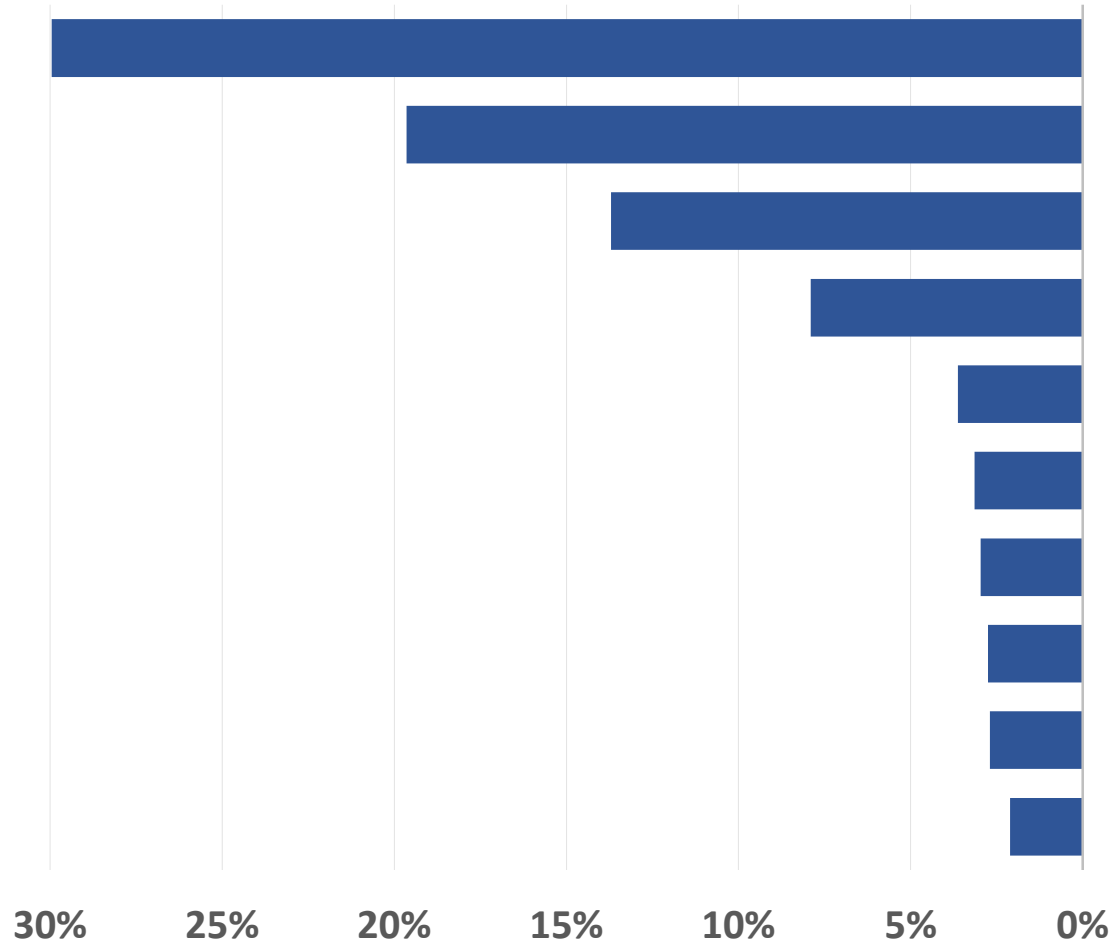


PERCENT CHANGE V. FEB 2016

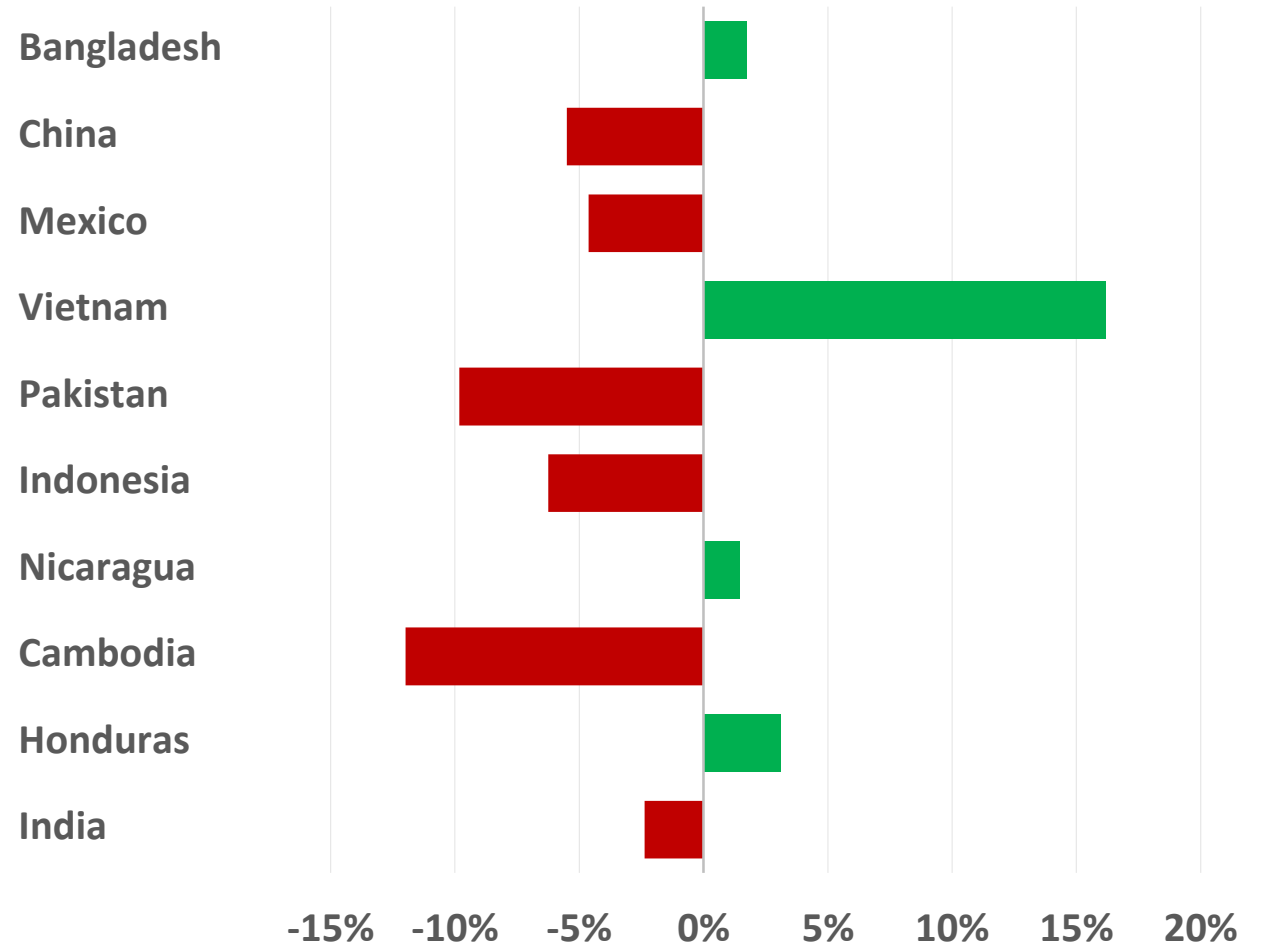


M/B Cotton Trousers/Breeches/Shorts

PERCENT SHARE FEB 2017

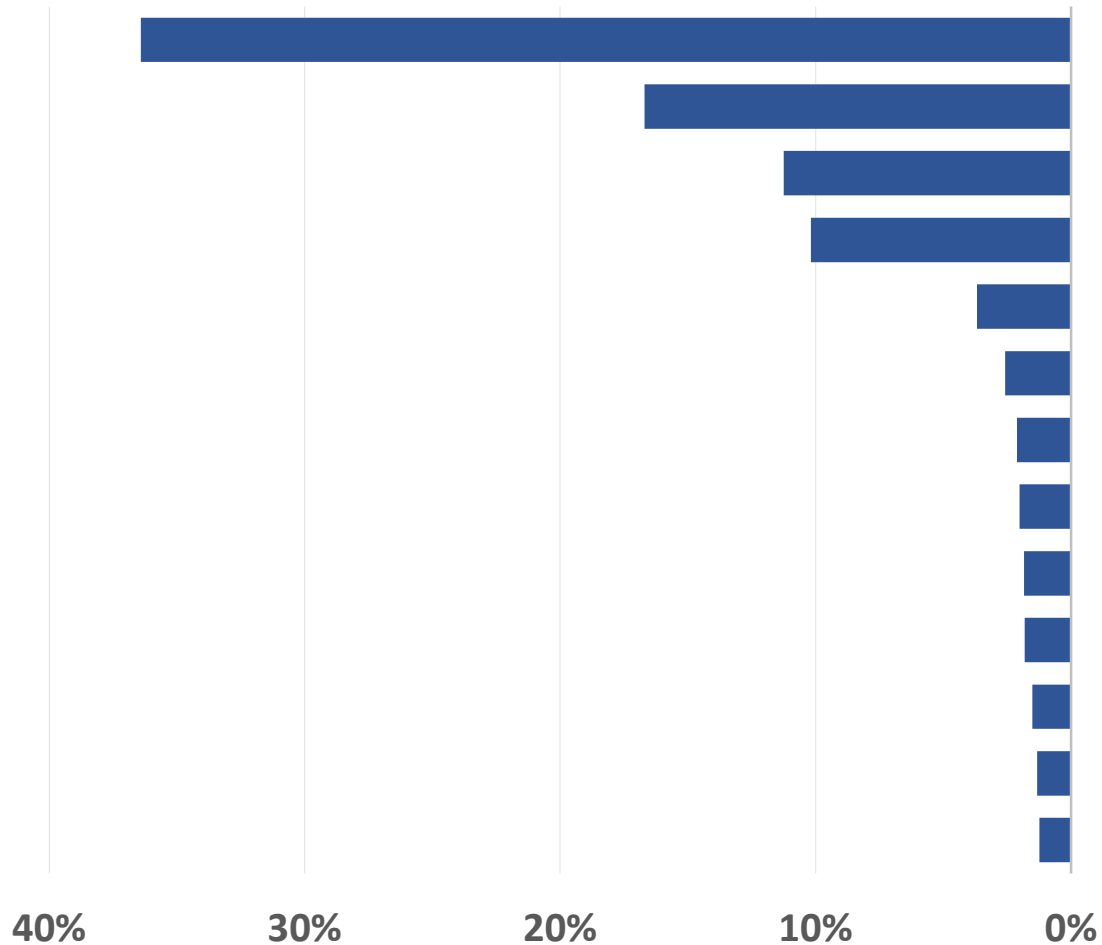


PERCENT CHANGE V. FEB 2016

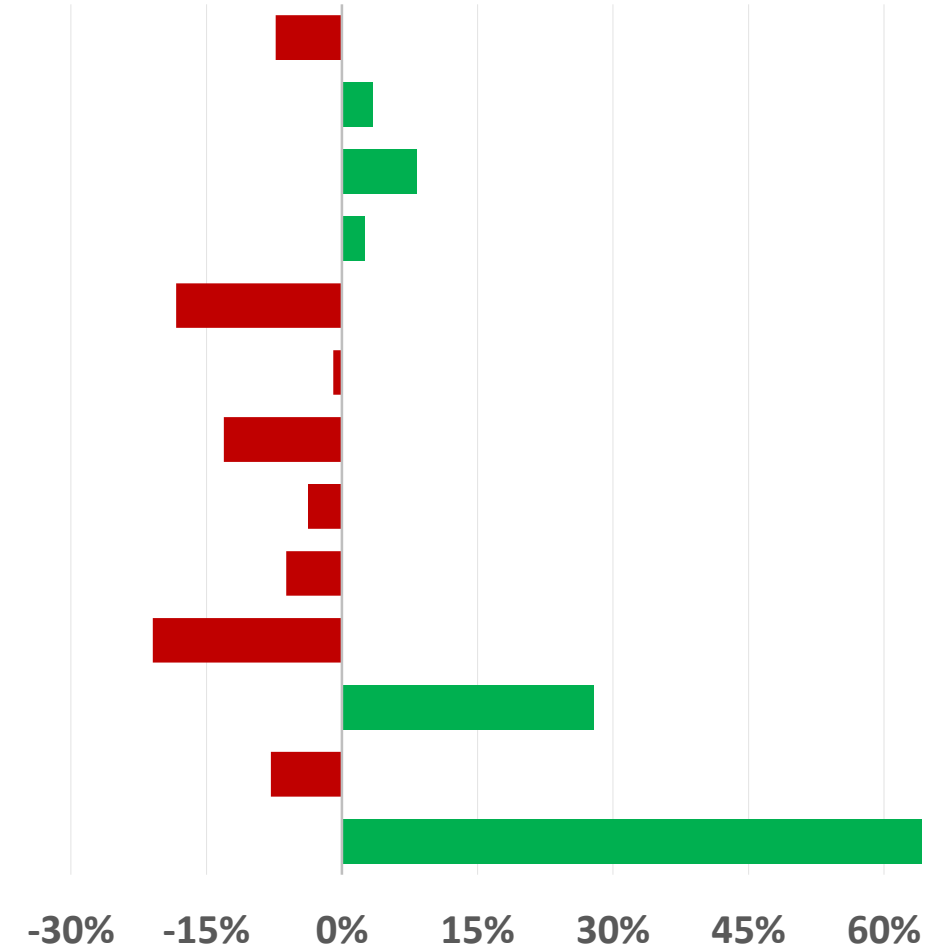


W/G Cotton Trousers/Slacks/Shorts

PERCENT SHARE FEB 2017



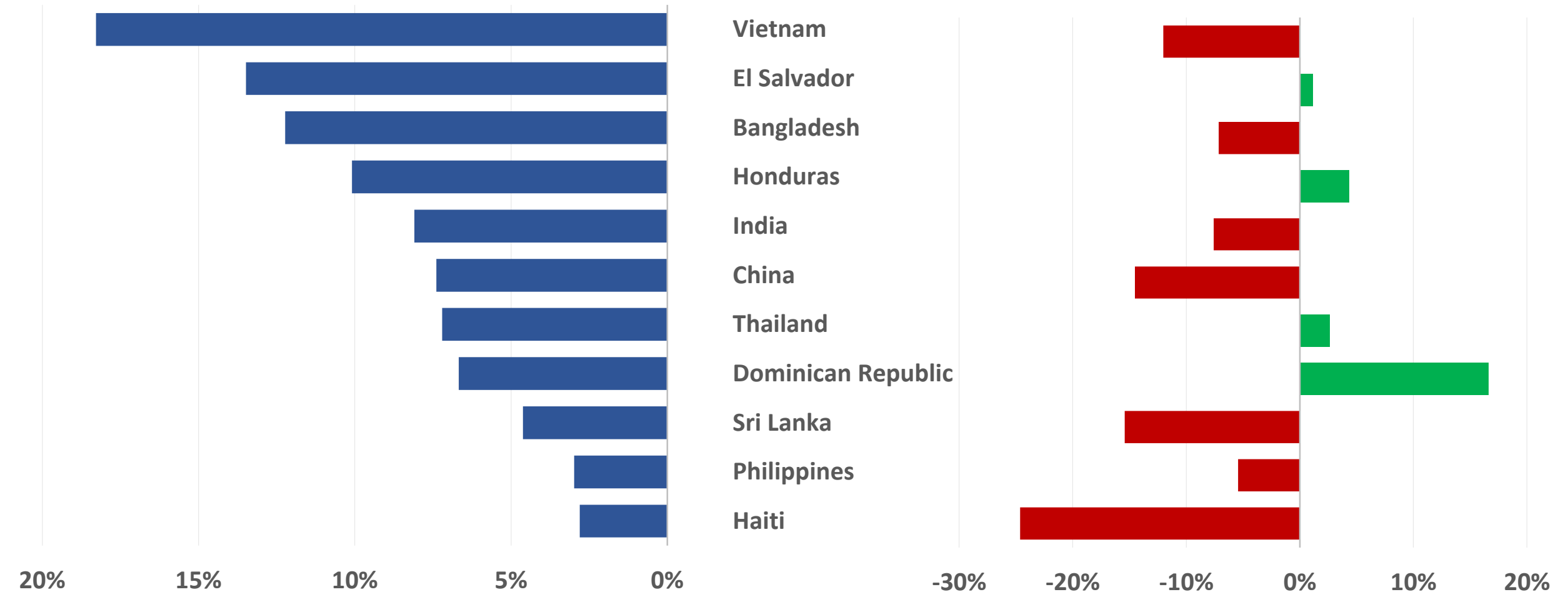
PERCENT CHANGE V. FEB 2016



Cotton Underwear

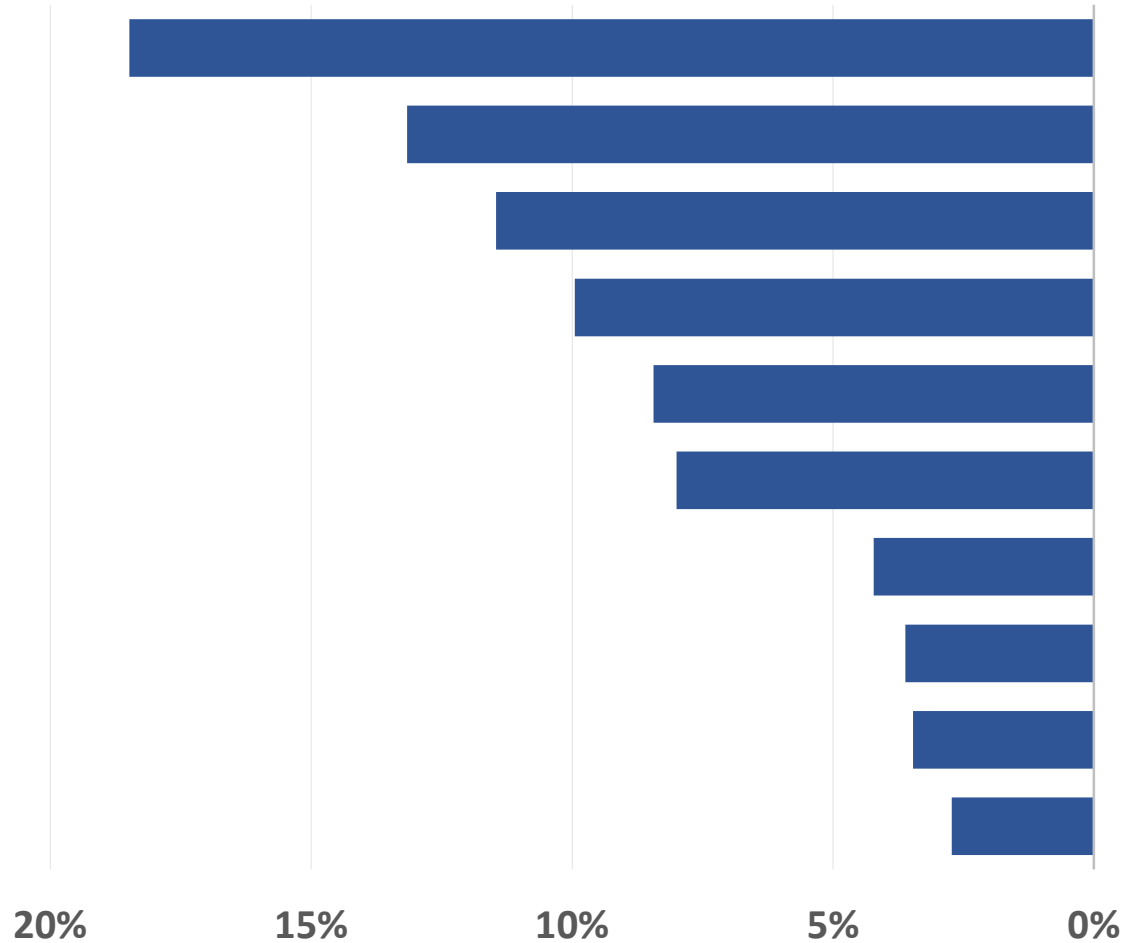
PERCENT SHARE FEB 2017

PERCENT CHANGE V. FEB 2016

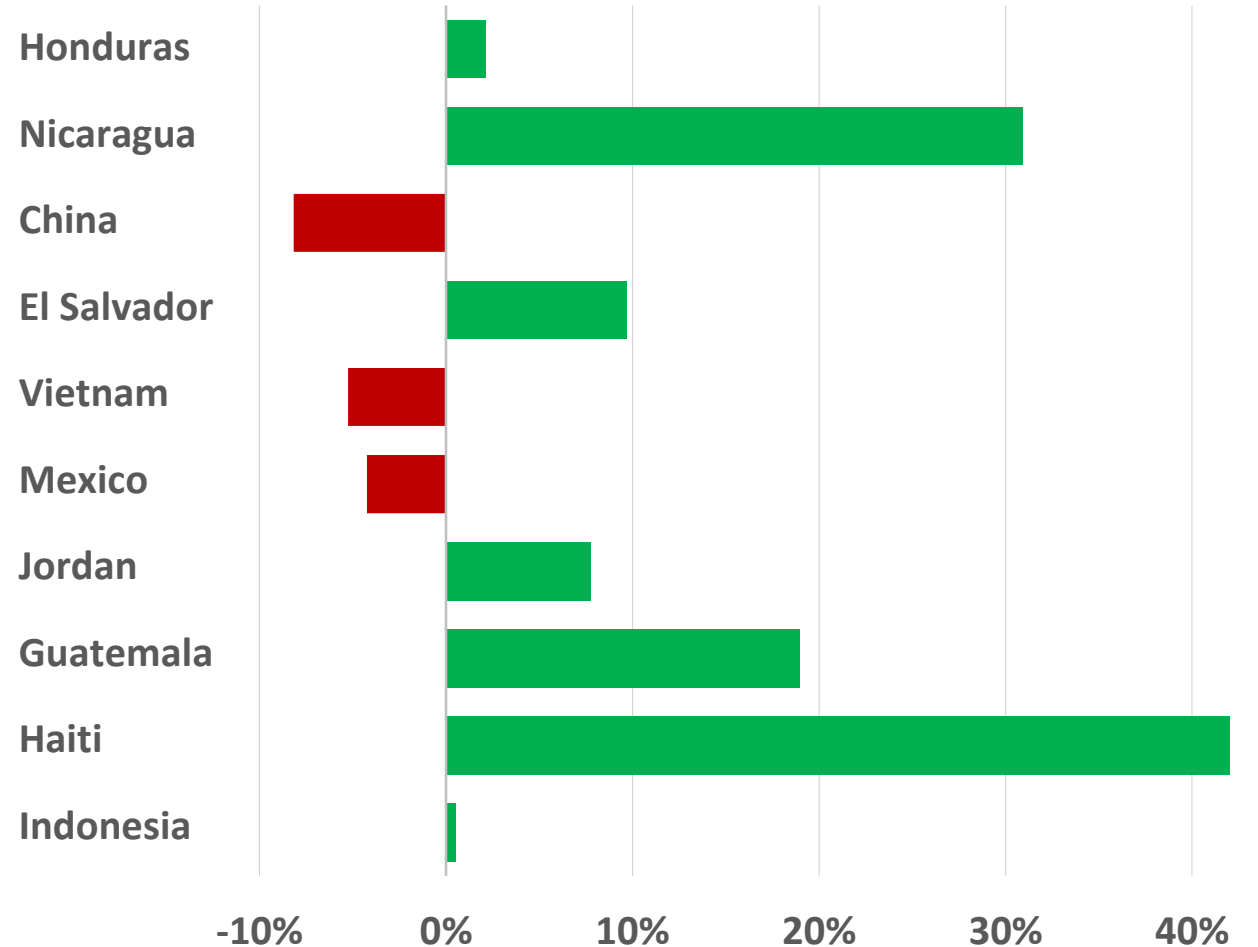


M/B MMF Knit Shirts

PERCENT SHARE FEB 2017



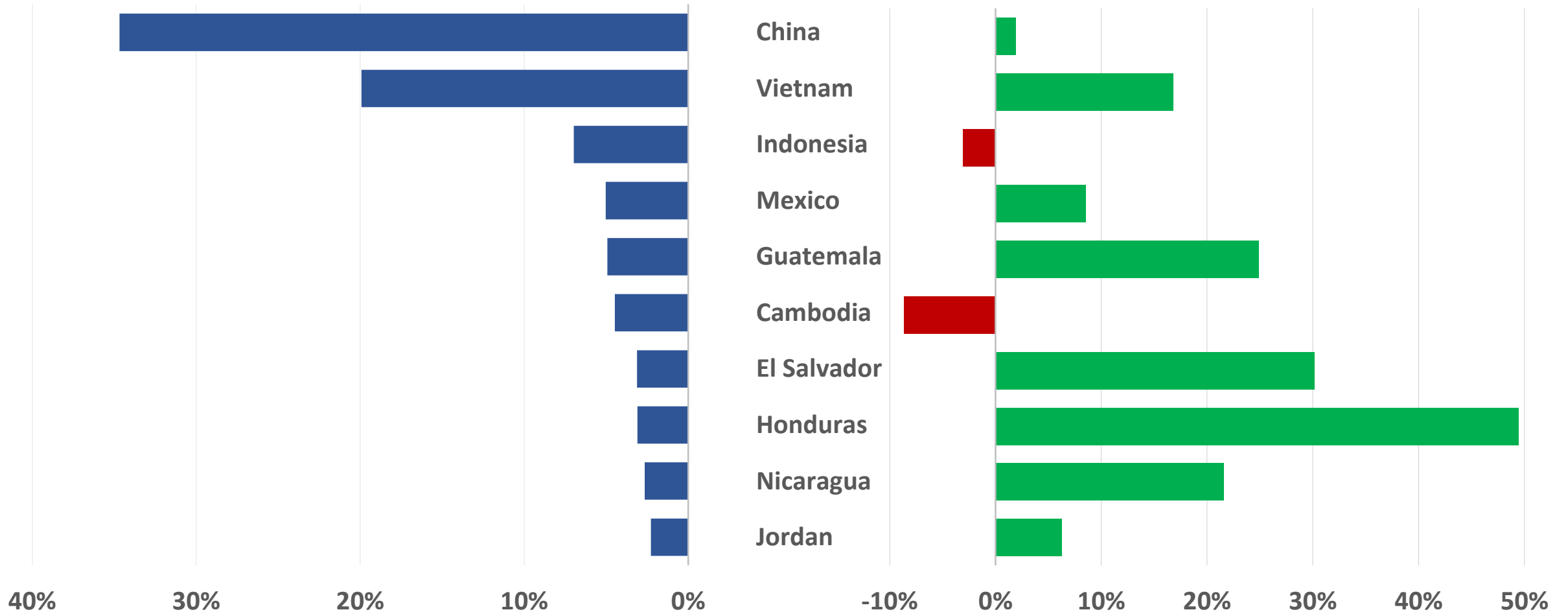
PERCENT CHANGE V. FEB 2016



W/G MMF Knit Shirts/Blouses

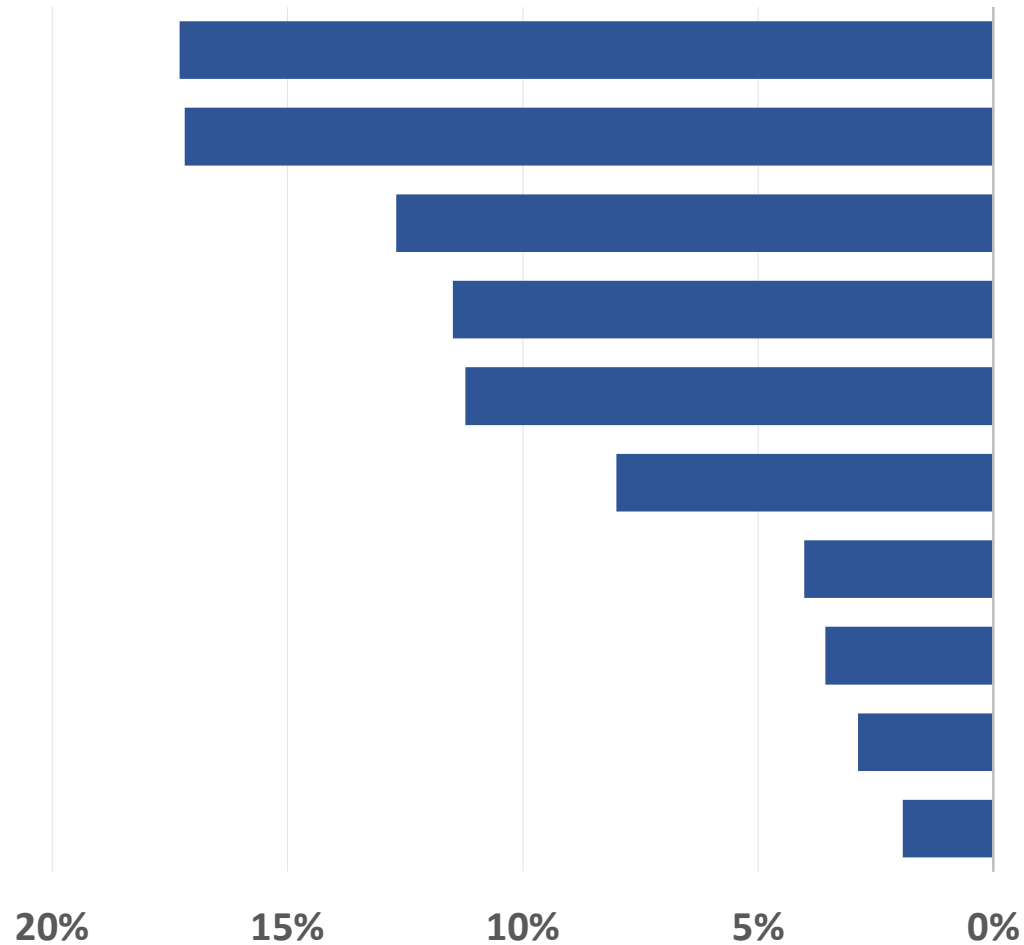
PERCENT SHARE FEB 2017

PERCENT CHANGE V. FEB 2016

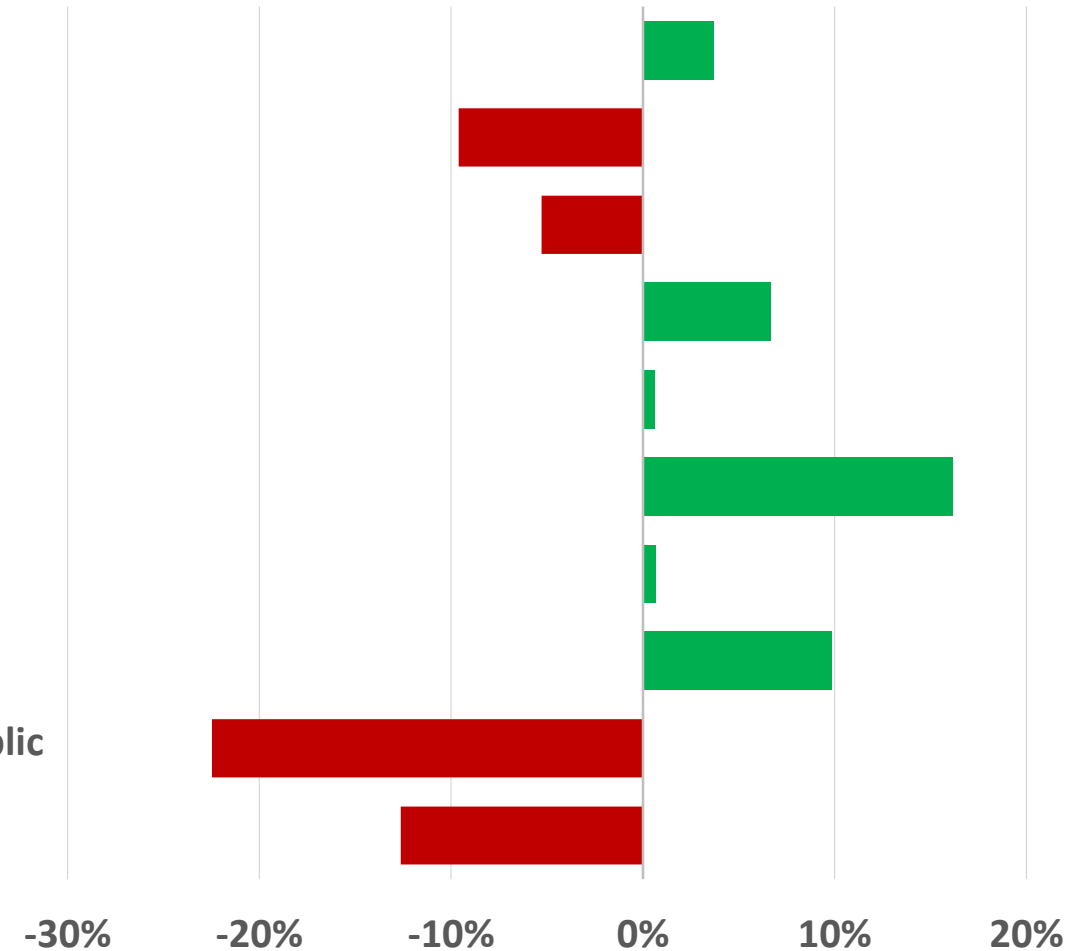


M/B Not-Knit MMF Shirts

PERCENT SHARE FEB 2017

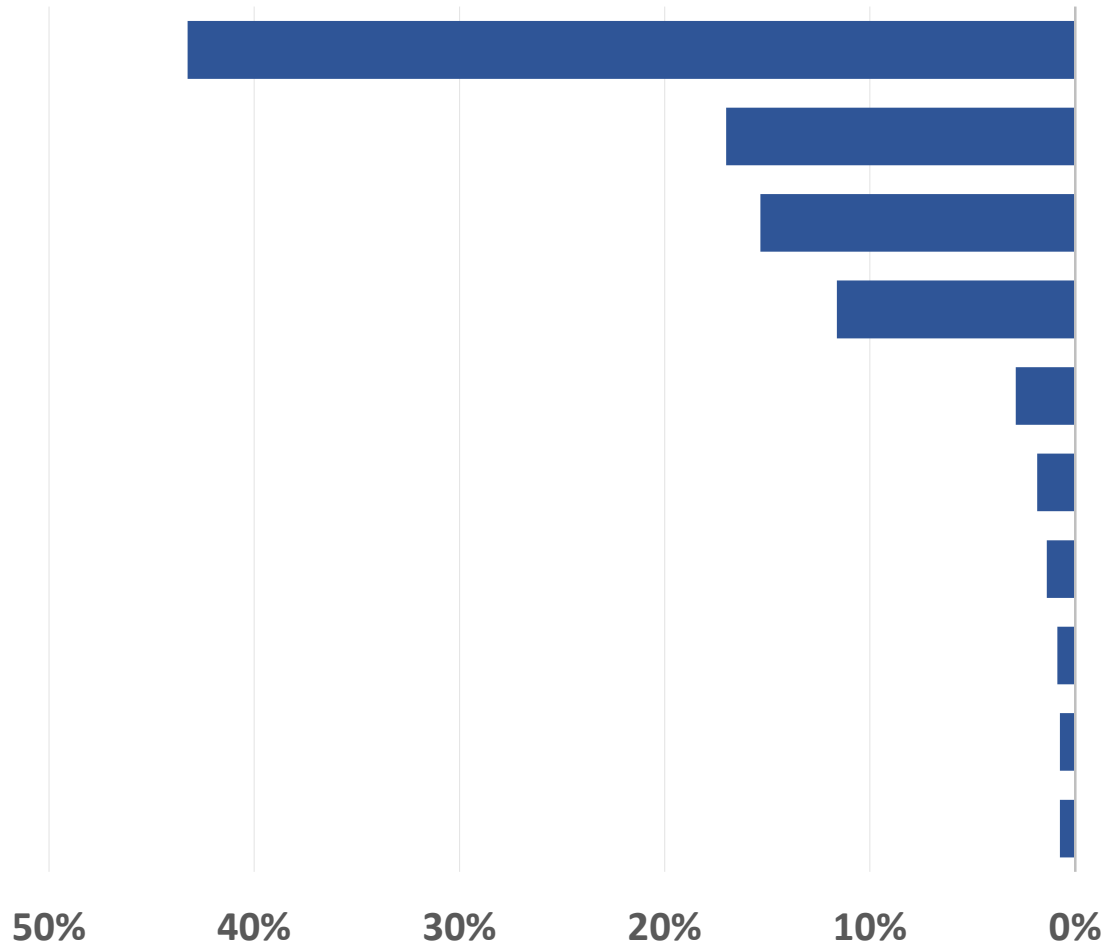


PERCENT CHANGE V. FEB 2016

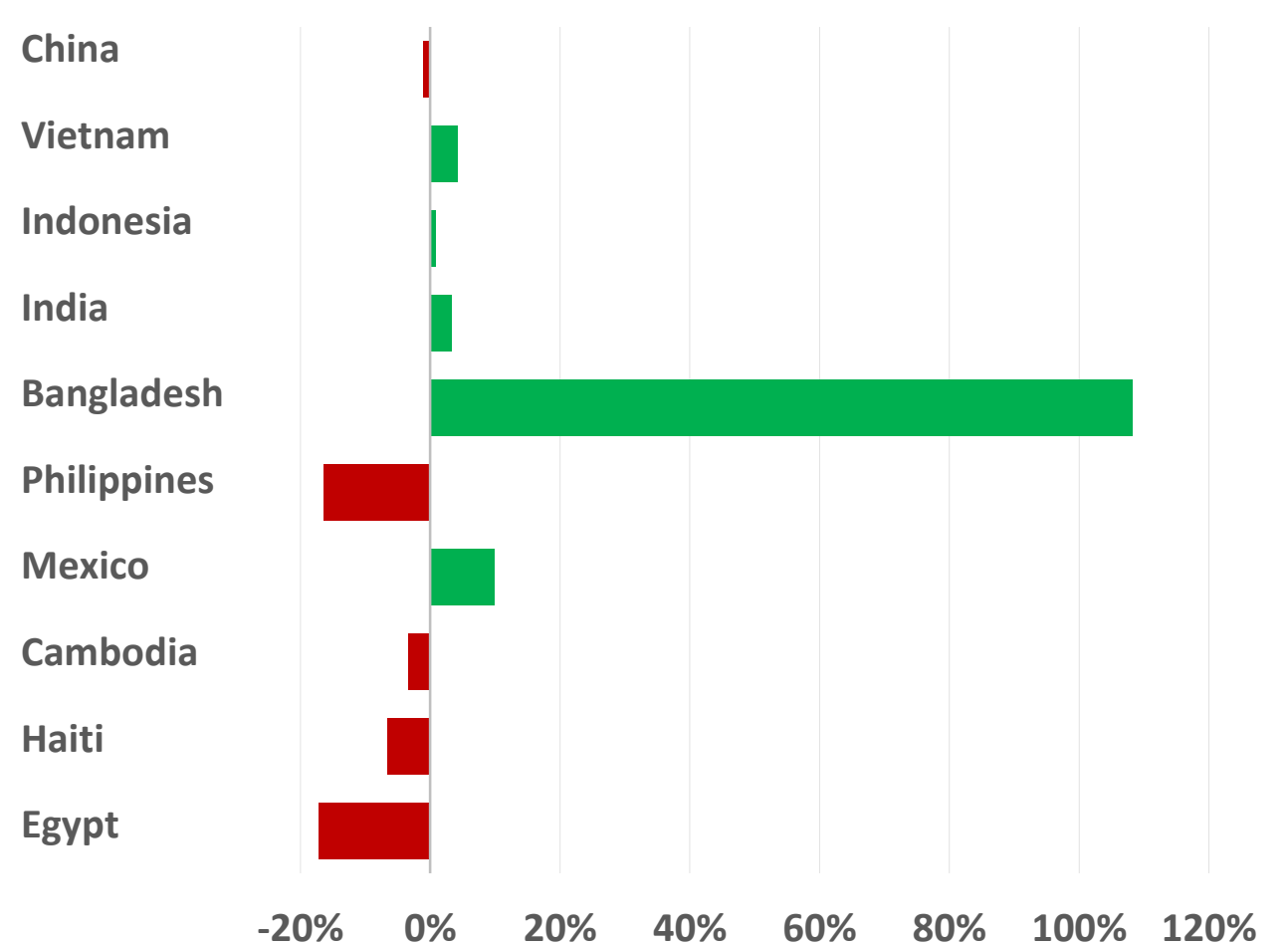


W/G Not-Knit MMF Shirts/Blouses

PERCENT SHARE FEB 2017

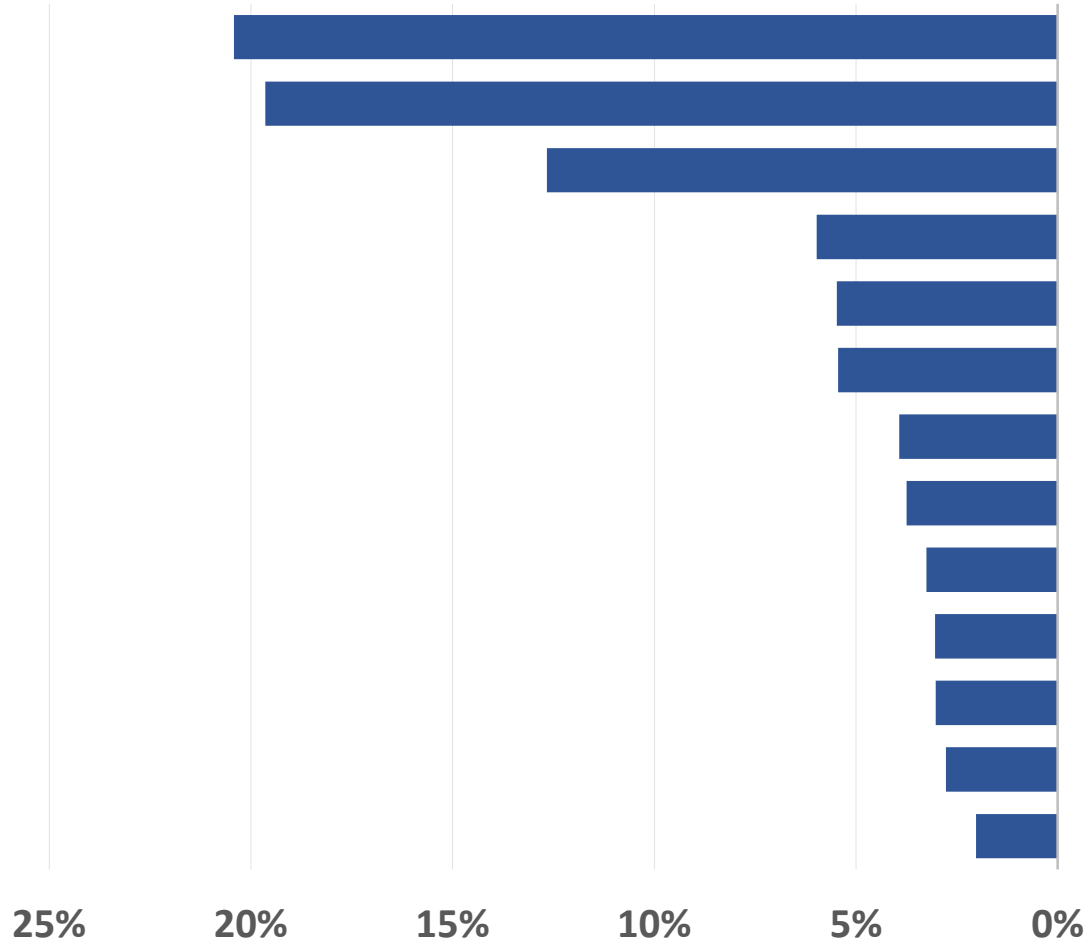


PERCENT CHANGE V. FEB 2016

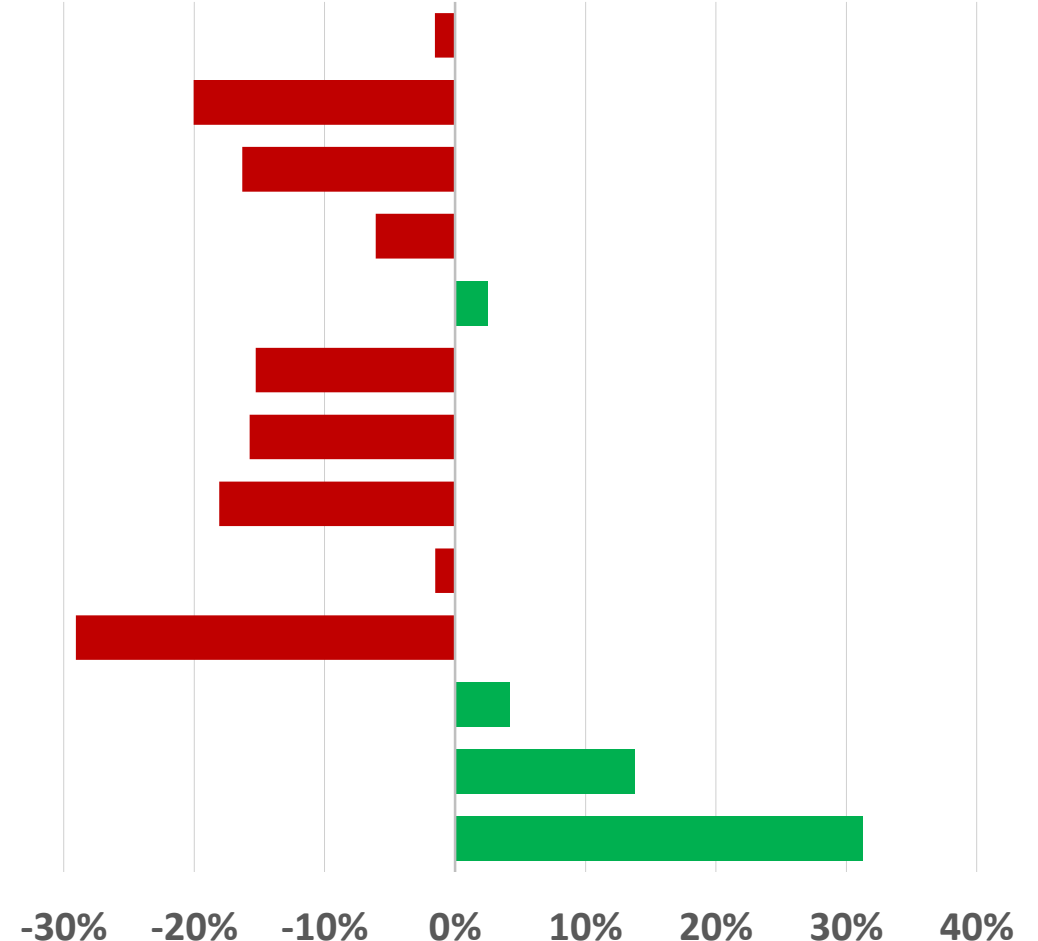


M/B MMF Trousers/Breeches/Shorts

PERCENT SHARE FEB 2017

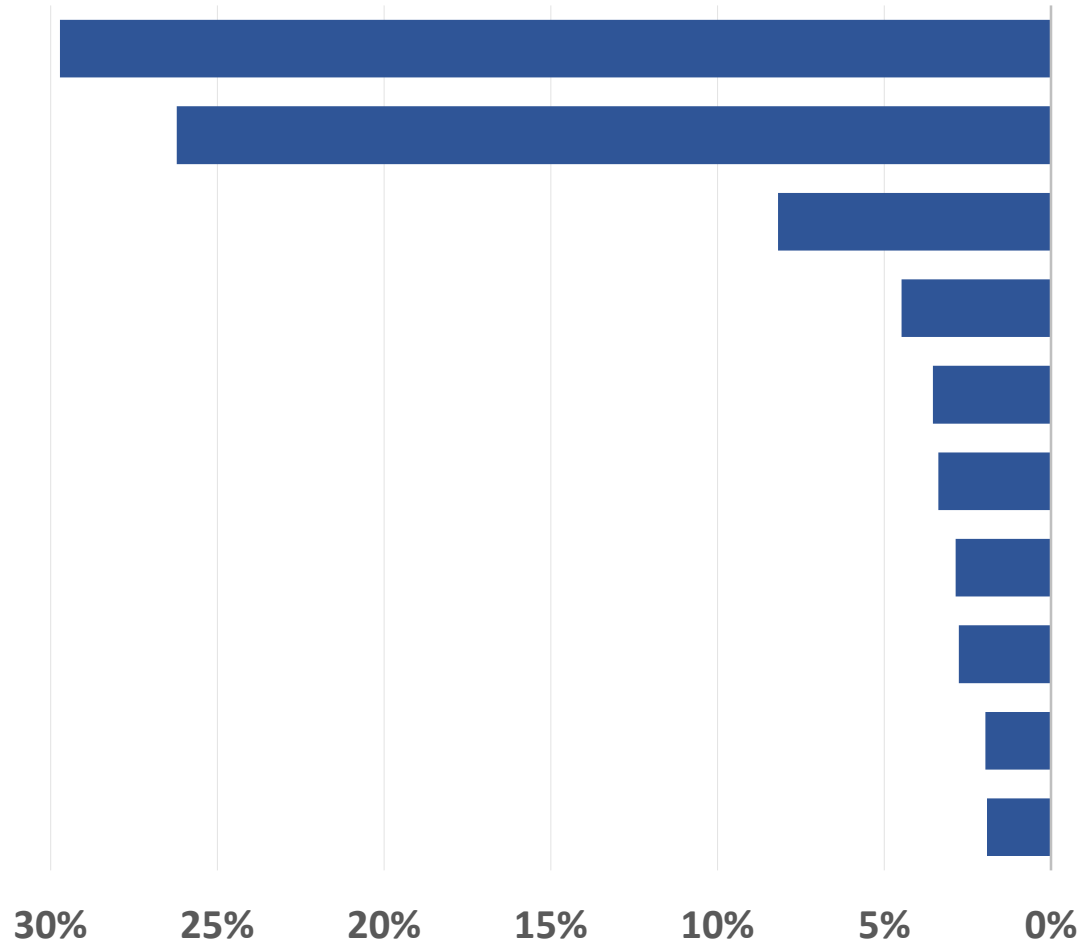


PERCENT CHANGE V. FEB 2016

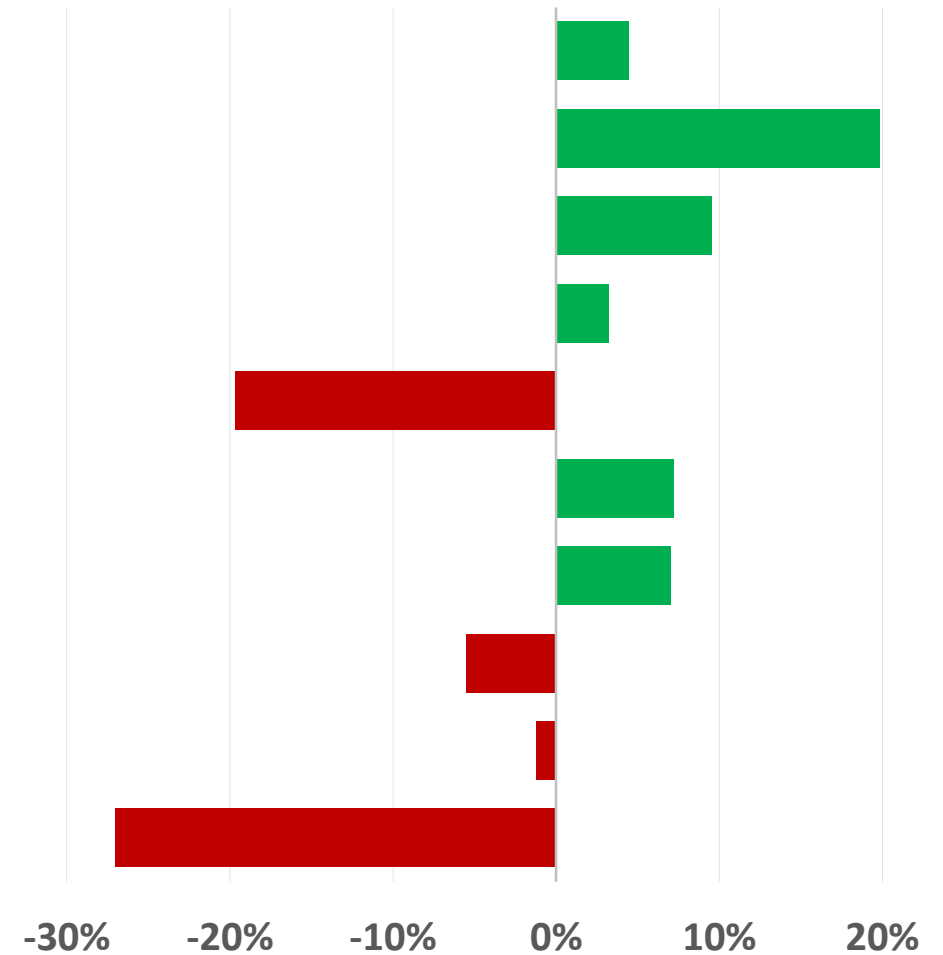


W/G MMF Slacks/Breeches/Shorts

PERCENT SHARE FEB 2017



PERCENT CHANGE V. FEB 2016



Thank You!

- Sources:
 - The NPD Group, www.NPD.com
 - OTEXA, Office of Textiles and Apparel, <http://otexa.trade.gov>