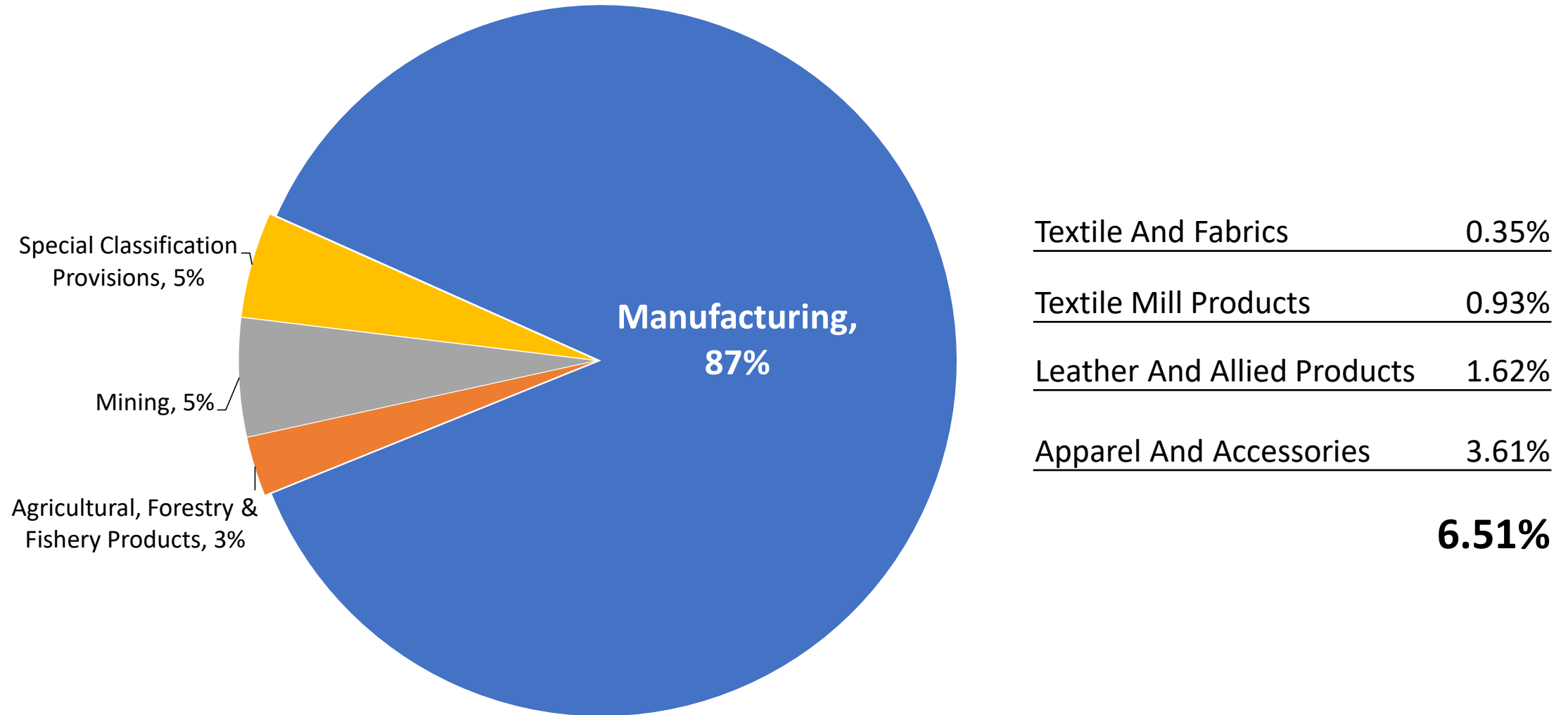


State of the Industry

November 28th, 2018
San Pedro Sula, Honduras

2017: Total Imports for Consumption = \$2.33 trillion



2017: Calculated Duty = \$33 billion

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

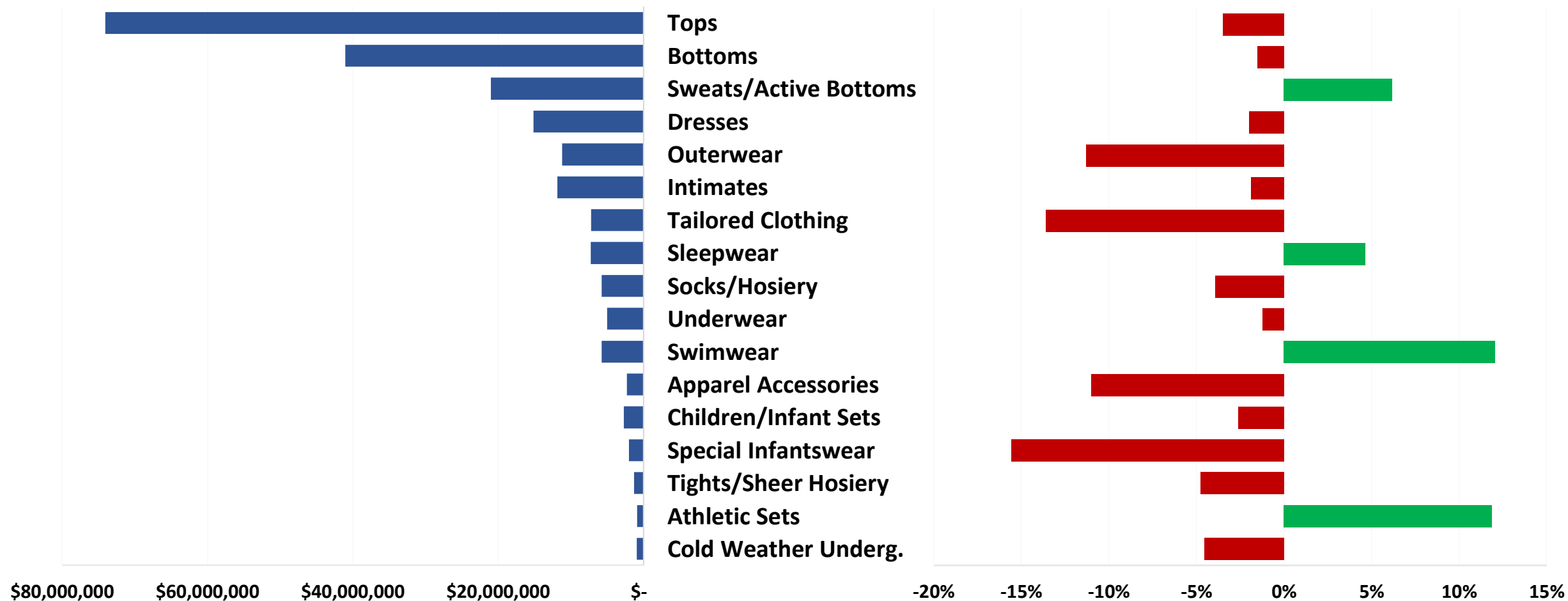
<u>Textile And Fabrics</u>	1.10%
<u>Textile Mill Products</u>	4.06%
<u>Leather And Allied Products</u>	12.41%
<u>Apparel And Accessories</u>	34.10%

51.67%

Total apparel -2.4% in 2017: most categories decreased

DOLLAR VOLUME (000)

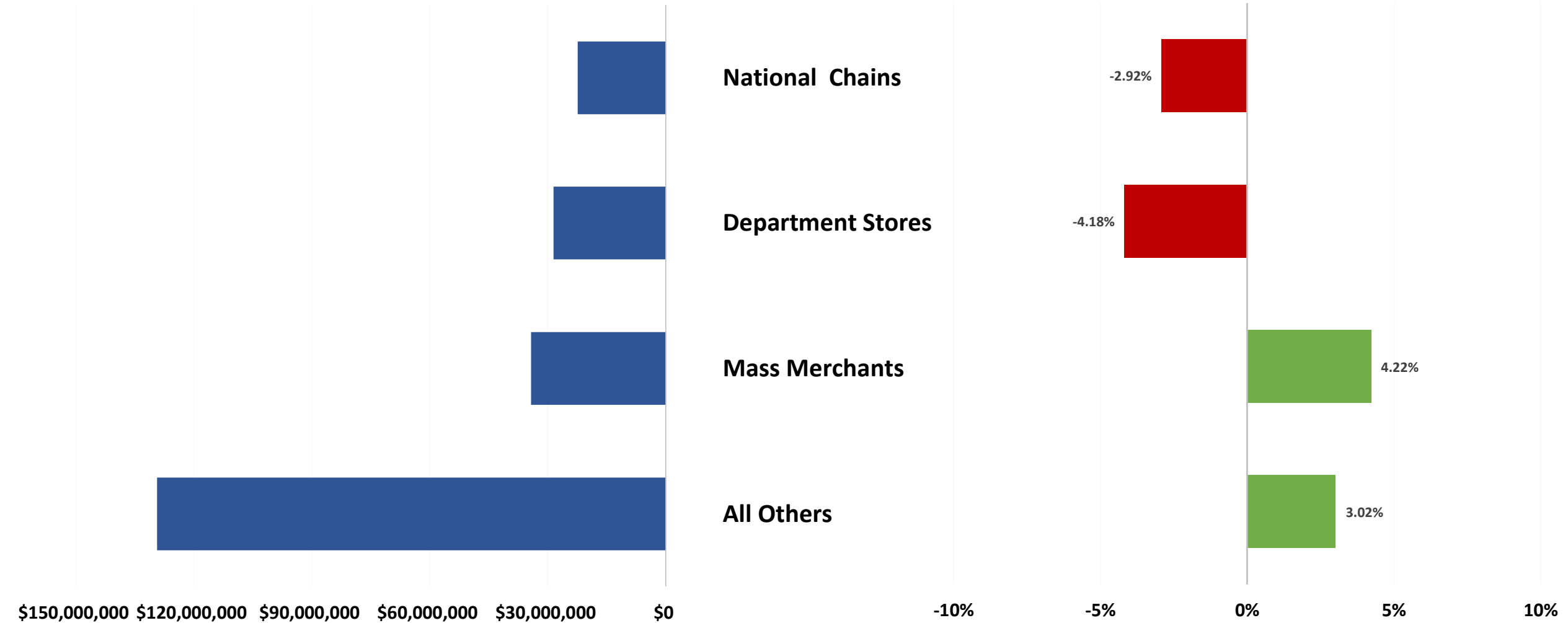
DOLLAR VOLUME CHANGE (2016 v. 2017)



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

DOLLAR VOLUME (000)

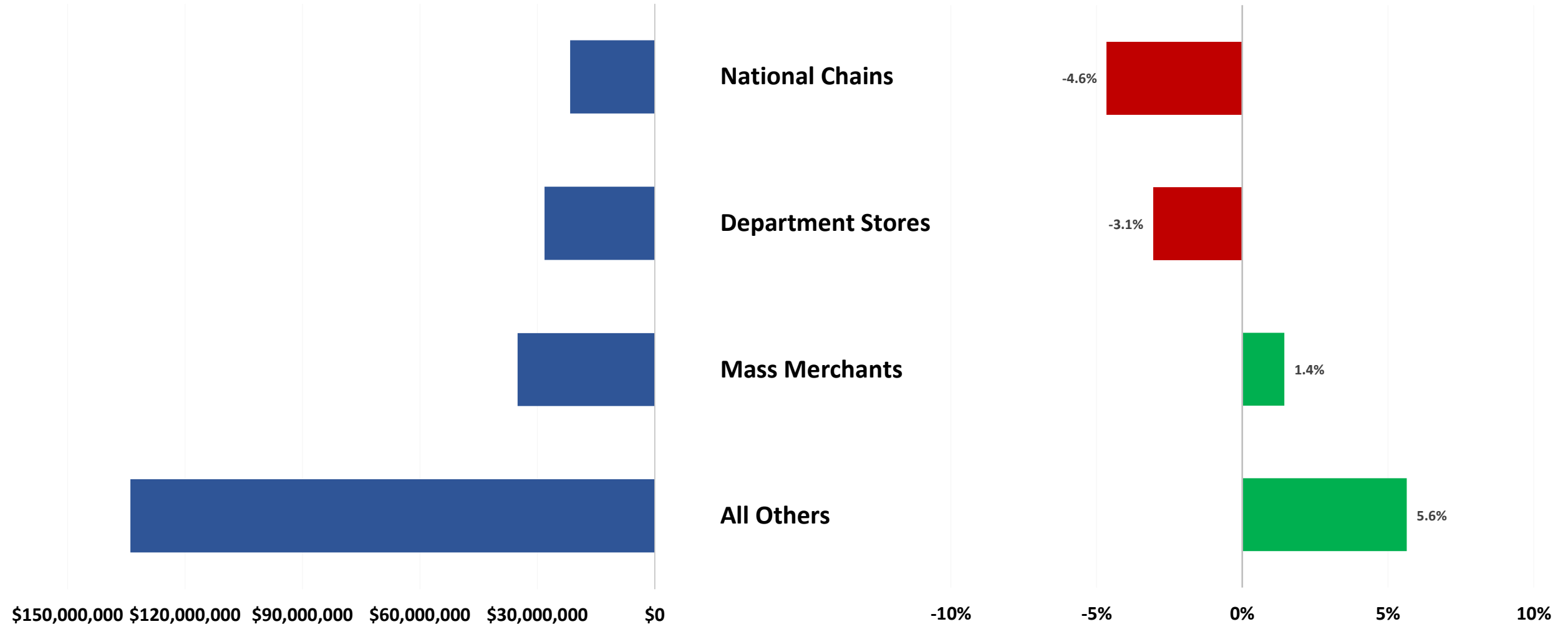
DOLLAR VOLUME CHANGE v. 2014



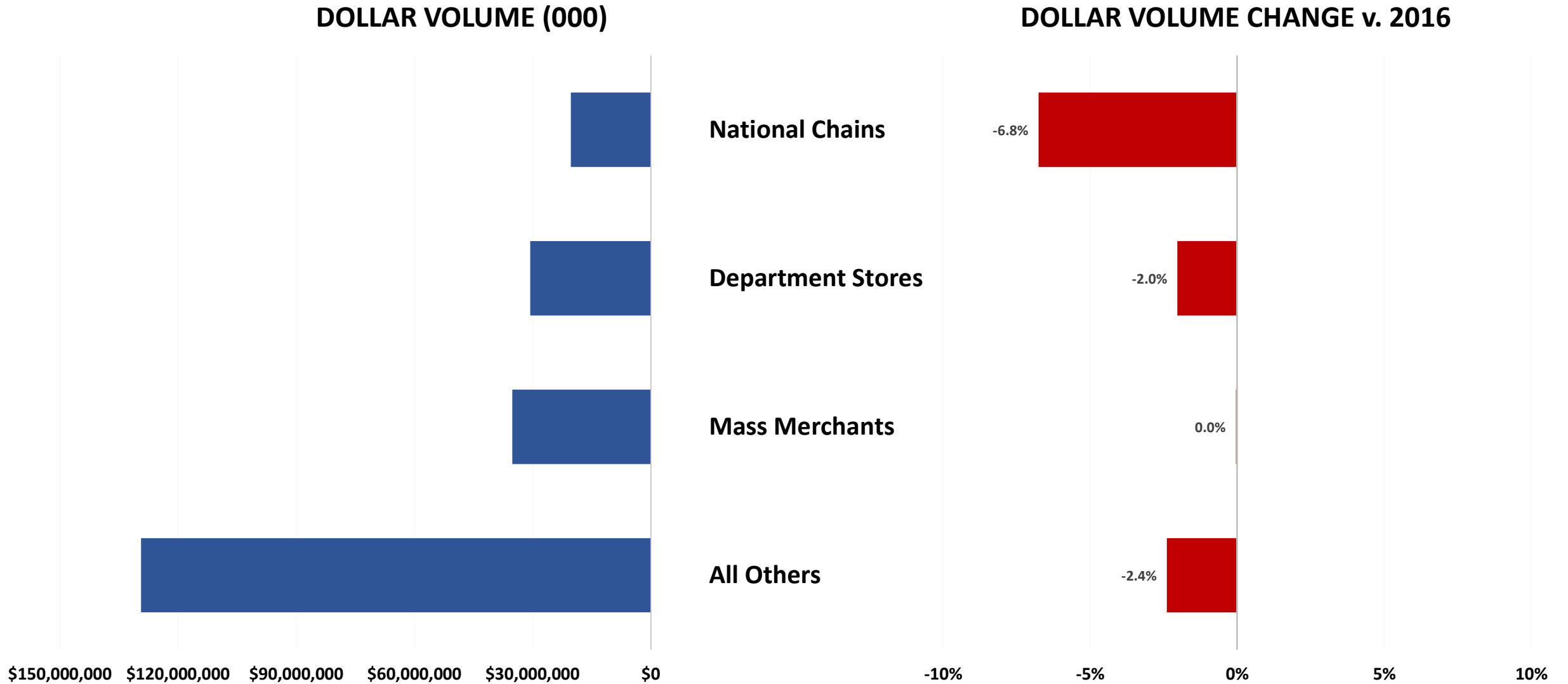
2016: Channel Share is Shifting to Mass, Off Price, Online

DOLLAR VOLUME (000)

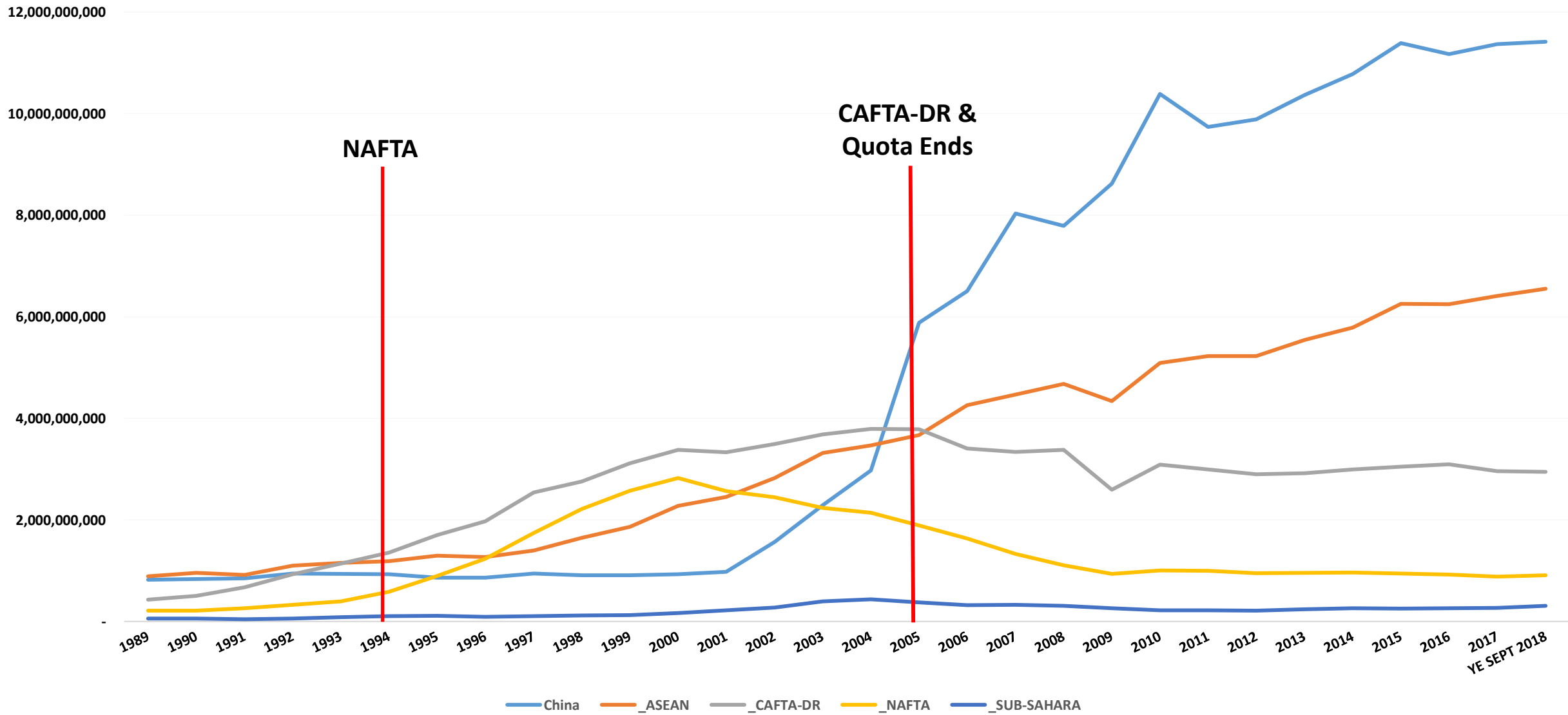
DOLLAR VOLUME CHANGE v. 2015



2017: Channel Share Continues to Shift



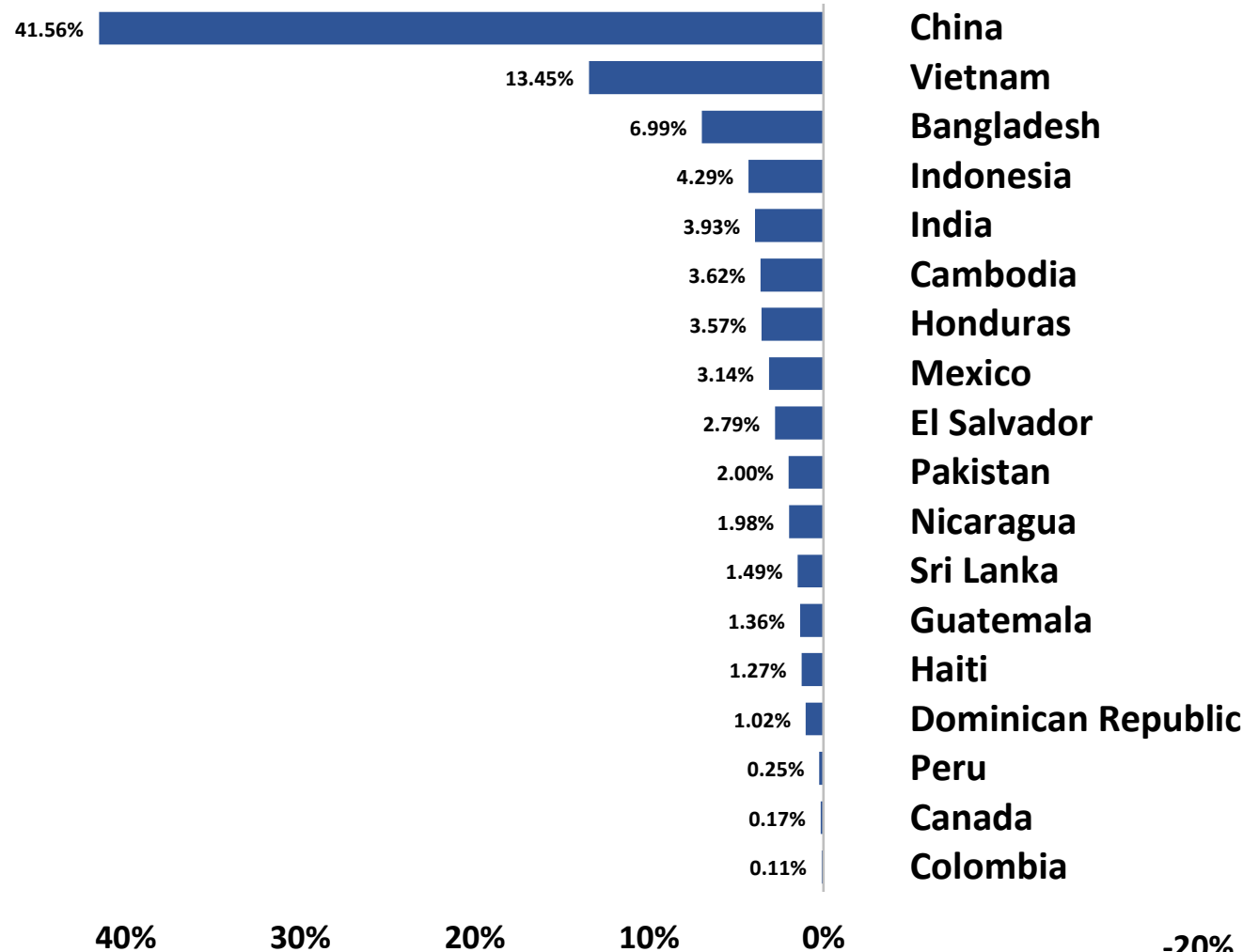
Total U.S. Apparel Imports (SME)



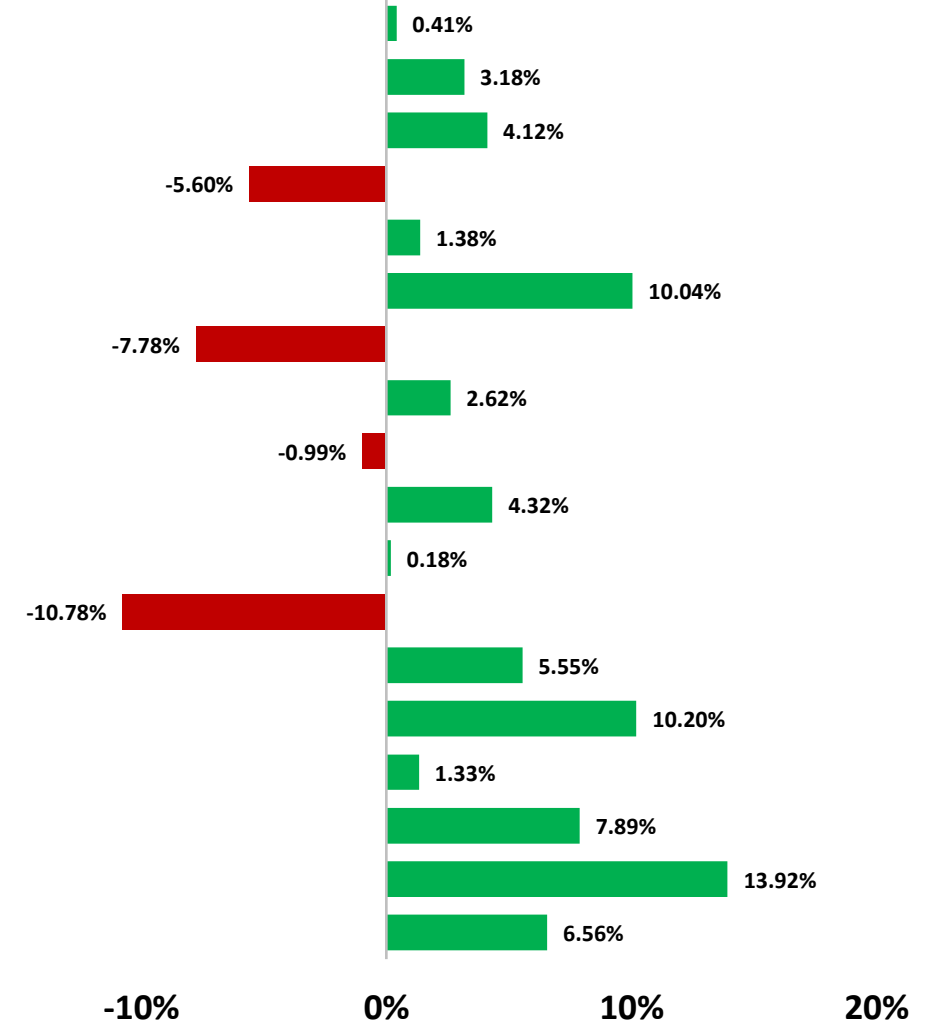
Source: Office of Textiles and Apparel (OTEXA)

CAT 1: Total U.S. Apparel Imports (SME)

% SHARE YE 9/2018



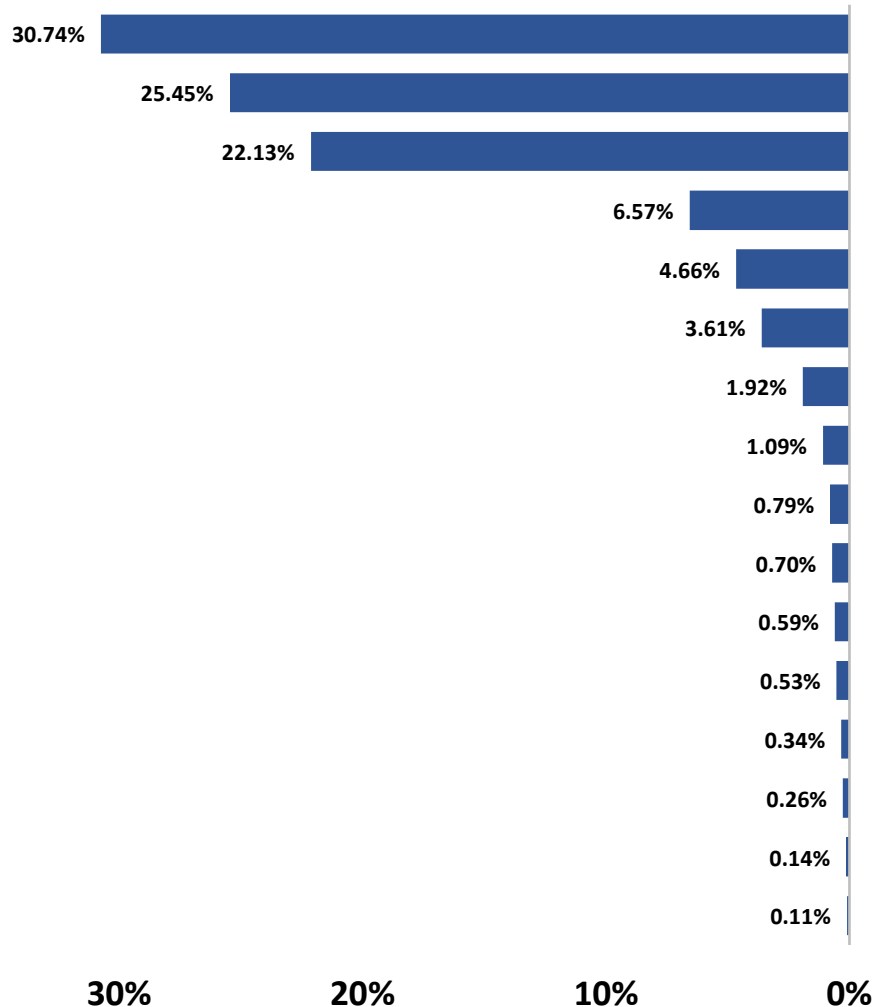
YE % CHANGE



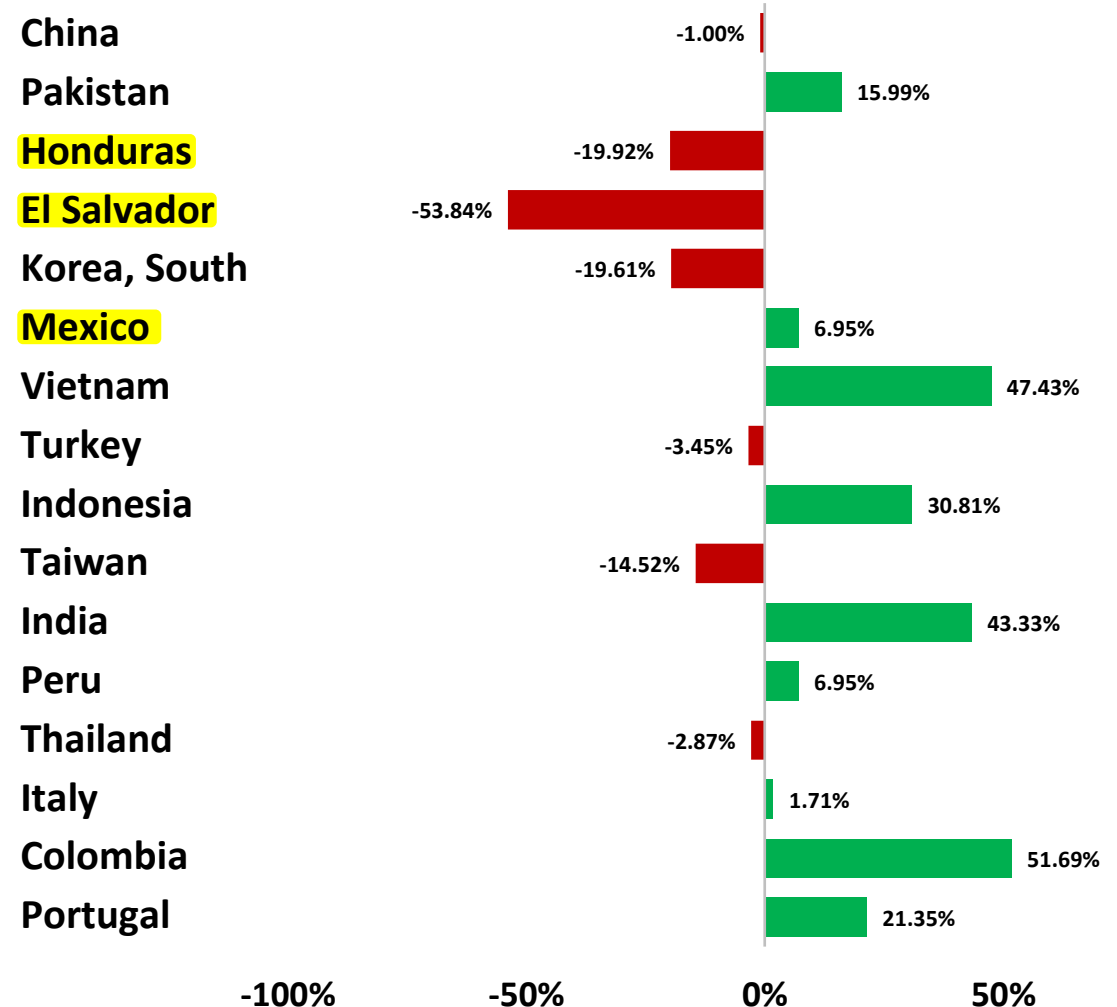
Source: Office of Textiles and Apparel (OTEXA)

CAT 332: Cotton Hosiery

% SHARE YE 9/2018

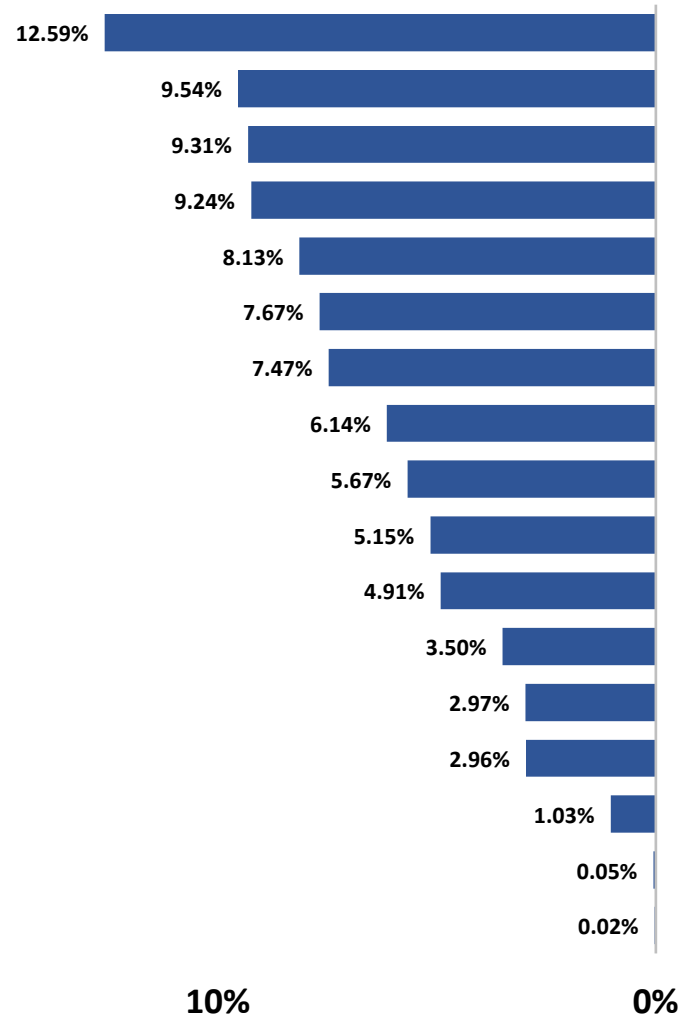


YE % CHANGE

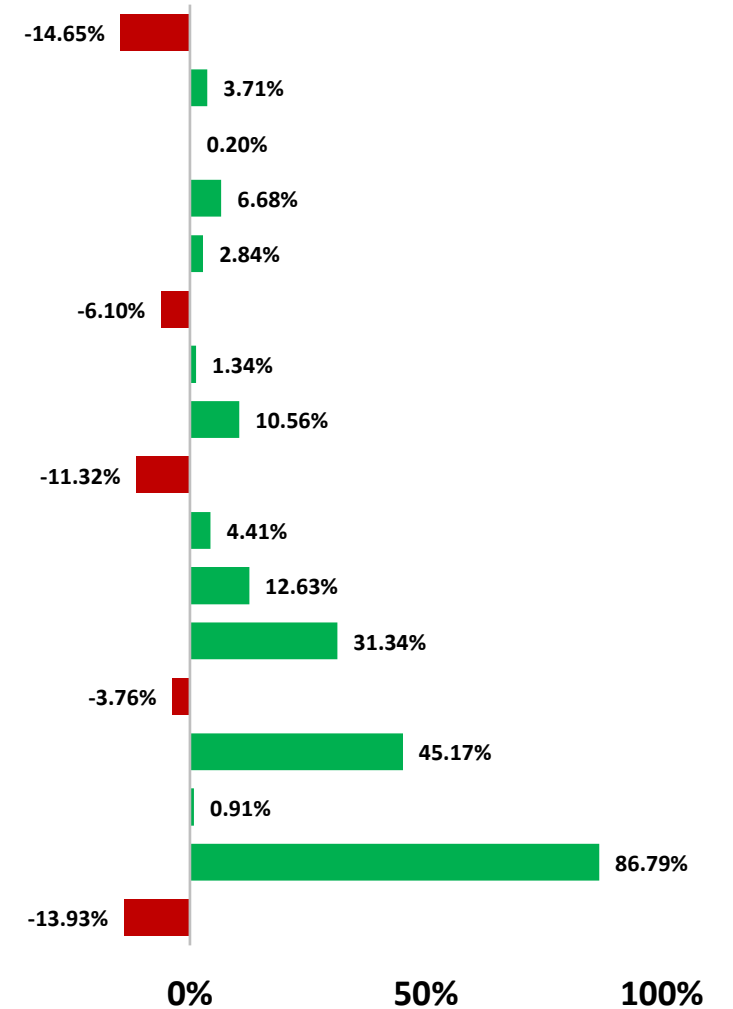


CAT 338: M/B Knit Shirts, Cotton

% SHARE YE 9/2018



YE % CHANGE



20%

10%

0%

-100%

-50%

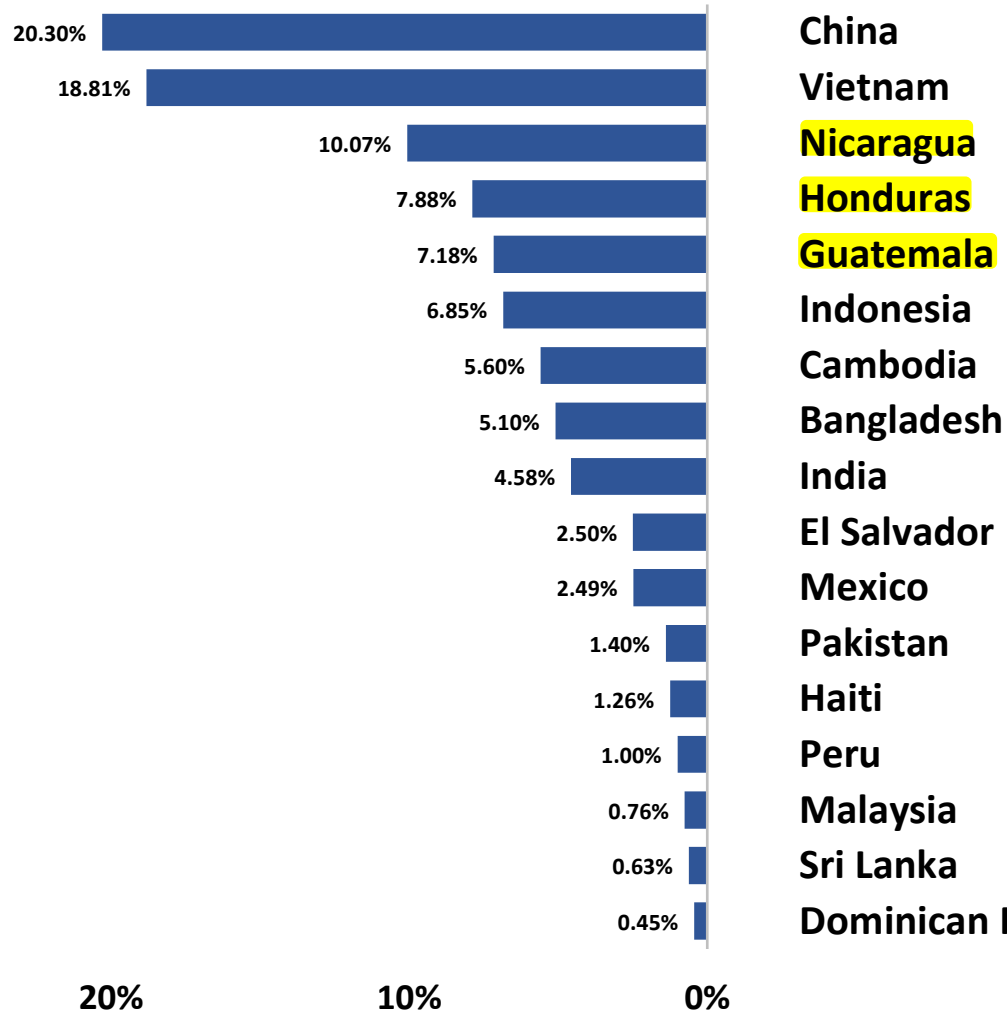
0%

50%

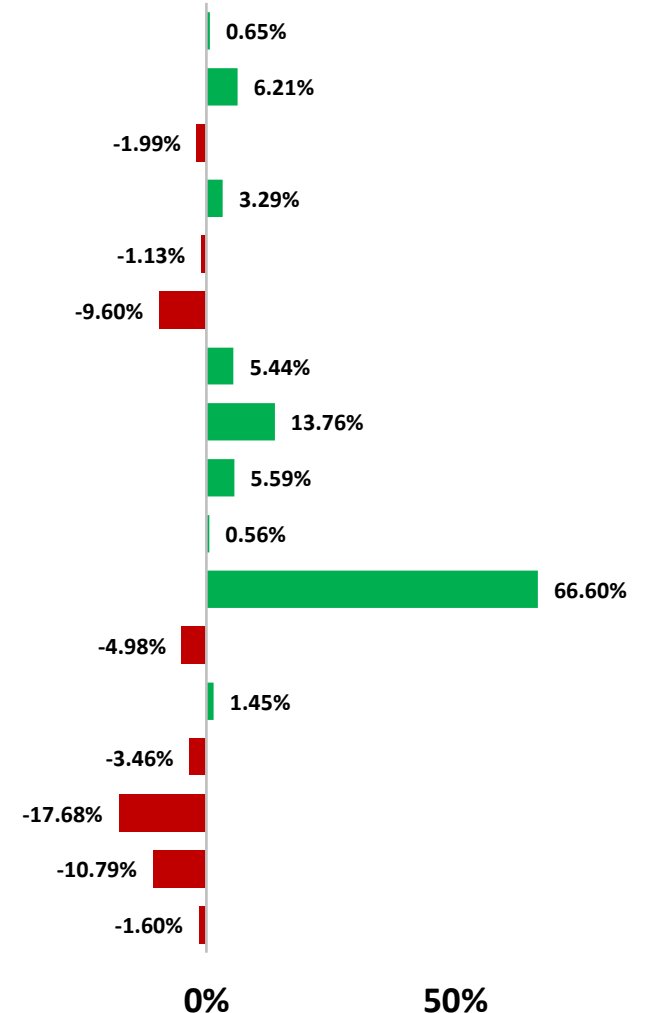
100%

CAT 339: W/G Knit Shirts, Cotton

% SHARE YE 9/2018

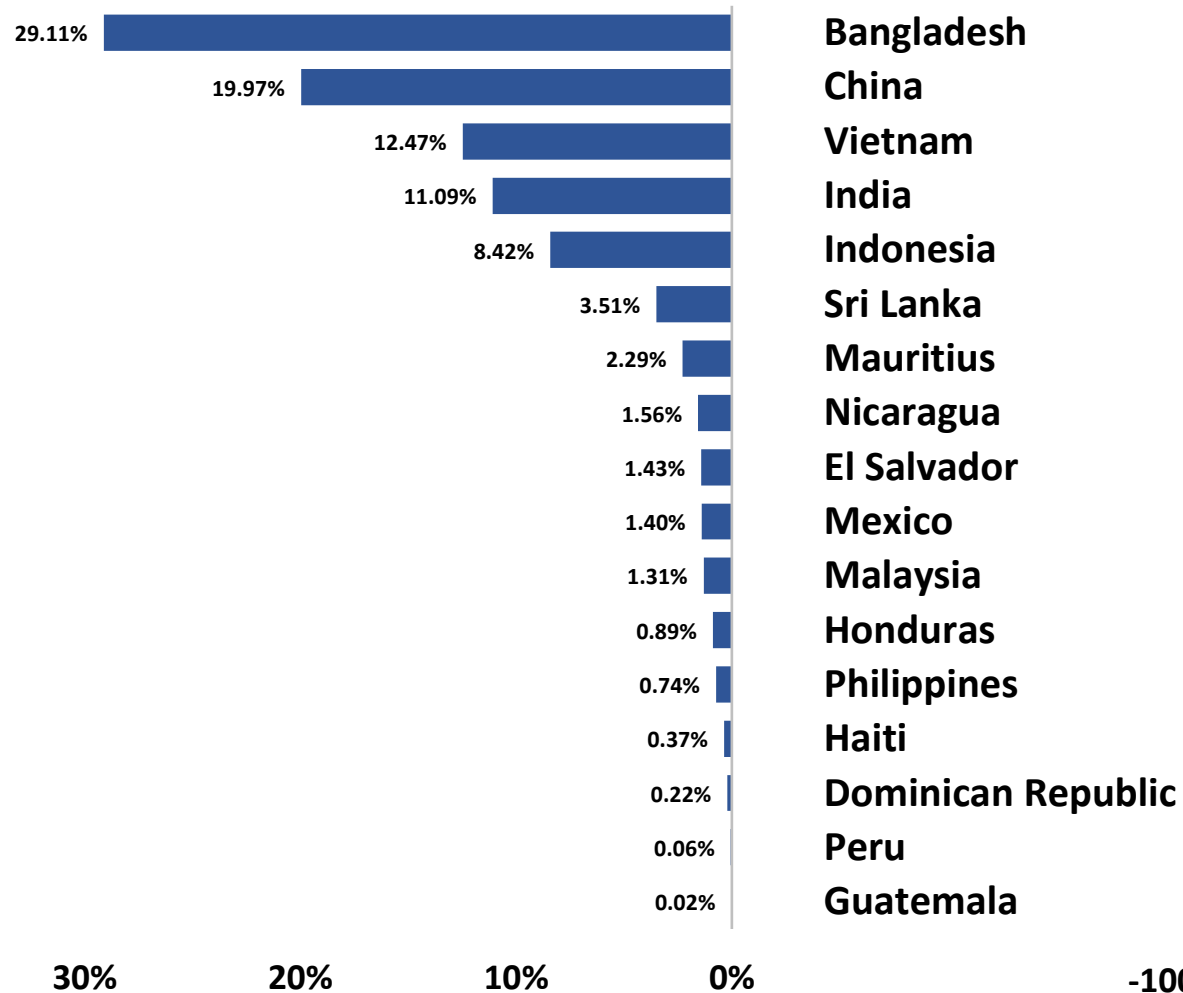


YE % CHANGE

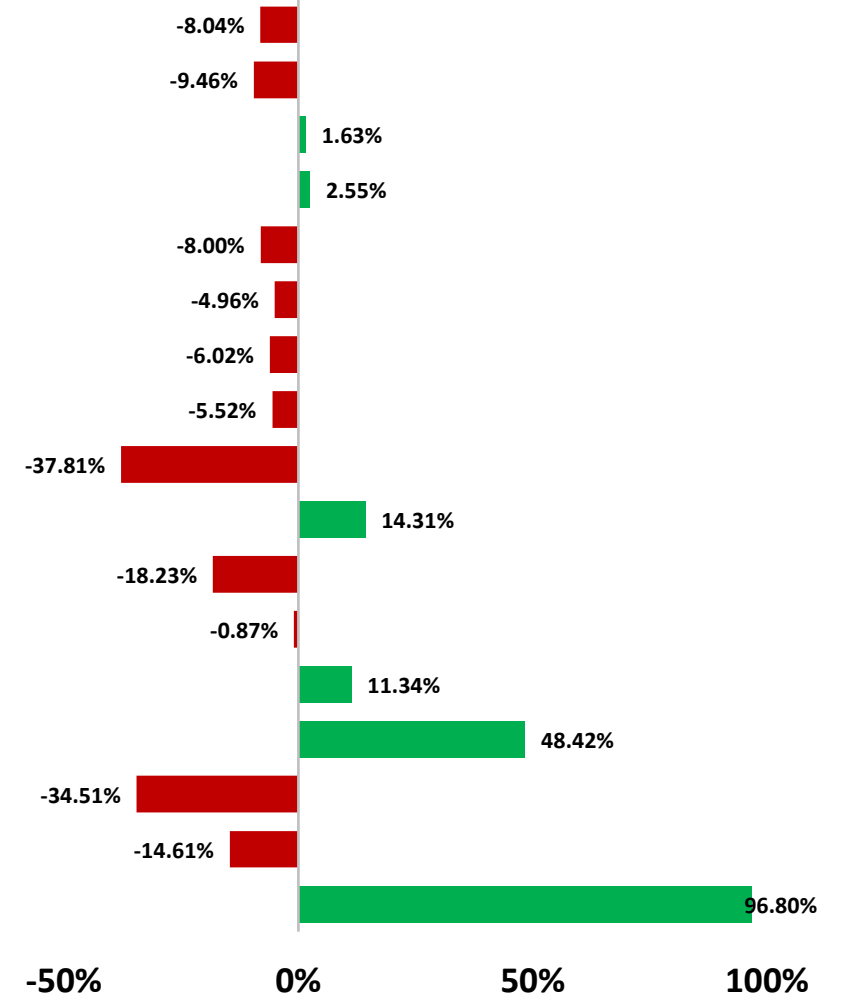


CAT 340: M/B Cotton Shirts, Not Knit

% SHARE YE 9/2018

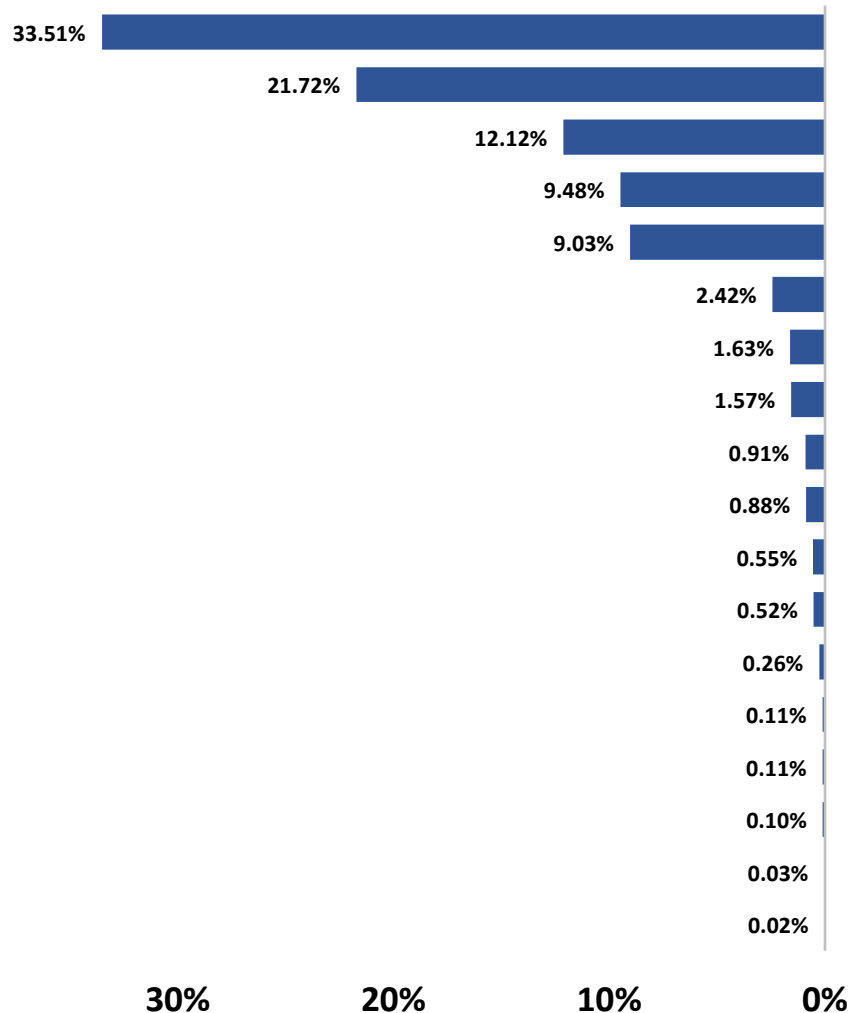


YE % CHANGE

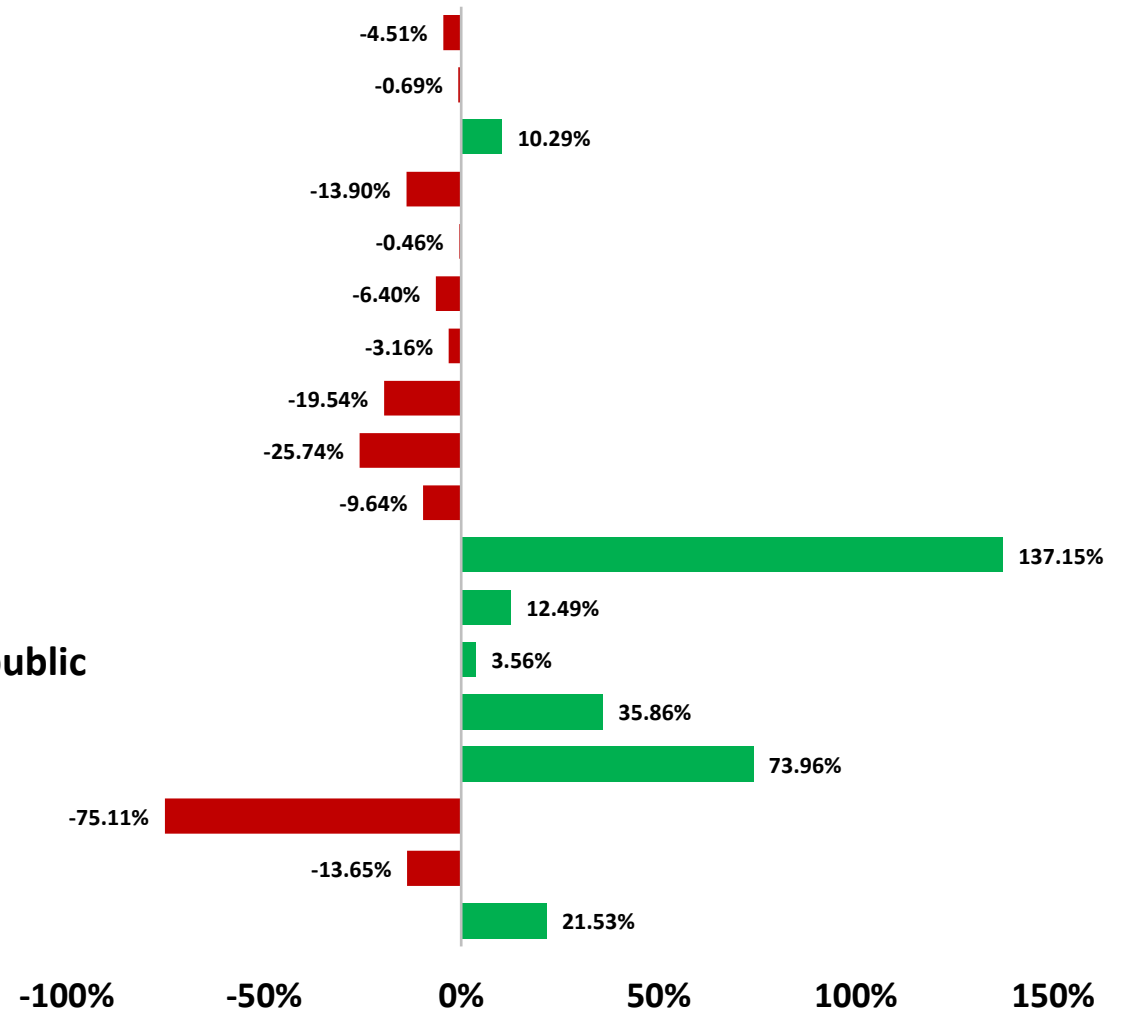


CAT 341: W/G Cotton Shirts, Not Knit

% SHARE YE 9/2018

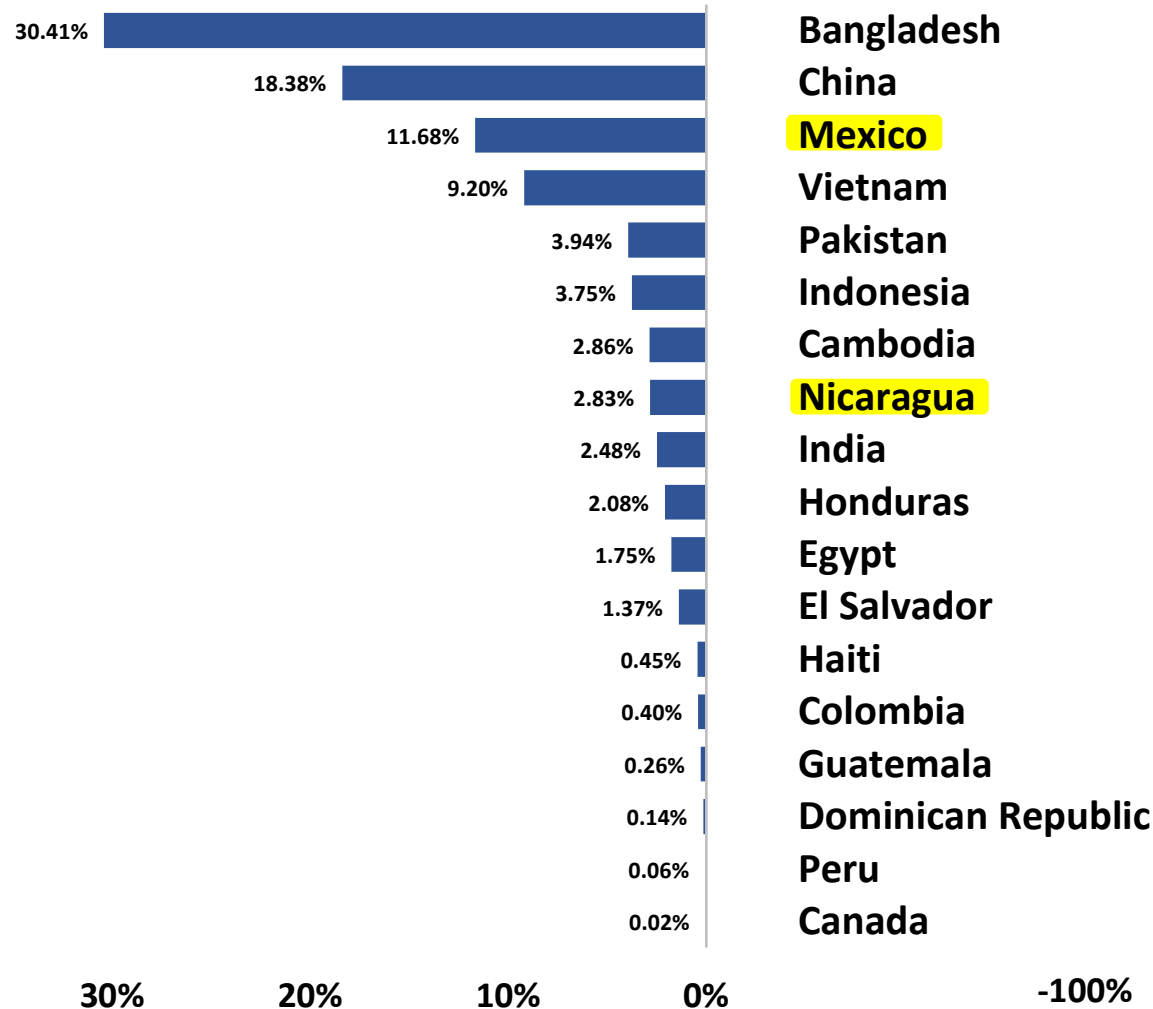


YE % CHANGE

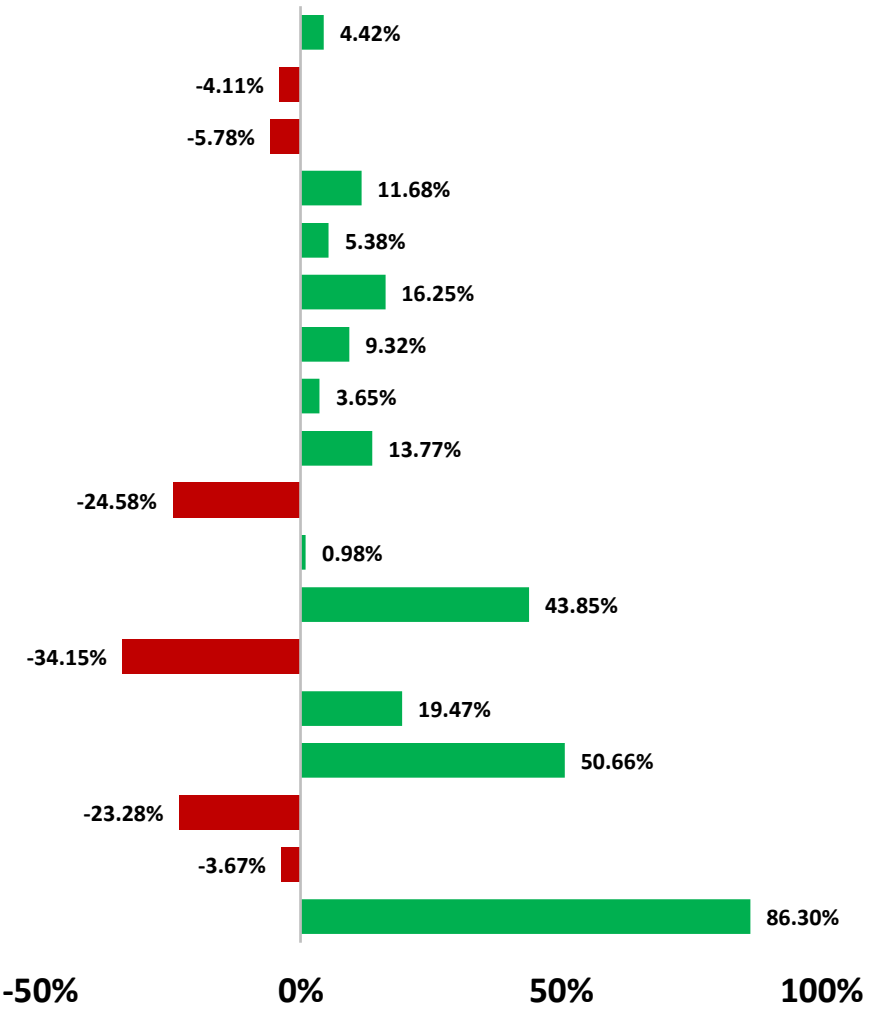


CAT 347: M/B Cotton Trousers/Breeches/Shorts

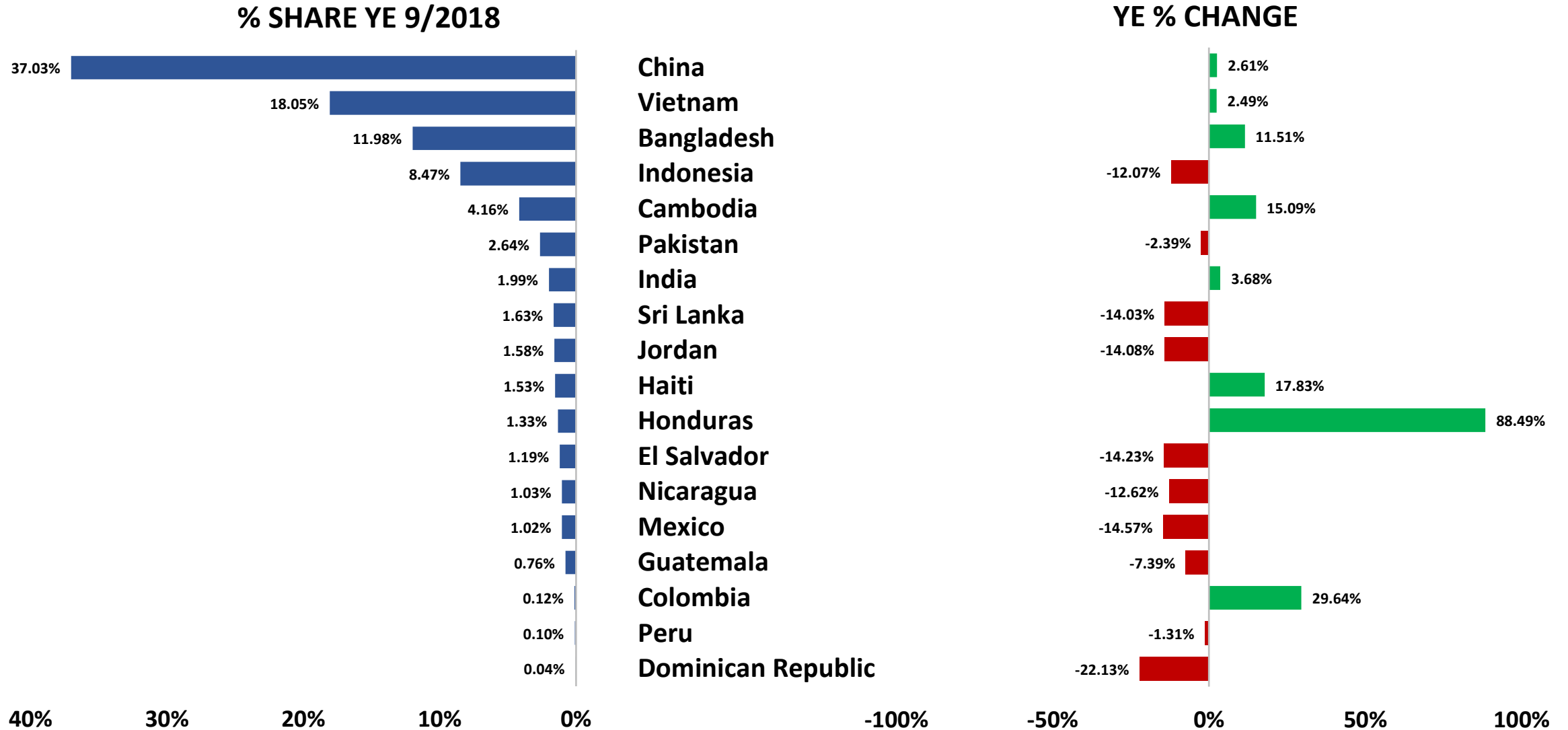
% SHARE YE 9/2018



YE % CHANGE

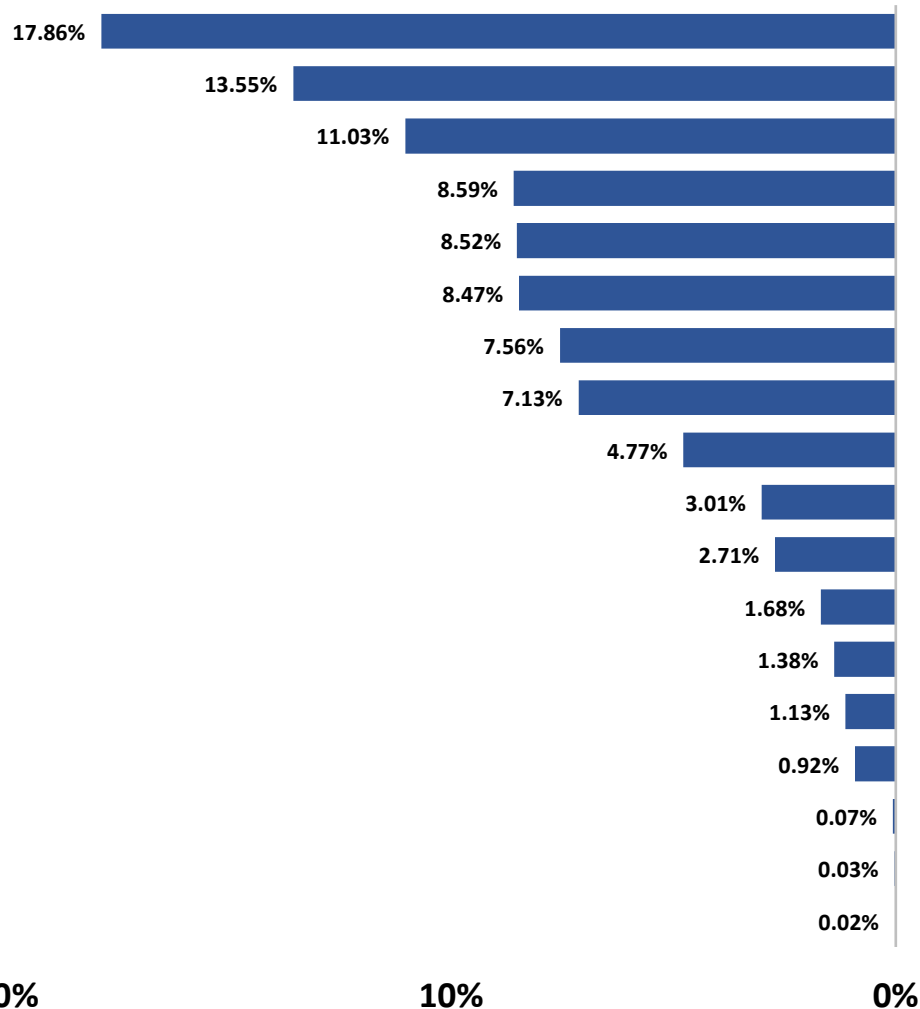


CAT 348: W/G Cotton Trousers/Slacks/Shorts

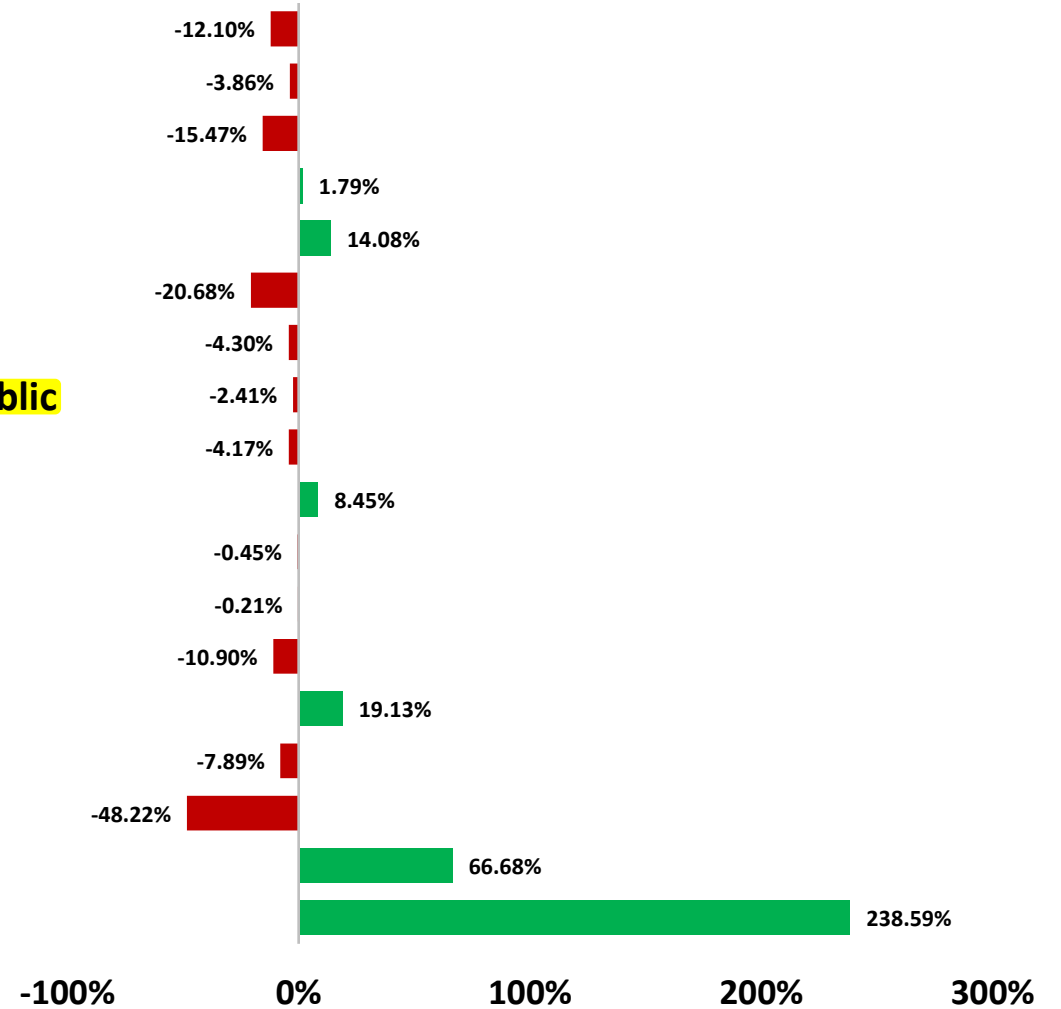


CAT 352: Cotton Underwear

% SHARE YE 9/2018

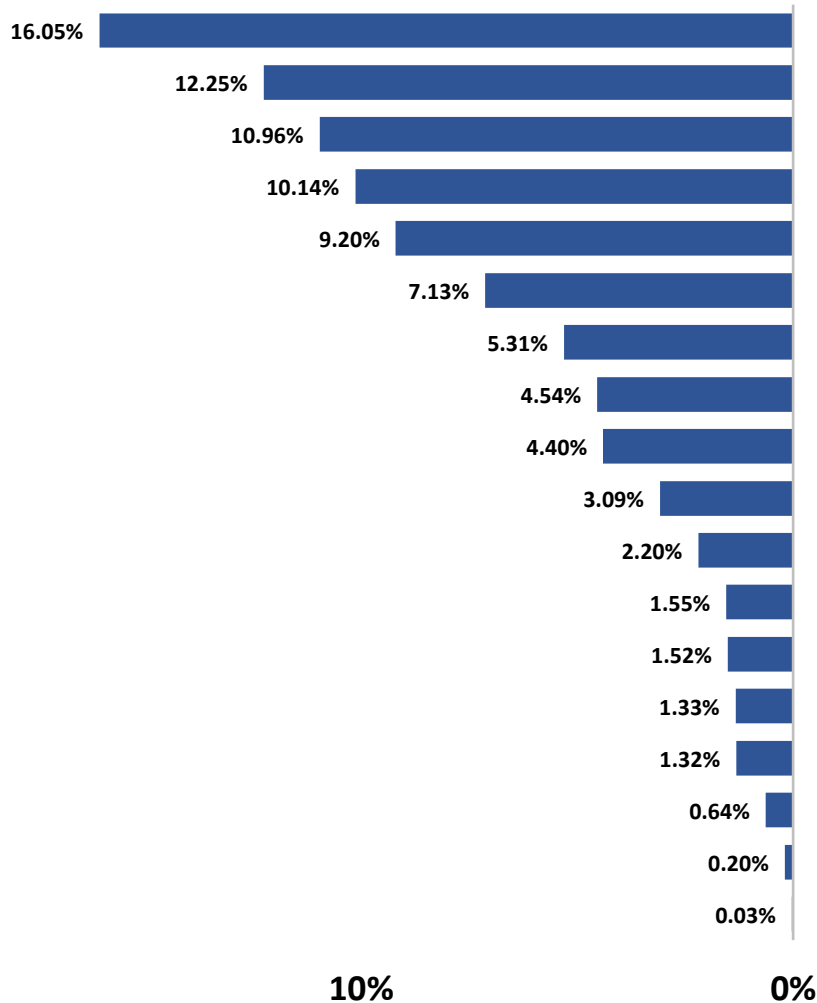


YE % CHANGE

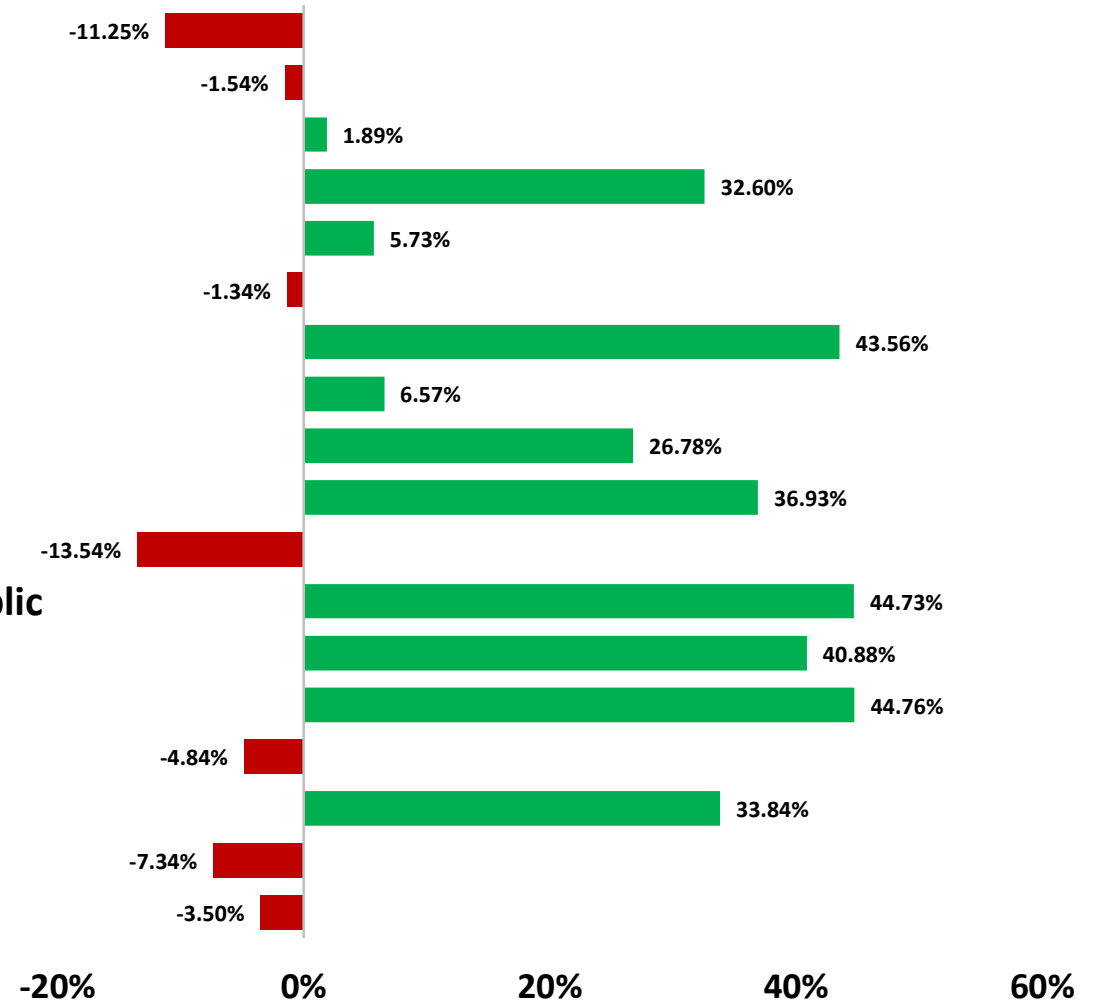


CAT 638: M/B MMF Knit Shirts

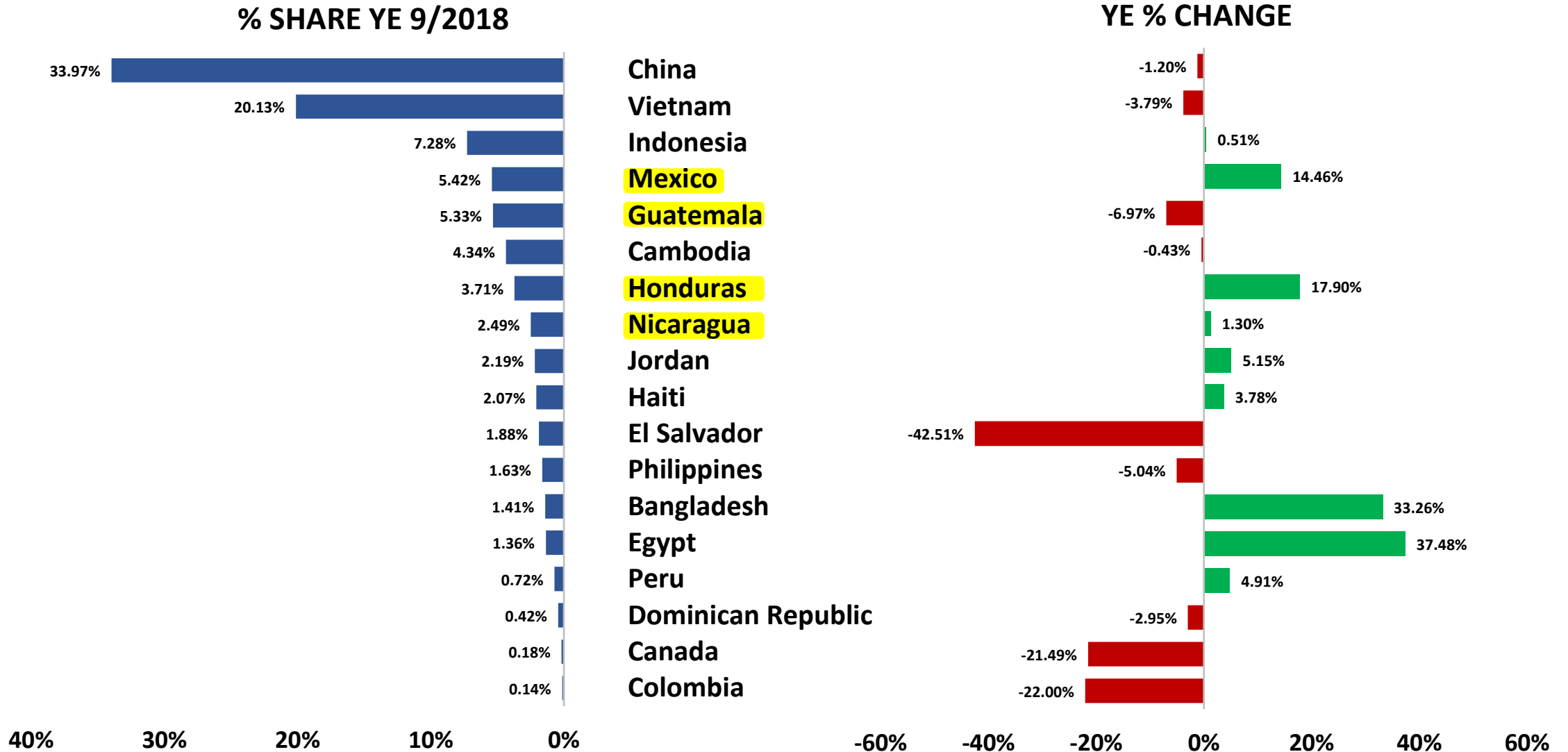
% SHARE YE 9/2018



YE % CHANGE

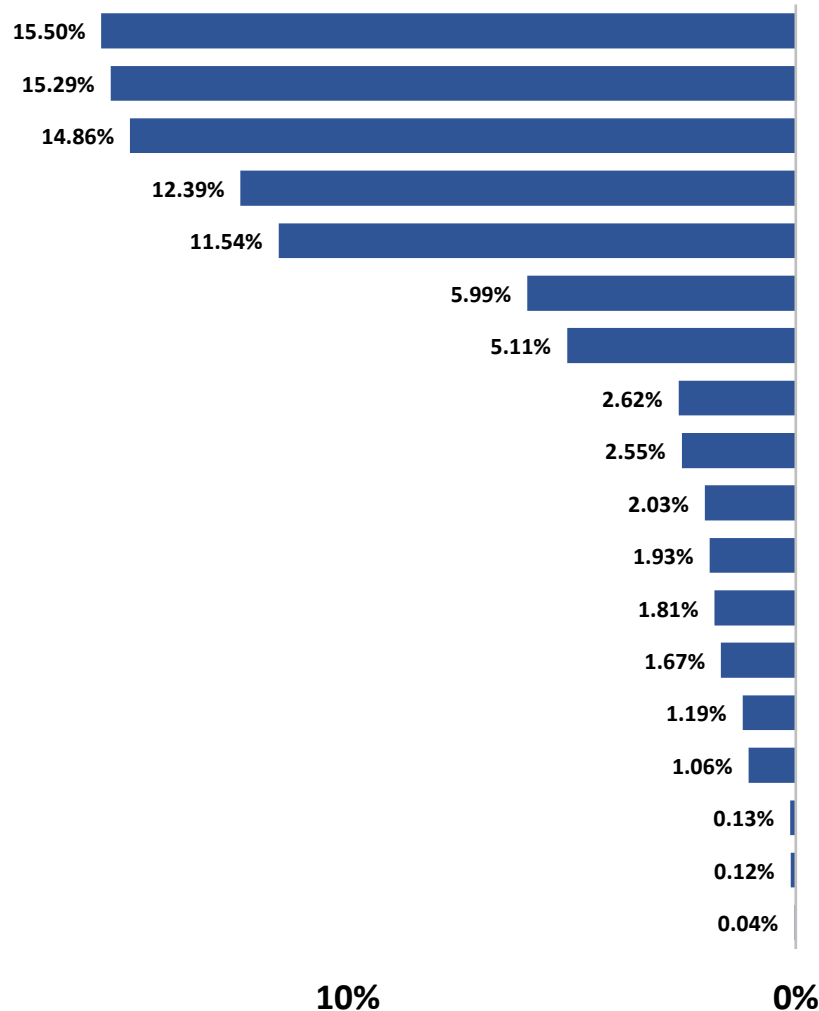


CAT 639: W/G MMF Knit Shirts/Blouses

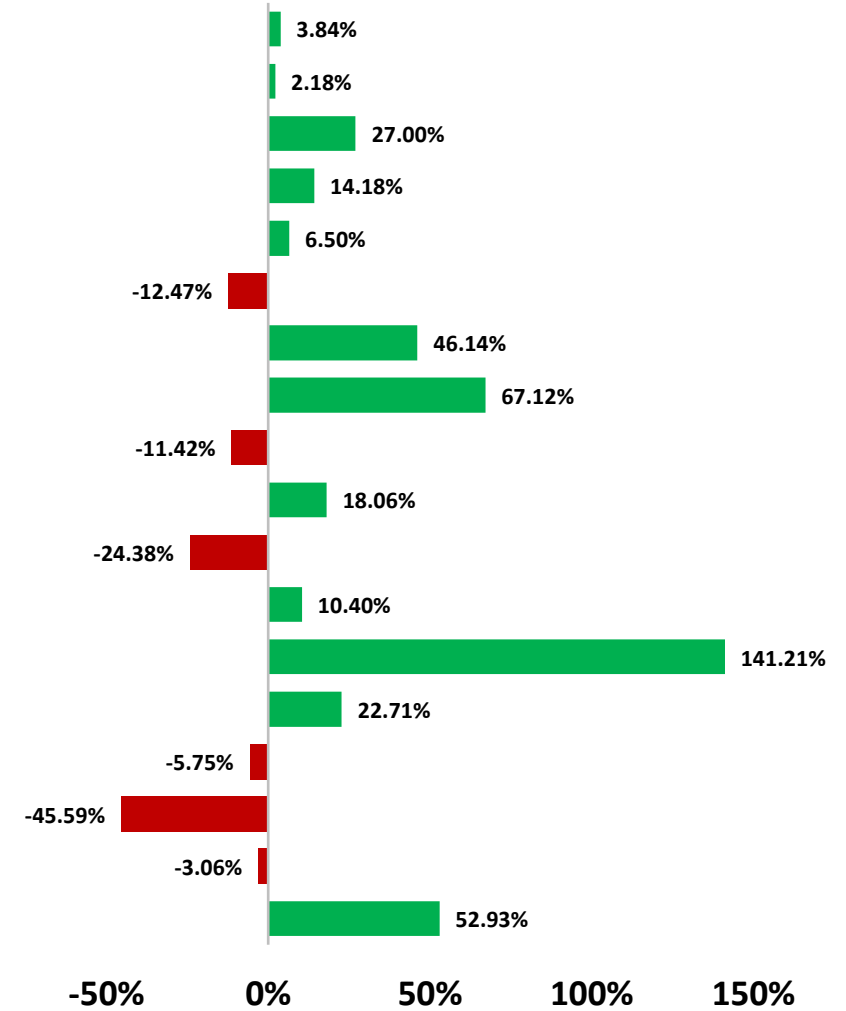


CAT 640: M/B Not-Knit MMF Shirts

% SHARE YE 9/2018

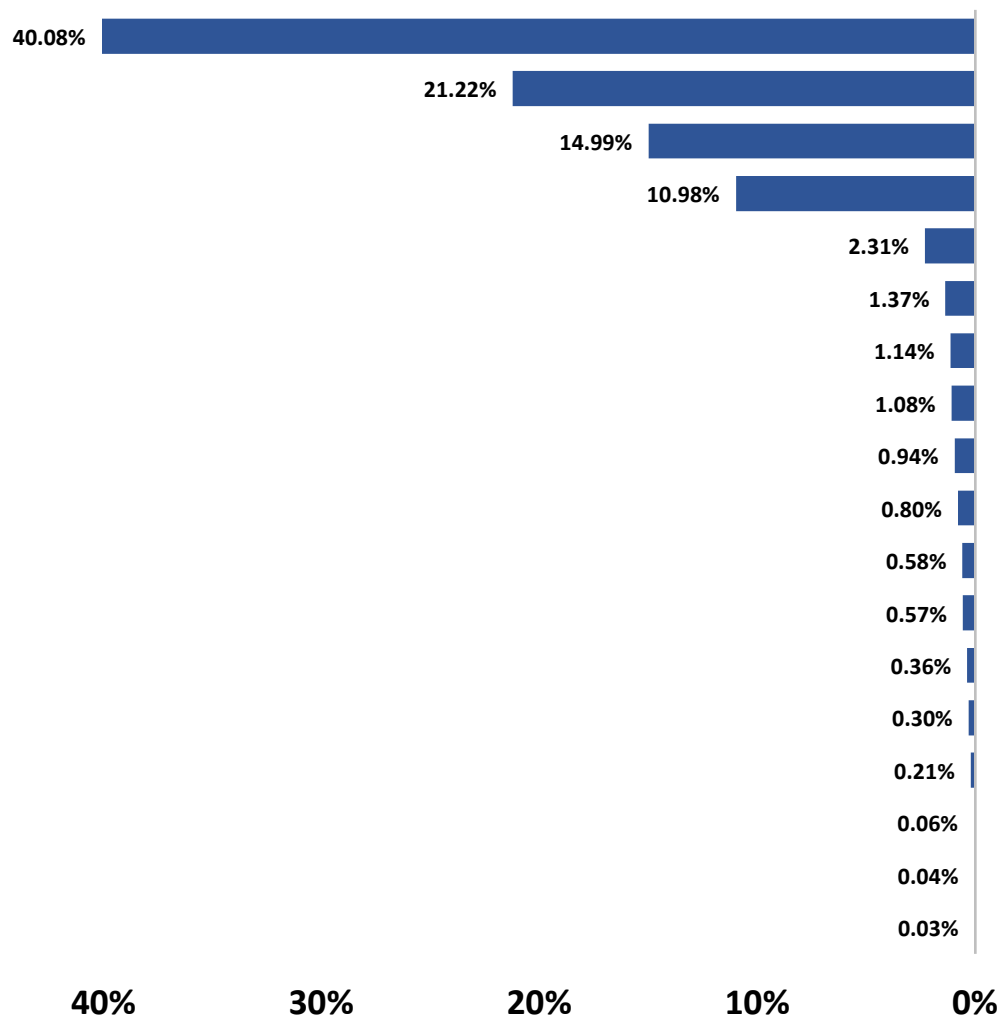


YE % CHANGE

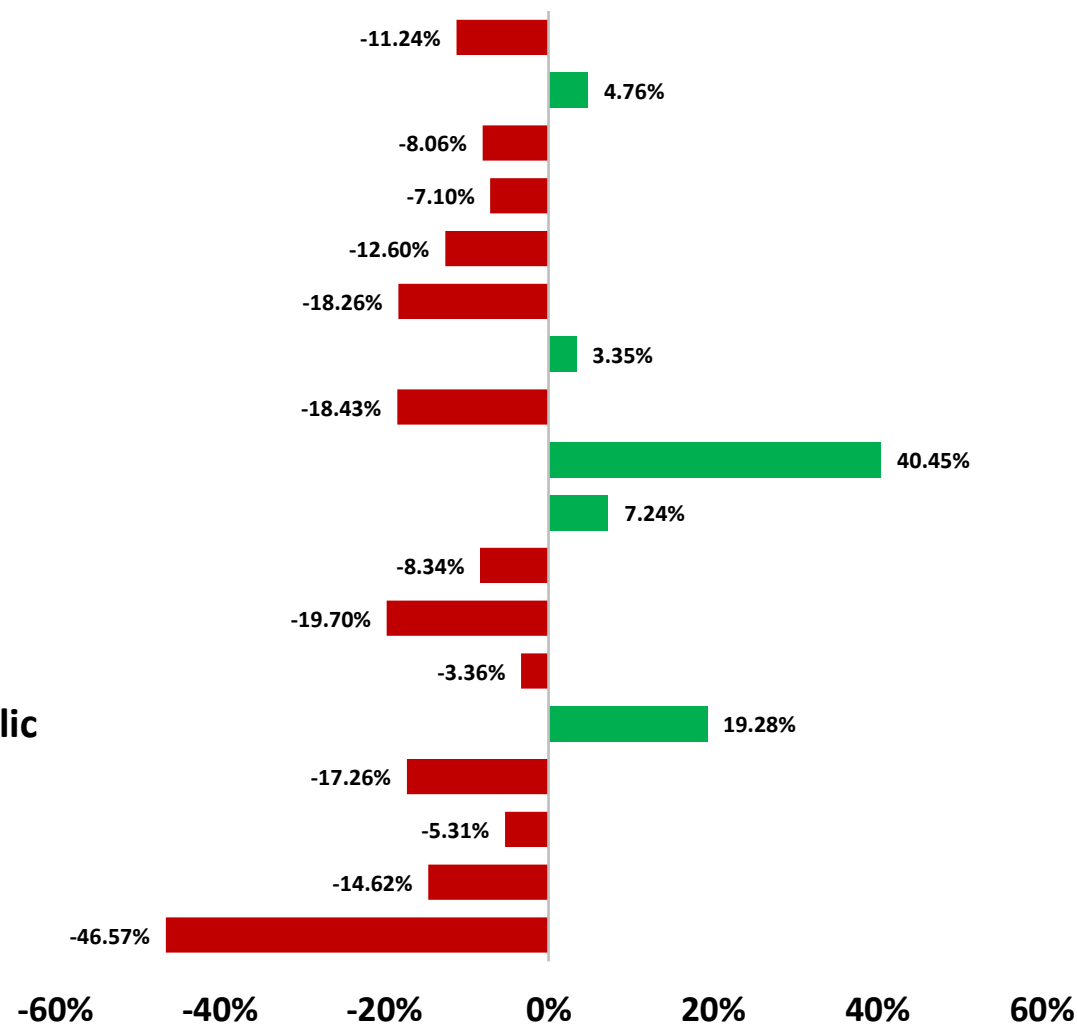


CAT 641: W/G Not-Knit MMF Shirts/Blouses

% SHARE YE 9/2018

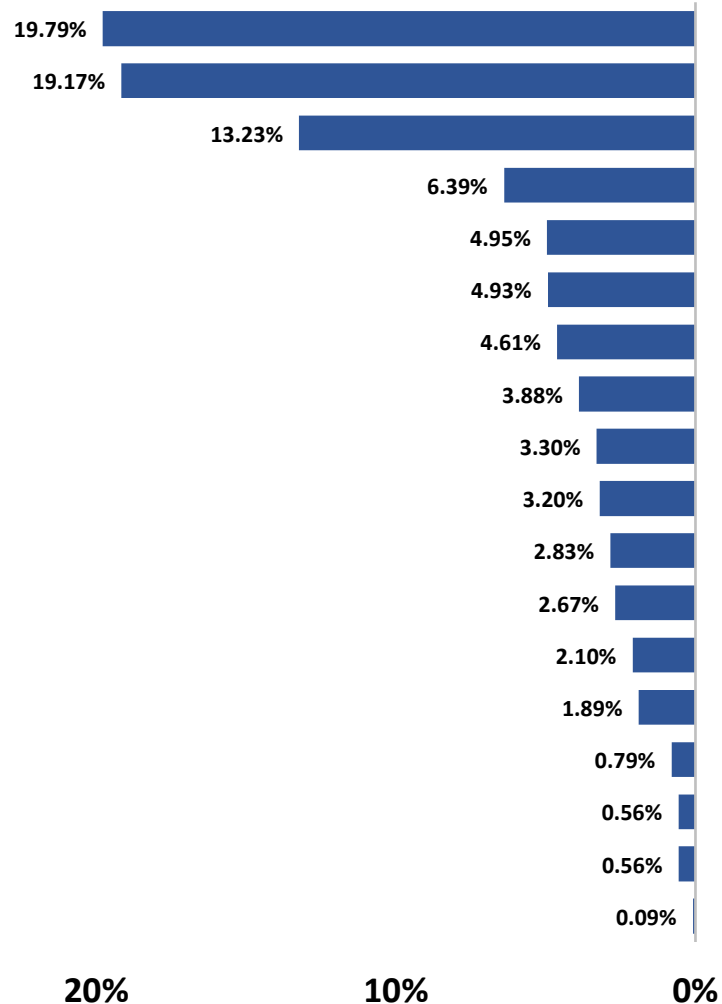


YE % CHANGE

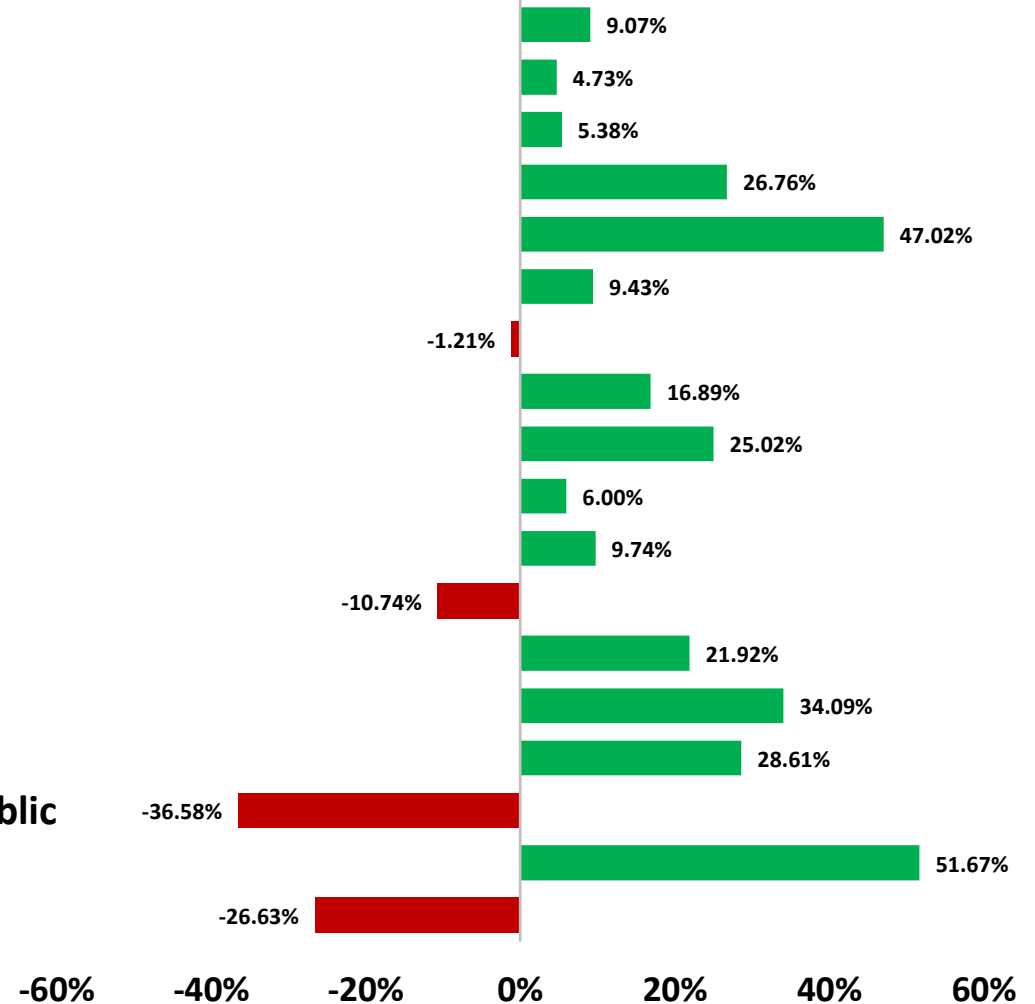


CAT 647: M/B MMF Trousers/Breeches/Shorts

% SHARE YE 9/2018



YE % CHANGE



Vietnam
 China
 Bangladesh
 Egypt
 Jordan
 Indonesia
Mexico
Honduras
El Salvador
 Cambodia
 Nicaragua
 Thailand
 Haiti
 Kenya
 Guatemala
 Dominican Republic
 Sri Lanka
 Colombia

30%

20%

10%

0%

-60%

-40%

-20%

0%

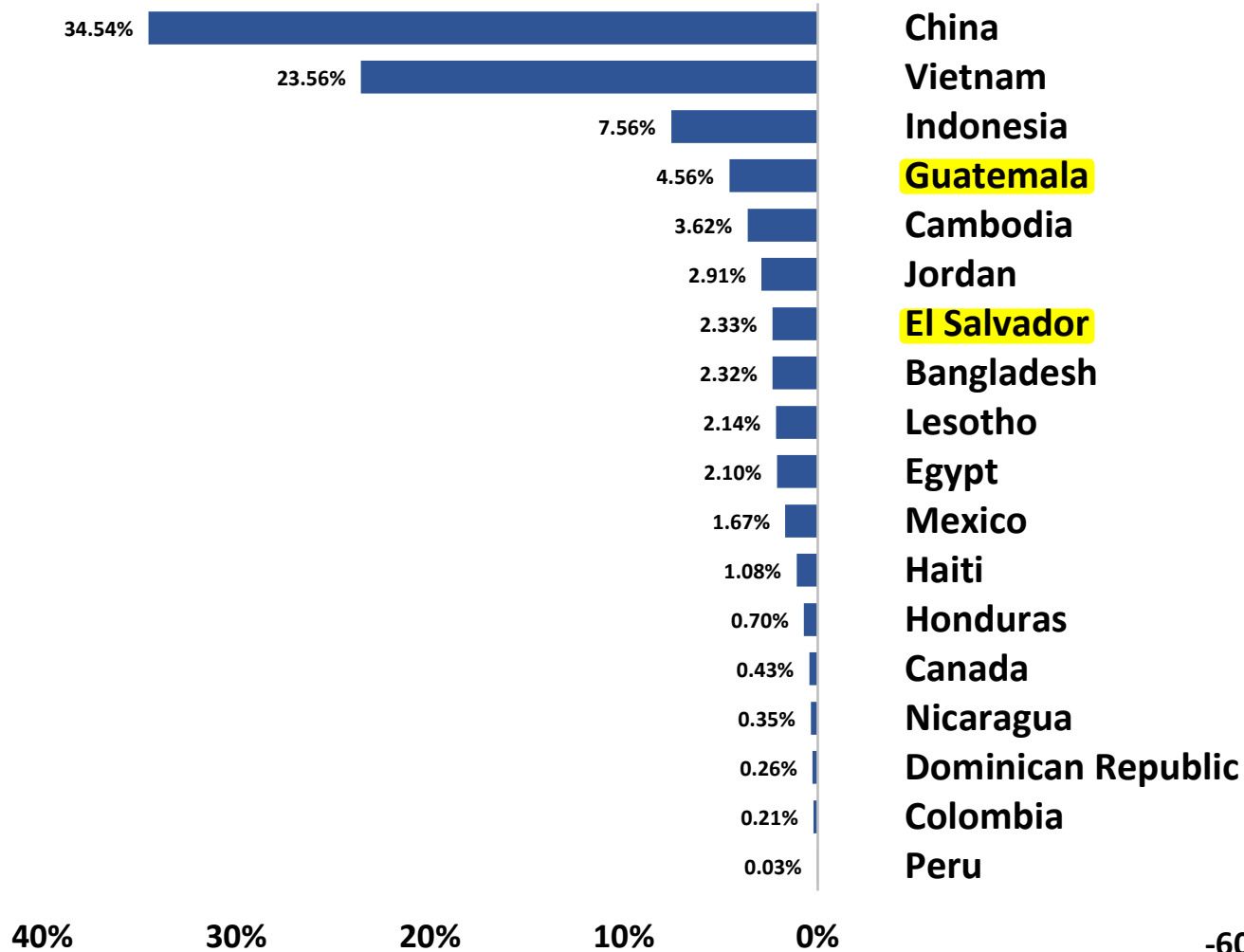
20%

40%

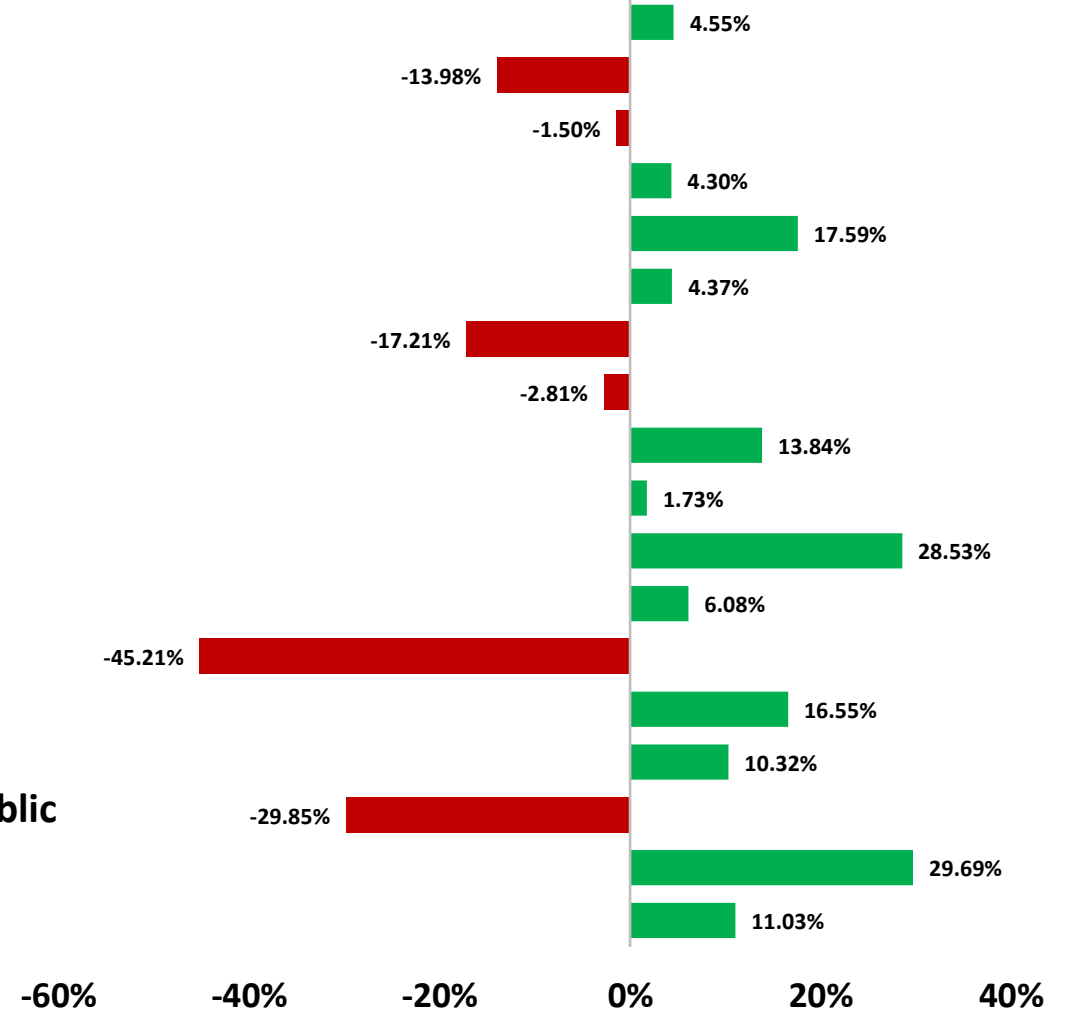
60%

CAT 648: W/G MMF Slacks/Breeches/Shorts

% SHARE YE 9/2018



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>