

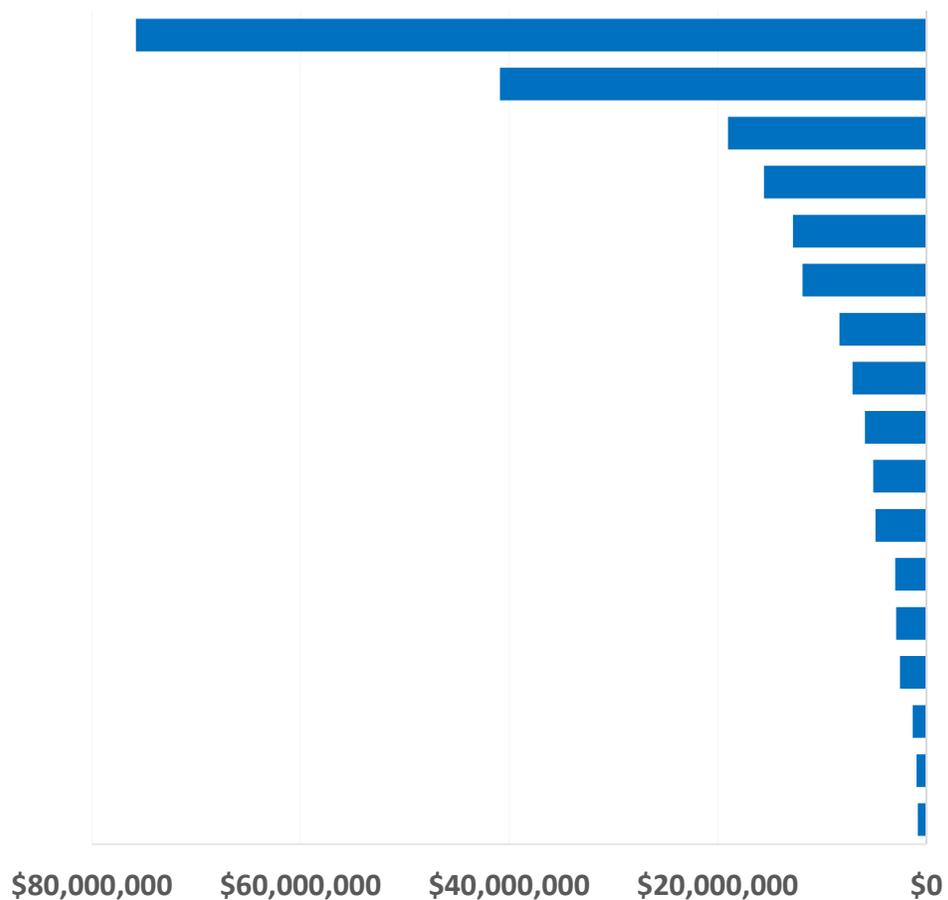
State of the Industry

August 23, 2017

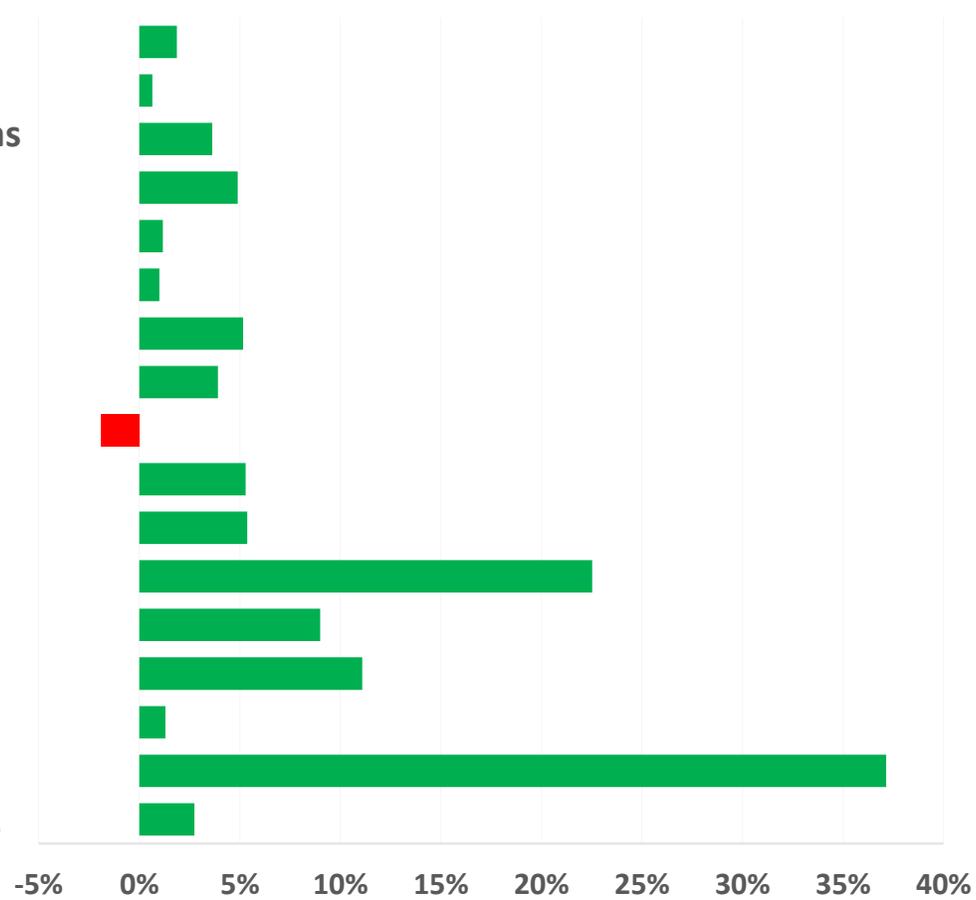
Seattle, WA

Total apparel +2.7% in 2016: most categories grew

DOLLAR VOLUME (000)



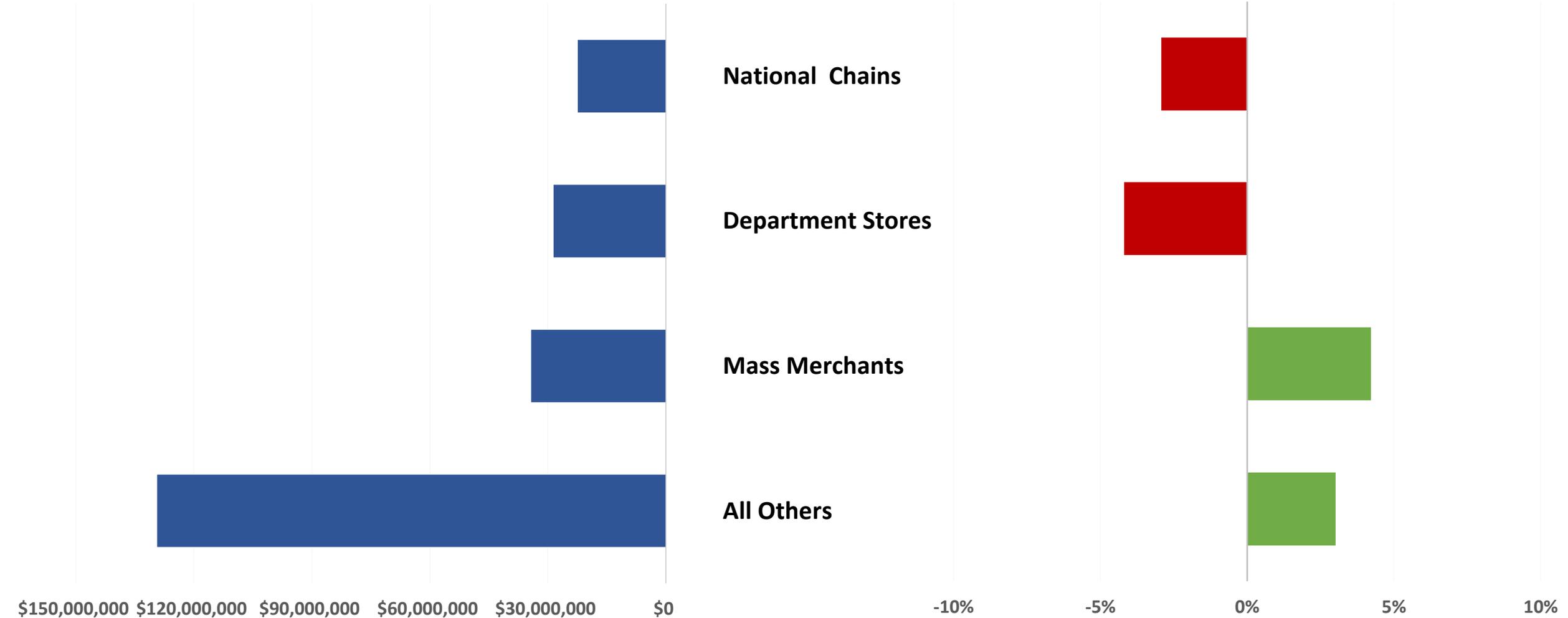
DOLLAR VOLUME CHANGE (2015 v. 2016)



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

DOLLAR VOLUME (000)

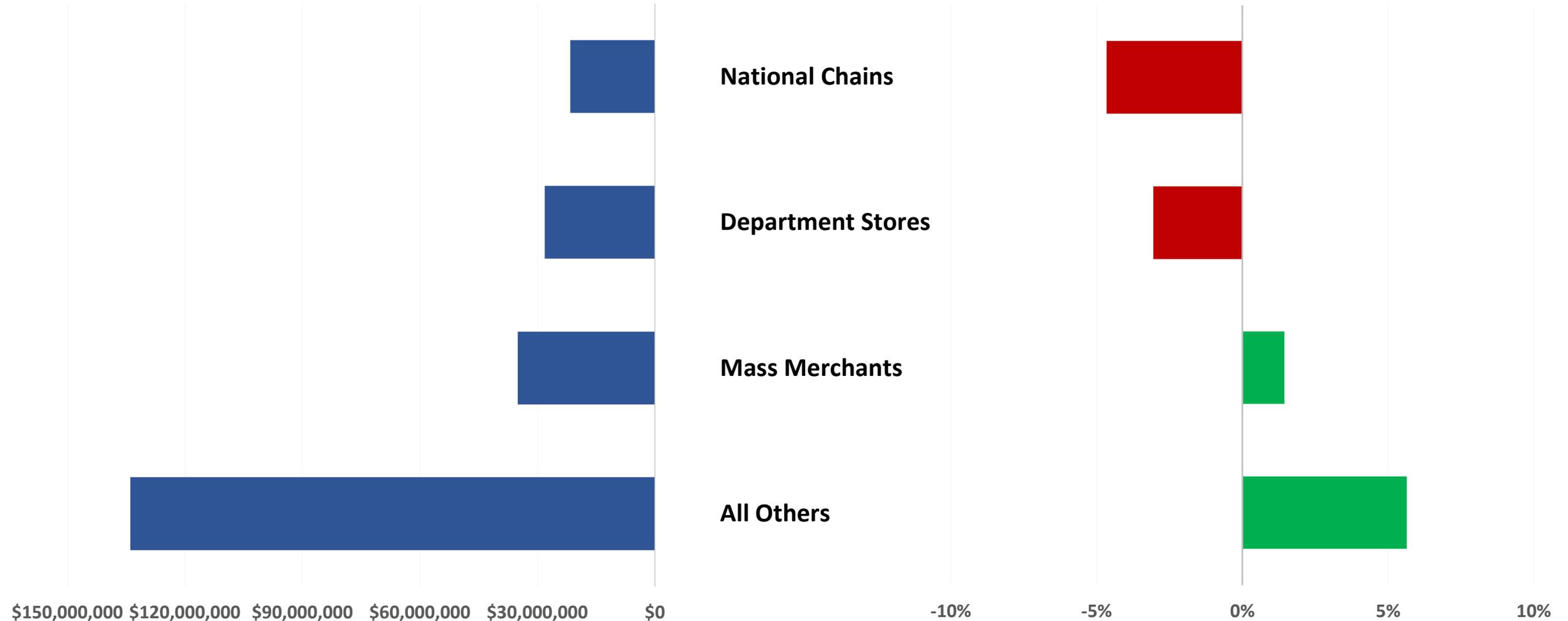
DOLLAR VOLUME CHANGE (2014 v. 2015)



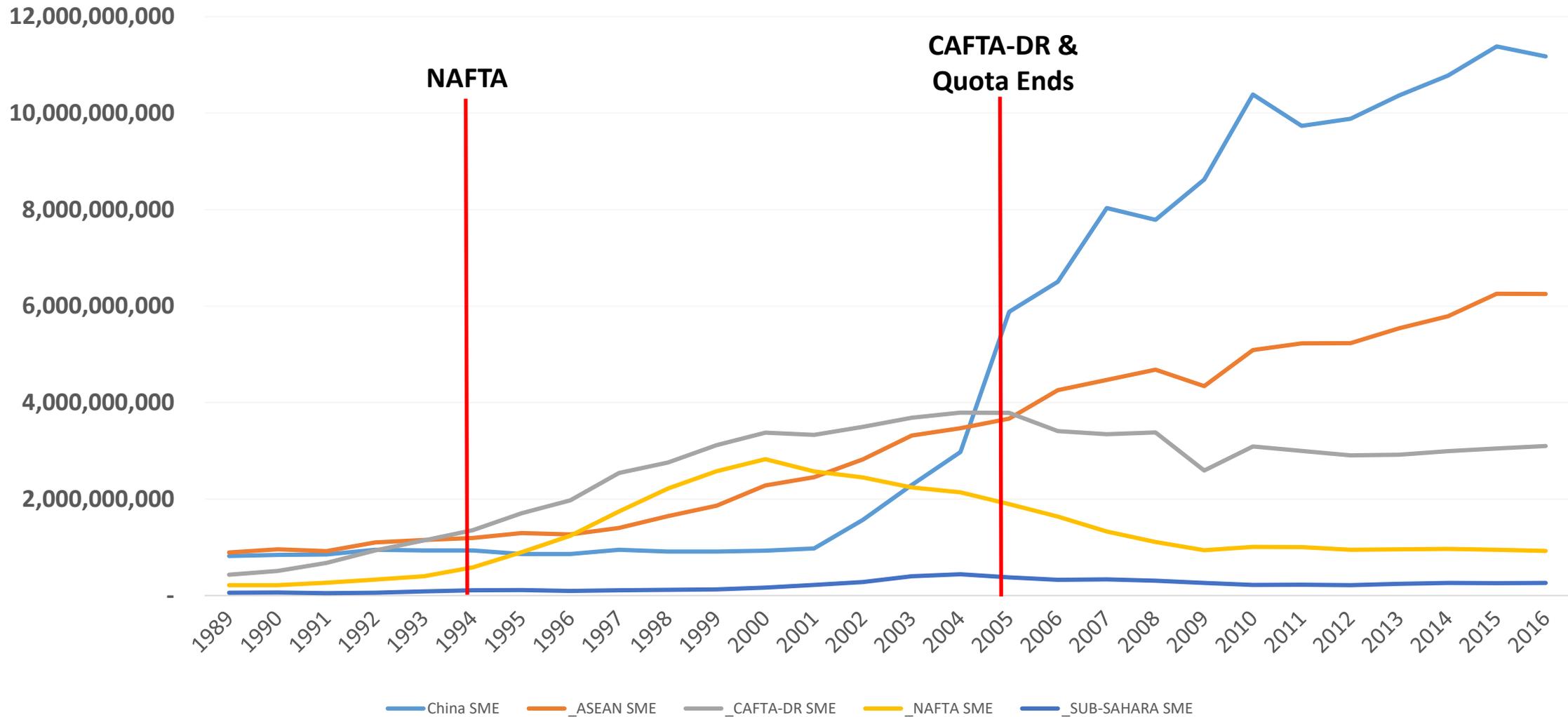
Channel Share is Shifting to Mass, Off Price, Online

DOLLAR VOLUME (000)

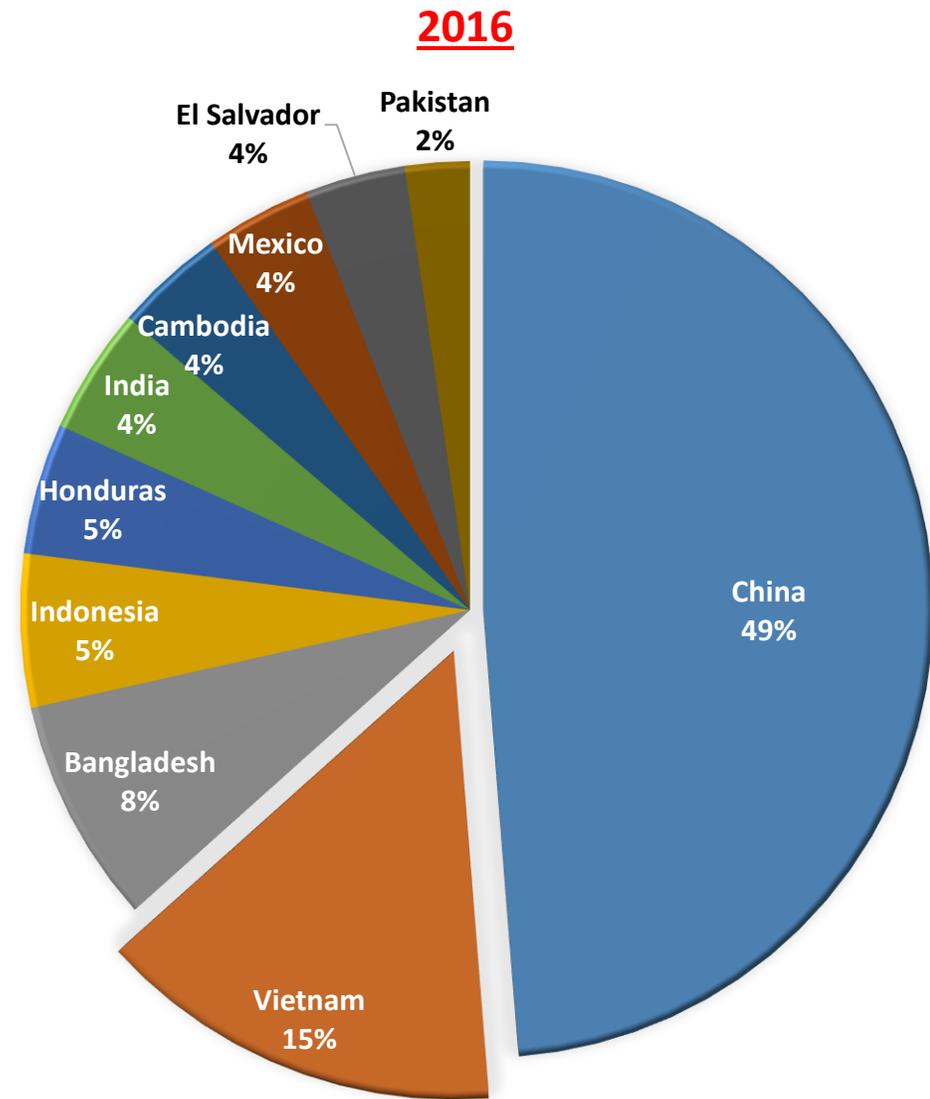
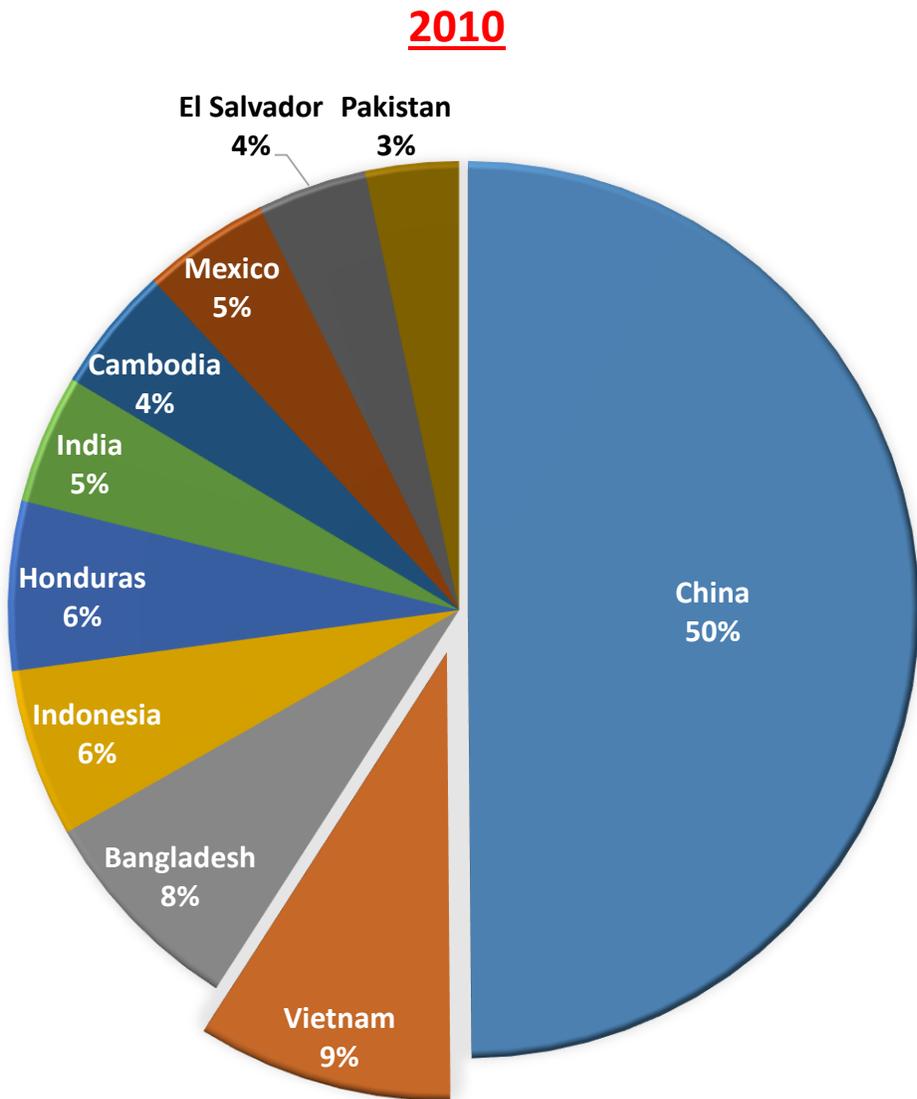
DOLLAR VOLUME CHANGE (2015 v. 2016)



U.S. Apparel Imports (SME)

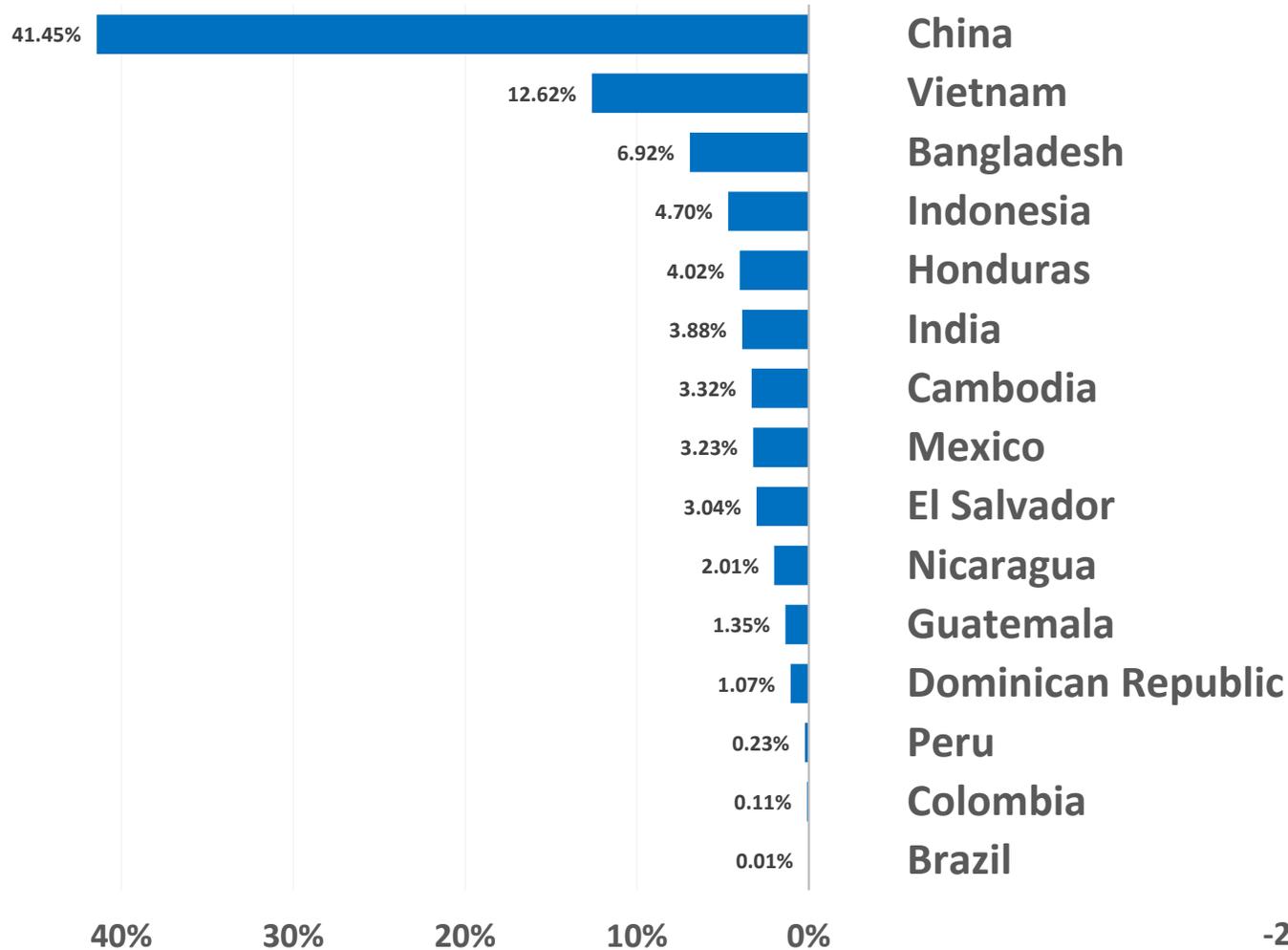


U.S. Apparel Imports (SME) Top 10 Suppliers

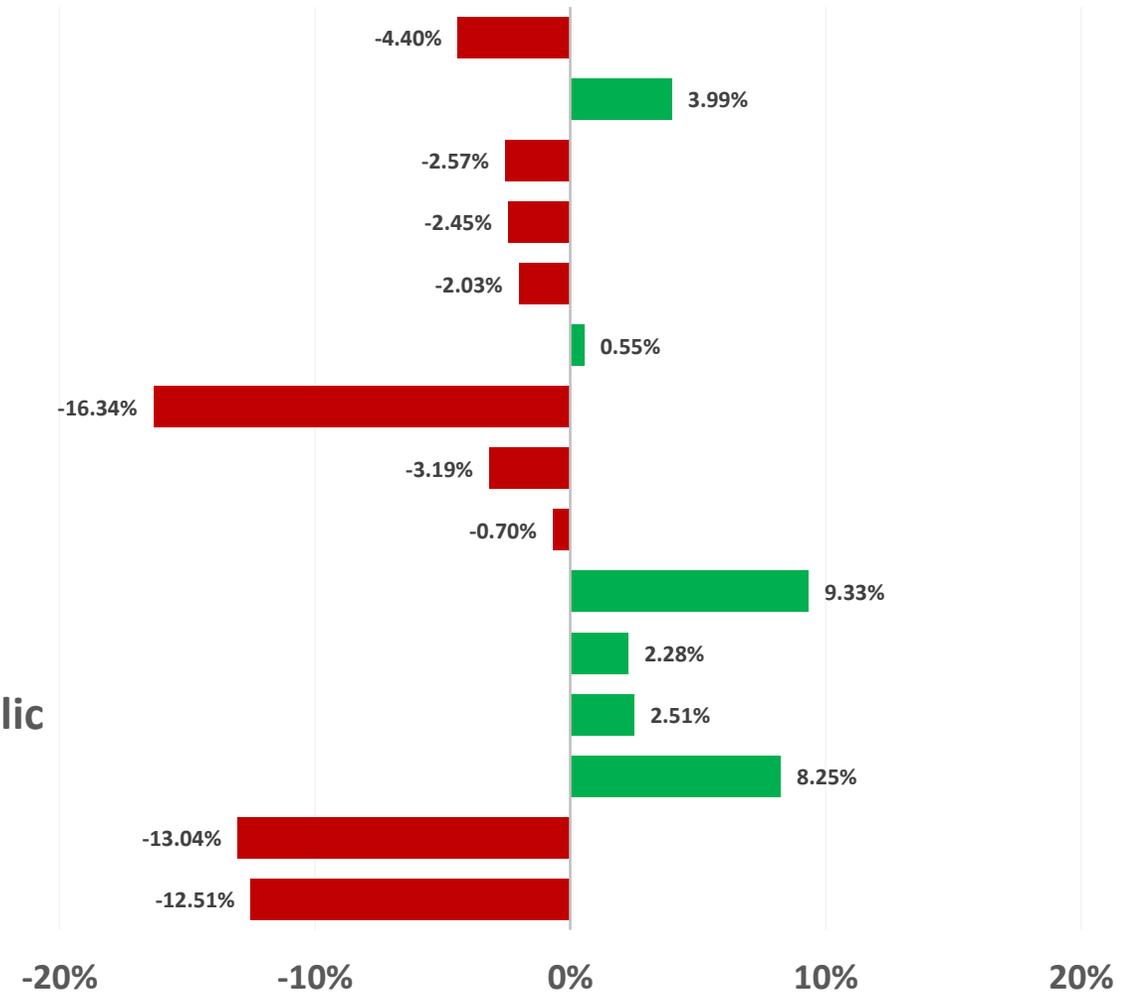


Total Apparel Imports (SME)

PERCENT SHARE YE FEB 2017



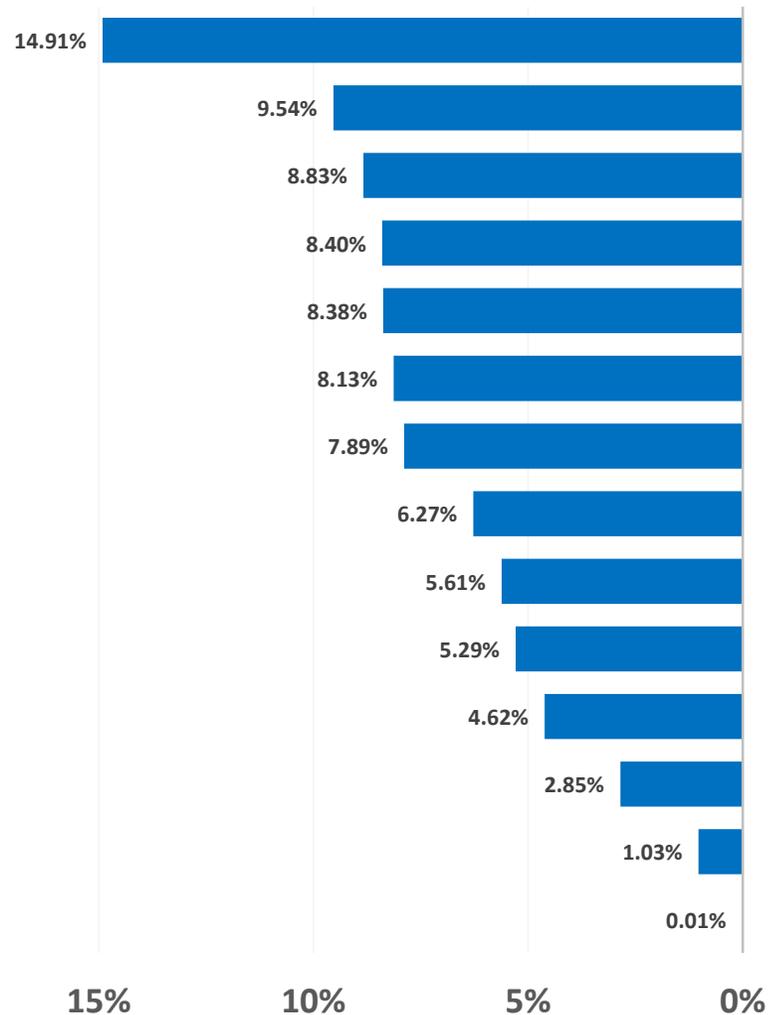
PERCENT CHANGE V. YE FEB 2016



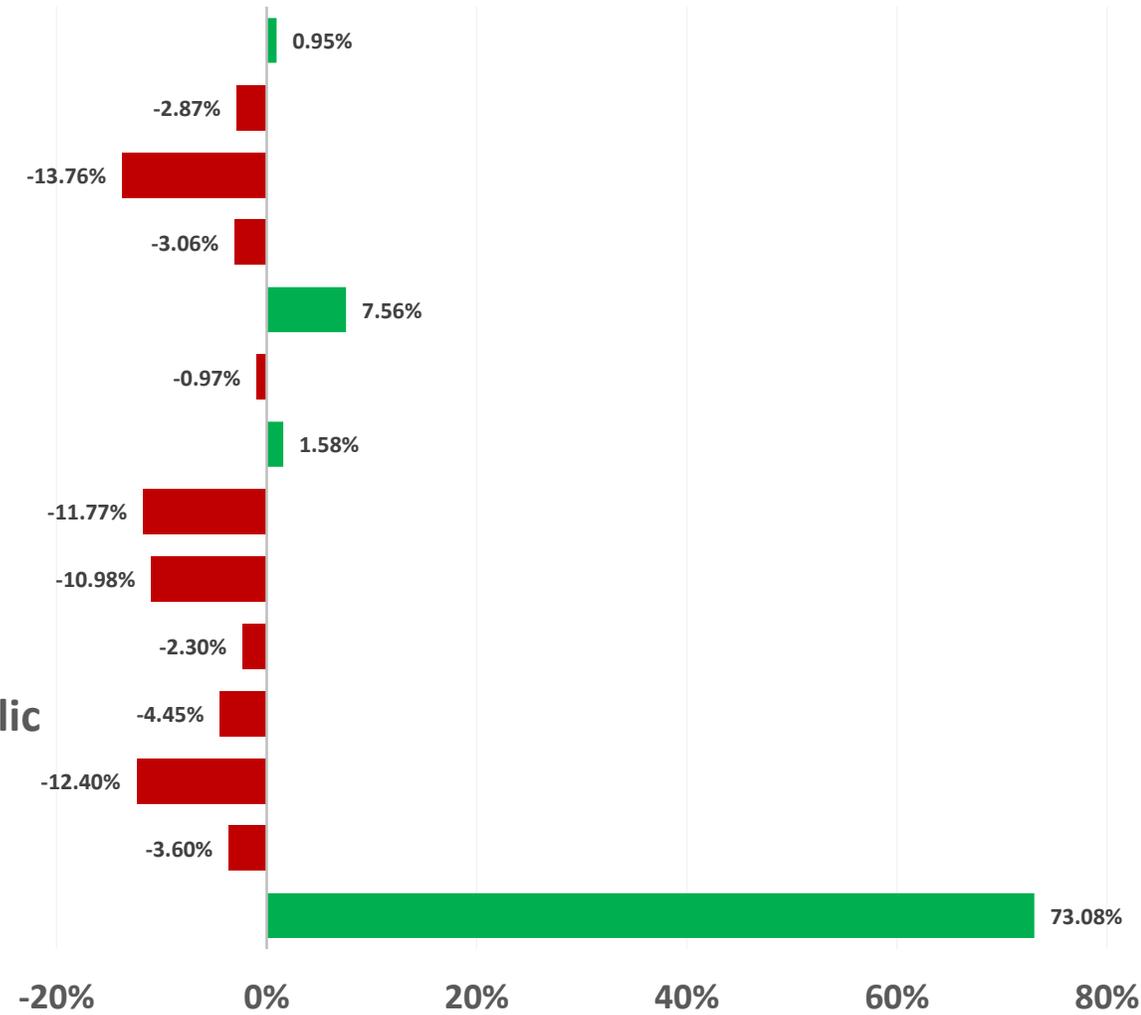
M/B Knit Shirts, Cotton

PERCENT SHARE YE FEB 2017

PERCENT CHANGE V. YE FEB 2016

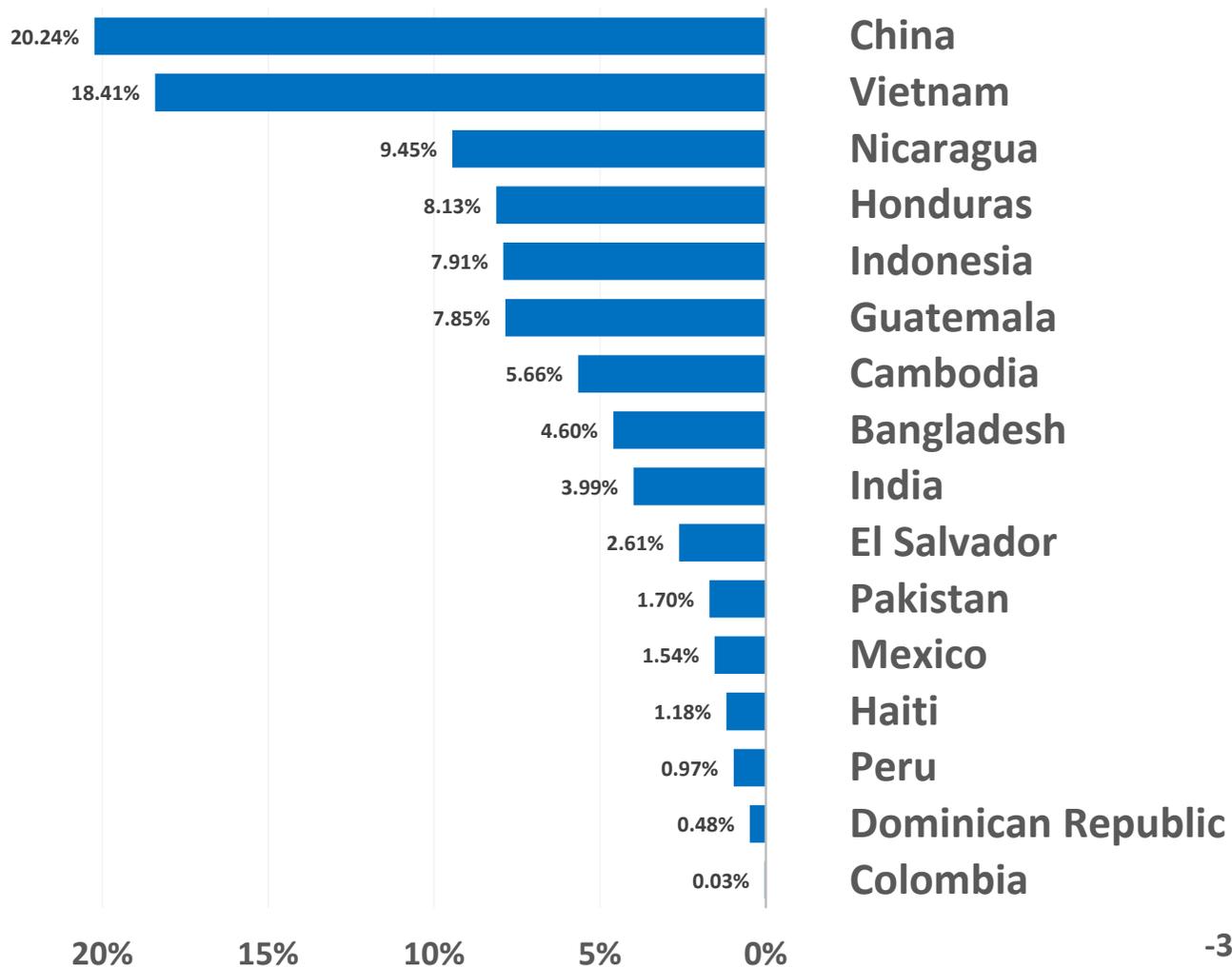


Honduras
 China
 Haiti
 Nicaragua
 El Salvador
 Vietnam
 India
 Mexico
 Bangladesh
 Pakistan
 Dominican Republic
 Guatemala
 Peru
 Colombia

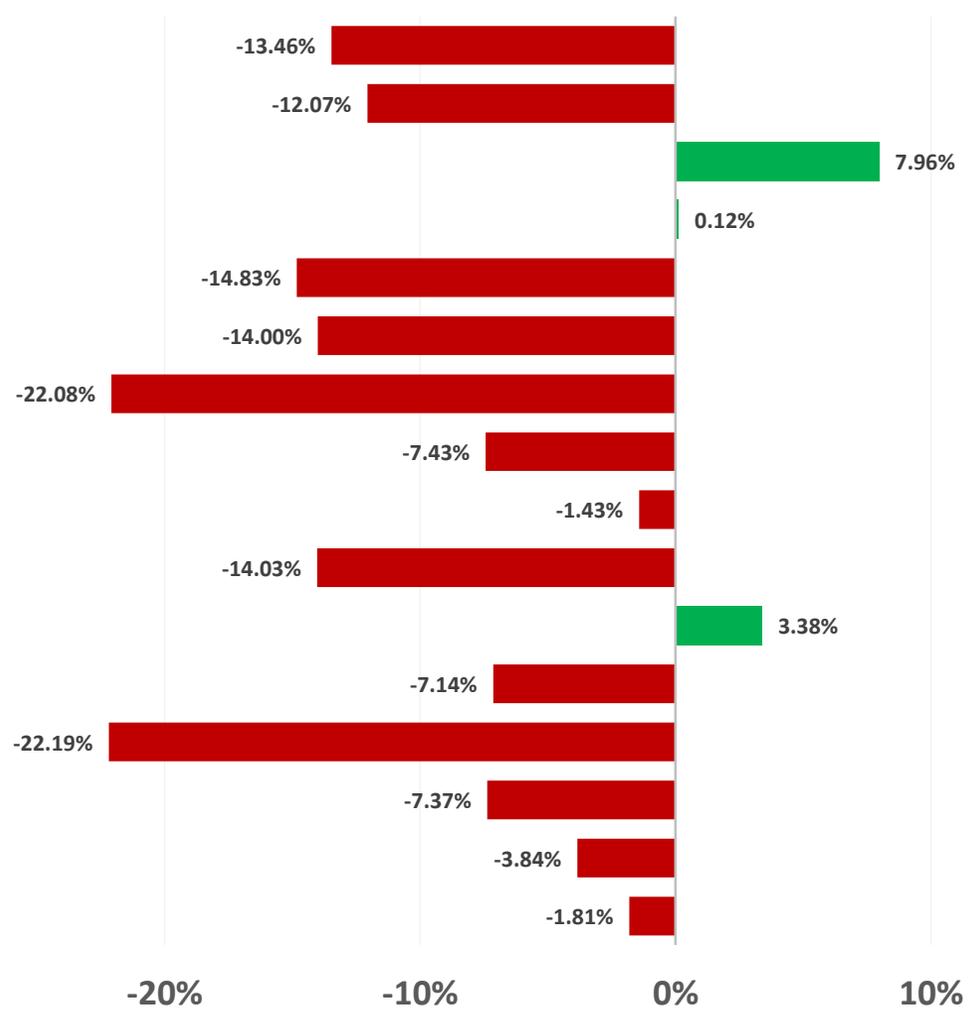


W/G Knit Shirts, Cotton

PERCENT SHARE YE FEB 2017



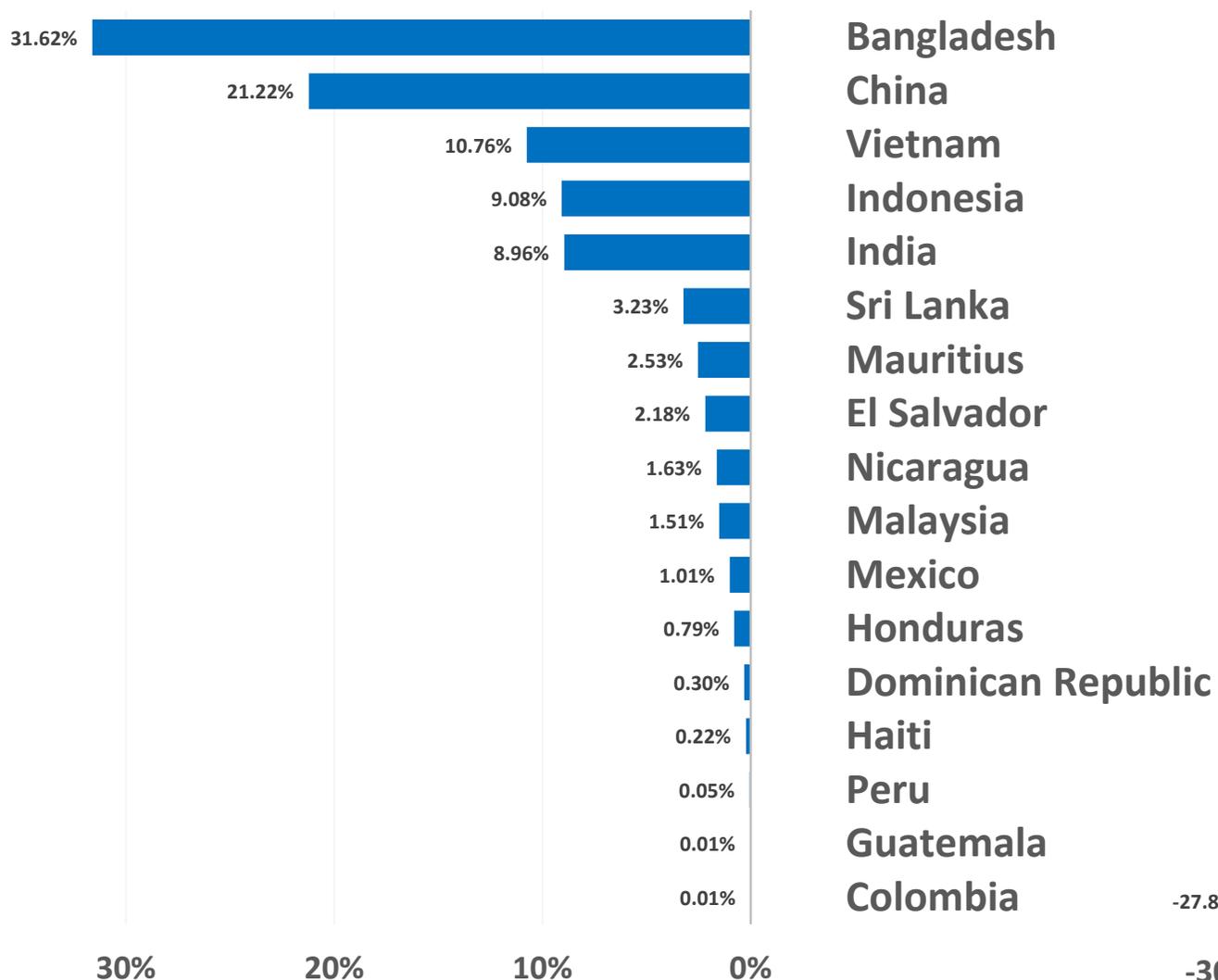
PERCENT CHANGE V. YE FEB 2016



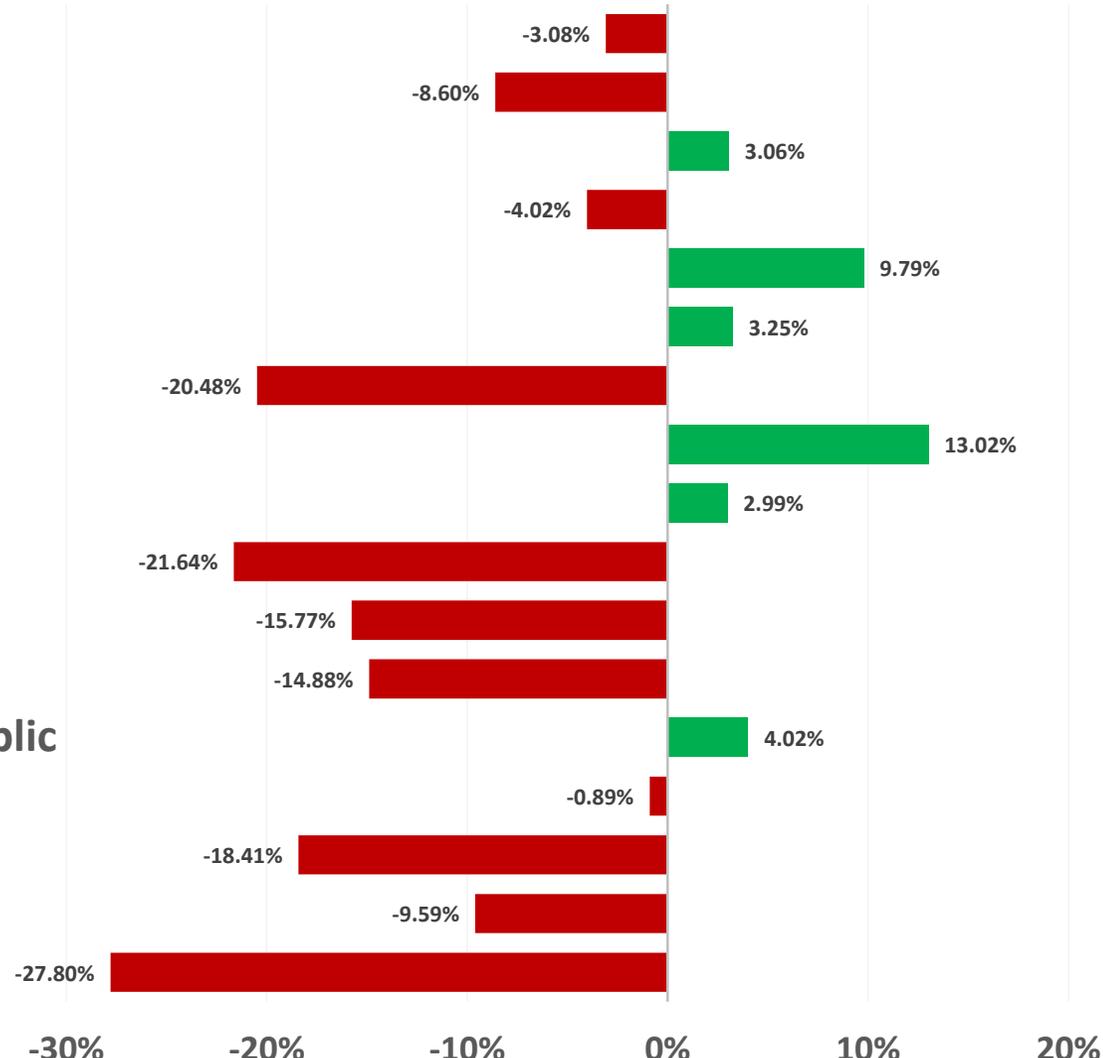
Source: Office of Textiles and Apparel (OTEXA)

M/B Cotton Shirts, Not Knit

PERCENT SHARE YE FEB 2017

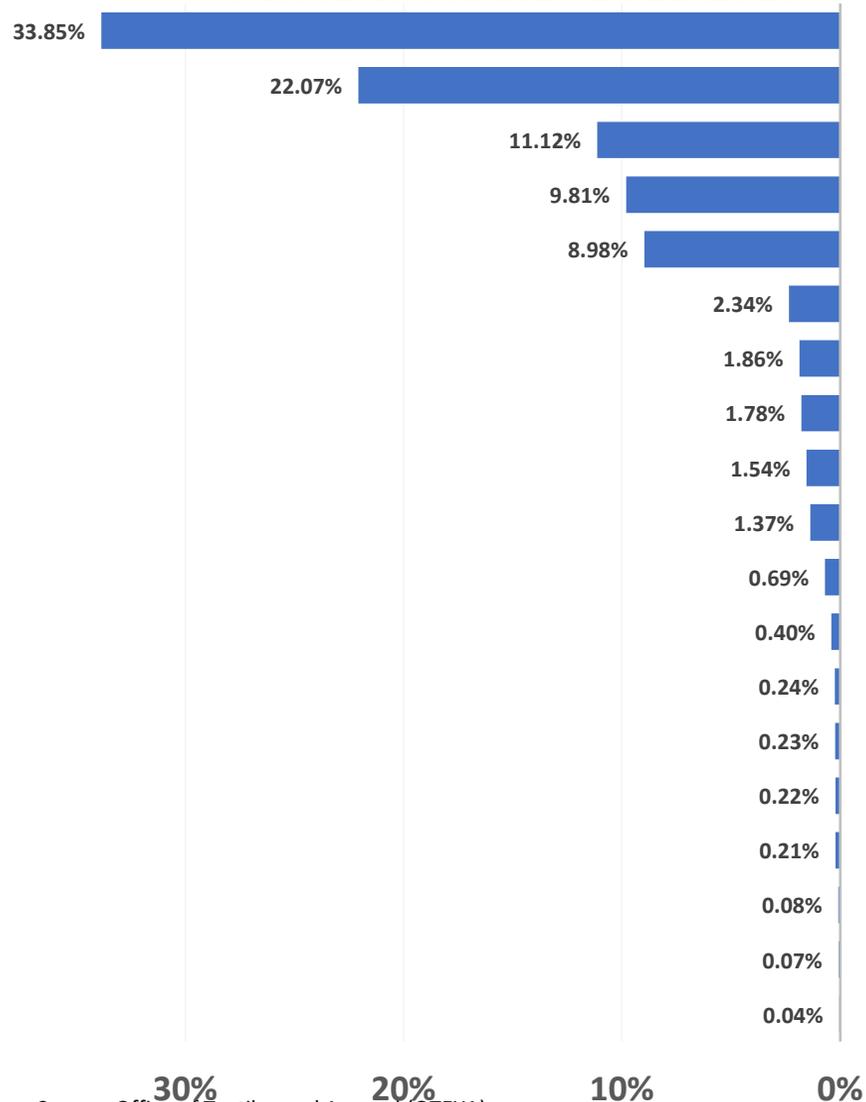


PERCENT CHANGE V. YE FEB 2016

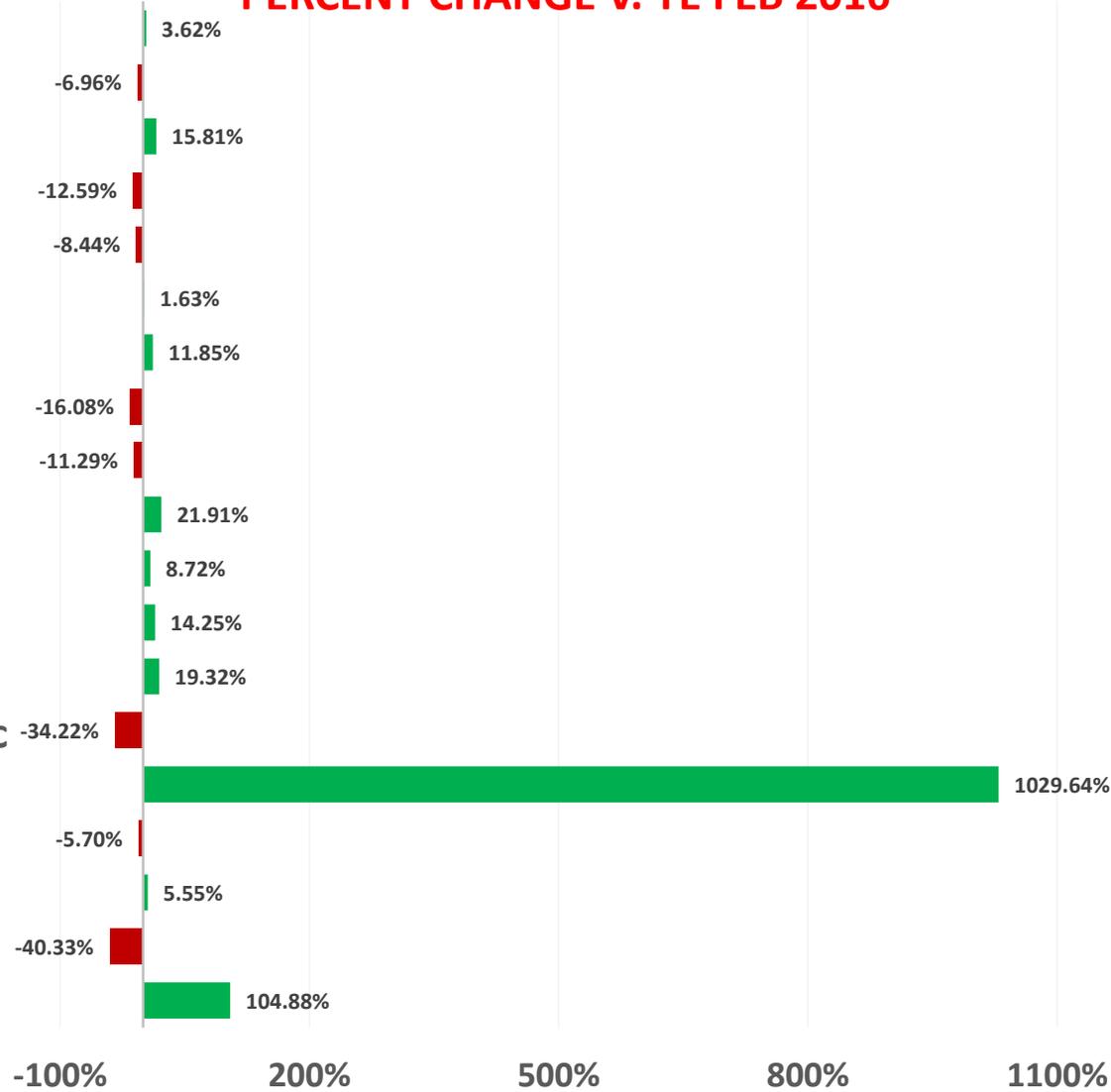


W/G Cotton Shirts, Not Knit

PERCENT SHARE YE FEB 2017



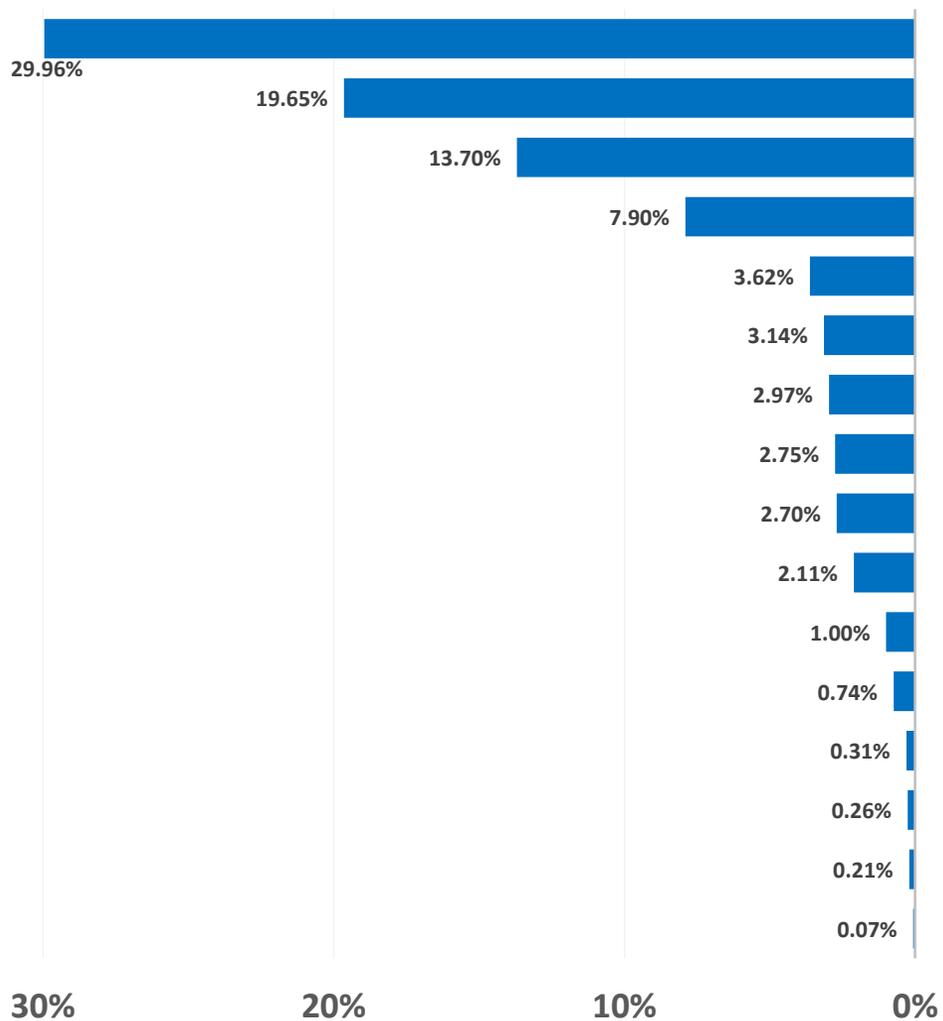
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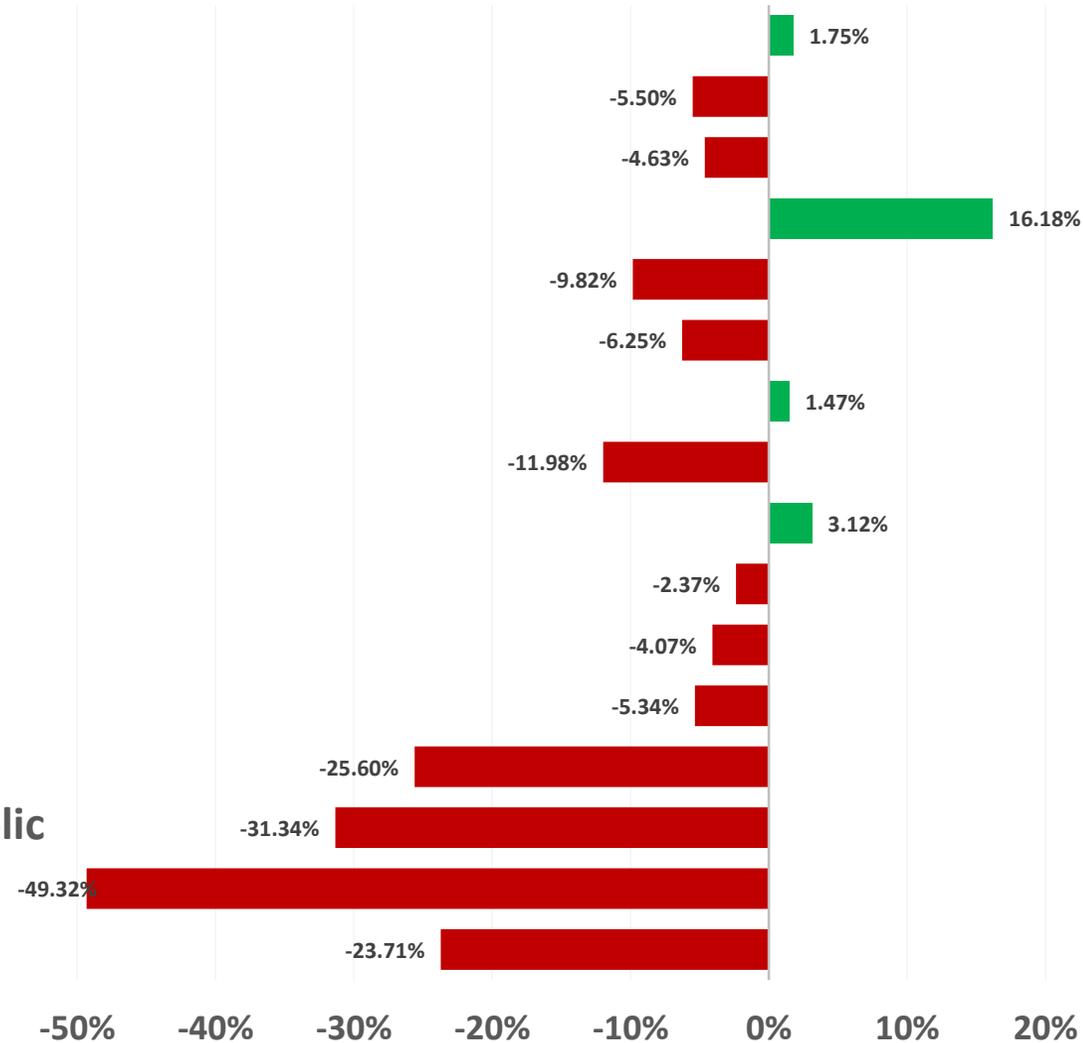
Source: Office of Textiles and Apparel (OTEXA)

M/B Cotton Trousers/Breeches/Shorts

PERCENT SHARE YE FEB 2017



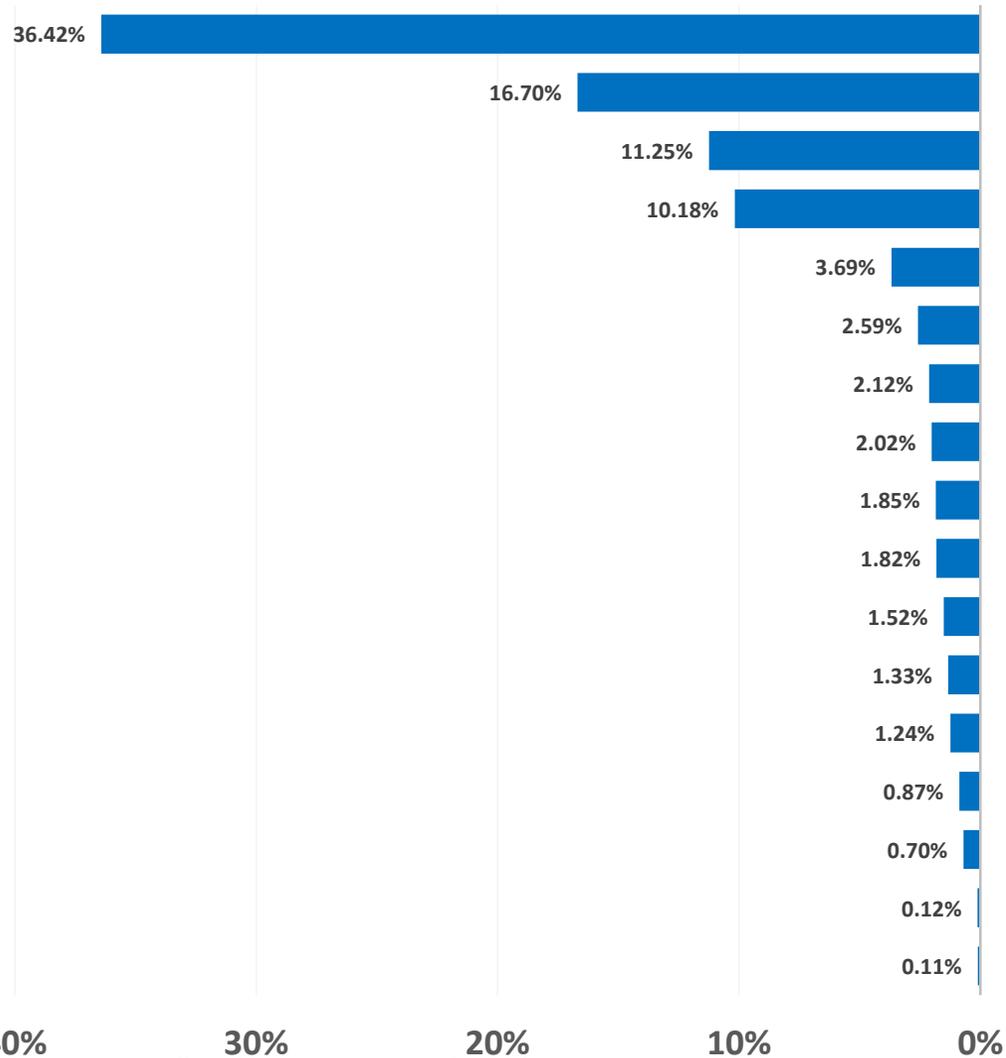
PERCENT CHANGE V. YE FEB 2016



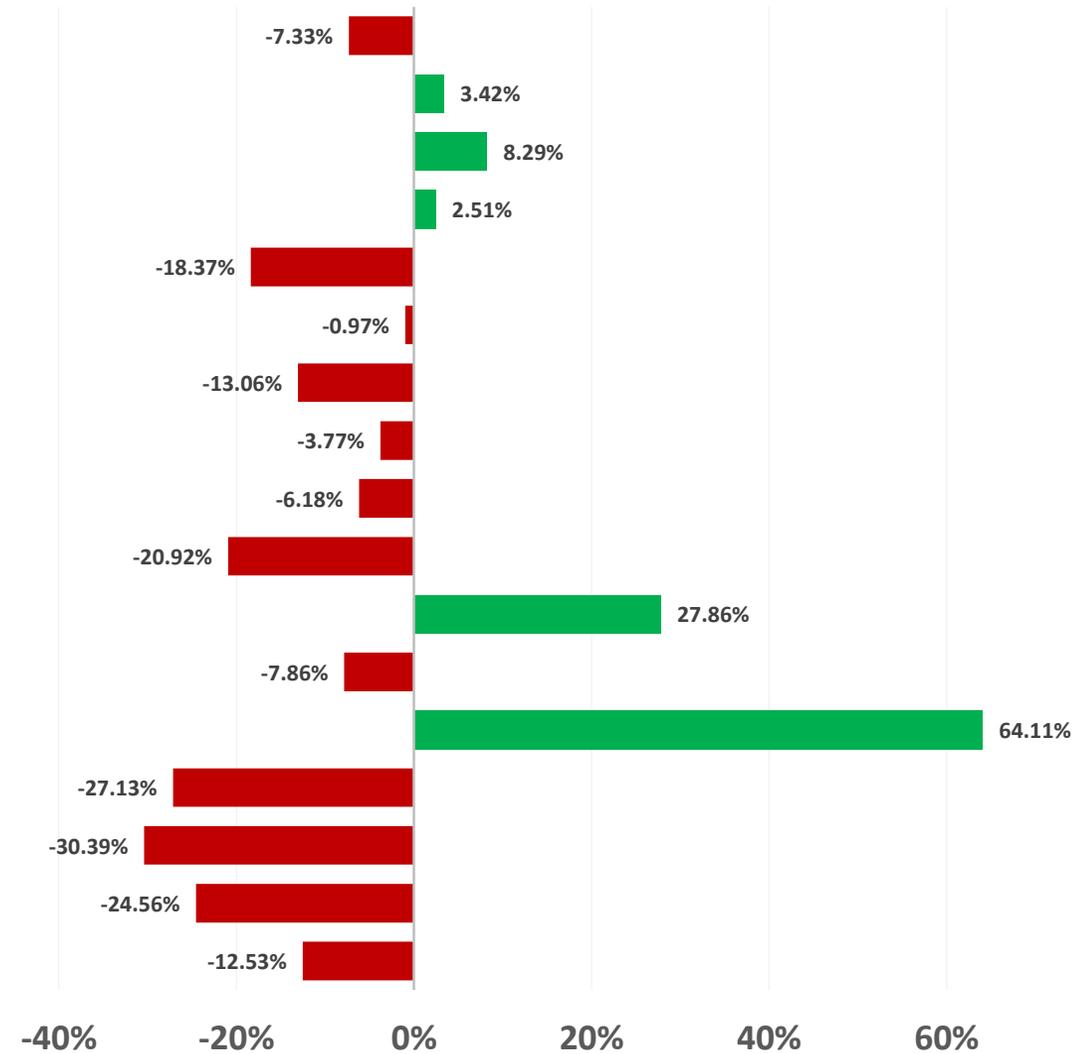
Source: Office of Textiles and Apparel (OTEXA)

W/G Cotton Trousers/Slacks/Shorts

PERCENT SHARE YE FEB 2017

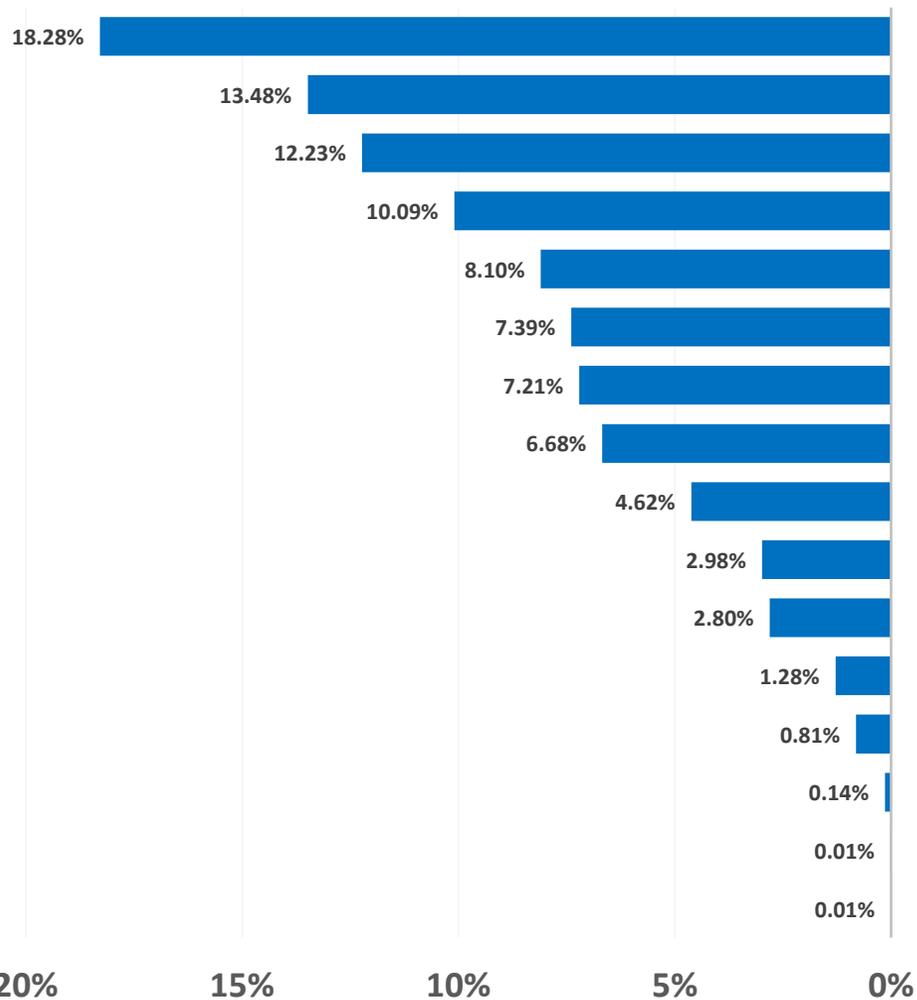


PERCENT CHANGE V. YE FEB 2016

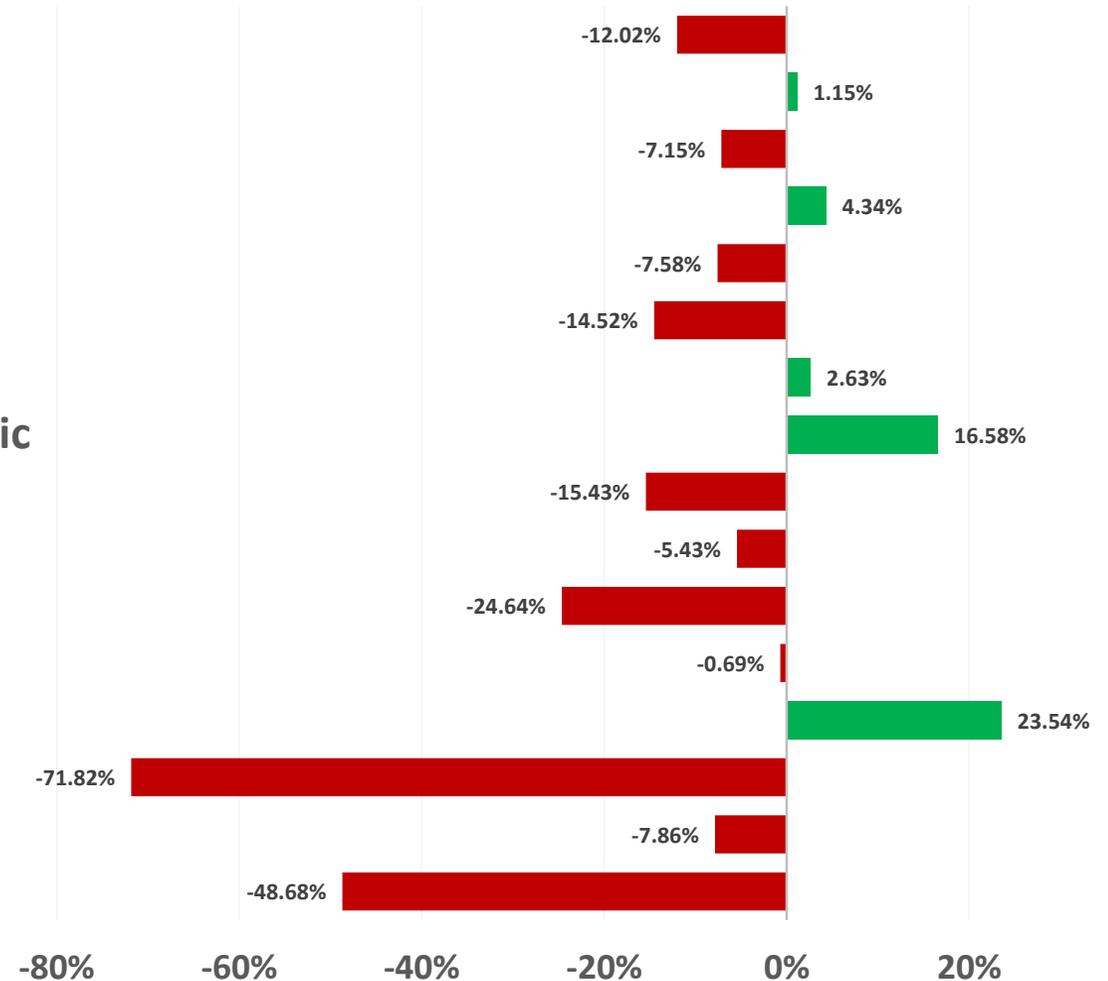


Cotton Underwear

PERCENT SHARE YE FEB 2017

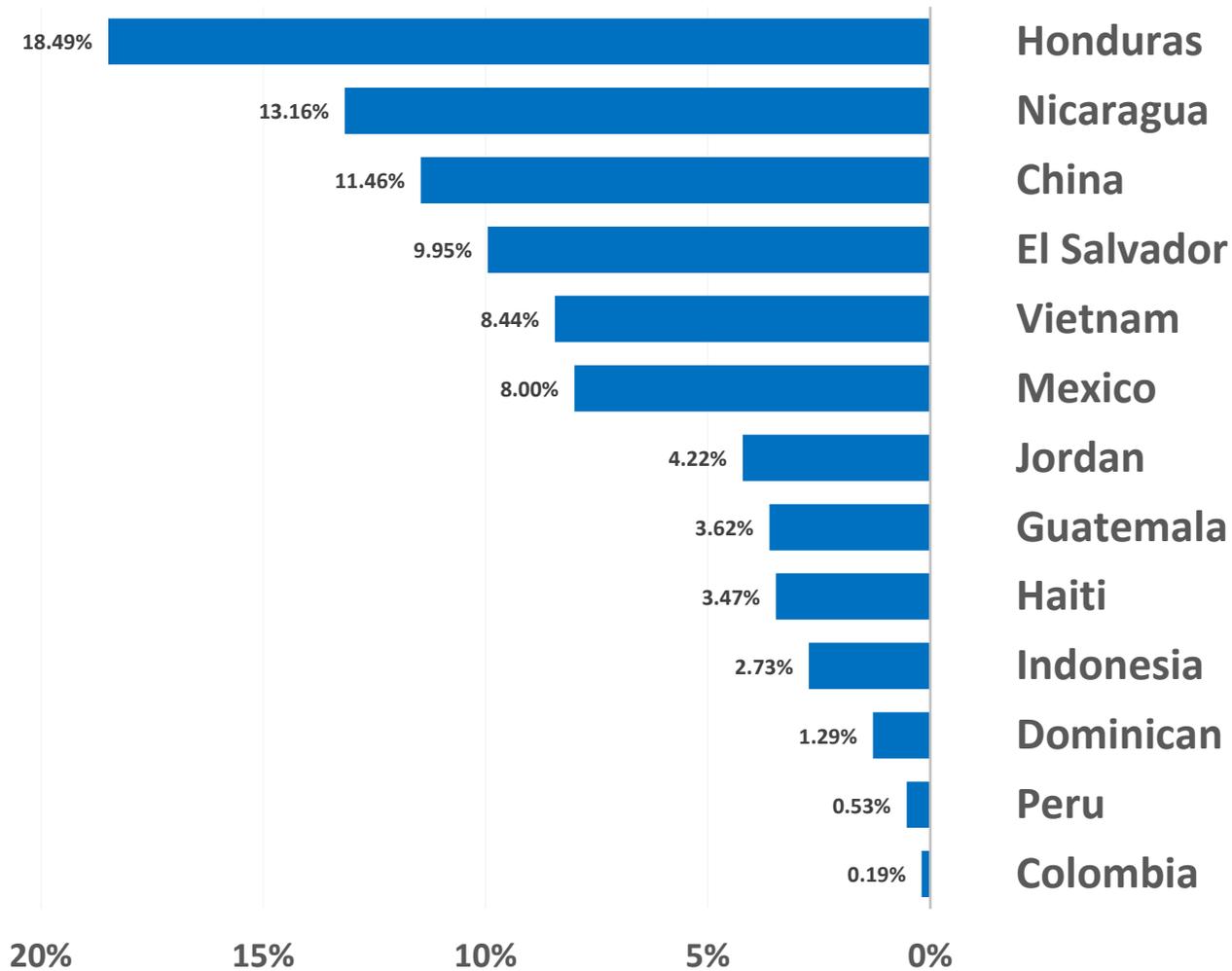


PERCENT CHANGE V. YE FEB 2016

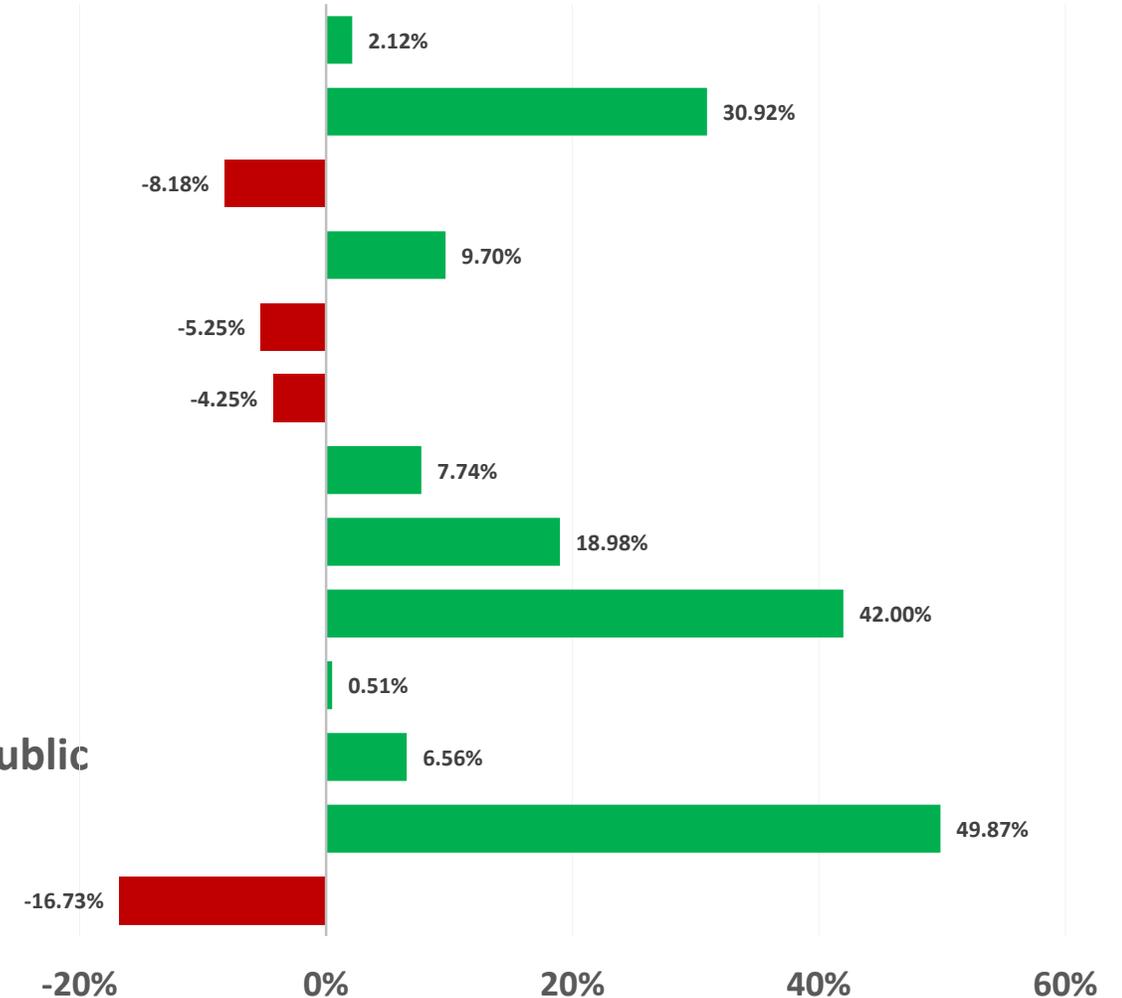


M/B MMF Knit Shirts

PERCENT SHARE YE FEB 2017

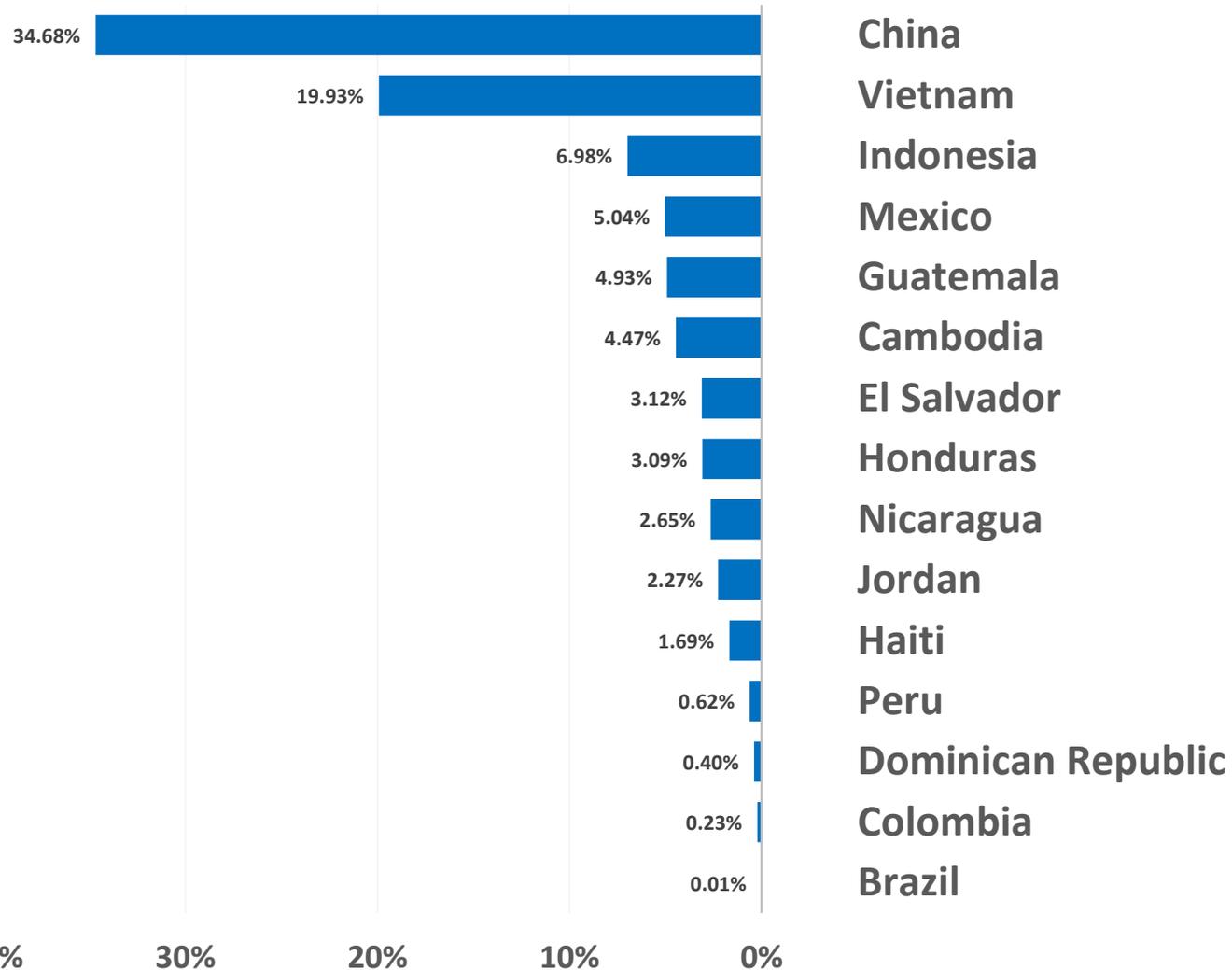


PERCENT CHANGE V. YE FEB 2016

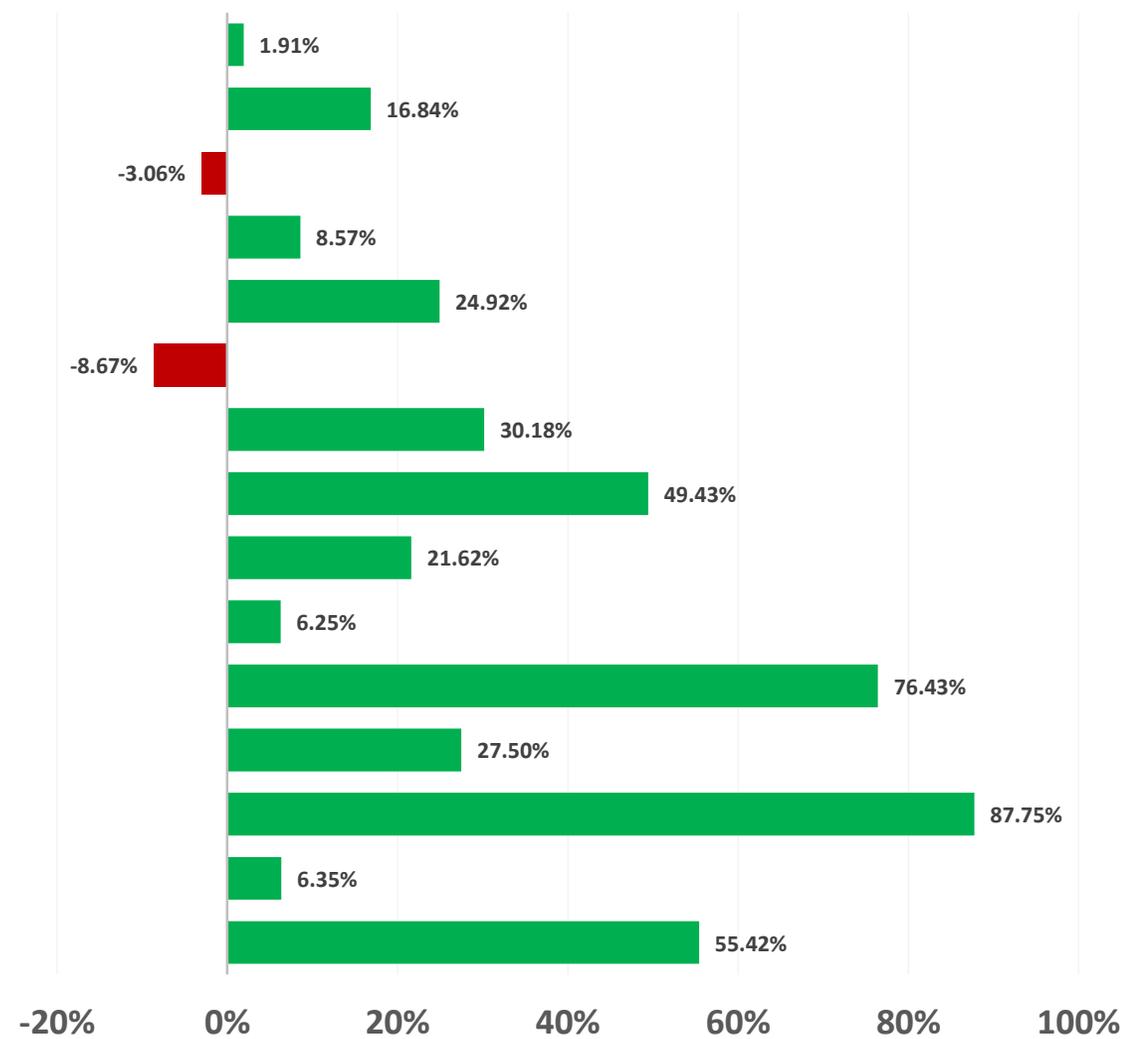


W/G MMF Knit Shirts/Blouses

PERCENT SHARE YE FEB 2017



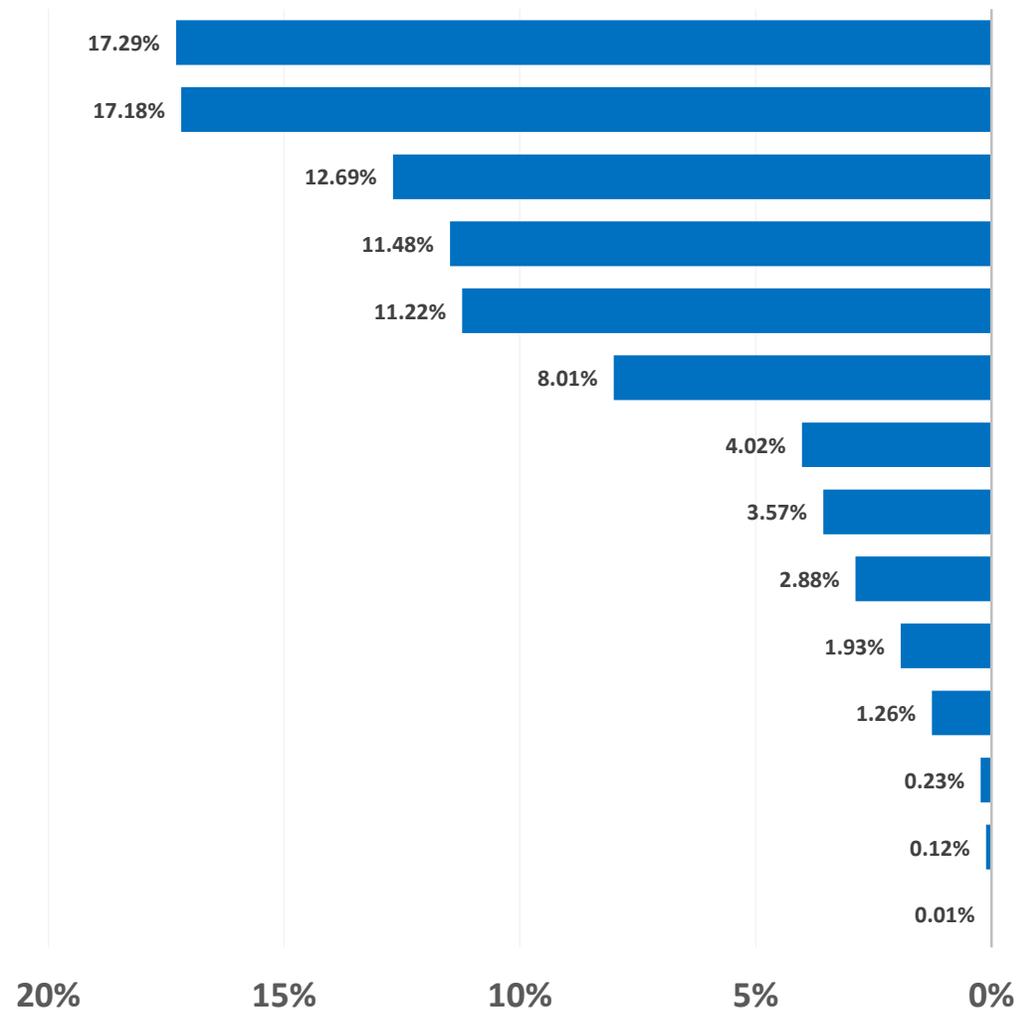
PERCENT CHANGE V. YE FEB 2016



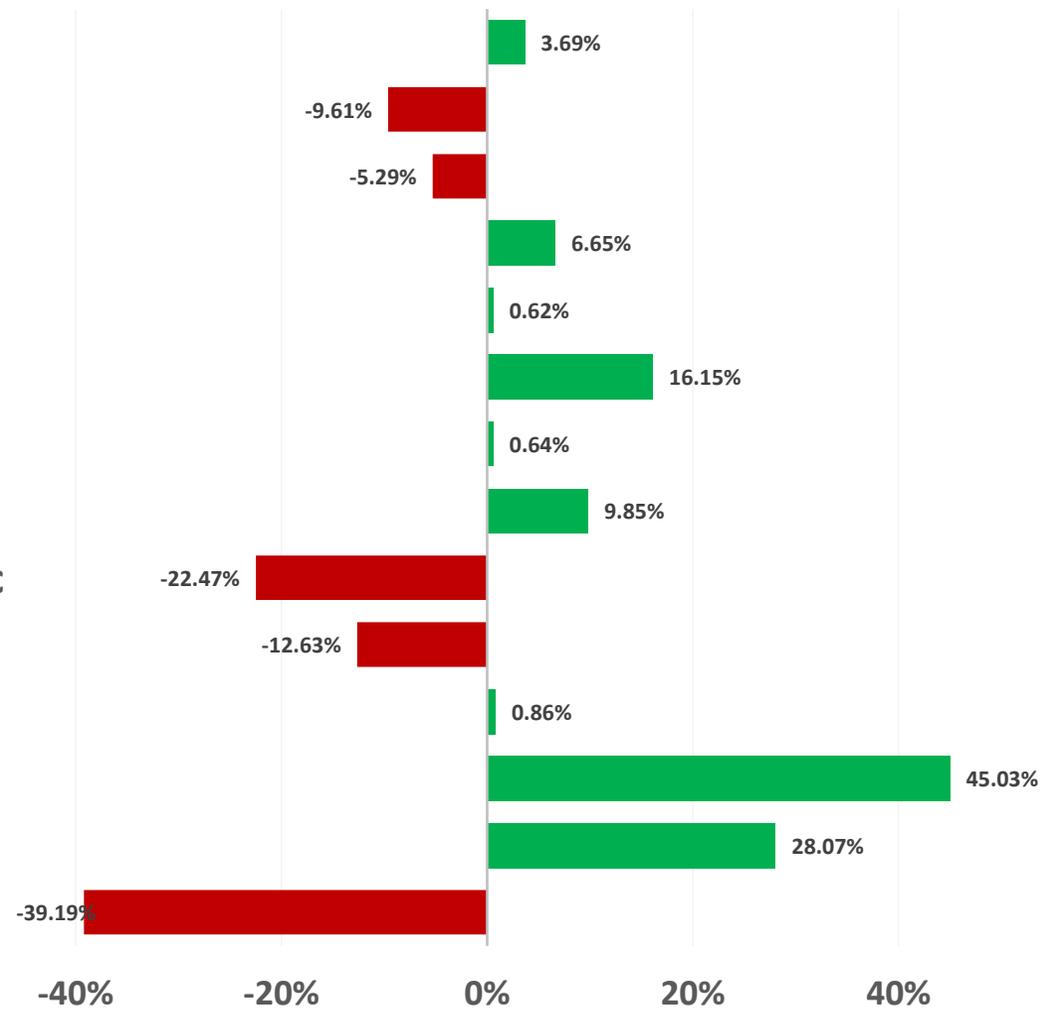
M/B Not-Knit MMF Shirts

PERCENT SHARE YE FEB 2017

PERCENT CHANGE V. YE FEB 2016

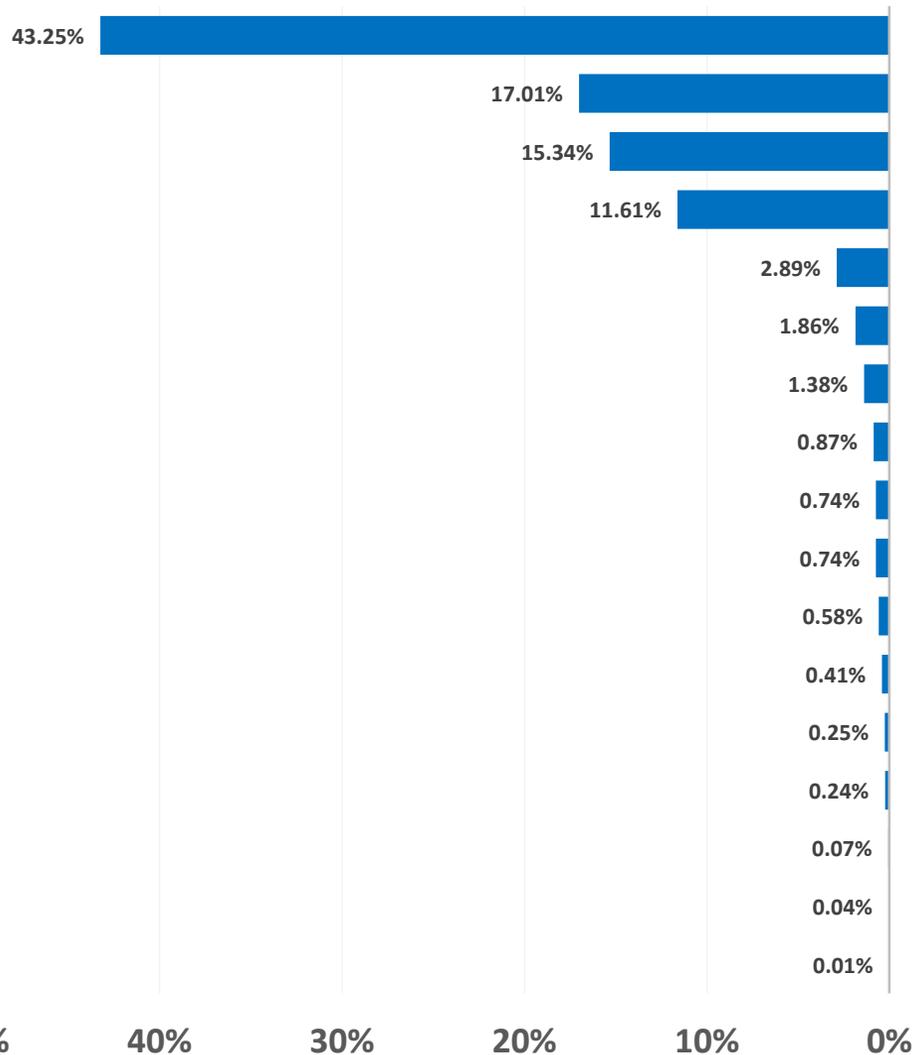


Honduras
 China
 Bangladesh
 Mexico
 Vietnam
 Indonesia
 Haiti
 Egypt
 Dominican Republic
 Nicaragua
 El Salvador
 Guatemala
 Colombia
 Peru

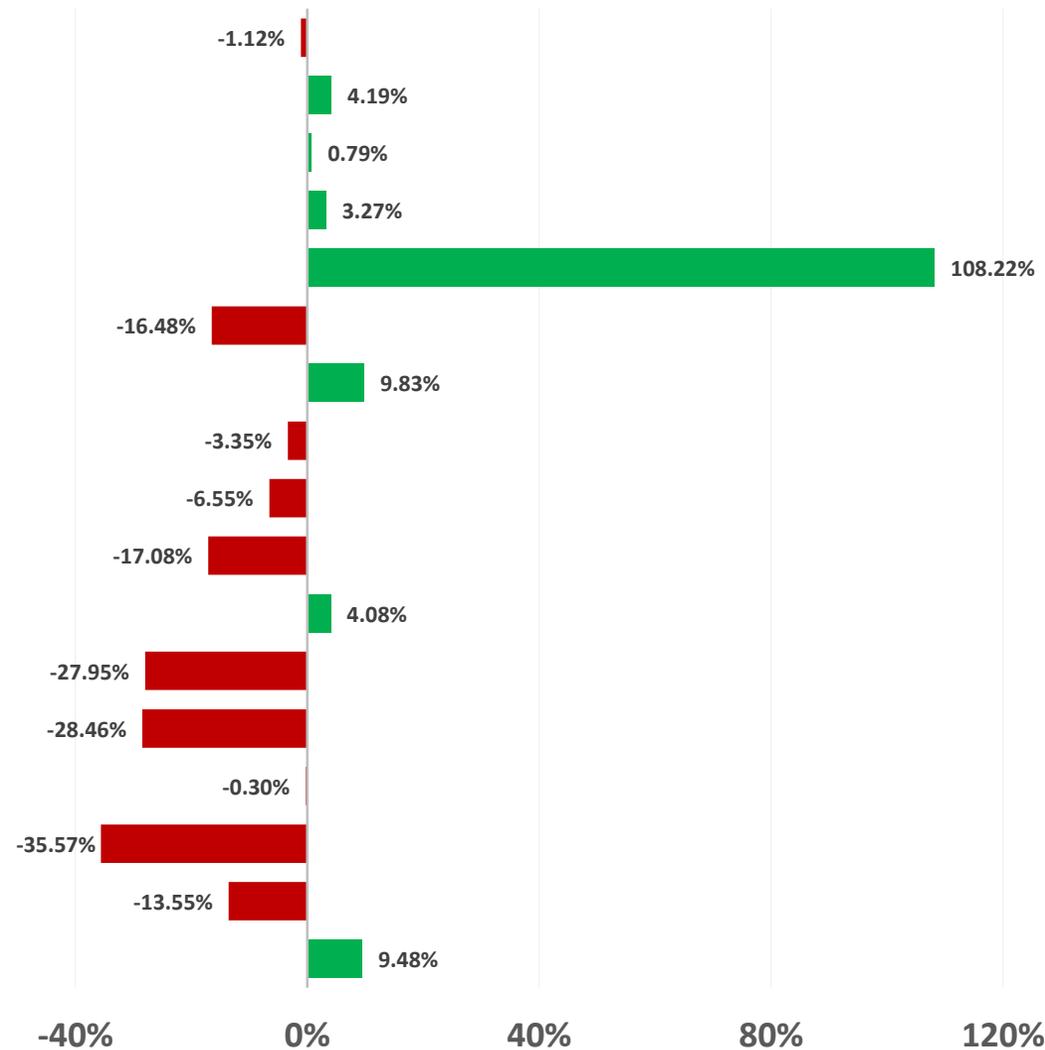


W/G Not-Knit MMF Shirts/Blouses

PERCENT SHARE YE FEB 2017



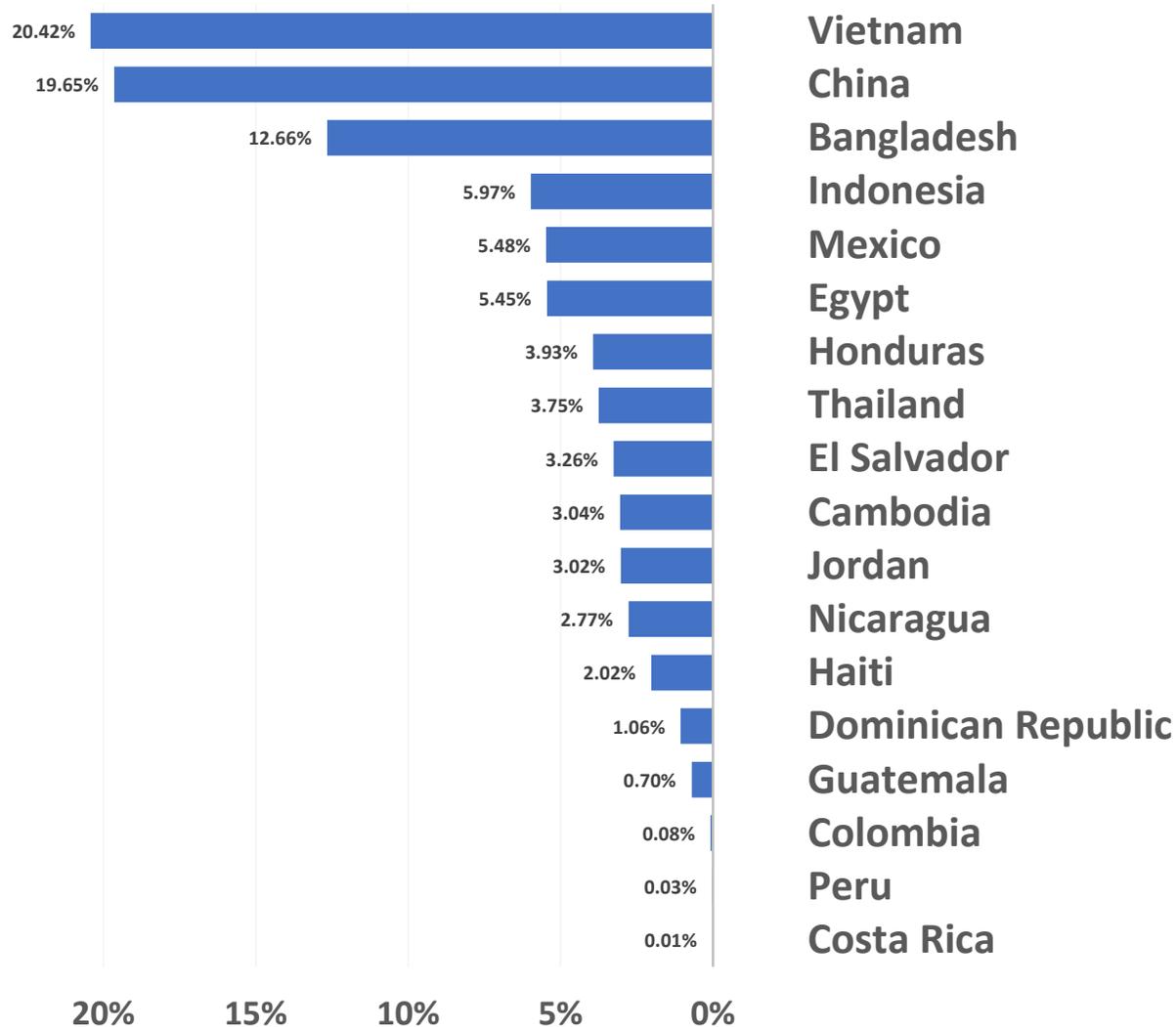
PERCENT CHANGE V. YE FEB 2016



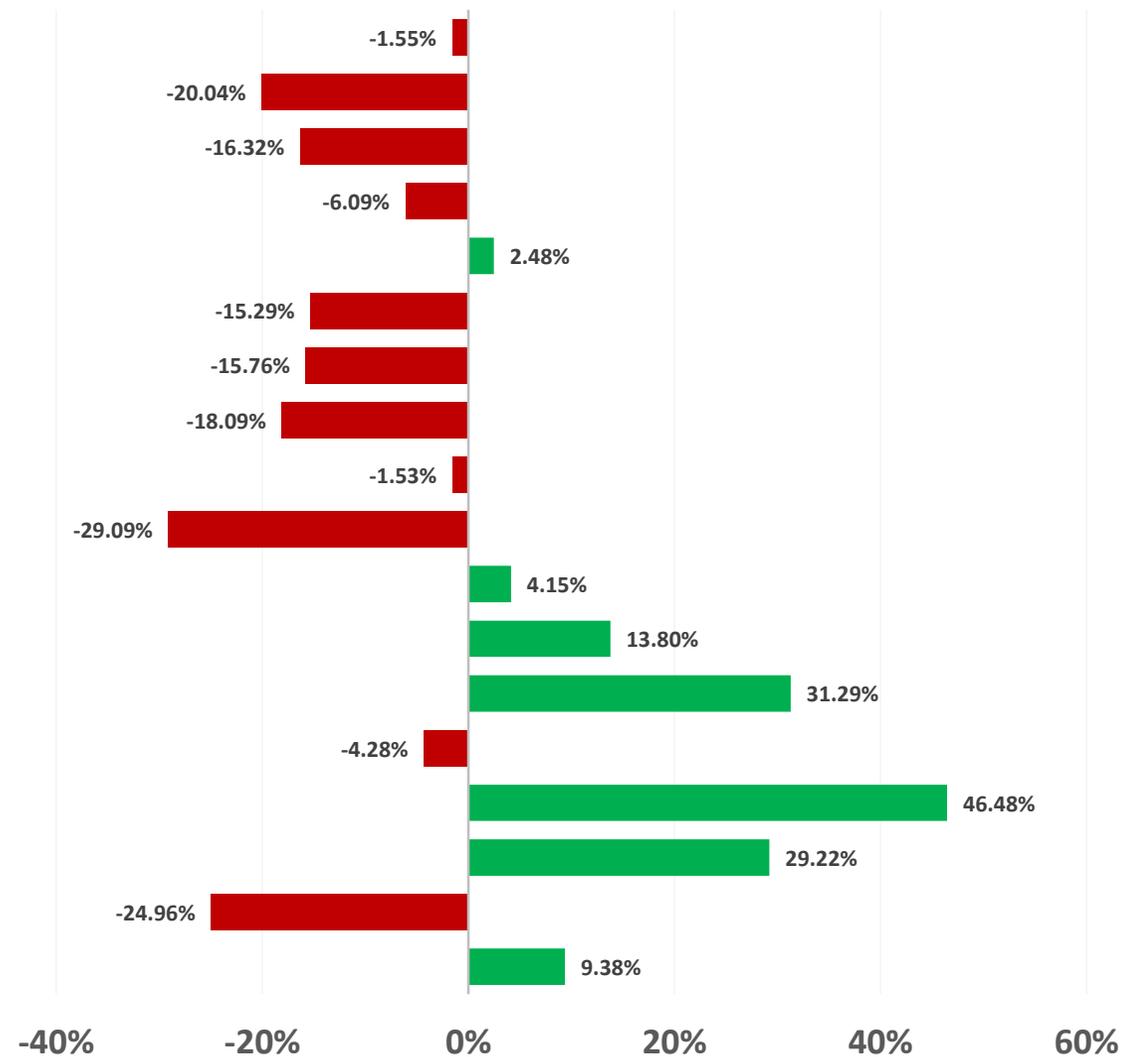
Source: Office of Textiles and Apparel (OTEXA)

M/B MMF Trousers/Breeches/Shorts

PERCENT SHARE YE FEB 2017



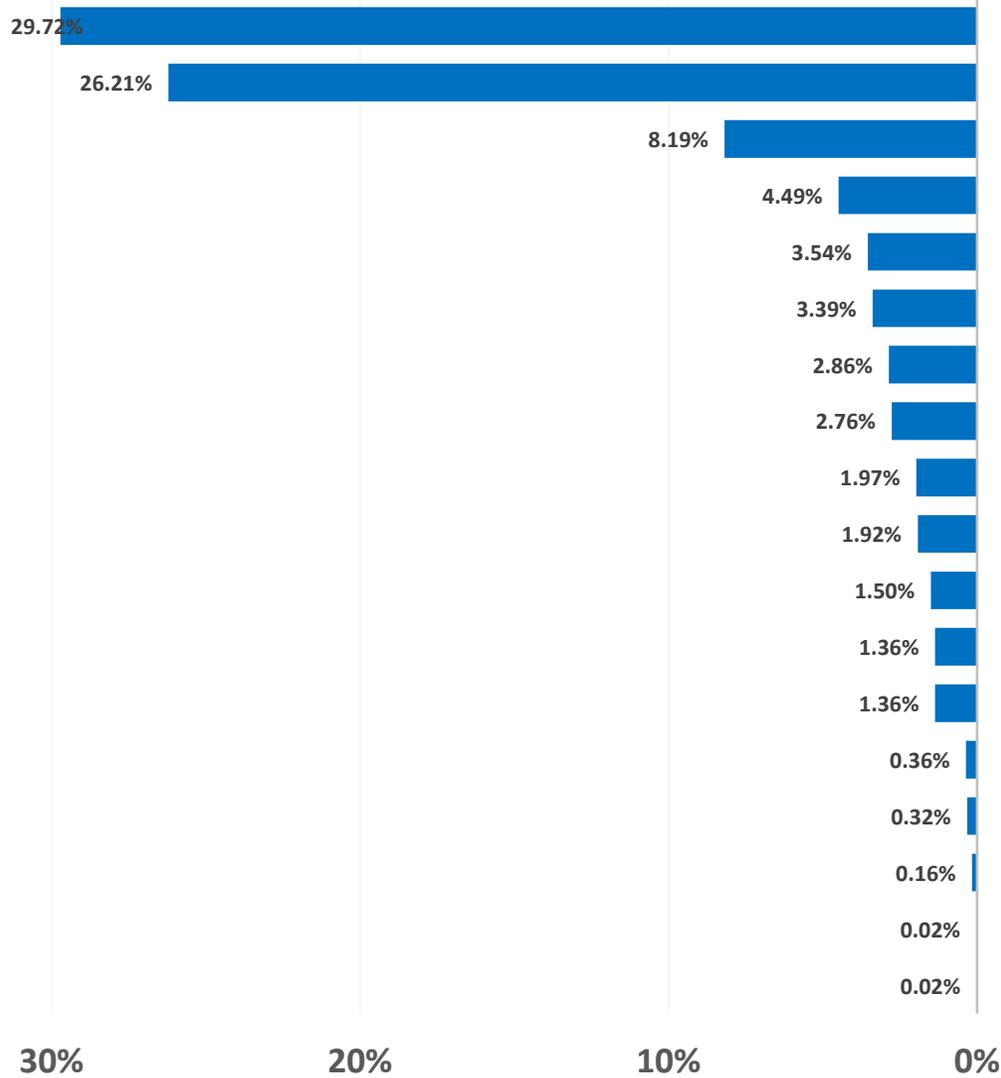
PERCENT CHANGE V. YE FEB 2016



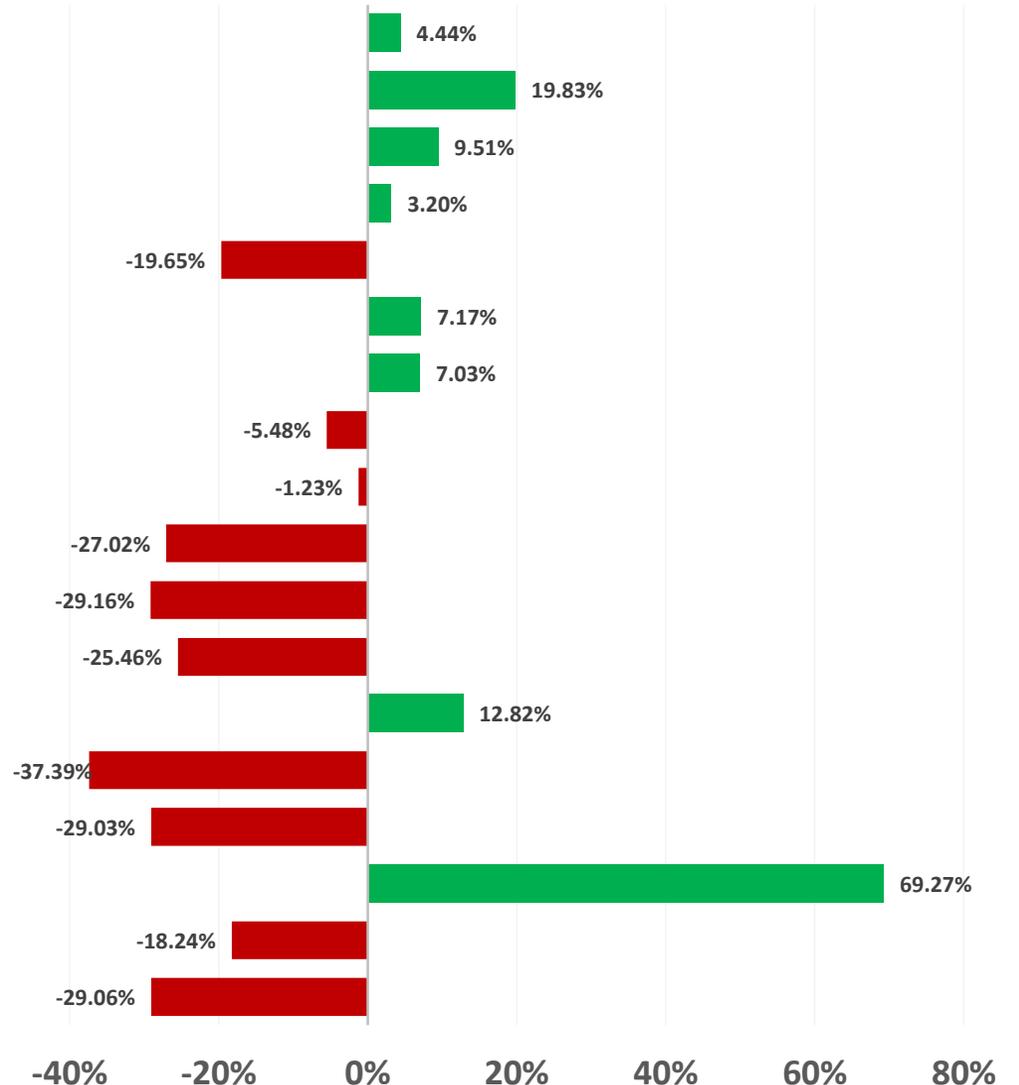
Source: Office of Textiles and Apparel (OTEXA)

W/G MMF Slacks/Breeches/Shorts

PERCENT SHARE YE FEB 2017



PERCENT CHANGE V. YE FEB 2016



Source: Office of Textiles and Apparel (OTEXA)

Thank You!

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