

UNITED STATES  
FASHION INDUSTRY  
ASSOCIATION

# Sourcing Report for 2013-2014

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## INTRODUCTION

When the United States Association of Importers of Textiles & Apparel (USA-ITA) was founded in 1989, the nine, forward-thinking founding members specifically used the word “importers” in the association’s name.

Why? These companies were tired of Washington just talking about exports—and wanted to remind policymakers that imports are good, too, in our effort to eliminate the global apparel quota system. After all, these companies’ imports help create American jobs, expand the U.S. economy, and provide families with more options when they shop.

Happily, in 2005, USA-ITA was successful in eliminating those quotas that burdened our industry and hindered our members’ abilities to create jobs—not to mention, produce affordable clothes and shoes for American families.

Since then, the industry has rapidly globalized. Today, fashion brands and retailers rely on complex, global value chains to produce the best product, at the best price, and thus remain competitive and grow.

And today, there are endless possibilities for sourcing fashion products—for example, a company might choose yarn from China, fabric from Mexico, and a sewing factory in Vietnam to produce a garment that was wholly designed and marketed in New York City, San Francisco, or Columbus. Increasingly, that garment is not only shipped to the United States, but also shipped to stores in Europe, Asia, and South America, too, where American-designed fashion is highly sought after.

This globalization of the industry has led to new challenges, especially in our members’ efforts to find the best product, at the best price for American consumers. The association has evolved with our members to address these challenges, which, as you know, led us to rebrand as the United States Fashion Industry Association (USFIA) last year.

And as the industry and its challenges have evolved, so, too, has the sourcing landscape. USFIA is committed to provide our member companies with the latest sourcing analysis that will support your business. This report takes a look at the current sourcing landscape for our industry—what (and how much) companies are sourcing, where they’re sourcing from, and why they make these decisions. We’ve also taken a peek into our “crystal ball” to determine what the future holds for textile and apparel sourcing based on the current trends.

We hope you find this report useful as you plan your sourcing strategy for the coming years.

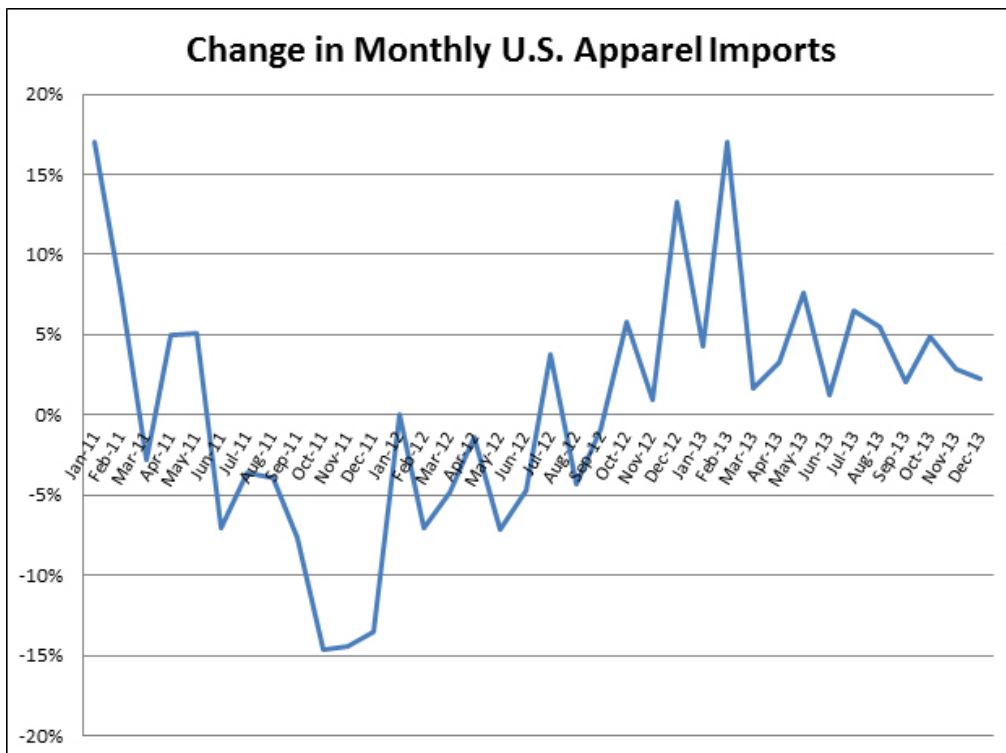
With best regards,  
Julia K. Hughes, President, United States Fashion Industry Association



## OVERVIEW: Sourcing Trends for 2013

Despite the many barriers to trade for the fashion industry, 2013 was a strong year based on the volume and growth of textile and apparel imports.

Overall, total textile and apparel imports grew 4.87 percent, and were up every single month of the year. Of these imports, nearly half were apparel products, which grew 4 percent to total 24.8 billion SME—a record high for U.S. apparel imports.



*See Addendum for U.S. Fabric, Yarn, and Made-Ups Imports.*

Additionally, imports of fabrics, made-ups, and yarn grew at rates of 4.66 percent, 4.37 percent, and 3.20 percent, respectively.

If we take a deeper dive into the data, a few key trends emerge:

1. China remains the dominant supplier...
2. But Vietnam is up to the challenge.
3. Companies aren't leaving Bangladesh...
4. But companies continue to look for sourcing opportunities closer to home.
5. Despite the high duty rates, companies aren't utilizing FTAs and other preference programs.



**TREND #1:**  
**China remains the dominant supplier...**

China remains the dominant supplier of all textiles and apparel to the U.S. market. In 2013, U.S. textile and apparel imports from China grew 5.76 percent, or an increase of 485.8 million SME. If this seems like a lot, it is—in fact, the increase is only slightly larger than the total annual apparel imports from 11th-ranked Nicaragua.

China is the dominant supplier in all categories, supplying 41 percent of apparel, 35 percent of textiles, 18 percent of yarns, and 67 percent of made-ups to the United States.

**U.S. General Imports for 2013**  
**(All Data in Millions)**  
**Apparel**

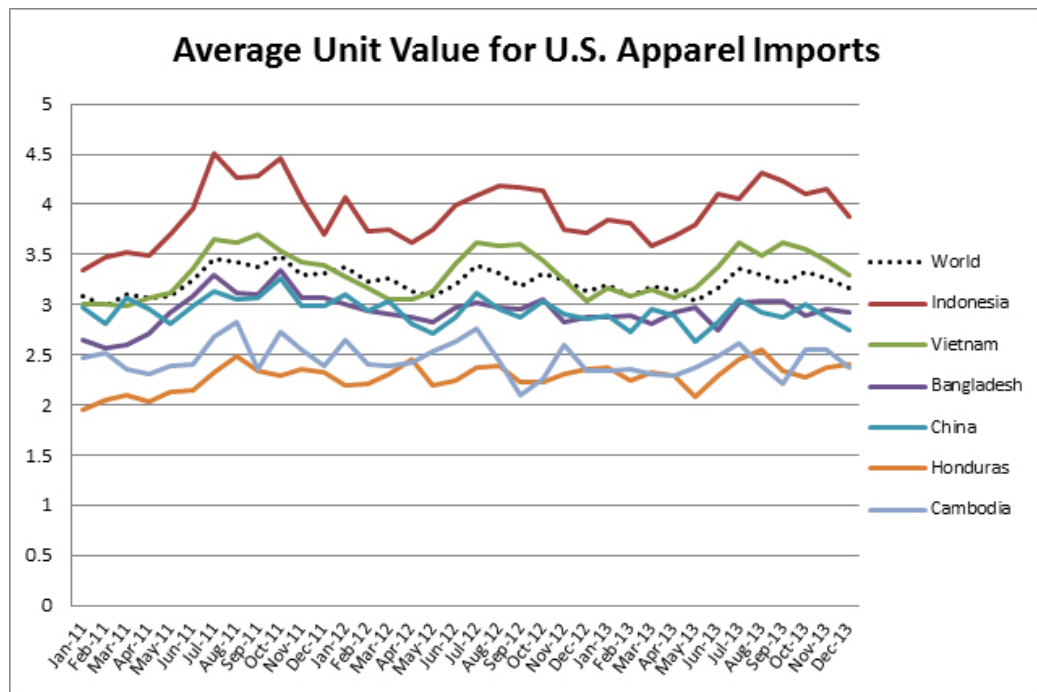
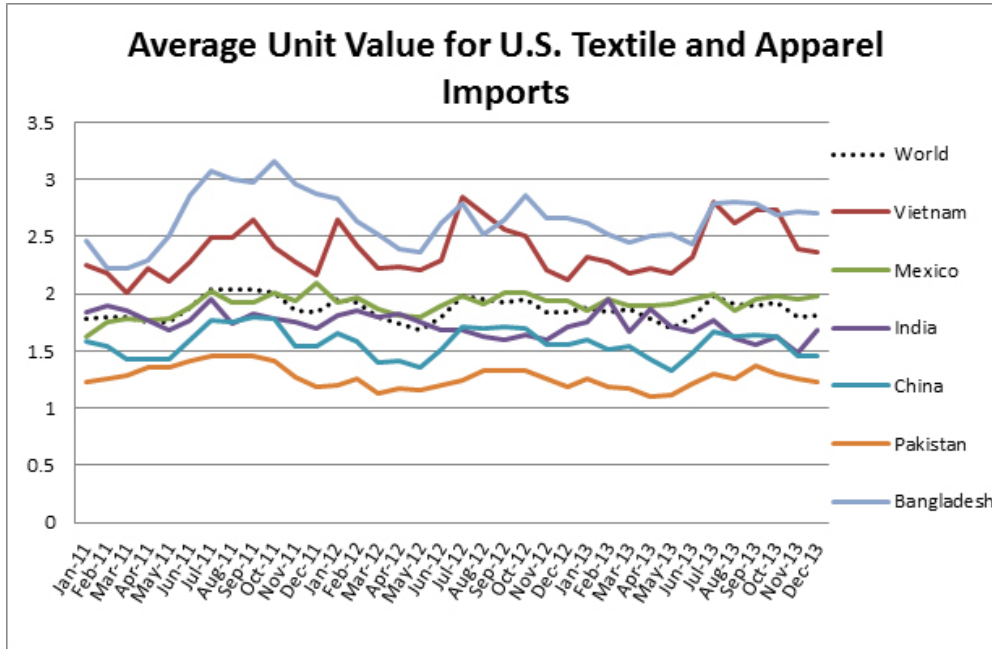
| Country     | Rank | Square Meter Equivalentents (SMEs) |          |          |         | U.S. Customs Value |          |          |         |
|-------------|------|------------------------------------|----------|----------|---------|--------------------|----------|----------|---------|
|             |      | 2013                               | 2012     | % Change | % Share | 2013               | 2012     | % Change | % Share |
| World       |      | 24,838.7                           | 23,684.5 | 4.87     | 100.00  | 79,797.6           | 76,811.1 | 3.89     | 100.00  |
| China       | 1    | 10,369.9                           | 9,884.1  | 4.91     | 41.75   | 29,783.1           | 29,060.2 | 2.49     | 37.32   |
| Vietnam     | 2    | 2,430.4                            | 2,145.0  | 13.30    | 9.78    | 8,126.3            | 7,101.1  | 14.44    | 10.18   |
| Bangladesh  | 3    | 1,692.4                            | 1,521.9  | 11.20    | 6.81    | 4,947.5            | 4,470.0  | 10.68    | 6.20    |
| Indonesia   | 4    | 1,261.8                            | 1,262.7  | -0.07    | 5.08    | 4,975.2            | 4,935.4  | 0.81     | 6.23    |
| Honduras    | 5    | 1,073.3                            | 1,118.7  | -4.06    | 4.32    | 2,497.7            | 2,559.4  | -2.41    | 3.13    |
| Cambodia    | 6    | 1,065.0                            | 1,039.2  | 2.49     | 4.29    | 2,555.4            | 2,533.9  | 0.85     | 3.20    |
| Mexico      | 7    | 908.5                              | 897.0    | 1.28     | 3.66    | 3,681.9            | 3,695.8  | -0.38    | 4.61    |
| India       | 8    | 885.2                              | 835.0    | 6.02     | 3.56    | 3,211.6            | 3,041.2  | 5.61     | 4.02    |
| El Salvador | 9    | 796.8                              | 789.8    | 0.89     | 3.21    | 1,859.4            | 1,840.6  | 1.03     | 2.33    |
| Pakistan    | 10   | 584.0                              | 582.0    | 0.35     | 2.35    | 1,476.0            | 1,471.9  | 0.28     | 1.85    |

*See Addendum for U.S. General Imports for 2013 for Fabrics, Yarn, and Made-Ups.*



## TREND #1: China remains the dominant supplier...

It's important to note that while there has been a lot of press about rising costs in China, and elsewhere, unit values have actually been decreasing. In July 2013, the world average unit value for textile and apparel imports peaked at \$1.98/SME, but since then the value has been decreasing. China shadows the world average very closely, averaging \$1.5/SME for textiles and apparel for 2013.



**TREND #2:  
But Vietnam is up to the challenge.**

Asia as a whole remains the fastest-growing supplier of textiles and apparel to the United States, but Vietnam particularly stands out as the second-largest supplier of apparel with 9 percent of the market share and the fourth-largest supplier of fabrics with 7.33 percent of the market share.

And Vietnam continues to grow, with apparel imports up 13 percent in 2013 compared to the previous year. When we look into our crystal ball (see page 13), we see great potential for Vietnam—especially if we’re able to negotiate a Trans-Pacific Partnership (TPP) agreement that works for our industry.

**Top Apparel Imports from Vietnam in 2013**

| <b>Cat.</b> | <b>HTS</b>    | <b>Description</b>  | <b>2013 Value</b> | <b>% Change</b> | <b>% of Total Apparel Imports</b> |
|-------------|---------------|---|-------------------|-----------------|-----------------------------------|
| 339         | 6110.20.20.79 | Women’s or Girls’ Knit Other Cotton Other Pullovers, Other          | 711,396,550       | 9.68%           | 8.75%                             |
| 639         | 6110.30.30.59 | Women’s or Girls’ Other Man-Made Fiber Other Pullovers, etc., Other | 455,731,124       | 11.96%          | 5.61%                             |
| 348         | 6204.62.40.21 | Women’s Not Knit Cotton Trousers & Breeches, Other                  | 269,100,229       | 18.02%          | 3.31%                             |
| 338         | 6110.20.20.69 | Men’s or Boys’ Knit Other Cotton Other Pullovers, etc., Other       | 242,075,181       | 21.70%          | 2.98                              |
| 352         | 6107.11.00.10 | Men’s Knit Cotton Under-pants and Briefs                            | 225,169,958       | 32.84%          | 2.77%                             |

There are several other countries to watch in Asia, both in terms of imports of apparel as well as imports of textiles, made-ups, and yarn.

For apparel, Bangladesh is ranked third with 6 percent of the market share and Indonesia is ranked fourth with 5 percent of the market share.

For textiles, Korea is ranked second, India is ranked third, and Vietnam is ranked fourth, each with about 7 percent of the market share. For yarns and made-ups, China is dominant, though Korea, Indonesia, India, and Pakistan supply a significant amount, as well.



### TREND #3: Companies aren't leaving Bangladesh...

You might think that given the recent tragedies in Bangladesh due to the fire and building safety challenges, companies would be rushing to take their business elsewhere. But, based on the data, this simply isn't the case. In 2013, Bangladesh ranked third for apparel imports to the United States, capturing 6 percent of the market share, and ranked sixth for made-ups, with 1.35 percent of the market share. And, in fact, imports of apparel from Bangladesh are up 11 percent in 2013 from the previous year, though we did start to see a slowdown in December with growth of just 1 percent. It remains to be seen whether this slowdown will continue.

#### Top Apparel Imports from Bangladesh in 2013

| Cat. | HTS           | Description   | 2013 Value  | % Change | % of Total Apparel Imports |
|------|---------------|---|-------------|----------|----------------------------|
| 347  | 6203.42.40.16 | Men's Not Knit Cotton Trousers & Breeches, Other          | 425,791,376 | 27.10%   | 8.61%                      |
| 347  | 6203.42.40.51 | Men's Not Knit Cotton Shorts                              | 358,594,828 | 9.64%    | 7.24%                      |
| 340  | 6205.20.20.51 | Men's Not Knit Cotton Other Shirts, Yarn-Dyed, Not Napped | 279,881,107 | 18.10%   | 5.66%                      |
| 348  | 6204.62.40.21 | Women's Not Knit Cotton Trousers & Breeches, Other        | 216,465,932 | 11.81%   | 4.38%                      |
| 347  | 6203.42.40.11 | Men's Not Knit Cotton Trousers & Breeches, Blue Denim     | 158,084,666 | 9.87%    | 3.20%                      |

Since the April 2013 Rana Plaza factory collapse and subsequent formation of the Alliance for Bangladesh Worker Safety and the Accord on Fire & Building Safety in Bangladesh, apparel brands and retailers have committed money and resources to improve safety there. The Bangladesh manufacturers continue to receive heightened attention about these worker safety issues and the disruptions caused by protests. Until these issues are resolved, apparel brands and retailers will remain engaged to improve working conditions, and so far we certainly don't see U.S. companies rushing to leave.





## TREND #4:

### But companies continue to look for opportunities closer to home.

One of the hot topics in our industry continues to be sourcing in the Western Hemisphere, including “Made in America.” There are several duty-free opportunities to source textiles and apparel closer to home, especially under the North American Free Trade Agreement (NAFTA), the Dominican Republic-Central America Free Trade Agreement (CAFTA-DR), and the Haiti HELP and Hope Acts.

In fact, Honduras, a CAFTA-DR partner, is the fifth-largest supplier of U.S. apparel imports, with 4 percent of the market share. However, imports from Honduras nonetheless fell 4 percent in 2013, by 45.4 million SME, and continue to fall.

#### Top Apparel Imports from Honduras in 2013

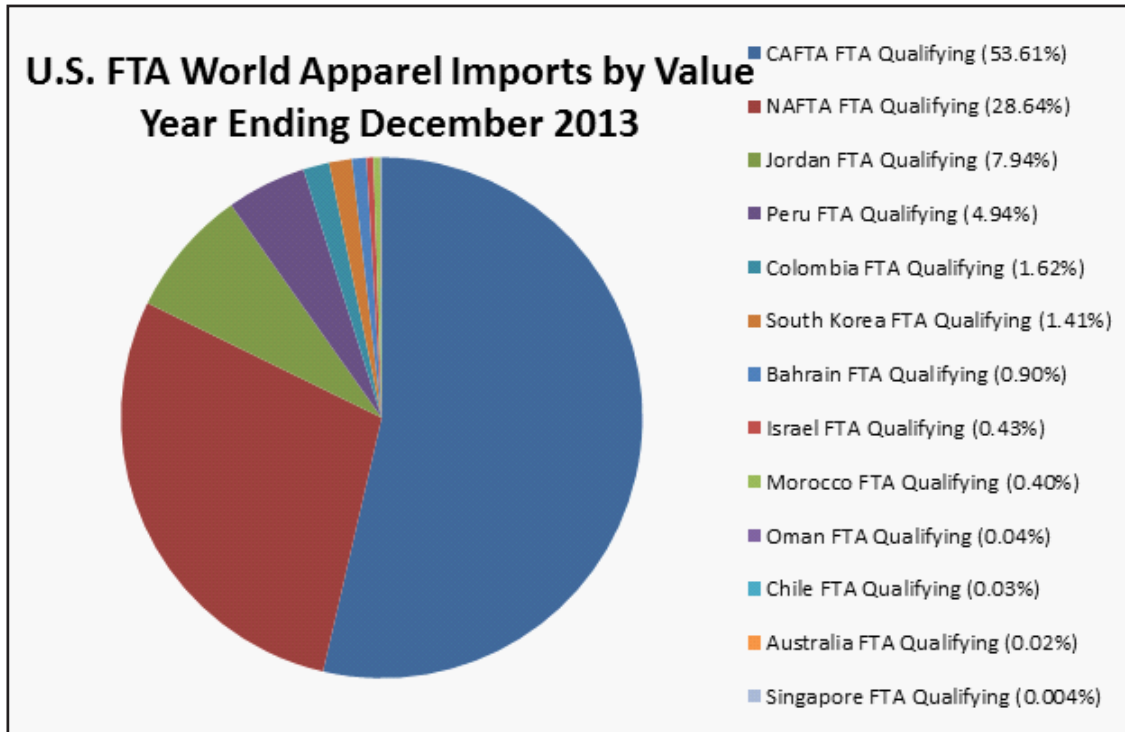
| Cat. | HTS           | Description   | 2013 Value  | % Change | % of Total Apparel Imports |
|------|---------------|---|-------------|----------|----------------------------|
| 338  | 6109.10.00.12 | Men’s Knit Cotton Other T-Shirts, Except Underwear                | 238,870,296 | -9.17%   | 9.56%                      |
| 338  | 6110.20.20.69 | Men’s or Boys’ Knit Other Cotton Other Pullovers, etc., Other     | 200,796,366 | -14.51%  | 8.04%                      |
| 638  | 6110.30.30.40 | Men’s or Boys’ Knit Other Man-Made Fiber Sweat-shirts             | 183,816,647 | -6.29%   | 7.36%                      |
| 339  | 6109.10.00.40 | Women’s Knit Cotton T-Shirts, Except Underwear                    | 132,364,214 | -5.07%   | 5.30%                      |
| 332  | 6115.95.90.00 | Knit Cotton Other Hosiery, Socks, etc. Not Containing Lace or Net | 115,000,142 | -17.07%  | 4.60%                      |

Mexico is another opportunity worth a fresh look, as Mexico is part of NAFTA and also the Trans-Pacific Partnership (TPP) negotiations. Mexico is the seventh-largest supplier of apparel to the United States, and has been one of the top producers of U.S. apparel for 20 years—since NAFTA went into effect in 1994. If the TPP is negotiated with rules that mirror the yarn-forward rules of origin in NAFTA, then TPP is not likely to have much impact on sourcing in Mexico. However, if there are more liberal exceptions to the strict rule of origin—as well as efforts to reduce the non-tariff barriers to trade among the TPP partners—there could be some very positive opportunities for the Mexican apparel industry.



**TREND #5:**  
**Despite high duty rates, companies aren't utilizing FTAs and other preference programs.**

The United States Fashion Industry Association (USFIA) supports the elimination of duties on textiles, apparel, and other fashion items, especially through the negotiation of Free Trade Agreements (FTAs) and other preference program. But looking at the historical trends, a duty-free trade agreement does not guarantee that trade will expand.



**TREND #5:**  
**Despite high duty rates, companies aren't utilizing FTAs and other preference programs.**

Despite textiles and apparel having some of the highest duty rates in the Tariff Schedule, in 2013, only 16 percent of U.S. apparel imports were duty-free under a Free Trade Agreement, Qualified Industrial Zone (QIZ), or other unilateral preference trade program. This actually represents a slight decrease from 2012, when 17 percent of U.S. apparel imports entered duty free.

**Apparel Imports from FTA Countries in 2013**

|                 | Total 2013           | Preference 2013      | Preference Apparel Imports 2013 |              |              |
|-----------------|----------------------|----------------------|---------------------------------|--------------|--------------|
|                 |                      |                      | % Growth 2013                   | Share 2013   | Share 2012   |
| World           | 24,901,652,564       | 3,988,759,382        | -4.64                           | 16.02        | 17.61        |
| AGOA            | 231,049,909          | 227,557,429          | 15.48                           | 98.49        | 98.99        |
| ATPDEA          | 41,426,488           | 2,707,698            | -84.57                          | 6.54         | 42.70        |
| Australia       | 1,057,673            | 251,618              | 17.35                           | 23.79        | 40.05        |
| Bahrain         | 14,009,558           | 13,777,485           | 17.23                           | 98.34        | 99.49        |
| <b>CAFTA-DR</b> | <b>2,920,705,702</b> | <b>2,249,116,977</b> | <b>-8.51</b>                    | <b>77.01</b> | <b>84.68</b> |
| CBTPA           | 308,237,313          | 164,328,540          | -9.11                           | 53.31        | 66.26        |
| Chile           | 203,722              | 183,824              | 10.84                           | 90.23        | 87.74        |
| Colombia        | 36,781,653           | 33,507,295           | 2.44                            | 91.10        | 89.03        |
| Egypt           | 197,266,409          | 180,391,350          | -11.86                          | 91.45        | 97.60        |
| Israel          | 20,469,894           | 9,977,622            | -51.87                          | 48.74        | 96.00        |
| Jordan          | 185,973,638          | 170,872,295          | 5.56                            | 91.88        | 91.80        |
| Korea           | 72,735,192           | 47,998,968           | 33.17                           | 65.99        | 53.23        |
| Morocco         | 12,350,288           | 6,165,511            | 64.54                           | 49.92        | 38.96        |
| NAFTA           | 958,381,093          | 807,769,816          | -0.19                           | 84.28        | 85.23        |
| Oman            | 1,914,126            | 1,913,265            | 95.51                           | 99.96        | 93.01        |
| Panama          | 217,317              | 20,691               | 2,942.79                        | 9.52         | 0.34         |
| Singapore       | 3,281,018            | 205,675              | 24.04                           | 6.27         | 4.94         |

Note: The Colombia FTA numbers include only products qualifying under the FTA. ATPDEA data for 2012 includes ATPDEA imports from Colombia prior to the FTA.



## USFIA & University of Rhode Island Benchmarking Study Summary

In March and April of 2014, USFIA worked with Dr. Sheng Lu of the University of Rhode Island Department of Textiles, Fashion Merchandising and Design to survey executives at the leading textile, apparel, and fashion brands, retailers, importers, and wholesalers. We were fascinated to discover that these companies' sourcing and business practices reflect the official data in this report—and to glean insights into their thoughts on the business outlook and future of trade policy.

The key findings are below, and the full report is available at [www.usfashionindustry.com](http://www.usfashionindustry.com).

- **Respondents (89 percent) are optimistic about the five-year outlook for the U.S. fashion industry.** They are worried about rising cost, but expect only moderate increases in 2014—78 percent expect sourcing cost to increase slightly or moderately, and only 3.7 percent expect it to increase substantially.
- **China will remain the dominant supplier.** When asked about the next two years, 50 percent of respondents expect a decrease in sourcing value or volume from China. But even those companies who expect less sourcing from China anticipate only a modest decrease. Another 50 percent expect no change or even a slight increase. Yet Vietnam, and Asia as a whole, are seen as having more growth potential.
- **Companies aren't leaving Bangladesh.** Currently, 76.9 percent of respondents source from Bangladesh, and 60 percent say they expect to somewhat increase sourcing from Bangladesh in the next two years while 5 percent expect to strongly increase it. Another 15 percent expect no change in their current scale of sourcing in Bangladesh.
- **Companies continue to look for opportunities closer to home, including the United States.** Currently, 84 percent of respondents source in Central America and the Caribbean Basin, and 76.9 percent source in the United States. Respondents express strong interest in expanding sourcing in these regions, too. Companies with the most diversified global sourcing bases seem more likely to commit to sourcing in the United States, and sourcing in the United States seems to be a component of an overall strategy to diversify sourcing—not cut back on imports.
- **It's clear that most companies' look at "China plus many" as the strategy of choice.** The majority of respondents (52 percent) report currently sourcing from 6-20 countries, while another quarter source from more than 20 countries. The majority (56 percent) also expect their sourcing base will become more diversified in the next two years.
- **Respondents report a fairly low utilization rate of most FTAs and preference programs between the United States and its trading partners.** NAFTA, CAFTA-DR, AGOA, and KORUS are the top four most-used FTAs and preference programs among respondents. All other enacted FTAs and preferences programs have utilization rates of less than 20 percent among respondents, and some are not used at all by respondents.



## THE CRYSTAL BALL: Sourcing Outlook Beyond 2014

As our members told us in our rebranding effort last year, we keep them informed not only about the regulatory challenges today, but also the regulatory challenges of tomorrow—and as our industry continues to globalize, we continue to expand our reach.

As much as we'd like to see new trade agreements available for use this year, especially the Trans-Pacific Partnership (TPP) agreement, there's still much work to be done on the remaining, sensitive issues, especially textiles and apparel. Nonetheless, we remain engaged and continue to press the negotiators to recognize the importance of the global value chain for our industry, and market access and rules of origin that align with today's business realities.

Other trade policy initiatives we're also focusing on include the Transatlantic Trade & Investment Partnership (TTIP) negotiations with the European Union, the renewal of key existing initiatives like the African Growth & Opportunity Act (AGOA) and the emergence of Myanmar as a sourcing hub, all of which could provide enormous opportunities for the fashion industry.

Let's take a closer look into our crystal ball to see what's on the horizon.



## THE CRYSTAL BALL: Trans-Pacific Partnership (TPP)

The Trans-Pacific Partnership (TPP) agreement is one of the most ambitious trade agreements ever under negotiation. The parties are: Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore, the United States, and Vietnam.

As of the end of 2013, the TPP countries represent 13 percent of the total U.S. textile and apparel imports by quantity, and 15 percent of the total U.S. imports by value. These numbers make the TPP the largest textile and apparel trading bloc with the United States—with the exception, of course, of China.

### Textile & Apparel Imports from TPP Countries in 2013

|             | Rank | Textiles & Apparel |         | Apparel Only |         |
|-------------|------|--------------------|---------|--------------|---------|
|             |      | Million \$         | % Share | Million \$   | % Share |
| World       |      | 104,724.6          | 100.0   | 79,797.6     | 100.00  |
| Vietnam     | 3    | 8,771.8            | 8.38    | 8,126.3      | 10.18   |
| Mexico      | 5    | 4,650.6            | 4.44    | 3,681.9      | 4.61    |
| Canada      | 11   | 1,366.2            | 1.30    | 532.5        | 0.67    |
| Japan       | 25   | 428.0              | 0.41    | 39.6         | 0.05    |
| Malaysia    | 29   | 527.8              | 0.50    | 500.4        | 0.63    |
| Peru        | 39   | 646.1              | 0.62    | 616.2        | 0.77    |
| New Zealand | 53   | 27.5               | 0.03    | 0.9          | 0.00    |
| Australia   | 57   | 19.7               | 0.02    | 7.8          | 0.01    |
| Singapore   | 77   | 28.6               | 0.03    | 27.2         | 0.03    |
| Chile       | 90   | 14.5               | 0.01    | 4.7          | 0.01    |
| Brunei      | 91   | 4.2                | 0.004   | 4.2          | 0.01    |

The agreement could provide new opportunities, especially from Vietnam and Mexico. Additional opportunities include Peru and Malaysia, which rank as the 21st- and 23rd-largest suppliers of apparel to the United States. Like Mexico, the majority of U.S. imports from Peru (97 percent) are already duty free under the U.S.-Peru Free Trade Agreement, but there could be new business opportunities under a TPP. Malaysia represents another substantial opportunity for apparel, especially with the opportunity to source inputs from other TPP countries like Japan. In addition to apparel, TPP countries also provide significant opportunities for textiles, including cotton from Peru, Malaysia, and Mexico, man-made fibers from Vietnam, and wool from Australia and New Zealand.

It's important to mention that TPP countries include some of the fastest-growing consumer markets in the world, offering huge opportunities for U.S. exports of branded apparel and home furnishings.



## THE CRYSTAL BALL: Transatlantic Trade & Investment Partnership (TTIP)

On February 12, 2013, President Obama announced the launch of talks on a comprehensive Transatlantic Trade & Investment Partnership (TTIP) with the European Union. The United States and EU have since completed five rounds of negotiations, though much work remains to be done.

Despite our discussions on the dominance of Asia, the European Union represents a significant opportunity for the fashion industry. In 2013, the United States imported \$4 billion worth of textile and apparel products from the EU, half of which was apparel, including men's and boys' non-knit wool suits, other nonwovens, and non-knit wool scarves, shawls, and mufflers.

Like the TPP countries, the European Union is also a major destination for the sale of branded textile and apparel products from the United States, and an opportunity to grow our industry worldwide.

### Top Apparel Imports from EU Countries in 2013

| Cat | HTS           | Description  | 2013 Value  | % Change | % Share |
|-----|---------------|--|-------------|----------|---------|
| 443 | 6203.11.90.00 | Men's or Boys' Not Knit Wool / Fine Animal Hair Suits                                | 106,770,680 | 5.12%    | 2.67%   |
| 433 | 6203.31.90.20 | Men's / Boys' Not Knit Wool Suits, Wool Yarn dia <=18.5 microns, in note 3(a), Other | 79,521,376  | 6.00%    | 1.99%   |
| 223 | 5603.12.00.90 | Other nonwovens, of man-made filaments, more than 25 g/m2 but not more than 70 g/m2  | 72,786,182  | 12.23%   | 1.82%   |
| 223 | 5603.92.00.90 | Other nonwovens, not of man-made filaments, more than 25 g/m2 not more than 70 g/m2  | 62,441,469  | 20.85%   | 1.56%   |
| 459 | 6214.20.00.00 | Not Knit Wool Scarves, Shawls, Mufflers, etc.  | 62,328,777  | 10.35%   | 1.56%   |



## THE CRYSTAL BALL: On the Horizon

As noted, there are several other trade negotiations under negotiation or discussion for renewal/expansion.

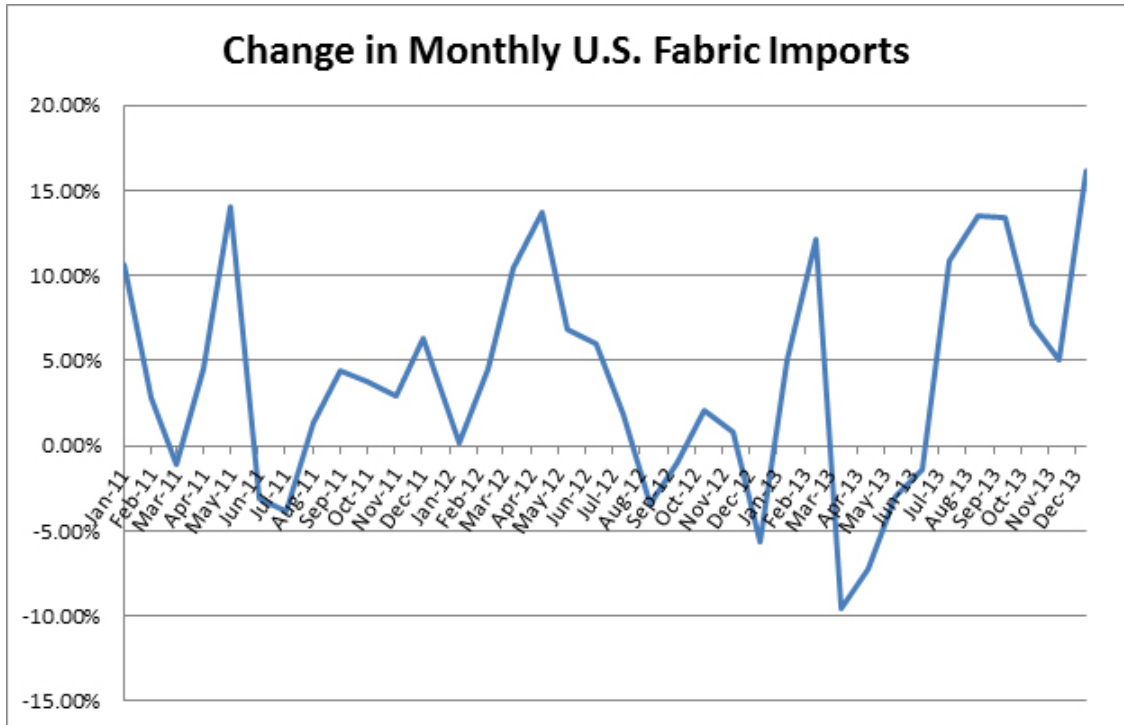
The African Growth & Opportunity Act (AGOA), and the rise of Africa more generally, have been hot topics of discussion in Washington and around the world, and USFIA has been engaged with the Office of the U.S. Trade Representative and other government and industry groups to push for renewal of this important agreement. While the AGOA countries are not one of the largest sources of apparel for the United States, more than 91 percent of the apparel imports from these countries enter the United States duty free, and we know companies are interested in increasing operations in the AGOA region if the agreement is renewed quickly, and for several years.

The emergence of Myanmar (Burma) as a potential sourcing hub is also of great interest to the fashion industry. In 2012, the U.S. Government eased the sanctions on Myanmar, allowing bilateral trade and investment in the country. On May 21, 2013, the United States and Myanmar signed a Trade & Investment Framework Agreement (TIFA) to increase trade between the two nations as well as support development in Myanmar. While apparel sourcing is minimal at the moment, we will continue to watch this country for opportunities and engage with Myanmar government and industry to support the developing fashion industry there. Apparel imports from Myanmar currently are valued at \$4.5 million.





## ADDENDUM

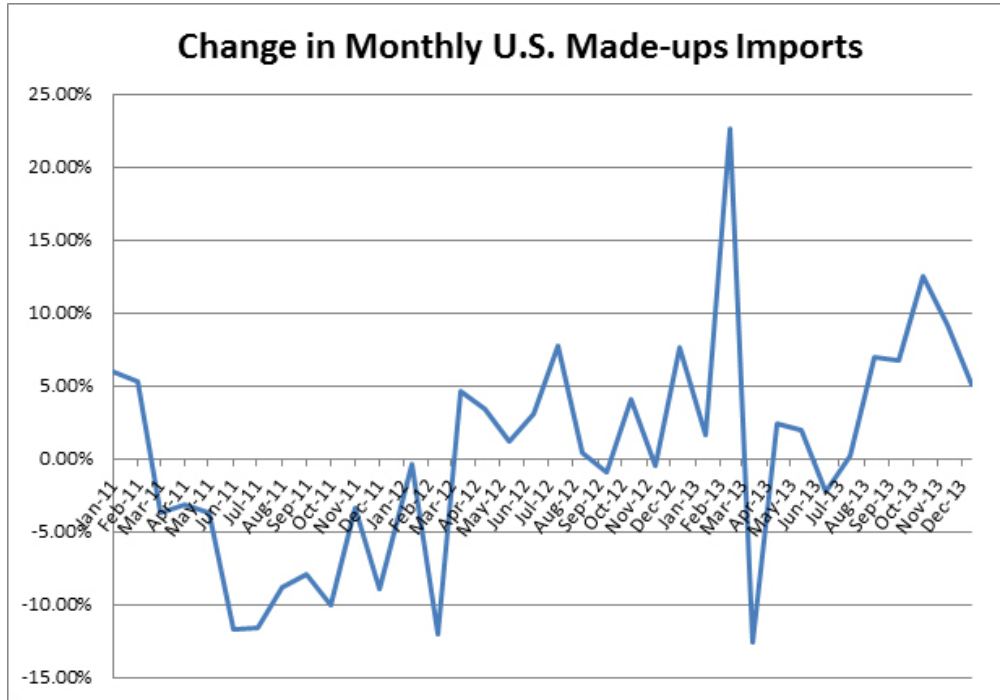


### U.S. General Imports for 2013 (All Data in Millions) Fabrics

| Country | Rnk | Square Meter Equivalent (SMEs) |          |         |        | U.S. Customs Value |          |         |        |
|---------|-----|--------------------------------|----------|---------|--------|--------------------|----------|---------|--------|
|         |     | Current                        | Previous | Percent |        | Current            | Previous | Percent |        |
|         |     | Year                           | Year     | Change  | Share  | Year               | Year     | Change  | Share  |
| World   |     | 10,189.6                       | 9,736.3  | 4.66    | 100.00 | 5,919.8            | 5,732.7  | 3.26    | 100.00 |
| China   | 1   | 3,632.9                        | 3,230.6  | 12.45   | 35.65  | 1,707.9            | 1,607.4  | 6.25    | 28.85  |
| Korea   | 2   | 796.4                          | 910.6    | -12.55  | 7.82   | 507.2              | 547.9    | -7.43   | 8.57   |
| India   | 3   | 787.7                          | 774.4    | 1.72    | 7.73   | 304.6              | 300.1    | 1.51    | 5.15   |
| Vietnam | 4   | 746.8                          | 636.6    | 17.30   | 7.33   | 209.0              | 179.6    | 16.33   | 3.53   |
| Canada  | 5   | 667.3                          | 711.0    | -6.16   | 6.55   | 399.9              | 428.3    | -6.64   | 6.75   |
| Mexico  | 6   | 480.0                          | 456.7    | 5.11    | 4.71   | 306.4              | 278.2    | 10.15   | 5.18   |
| Taiwan  | 7   | 451.3                          | 424.0    | 6.44    | 4.43   | 320.3              | 313.7    | 2.09    | 5.41   |
| Israel  | 8   | 335.6                          | 289.0    | 16.13   | 3.29   | 116.3              | 101.9    | 14.09   | 1.96   |
| Germany | 9   | 318.0                          | 244.5    | 30.07   | 3.12   | 227.3              | 186.6    | 21.83   | 3.84   |
| Turkey  | 10  | 237.0                          | 251.9    | -5.91   | 2.33   | 148.5              | 145.8    | 1.82    | 2.51   |



## ADDENDUM

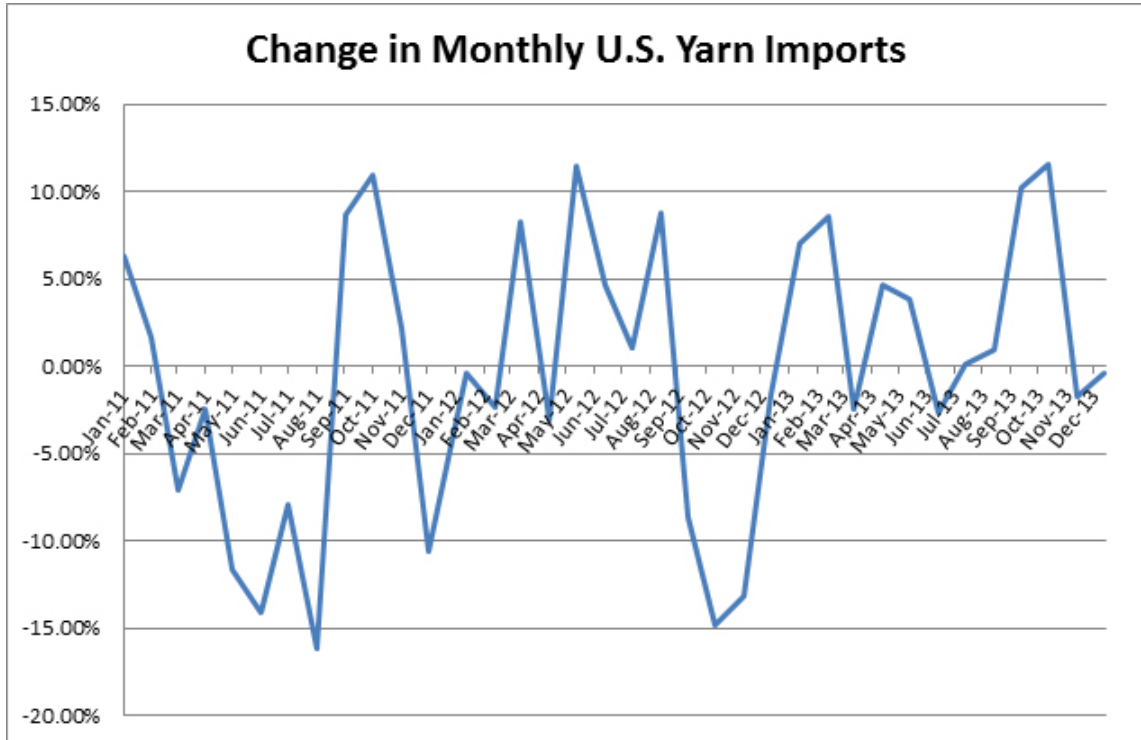


### U.S. General Imports for 2013 (All Data in Millions) Made-Ups

|            |     | Square Meter Equivalents (SMEs) |          |         |        | U.S. Customs Value |          |         |        |
|------------|-----|---------------------------------|----------|---------|--------|--------------------|----------|---------|--------|
|            |     | Current                         | Previous | Percent |        | Current            | Previous | Percent |        |
| Country    | Rnk | Year                            | Year     | Change  | Share  | Year               | Year     | Change  | Share  |
| World      |     | 18,661.0                        | 17,879.5 | 4.37    | 100.00 | 17,543.3           | 16,937.8 | 3.57    | 100.00 |
| China      | 1   | 12,588.8                        | 12,000.9 | 4.90    | 67.46  | 9,975.1            | 9,747.6  | 2.33    | 56.86  |
| India      | 2   | 1,829.7                         | 1,625.3  | 12.58   | 9.80   | 2,685.6            | 2,463.9  | 9.00    | 15.31  |
| Pakistan   | 3   | 1,716.7                         | 1,629.7  | 5.34    | 9.20   | 1,445.8            | 1,378.6  | 4.88    | 8.24   |
| Mexico     | 4   | 668.9                           | 712.9    | -6.17   | 3.58   | 483.4              | 476.8    | 1.39    | 2.76   |
| Vietnam    | 5   | 371.3                           | 344.9    | 7.64    | 1.99   | 415.2              | 358.6    | 15.79   | 2.37   |
| Bangladesh | 6   | 252.0                           | 242.3    | 4.00    | 1.35   | 157.2              | 151.3    | 3.91    | 0.90   |
| Turkey     | 7   | 200.5                           | 207.7    | -3.47   | 1.07   | 423.1              | 387.2    | 9.26    | 2.41   |
| Indonesia  | 8   | 123.5                           | 128.8    | -4.10   | 0.66   | 82.1               | 85.6     | -4.09   | 0.47   |
| Taiwan     | 9   | 110.6                           | 98.9     | 11.85   | 0.59   | 101.6              | 101.8    | -0.23   | 0.58   |
| Canada     | 10  | 98.2                            | 101.5    | -3.32   | 0.53   | 209.5              | 216.1    | -3.04   | 1.19   |



## ADDENDUM



### U.S. General Imports for 2013 (All Data in Millions) Yarns

|           |     | Square Meter Equivalents (SMEs) |          |         |        | U.S. Customs Value |          |         |        |
|-----------|-----|---------------------------------|----------|---------|--------|--------------------|----------|---------|--------|
|           |     | Current                         | Previous | Percent |        | Current            | Previous | Percent |        |
| Country   | Rnk | Year                            | Year     | Change  | Share  | Year               | Year     | Change  | Share  |
| World     |     | 2,836.5                         | 2,748.4  | 3.20    | 100.00 | 1,464.0            | 1,450.3  | 0.94    | 100.00 |
| China     | 1   | 524.3                           | 524.0    | 0.05    | 18.48  | 207.8              | 168.0    | 23.63   | 14.19  |
| Korea     | 2   | 412.6                           | 309.6    | 33.26   | 14.55  | 88.9               | 79.6     | 11.78   | 6.08   |
| Mexico    | 3   | 350.0                           | 347.9    | 0.62    | 12.34  | 178.9              | 178.0    | 0.50    | 12.22  |
| Indonesia | 4   | 290.6                           | 287.3    | 1.13    | 10.24  | 118.1              | 117.4    | 0.59    | 8.07   |
| Canada    | 5   | 240.9                           | 293.5    | -17.93  | 8.49   | 224.4              | 252.4    | -11.11  | 15.32  |
| India     | 6   | 227.4                           | 203.4    | 11.84   | 8.02   | 97.0               | 90.5     | 7.18    | 6.63   |
| Taiwan    | 7   | 132.9                           | 166.8    | -20.30  | 4.69   | 49.6               | 56.8     | -12.80  | 3.39   |
| Turkey    | 8   | 124.2                           | 98.5     | 26.08   | 4.38   | 92.2               | 79.2     | 16.37   | 6.30   |
| Portugal  | 9   | 59.5                            | 52.5     | 13.28   | 2.10   | 24.0               | 19.8     | 21.14   | 1.64   |
| Vietnam   | 10  | 54.1                            | 40.8     | 32.76   | 1.91   | 21.3               | 15.3     | 39.48   | 1.46   |

