The impact of US trade barriers on the fashion Industry

Capstone Project

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Appendices:

The following research will be based around the relationship of trade barriers and how it is interlinked with the fashion Industry. The area that is being looked at is how trade tariffs and quotas play a role in the industries sourcing of materials and third-party manufacturing.

This will be done with the use of two main hypotheses. The first is that the quantities being imported from china will be negatively impacted due to the additional tariffs implemented in 2018 and 2019. The second hypothesis is for the impact of the phasing back of quotas with the ATC. This will be done with the aim of proving or disproving that the amount being imported from china was restricted and that there will be a surge in imports once restrictions are lifted. This will be done using the amount of quantitative and qualitative analysis of government policy.

This topic and the methods of analysis was chosen due to its importance in the industry, Relevance due to trade negotiations and accessibility of industry data. The Importance of efficient manufacturing processes was highlighted when factories closed due to the pandemic. The reduced amount of control that comes with third party manufacturing is highlighted in the scenario. The secrecy surrounding and complexity surrounding big conglomerates data is an issue that prevents looking at elements from a micro level.

1.0 Literature review

The following analysis of the literature will be involved around the area of relevant US trade barriers and how they interact with the fashion industry. The research discussed will be focused on economic arguments, the use of trade tariffs and quotas.

1.1 Introduction to trade barriers

The argument for the use of trade barriers between countries can be seen across different stages of history in terms of the changed areas of the fashion industry. These trade barriers can be described as a government led method of restriction of trade with relation to imports and exports. These can vary in severity depending on the governments trade policy and level of openness, the use of trade barriers can also be related to current affairs issues. Severe use of trade barriers can be used as a form of sanction against other governments or states. Examples are seen regarding the sanctions against Russia for the variety of laws broken by the government (Fas, 2020) as well as countries such as Cuba and Iran (Oregon State University, 2020). These Trade policies implemented by a government are varied and can also have different impacts on each industry. The Common areas of the fashion industry that

are affected by trade barriers include the areas of textiles and Apparel goods manufacturing and raw materials.

Governments can choose barriers from two different genres: Tariff and non-tariff (Mankiw and Taylor, 2017). The application of Non-Tariff barriers is often interlinked with tariff barriers in relation to the terms of application. Take for example the government may places quotas as a form of level of indicator on the amount of goods that are imported. In most trade policies, Goods over a certain value or quantity quota may be taxed a higher rate of tariff in comparison to those bellow the quota level. The implementation of these trade barriers by Governments is done through a variety of economic based arguments. Mankiw and Taylor (2017) argue that the use of trade barriers is used under the infant industry argument, the unfair competition argument and the jobs argument. These arguments can be linked with trade barriers that have resulted from breaches in trade laws or agreements.

1.2 The use of trade tariffs

Trade tariffs are a form of taxation placed on non-domestic produced goods or services that are sold in the domestic market (Mankiw and Taylor,2017, Pg.397). The main aim in their use is to offset the demand for domestic product by increasing the price of imports. This is in the aim of decreasing consumer and industry demand for the product. The Impact of the tariff is seen in the price paid by consumers as the overall costs for the company and the consumer rises (Masashweri,2019). This can be seen with regards to the historical use of tariffs by the government. The historical precedence for the use of tariff protectionism being used as early as 1816 in the US in the aim of protecting the US cotton industry. This was used to allow the domestic competitors to adjust to the new market conditions and gain stability in a time-era of instability in terms of the textile manufacturing industry (Bils, 1984).

The use of outsourcing in the industry has remained high as McKinsey & Company (2019) reports that the US fashion industry is accountable for 6% of the countries imports but is responsible for 51% of the governments tariff receipts. These figures have been contributed to by the trade war between the united states and China since 2017. This trade war is a result of section 301 investigation by the United States government into unfair trade practices conducted within China (USTR,2018). The trade war can be related back to the unfair competition argument. This has impacted industry in terms increased costs and difficulty in sourcing and manufacturing in regions outside of the united states and their free trade partners. Research by Lu (2017) reported that 61% of the US companies plan to decrease

their sourcing from China in their supply chain. This will help aid those in avoiding increases in costs associated with this form of manufacturing from using Chinese sourcing. Other research into the impact of the tariffs in 2018 saw that American companies have negatively impacted profit levels and have negatively impacted demand for imported goods from China (Statista, 2020). In an article by Fung and Pancheco (2019) in the Wall street Journal it discussed how those in the industry are negotiating contracts with suppliers to keep customer prices at the same level. Other companies in the industry are working out solutions to avoid the extra costs by switching their suppliers to whom operate in countries with trade agreements and less tariffs. It has also been reported as an area of risk for large global fashion companies. Take for example the fashion group PVH Corp. to whom partly owns Tommy Hilfiger and Calvin Klein to which imported $215 million worth of goods from China into the United States in 2019 (PVH,2020).

These applications of extra tariffs can be applied to the pricing for consumers of those affected. In an article by Masashweri (2019) for the New York Times, it showed how the tariffs implemented in 2019 by the trump administration will impact consumer prices of clothing. The article used examples with the use of data from the Brand Everlane. In the estimate examples provided, it looked at how the increase in tariffs of up to 25% without the reduction of profits. The effect seen that a jumper previously priced at $100 before the rise in tariff would increase to $124 (US dollar) after the new tariff, this included the additional $11 dollars tariff and no change in profit margin. These results were seen across the other products in their range that were analysed. This increase in tariffs could be reflected in pricing for consumers. This could be at the cost of decreased demand due to the trend of customers not responding well to price increases by retailers as discussed by Fung and Pacheco (2019).

Other research in the field showed that it was estimated that the introduction of the tariff in late 2019 would see a bigger effect on the areas of Women's and Children's apparel then menswear due to the percentages of the imports. In the proportions of the imports received from the industry, the evidence showed that imports of womenswear were higher than menswear. In 2018 only 26% of the clothing and shoe imports from China was related to menswear and boy's children's wear in comparison to 42% for women and girls wear (Mauldin and Debarros, 2019), This can be applied to those brands in each area of the industry in the US market. This can be related back to shopping patterns and manufacturing

supply-chain in each field. In field of consumer trends, this can be related to the differences in buying patterns between men and women.

1.3 The use and impact of Quotas

Import quotas can be described as limitations placed on imports in relation to quantity allowed to be sold in the domestic market (Mankiw and Taylor,2017, Pg.398). Quotas have played a key role in the past in its use by both the United states, European Union and New-Zealand in relation to the aim of protecting textile industry jobs. The United states government first implemented quotas on the area of textiles when they implemented quotas on Japanese cotton in 1957, this developed into implementing quotas on textiles from Hong Kong in the 1960s which stayed in place for up to 25 years (Tarr and Morkre, 1984, Pg. 11).This further grew with the implementation of global trade agreements to which quotas were placed on clothing and textile imports into the United states. The United states used the GATT Multi-fibre agreement (MFA) from 1973 to the end of 1994. The MFA was followed by Agreement of textiles and clothing (ATC) which was implemented from 1995 until the end of the year 2004 (Knappe, 2003) (UNCTAD,2010). The use of the ATC has allowed for gradual integration of increased quantities of imports into markets that previously had been protected with the multifibre agreement (World trade Organization, N/A).The use of both Agreements was beneficial in the efforts of the US government in protecting domestic production by domestic competitors. This is due to other competitors outperforming them in production, this is seen in 2003 when China was the largest supplier in the US supplier market (Oh and Kim, 2006, Pg. 247).

The effect of these agreements can be seen in the downward trend in the trade of textiles from Asia to North America between 1990 and 2001.This was seen with exports from Asia falling to -6% in 2001, overall northern America imports in relation to textiles dropped by 9% between 2000 and 2001(WTO,2002). In Theory, this aids the government with the balancing of its trade and hence provides further opportunities for other manufacturers. The trend is ideal for the US economy and can be ideal for those domestic producers as it creates the gap or buffer as such which could be needed for those either adapting or entering the market, this can be linked back to the principles in the infant industry argument.

Meltzer and Shenai (2019) have argued that the influence of the emergence of china as a manufacturing area has led to 560,000 jobs being lost in the US manufacturing industry between 1999 and 2011. This argument is reflective in the productivity real output in terms of

textile mills and apparel manufacturing decreased slowly in the time period of 1990 to 2000, however after this time the decrease in output became sharper and defined (US Bureau of Labour Statistics, 2012). The similar quotas were put in place on imports into the European union. This seen similar results in the way of protecting domestic jobs with approximately 2 million being employed in the fashion industry in 2004 within their member states (Keenan, Zaritas and Kroener,2004).This also had an Influence on trade with the textile and clothing industry trade, as it had multiplied 60 times in the 40 years prior to 2001 with trade worth €342 Billion in 2001. Strong proof of how well the quotas can protect smaller markets can be seen in New Zealand's apparel industry. This is visible after their use of quotas ended completely in 2007 when quotas on imports were removed. The removal of the barriers led to cheaper imports from areas within south east Asia and China flooding the market (Dana, Hamilton and Pauwels, 2007).

In the area of Manufacturing, US based firms in the area the increased quotas can have a positive impact on those firms as decreases the amount of the competitor's power in the market. This aids firms trying to find or maintain market power in an uncompetitive area of the market. Research conducted by Sheng Lu (2017) showed that products that are 'Made in America' account for less than 10% of the sourcing profile of the 52% of those who source from the United States.

1.4 The Infant industry Argument

The infant industry has been described by Govers "as a type of industry which is in its early stages of development" (2012, Pg.49). This allows for new entrants to compete within the new market protected under temporary trade restrictions which can help aid in gaining foothold in the market. It also allows for mature market competitors to have a level of protection whilst redeveloping and adjusting to new operating conditions of the current market (Mankiw and Taylor, 2017, Pg.402). Previous re-developments that have been seen across history are associated with technological and social advancements, this can be seen in terms of the industrial revolution.

These re-developments of operating conditions for the industry have previously been around the introduction of technology-based design and manufacturing systems as well as the expansion E-commerce. Research was conducted by Nayak and Padyhe (2017) into the area of automation and how it interlinked with the area of manufacturing and design. This research showed the use of high-speed industrial sewing machines and Electronic based

design programs such as Computer aided design are used frequently in the supply chain model. The use of these programs can be associated with the benefit of increased quality and cost control.

These past advancements have also led shifts in the market's practices and norms. This would be evident within the fashion and textiles industry in relation to the manufacturing stage of the supply chain models. These changes played a role of changing manufacturing processes impacting national and third-party interests. Changes in company's models and technology advancement can aid companies to reduce cost of sales, this has been done through relocating and changes in manufacturing structures. In the 1990s these changes are clearly presented with the switch in manufacturing processes from domestic to third party manufacturing processes (Klein, 2001).

More recent changes have been with regards to the supply changes by companies to partake in sustainable manufacturing and procurement choices. This has led to the increase need of innovation to come up with solutions to manage demand and supply side factors and problems (Bostrom and Micheletti, 2016). Evidence of this in the fashion industry has been seen with Inditex (Zara) utilising just-in-time production methods by which they maximise the idea of scarcity and limit production of goods (Lenzi,2017, Pg.310-11). Other methods have been through use of eco-friendly fabric and manufacturing. This can be seen across different areas of the fashion industry with High Street Brands H&M coming out with eco ranges as well as the fashion house Prada who signed a deal in 2019 to become more eco-efficient (Chan,2019)(Cernansky, 2020). This trend has trickled down into government policy within the European Union. This is through the EU promoting the use of sustainable textile business models with the offering of up to €21 million in funding support, this is aimed at aiding new designers (McKinsey and Company, 2020, pg.63).

1.5 The Unfair Competition Argument

The Unfair competition argument is based upon the idea that the use of tariffs is intended to offset actions by other countries. Other trade policies can cause domestic product to be placed in an anti-competitive advantage in comparison to imports within the domestic market. The use of subsidies can have this effect hence the need to create balance within the market. When describing this argument Mankiw and Taylor (2017) use the example of the application of subsidies on olive oil in the country of production. By the domestic country subsidising costs this creates the opportunity to sell goods at a cheaper price in foreign markets, this can

increase competition in foreign markets. This can be applied to the fashion industry in terms of subsidising costs for companies and suppliers in the industry, this could also bring positive impact to countries Gross Domestic Product and aid Domestic producers by increasing output and demand. There is evidence of the United States Government applying direct subsidies to other industries such as agriculture products such as cotton and Oil industry (Ellsmoor,2019).

There has been evidence of some success seen in the efforts of the EU aiding firms by subsidising their costs associated with operating within the union. These investments efforts occurred between the time of 2009 and 2010. These investments were seen with many of the large European high street brands receiving subsidies towards investments around the logistic side of their businesses. Hennes & Mauritz(H&M) received several varieties of funding which played a key role in their investment into logistic solutions in EU member states Belgium and Poland (O'Murchu and Ward, 2010). Similar actions are evident in the US with the use of federal and state incentives have been in form of tax cuts and grants for companies in the fashion and textile industry. This can be seen with the company Abercrombie and Fitch receiving a tax break on property in Ohio in 2006 which in turn provides employment in the area (Ohio, N/A). This method of indirect subsidising can be viewed as a form of protectionism. This can be seen in fluctuations within the history of US trade policy. In the North-western Journal of International law and Business the writers Borrus and Goldstein (1987) comment on how the governments opinions of free trade and use of trade protectionism is based around their own economic self-interest. This argument is backed up with the evidence of how their opinions changed from anti-free trade prior the second world war to being liberal in free trade post war. This was due to the possibility of potential economic growth.

In terms of retaliating to unfair trading conditions, there has been Evidence of the united states government retaliating to unfair trading conditions with the use of Section 301 of US trade laws (Borrus and Goldstein,1987). In 2017, the United states government issued an investigation into the breach of "section 301". Section 301 of the trade laws is in allows for sanctions in retaliation of breaches of trade agreements that hinder the countries rights. The legislation also allows retaliation on the grounds that a given foreign states policies that can be deemed as unreasonable and that has an impact on the US with extra burdens and/or restricts conditions in trading (Borrus and Goldstein, 1987). The sanctions in 2017 was in relation to China's policies and practices that were related to innovation and intellectual property rights (USTR, 2017). This led to economic sanctions in the form of extra trade

tariffs placed on different areas of imports, including the areas of textiles and apparel goods and accessories.

1.6 The Job Argument

The Job argument can be said to be being two sided. On one side of the argument the lack of barriers that are part of free trade can hinder domestic employment in some sectors. whilst on the hand it is also argued that increased selling of goods that include imported raw material by companies will aid in creating domestic employment whilst providing employment elsewhere in countries from the source country of the imported raw materials (Mankiw and Taylor, 2017, pg.402).

One of the main reasoning behind the industry switching to cheaper labour alternatives is due to the costs associated with producing domestically, Labour can account for between 30% and 50% of the final cost of the product (Dana, Hamilton and Pauwels, 2007). In terms of the companies in global fashion industry that once manufactured their goods in developed countries such as the United States this seen a switch in their business model with their supply chain and manufacturing processes. Big brand companies switched from being a domestic producer to becoming a demand-based company. This can be seen with famous mainstream companies and brands such as Nike, Adidas and Vans switch to third part producers in Asia. In 1997 approximately 45,000 US jobs in the apparel industry were lost due to factory closures (Klein, 2001, Pg. 198-199).

The Global changes were also seen in to influence smaller domestic industries in Countries like New Zealand. Job losses were seen with up to half the closing of small to medium firms in New Zealand between 1986 and 1993 with the gradual process of deregulation (Dana, Hamilton and Pauwels, 2007). In the 1980's, there was roughly 48,900 people employed in textiles and clothing manufacturing, this dropped to roughly 25,700 in the 1990's (Willis, 1994). This shift of deregulation led to a shift manufacturing sector of the market. This was in result of Companies switching domestic to outsourced production can be related to optimizing business processes by big fashion brands (Dana, Hamilton and Pauwels, 2007). Within the area of apparel manufacturing within the united states there was a similar drop in employment. In a report by the US Bureau of Labour Statistics (2012) they discussed how employment within this job area with an 80% drop between the 1990's and 2010. The report also showed that mass lay-offs that the area of Apparel seen the biggest change percentage wise in relation to the mass lay-offs between 1996 and 2011.

The expansion of sourcing can be seen in research by Sheng Lu (2017). His research in the field found that among the US companies that he surveyed that 52% source from over 10 countries globally in 2016. The use of a global supply chain model has a relationship with job creation and loss on a global scale. As Industry players move suppliers this has indirect and direct knock on effects in terms of employment and costs.

This brings in the use of foreign direct investment and initiatives taken by the US government to retain industry with the caveat of maintaining employment levels. The utilisation state and federal funding in terms of industry grants, loans and tax cuts have been used to maintain and increase employment by companies within the industry. One previous example discussed was the tax cuts for the company Abercrombie and Fitch in Ohio. Another example of this would be seen with the use of Capital project agreement between Oregon state and Nike Inc. to which had the condition of at least 500 employees to receive the tax incentive, this contract agreement was signed in the end of 2012(OCPP, 2012). These forms of incentives are beneficial to both the industry players and the state as the state would be able to keep employment and the income resulting from it. The companies receiving the grant can cut operating costs for the company, hence could be viewed as a form of indirect subsidisation by the relevant state or government.

2.0 Methodology

From the previous research discussed in the literature review**,** the area of the impact of trade tariffs and quotas on the fashion industry in terms of sourcing and supply-chain management will be the field of research. The research method that will be discussed is based on a mixture of similar research published Klein (2001) and the McKinsey &Company (2019) that was referenced in the literature review. This includes use of both statistics and qualitative research. This area will discuss different areas, these include: the method of data collection, research question, Philosophical assumptions in the data and any limitations that impacted the research method.

2.1 Research question and Hypothesis

The area of research falls under the sub sections of sourcing and Logistics of the fashion industry and how it has interacted with the implementation of government trade barriers. Areas of interest will revolve around industry statistics and Macro data on imports published by the office of US trade representatives. The research question is how US trade barriers

impact the textile and fashion industry in relation the reaction of sourcing within the supply chain management.

This was chosen in terms of the importance of sourcing and cost management and how this is integrated into companies within companies in the fashion industry. This element of efficient sourcing and management of the supply chain is key in the areas of cost and sales management within large companies as this is interlinked with other marketing and operational elements. They play key roles in the influence of pricing strategy and operations for companies, this can be evident in events to which prices rise to cover increased costs of sales for relevant companies. Poor procurement processes in companies can reflect badly on the variety, price and timing involved with the goods being sold. Limitations in procurement and increased costs have been relevant in society during the global pandemic to which the effect of limited supply was seen in the industry.

The hypothesis in relation to the application of Tariffs is that there will be evidence low negative change in the data before and after the implementation of Chinese imports. The other expectation is that there will be evidence of imports from other countries with similar qualities such as labour cost and manufacturing/production infrastructure will increase resulting from changes in supply-chain strategy. The predictions in the data for the phased reduction of quotas through the ATC is that there will be strong evidence of high demand of Chinese imports. The other is that there will be evidence that imports from countries within trade agreements benefiting from the restricted market. This hypothesis is based on comments made by those in the industry and Commonly known regarding the relationship between manufacturing and labour costs.

2.2 Philosophical assumptions

The philosophical assumptions for the research are based around the influence of past government and trade agreements and the influence of trends in the industry that have resulted from influences in the past.

The Existence of current data trends and industry strategies are products of what has been done in the past by the industry in terms of sourcing and manufacturing strategies. These have been moulded and changed by government trade policies and costing structures. The figures used in the analysis does not include any specific actions taken by other governments or companies to bypass policies or to gain advantage with easier trade barriers. These could

be in the case of less paperwork or lower tariffs and regulations. This creates the assumption that to some degree the influence of internal strategies and politics could be in use which would be represented in the data.

The research will be defined from how the links there is some amount of links between the current trade policies and how it has translated on the current data. The data is collected from trade paperwork and is merged to give the macro and some micro figures. The micro figures are visible in the accessibility of specific import tariff rates and the Quantity of the imports. This is done with the data being broken down into categories to which are based on the description of goods that have corresponding Harmonised tariff system codes (HTS). This is visible in the data for quotas to which the products in each phase are listed in numerical order for the type of good (fabric, yarn etc.).

The belief previously to this is that trade barriers will have a negative role in the fashion industry in terms of Pricing and Supply chain. This would specifically be related in brands to which have smaller price mark-ups. The Values in the research will be revolved around the relationship between policy and the figures. This changes and reactions will be what is driving the research results and answer the research question. In the area of researcher biases and assumptions this will vary slightly.

2.3 Data Collection

Theoretical influences

The research showed that there is a variety of studies that displays different lines and methods of research. The research methods vary from analysing industry based primary data to analysis of secondary data sources. The research that is based on primary research is completed using primary data from both the government and industry data. The McKinsey & Company (2019) and Lu (2017) use the combination of data from the industry and macro statistics. They also use data collected from either interviews and surveys or surveys. This brings in the importance that the influence of accessibility to data and contacts in the field. Other research published showed methods of analysis based around analysis of secondary data and previously published journals. Research from Klein (2001) and Masashweri (2019) focus more on the analysis of data that has been given from third party companies relevant to their pieces of research. For example, In the studies by Naomi Klein data from the company Nike was included in her discussion of how companies shifted away from domestic based production models in the 1990's. By conducting this type of analysis, it allows for a macro

point of view to be established. This can be seen specifically in the work by Naomi Klein to which a wider field of Knowledge and understanding of globalised manufacturing and sourcing and its effects are visible in the research published.

Data Collection method

The method of analysis that will be conducting is based on the lines of the research conducted by Naomi Klein and the research published by McKinsey and Company. Their analysis uses a combination of trade and macro statistics as well as qualitative data. In the analysis conducted it will be broken up into the sections of tariffs and Quotas. In each section the relationship between the macro import data and government policy will be examined.

In the section of tariffs the research analysis conducted will be based around the reaction of imports of apparel and textiles that are related to those extra tariffs introduced between 2018 and 2019.These additional tariffs are in retaliation to China's breech of "Section 301" of US trade laws. Each phase within this trade war brought in a news import market segment. This will be done using published government notices published by the office of the United states Trade representatives and Import data published by the office of textiles and Apparel (OTEXA) that is part of the United states international trade administration. The aim in this to identify the market reactions and any trends or changes that come from it.

For the analysis of the Quotas, the research will be based around the reaction within the import data in terms of the removal of quotas between the years of 1998 and 2005.This is in the aim of showing changes that occurred with the gradual easing of quotas that occurred with the ATC. This will be done with the use of secondary Data from the office of textiles and Apparel (OTEXA) and the use of the agreement of Textiles and Clothing (ATC) that was in place from 1995 to 2005.

The aim within each analysis's is to see the evidence of the market competitor reactions to the changes. The trend to look at is if there is any possible evidence occurrence of tariff avoidance within the data through large shifts in the data away from China in the data for tariffs. This could be in terms of data for countries such as Mexico or Canada rising due to free trade agreements.

2.4 Research and Ethical Limitations

Originally my method of analysis was going to be based in the field of conducting primary resources with the use of Interviews. These interviews were going to be based on how trade

barriers impact the industry as well as maybe questionnaires based of the past research on the change of prices and how it plays a key in consumer choices and industry strategies.

This original method of analysis was changed due to the increase in limitations in terms of access to personnel brought on from closure of businesses due to the global pandemic. This led the research into the use of secondary data to which brought up new limitations. One of the limitations was lack of Access to individuals and Raw data for the industry. This can be brought back to the pandemic and the secretive nature of the market. This is also seen in some degree in relation to the topics of government documentation and trade data. The trade data is limited in some areas due to the coding system that is used by the US government for imports and exports and some data being on an individual basis. This can also be seen with the accessibility of Government documentation due to timing of which the document was published.

3.0 Analysis of Trade tariffs

These economic sanctions were carried out in different stages that are referenced as Tranches in government documentation. In the four tranches, multiple of these are multi-phased in terms of the additional tariff rate. The timeline was spread out from July 2018 to December 2019 with each tranche broadening the scope on different areas of imports.

Table 1.1

Tranche	Additional tariff rates	Imports impacted (Value and description)	Tariff Dates (Implemented/planned)
1	25%	$34 Bn worth of Items involved in motors and Construction materials**	Implemented on 6th of July 2018 (USTR, 2018)
2	25%	$16 Bn worth of building and electrical materials**, tractor and railway parts and vehicles	Implemented on 23rd of August 2018 (USTR, 2018)
3	10% 25%	$200 Bn worth of food related goods, tobacco related goods, Natural stones/materials, fuel sources***, industry chemicals. Art/Photography supplies, grooming products, Rubber products and	The 10% tariff was implemented on 24th of September 2018. This was increased to 25% on 10h of May 2019. (USTR, 2018) (USTR, 2019)

		textiles, Animal furs/skins textiles and goods, Wood related goods and supply, Paper related goods, Textile, threads and knit related goods, glass related goods, Iron and steel related materials, electrical supplies.	
4	10% 15%	$300Bn worth of food related products, materials used in footwear and accessories, Apparel products, footwear products, Homeware glassware, Jewellery industry related supplies.	Implemented on 1st of September 2019. Second Phase due to be implemented on 15th of December 2019 was suspended. This was due to be applied on imports in the field of apparel and textiles. (USTR, 2019)

**Materials include parts and machinery

***sources indicating goods in the field of coal and heating source goods

From the analysis of official trade modification and notification documentation provided by the trade Representatives (USTR, 2018) (USTR, 2019). The main tranches directly relevant in in terms of the fashion industry would be in terms of the third and fourth tranches. Whilst the first two tranches were in the direction of core parts and machinery that would be relevant in the use within the electrical appliances, motor, construction, farming and railway industries. From observation there is a shift in how direct the tariffs are in the terms of how direct they are impacting a specific industry. The growth from the first to the last tranche shows that at each stage there is wider field of scope in terms of the industries affected. The first tranche focuses specifically on contraction and motor industry materials whilst the fourth tranche covers a wide variety of goods including food products and fashion apparel.

The third tranche is relevant as those products identified in the documentation is in terms of animal fur/skins, textile goods and products such as threads that would be used in the manufacturing stage of either apparel or textiles. Listed the descriptions goods within this phase, the textile categories of cotton, Yarn, woven and synthetic materials are listed as being some of the imports with additional tariffs.

The fourth tranche is similar with the third tranche including apparel items for womenswear, menswear and children's wear. These goods are represented through HTS codes to which are

explained within the product description of the documentation. These goods include goods made from cotton, Man-Made fibres and knitted materials.

3.1 Tranche 3

In this section the application of the 10% tariff that was implemented in September 2018 and the tariff of 25% introduced in May 2019 will be looked at. This included looking at the market trends in terms of non-apparel, total yarn, Cotton non-apparel and total fabric imports were analysed for the period of August to December in 2018 and April to December in 2019. These Time periods were chosen on the basis that the tariff was implemented in in September 2018 and May 2019. By starting the data in the Month prior to the implementation it creates a basis to work of and compare from with the data that may be influenced by the tariffs.

The countries imports chosen were those that were listed as the main trading partners in the field in relation to the volume of goods imported for each individual category.

Table 1.2

Category	*Top trading Partners in August 2018*	*Top trading Partners in April 2019*
Cat.2: Total Non-Apparel imports	China, India, Korean republic, Vietnam, Pakistan, Canada and Mexico	China, India, Pakistan, Korean republic, Mexico, Vietnam and Canada
Cat.12: Total Fabric imports	China, India, Korean republic, Vietnam, Canada and Mexico	China, India, Korean republic, Vietnam, Canada and Mexico
Cat.11: Yarn imports	China, India, Indonesia, Korean republic, Turkey, Mexico and Canada	China, Korean republic, Mexico, India, Indonesia and Canada
Cat.32: Cotton Non-Apparel products	China, India, Pakistan, Mexico, Korean republic and Vietnam	China, India, Pakistan, Mexico, Korean republic and Vietnam

Data sourced from Otexa (2018) (2019) (2020)

This showed two common Denominators. The first being the low cost of operating commonly known between top importing countries. The second trend noticed in the trading partners was

the occurrence of popularity of trading with Canada and Mexico to which would be more developed but have the economic advantage of being in a trade agreement with the US.

Imports from China

The results in the tranche 3 seen results that differed from what was predicted prior to the analysis. The quantities being imported remained stable and increased in the majority of the categories. The Imports in categories 2, 11 and 12 seen the biggest jumps between august and December in 2018. This shows that this rate of tariff had no effect in deterring those in the industry away from importing goods from china. (See Appendix 2-7)

The increase in the tariff seen the data react as predicted. The reactions three of the macro figure categories seen significant decreases in the quantities being imported from China. The biggest reaction was in category 11 to which covers yarn related imports and category 12 to which covers fabric related goods (See Appendix 4-7). This shows a clear shift in the decrease of the quantities of fabric and yarn related goods imported and indirect evidence of those in the industry switching to alternative suppliers as discussed by Lu (2017).

Chart 1.1

Imports from China in Tranche 3		
Category / % Change in Quantities (SME)	August to December 2018	April to December 2019
Cat. 32	3%	-12%
Cat. 12	4%	24%
Cat.11	13%	-32%
Cat. 2	4%	-2%

Data from Otexa (2018) (2019) (2020)

Data reactions

Across all the categories, the trend came across that imports from 5 countries other than China seen medium to large hikes in their data. These hikes mainly occurred in the amount being imported in the second phase of this tranche. These countries were India, Korean Republic, Vietnam, Indonesia and Pakistan.

The imports from Pakistan and Indonesia seen some medium hikes in the amount being imported overtime. For the imports from Pakistan this was in the categories 2 and 32, imports from Indonesia seen a hike in category 11.

The imports from Vietnam seen the biggest hikes percentage wise with the percentage changes varying from 11% to 38%. These were in the categories 2, 12 and 32. In the analysis cat. 12 seen the biggest hike numerically in the quantity being surveyed however cat. 32 seen the biggest jump percentage wise. This looks to be partially down to the size of the numbers within the data, the quantities for cat. 2 and 12 are in the thousands whilst cat. 32 is in the hundreds (See Appendix 2,3,6,7,9).

The data reacted mixed for the imports from India and Korean Republic. The data for India seen the Imports both rise and fall overall. The amount rising would be considered low to medium at 5% for cat.2 and 12. On the other hand, the percentages by which the quantities was dropping was more varied with Cat.32 was dropping 2% and Cat. 11 dropping by 17%. This shows that some internal movement within the market in terms of switching suppliers regardless of the tariff at play. The results for Korean imports showed evidence of stability. This is seen the quantities for cat. 11 and 32 to which changed by less than 1%. The other categories analysed showed that there was a rise within total fabric and total non-apparel imports.

Chart 1.2

Country/ Category % Change	Cat. 2	Cat. 11	Cat. 12	Cat. 32
Pakistan	6%			4%
Vietnam	11%		21%	38%
Korean Republic	4%	0%	8%	0%
India	5%	-17%	5%	-2%
Indonesia		10%		

Data from Otexa (2018) (2019)

Overall, this shows evidence of companies within the US shifting in where they are sourcing from prior the trade war. This can be related back to the evidence presented by Lu (2017) to which showed intent by those in the industry to look at alternative sourcing options by reducing sourcing from China. This topic is also mentioned by Fung and Pancheco (2019) in which it is discussed that popular US fashion companies commented on how they changed sourcing strategies due to the tariff.

3.2 Tranche 4

The fourth tranche of the tariffs is surrounded around the area of the application of a 10% tariff. This tariff will be applied to goods such as the materials used within the manufacturing

of footwear and accessories, Apparel and footwear products. This round of sanctions is an expansion of the last round to which focused on the areas of textiles in relation to imports for the fashion Industry.

The analysis of this round of sanctions will be based around the trends of the categories of the total apparel imports, Man-Made Fibre apparel products and cotton apparel products. This is done with the data from August to December in 2019 to which the impending increase in the additional tariff was suspended by the government. This is done to allow for the data in august to act as a base point as the tariff was brought into use in early September.

The analysis of each category will be done with the top trading partners this is the same method used in the third tranche.

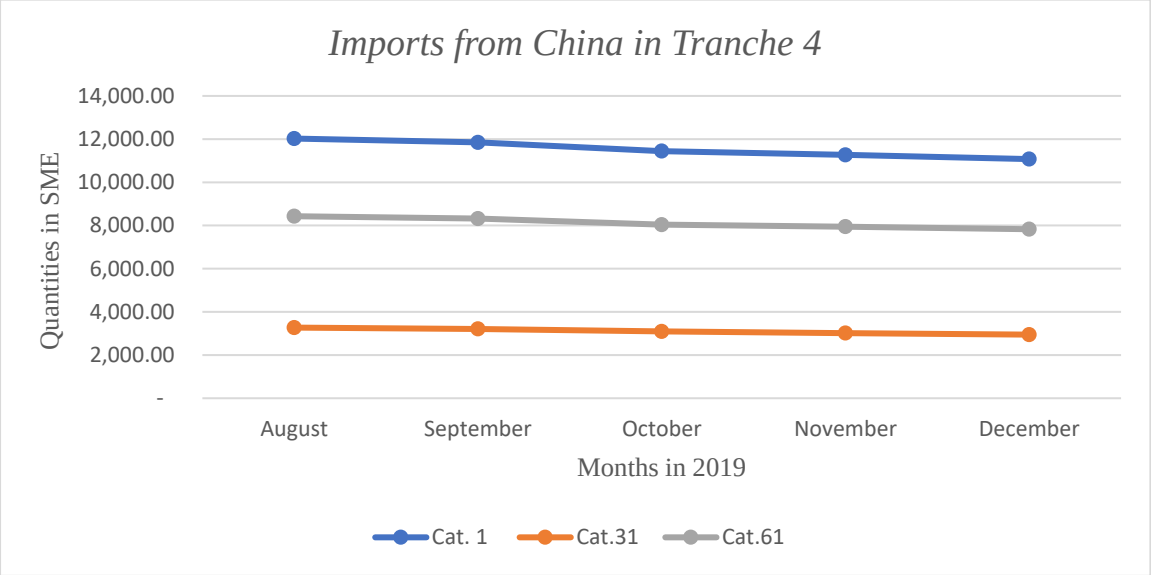
Table 1. 3

Category	*Top trading partners*
Cat. 1: Total Apparel imports	China, Vietnam, Bangladesh, Indonesia, India, Cambodia, Honduras, Mexico
Cat. 31: Cotton Apparel Products	China, Vietnam, Bangladesh, India, Honduras, Pakistan
Cat. 61: Man-Made Fibre Apparel Products	China, Vietnam, Bangladesh, Cambodia, Honduras, Indonesia

Imports from China

There was a negative trend in the data of the months following the implementation of the tariff. All three macro categories seen a medium level amount decrease rate between the months of August and December. Cat. 31 seen the largest decrease of 9.96% followed by Cat. 1 and Cat. 61(Appendix 1,8,10). Cat.1 seen the largest decrease quantity wise in the data. When looking at micro category headings there is evidence of a wider range in terms of the percentage changes in data.

Chart 1. 3



Data from Otexa (2019) (2020)

Data Reactions

The data for imports from other countries seen two trends in terms of the percentage changes. The First is that the data in both micro and macro categories seen low percentage changes that can be perceived as natural fluctuations in the industry market. The second trend is the emergence of medium and high increases and decreases within the micro headings. Surprising results in this trend showed that imports from Italy, Nicaragua, Honduras, Cambodia and Hong Kong seeing large increases and decreases relative to the size of quantities in their data.

Imports from Italy seen medium to high increases in cat. 445 and 446 to which is specific wool materials. The data for those from Nicaragua seen drops in data in cat. 339 and 638 with percentage drops of 6% and 2%. The goods imported in cat. 338, 339 and 638 seen low to medium drops and natural rises in the data with imports. The imports from Cambodia seen a low decrease in Cat. 639. The other trend was that there was a jump in imports in September in Cat. 446 with imports increasing by 163% between August and December. The imports from Hong Kong seen both large rises and falls in the data quantities and percentage changes. This occurred with Cat. 445 and 446, Cat. 445 seen an increase of 21% whilst Cat. 446 seen a decrease of 60%. (See Appendix 11-12,15-17)

Chart 1.4

Imports in Tranche 4	% Change in Quantities imported between August and December 2019					
Country of importers/ Category	*338*	*339*	*445*	*446*	*638*	*639*
Italy			11%	18%		
Nicaragua	2%	-6%			-2%	
Cambodia				163%		-4%
Hong-Kong			21%	-60%		

Data from Otexa (2019) (2020)

3.4 Data trends

The overall trends within the data revolved around the different reactions between the tariff rates, the positioning of Chinese imports, the sensitive market reaction for imports from trade agreement partner nations and the difference between the quantity and percentage change.

Within the comparison of the two-stage tariff for tranche 3, the implementation of the 25% tariff was more effective in creating market reaction. The 10% tariff seen an adverse reaction in the data with the quantities increasing rather than decreasing overall. This was not predicted prior the analysis and raised the question of how big of a gap the Chinese imports have in price that allows their goods to be not price sensitive as the tariff rate of 10% seen no impact whilst the tariff of 15% seen a large impact percentage wise (See Chart 1.1). This is relevant as the tariff rate of 10% seen no impact whilst the tariff of 15% seen a large impact percentage wise. Relatively similar results within the fourth tranche with the use of an extra 10% on top of the current tariff. The imports from china fell between the months of August and December. These drops however was lower percentage wise which indicates a lower negative impact. This indicates that the industry is reacted to both headings however the reaction was higher with the use of the 25% tariff.

Another aspect that needed to be considered was the gap between the imports from China and their nearest competitor state. The majority of those categories analysed seen the gap was too large that the imports from China had no competition quantity wise. The one exception to this would be for Yarn imports to which the imports from India overlapped with the imports from China as they declined. Within the categories of 445 and 446 there was evidence within the data that showed that imports from China held the large percentage in the amount being imported by the industry. In August 2019, the imports from china in category 445 accounted for 74% of total imports and imports within category 446 accounted for 87% of imports. (See Appendix 14-15)

One trend that was visible was how sensitive the data for imports from countries within South, Central and Northern America region was in comparison to the other more established manufacturing areas such as Vietnam and India. This is interesting as the US holds free trade agreements with these countries which is an advantage in the right situations, these situations would include materials sourcing and manufacturing. This can be seen with the data seeing some high peaks and some drops in the data. Take for example the imports of yarn in tranche 3 phase 1, the yarn imports for Mexico sees steady increases in the quantities imported whilst the imports from Canada fall with the fluctuations in the data (Appendix 4, 5).

Similar reaction and representations of the countries of Mexico, Honduras, Guatemala and Nicaragua in the categories of 638 and 639 to which related to Man-Made fibre knit shirts. Their representation in the data is visible with the imports from these specific countries holding positions in the top 6 of the individual countries. The Data also showed specifically in the category of 638 that in the imports from Honduras, Nicaragua and El Salvador was responsible for 39% of the total imports in December 2019 (Appendix 17-18). This shows trends of strategic sourcing on the industries behalf by maximizing trade agreements such as NAFTA and CAFTA-DR. This benefits those in the companies in the industry in cost management in terms of sourcing raw materials and outsourcing manufacturing processes.

Other trends in the data that can be related back to research conducted by Mauldin and Debarros (2019). This research discussed that the introduction of tariffs in late 2019 would impact imports related of women's and girl's more than men's and boys'. In the analysis of the Items descriptions in the fourth tranche, there was proof of this being true. The evidence for this was seen in the item's descriptions of the HTS codes. In Annex B of the document to which lists the descriptions of the items, these are listed under their HTS codes in Annex A. There was proof of this research having similar results in the analysis with items being labelled as men's and /or Boy's having a total of 202 product related codes whilst women's and /or Girls had been mentioned 236 times in the product descriptions. This does not include goods that are gender neutral or historically more associated with one specific gender identity.

Within the individual categories there was evidence of the tariff negatively impacting categories in both categories. These results were seen through the analysis of a sample of 10 of the 43 categories that use W/G or M/B in their title. Those related to Men's and Boy's clothing seen all negative trend in the quantity of apparel goods being imported. This was

with the range in the percentage change of the data between august and December being 9. The response for those categories in Women's and Girl's clothing seen majority negative responses with one outlier of category 644. This Shows that the response in the trade data is similar in that discussed by Mauldin and Debarros however the evidence in this sample shows that the data for M/B had an overall more negative affect. (See Appendix 11-20)

Chart 1.5

Imports from China in August to December 2019			
W/G categories	% Change	M/B categories	% Change
339: W/G Knit Shirts/Blouses, Cotton	-9	338: M/B Knit Shirts, Cotton	-7
341: W/G Cotton Shirts/Blouses, Not Knit	-9	340: M/B Cotton Shirts, Not Knit	-15
446: W/G Sweaters, Wool	-11	445: M/B Sweaters, Wool	-13
639: W/G MMF Knit shirts/Blouses	-7	638: M/B MMF Knit Shirts	-6
644: W/G MMF suits	40	643: M/B MMF suits	-11

Data from Otexa (2019) (2020)

4.0 Analysis of Quotas

The application of the agreement of textiles and clothing (ATC) came into effect with the start of phase one in 1995. The agreement is made up of four phases with the last stage being the final stage to which when all restrictions are lifted. The stages one through to three increase in percentages integrated.

Table 2.1

Phase	*1*	*2*	*3*	*4(final)*
Minimum trade integrated	16%	17%	18%	N/A
Increase to Quota growth rate	16%	25%	27%	N/A
Total percentage integrated:	16.21%	17.03%	18.11%	48.65%
Apparel	1.92%	1.98%	2.55%	31.27%
Fabric	2.39%	2.51%	3.91%	12.19%
Made ups	3.44%	4.54%	8.4%	2.55%

Yarns	8.46%	8%	3.26%	2.64%

Data from Otexa (N/A)

The easing of phases seen individual HTS products linked with different categories chosen. The categories integrated widen with each phase as displayed. The trend of the scope broadening occurs. The Second phase is focused on the integration of goods being imported that are Made ups and Apparel whilst the third phase concentrated on the integration of more yarn and Fabric imports. The final stage shows full integration and the removal of the protection that comes with the opening of the market for the relative industry. This breakdown of categories and percentages is similar to what is described by World trade Organization (N/A) in terms of the integration being gradual and progressive.

Table 2.2

Phase	*Total Categories*	*Made ups*	*Fabric*	*Apparel*	*Yarn*
2	48	7	1	39	1
3	37	7	4	21	5
4	115	9	27	72	7

Data trends

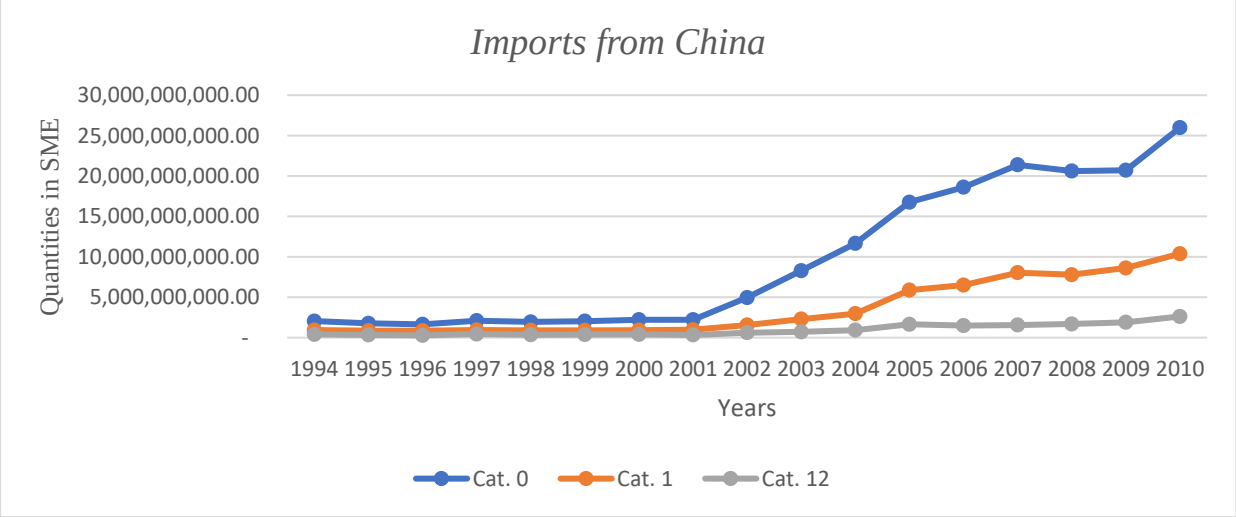
From the analysis of the data for both macro headings and some of the micro headings some interesting observations were noted. These trends have been seen in the results of the data across several scenarios.

The first trend was in terms of the increase in volume of imports being imported as the quotas were pulled back. This trend was predicted prior to the analysis. Within the data across all four phases seen that the amount of total apparel and textile imports between the years of 1994 and 2010 saw an increase in worldwide imports by 221% within the data (See Appendix 20). Within the macro-categories of total apparel, yarn and Fabric imports apparel imports seen the biggest rise with an increase of 194%, this was followed by Fabric than yarn imports (Appendix 22-23). The market reaction here shows to some degree the effects that the limitations had on the amount of foreign imported goods being brought in and sold or used within the industry.

The Second trend that was seen across several data sets was the timing of which Chinese imports began to rise. This jump in the quantities being imported occurred was seen between

the years of 2001 and 2002. This indicates evidence of an increased level of liberalisation in terms of the quantity of goods being imported from china that previously did not occur prior to the ATC. This was seen in both micro and macro categories. This is evident in Cat. 0, 1 and 12 in the macro categories and Cat. 666 in the analysis of phase 3 integration. For Cat. 666 to which is identifies as other man-made fibre furnishings (MMF) the growth rate for Chinese imports prior their introduction in phase 3 (See Appendix 20-25). The Data results showed that the quantity of imports rise by 6,926% between the years of 2001 and 2007. This shows the movement of the actions of the industry in terms of negotiating contracts in order to maximise cost management in the industry.

Chart 2.1



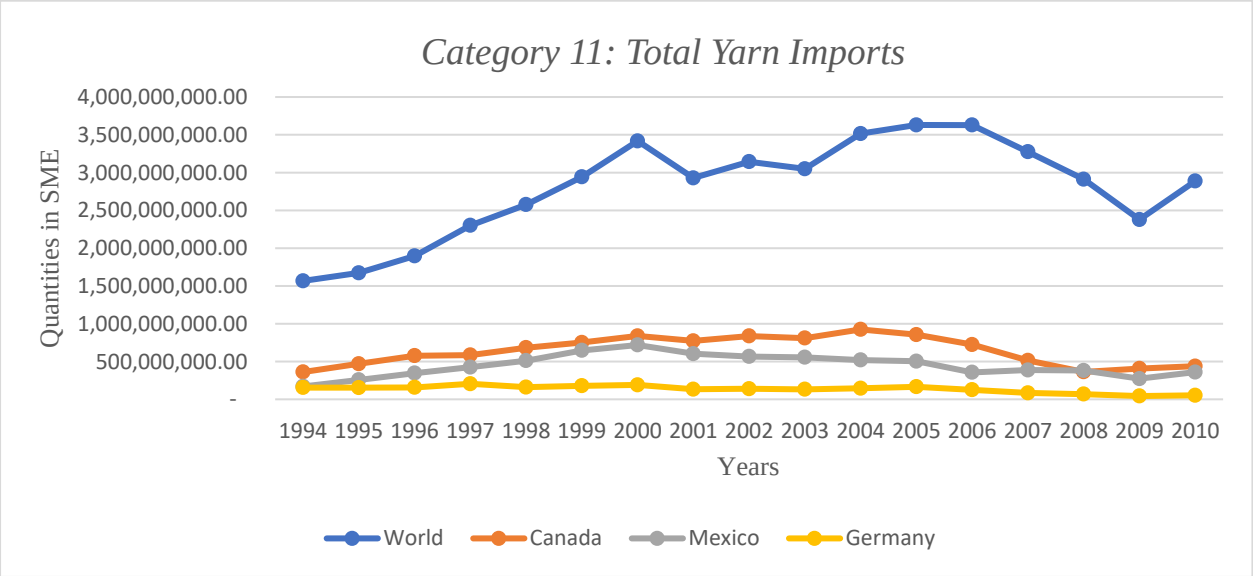
Data from Otexa (N/A)

The third trend was in terms of the positioning of countries within trade agreements and countries within the European Union. This can be seen specific to both type of categories. Take for example the category of special purpose fabrics (Cat. 229) which was released in the second phase. Within the data, the main top five individual importers were from Canada, Taiwan, Mexico, South Korea, Thailand and Germany out of which Canada (Appendix 24). When broken down further it is evident that two of these importers are members of trade agreements with the US and 1 of which was a member of the European Union to whom used the MFA and ATC. Other evidence of this can be seen in Cat. 11 to which Canada, Mexico and Germany had the highest amount of imports in 1994 and had the highest increase between the 1994 and 2010 figures. This trend is interesting as countries such as Canada and Germany would be considered more expensive in labour cost wise than those in places like

Thailand and Taiwan (Appendix 22). This reiterates the previous evidence that stated how European countries managed to take advantage of the quotas in terms of protecting their domestic manufacturers and hence took the opportunity of the gap in the market that was previously created. This reiterates the importance of how the use of quotas with the MFA allowed for greater opportunity and protection for other foreign and domestic competitors to whom had similar capabilities for the industry. This can be related back to the economic arguments.

The fourth trend was the large percentage regions had a specific fabric that was most popular for supplying in the data. For suppliers within North America and Europe this was yarn. For Man-made fibre related fabrics and goods this was suppliers for countries in Asia such as China and Vietnam.

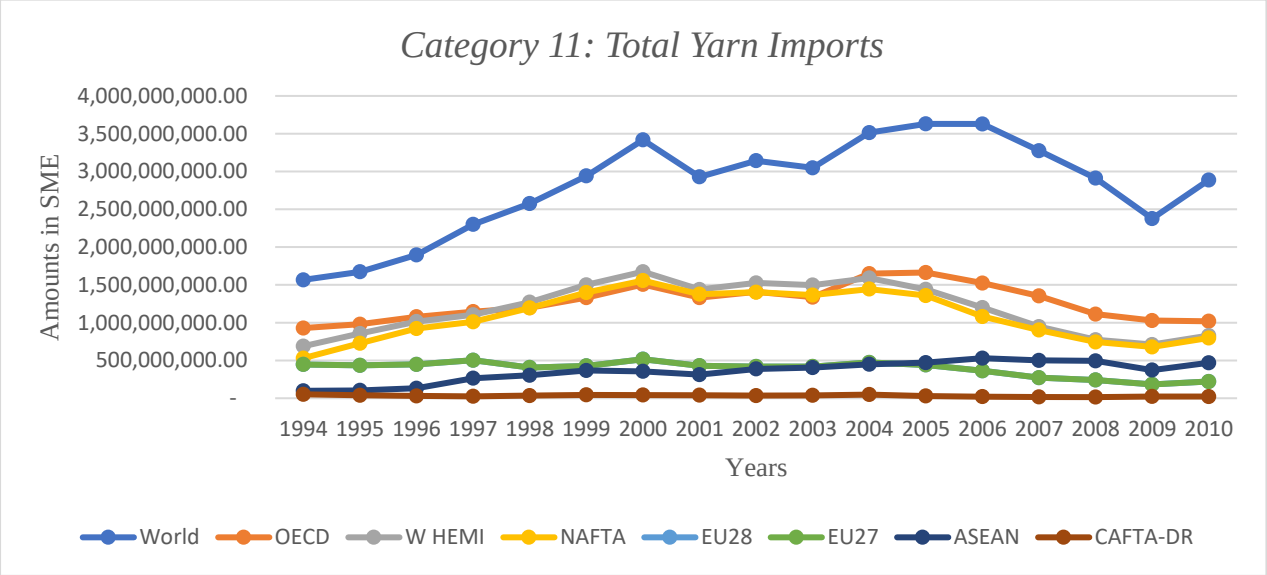
Chart 2.2



Data from Otexa (N/A)

This was also reflected in grouped country data. In the data for cat. 11, the country groupings of OECD, EU27 and EU28 held the highest figures in 1994 and 1995. Similar results are seen in category 61 to which looks at MMF apparel to which the top 5 trading partners were all based geographically in Asia. The imports from the ASEAN grouping held the highest amount of imports in the grouped country data. This trend was also similarly seen in the data for the analysis of tariffs.

Chart 2.3



Data from Otexa (N/A)

In conclusion the evidence shown within this data can be linked back to that stated in the research discussed. This showed how the deregulation in import quantities has impacted on sourcing patterns by those in the industry. The Data also showed how competitors utilized trade agreements to bypass this limitation.

The findings for trade tariffs showed that the effect of the tariff negatively impacted chinse imports, this hence showed that the hypothesis was true. The impact in the figures showed that the higher the additional tariff the higher the change in the imports. The prediction of other trading partners to whom are similar in labour costs and manufacturing costs increasing was seen in the data with Countries within both Asia, South and Central America.

In relation to the analysis of the data for quotas the hypothesis for both the imports from china and other trade agreements was true with the imports from china seeing steep increases in quantities as well as the imports from countries within NAFTA and CAFTA-DR seeing high positioning individually prior the easing of trading restrictions.

5.0 Conclusion

In conclusion the overall the findings showed that the results in the data that the hypotheses for Tariffs and Quotas was proved positive. The research findings showed how government policy has affected macro data in terms of the Quantities imported from China after the quotas was lifted and when the additional tariffs were implemented. This shows how government policy has had proven success in influencing how incumbents in the fashion industry reacted to policy changes and changes in there sourcing and manufacturing strategies. For Quotas this can be seen with the trends of Chinese imports increasing rapidly between the years of 2001 onwards. For tariffs this is seen with switching to providers in regions excluded from the additional tariff and those to which hold trade agreements with the United states. This aids protecting domestic competitors using the job and unfair competition argument.

The results from the data seen similar results from that stated in the research previously conducted. This can be seen with the research on how Men's imports are less effected by tariffs in 2019 than women's imports. The other trend discussed was the expansion of sourcing from countries other than china due to the additional tariff. This was discussed by Fung and Pancheco (2019) and McKinsey and Co. (2019). In the basis that the amount being imported from china decreased in the time-period to which additional tariffs were in use and hence had a knock affects. This shows the correlation between the data previously published and the analysis conducted. This also shows the important role that the influence of trade agreements has in sourcing materials and services when altering the supply-chain due to government policies.

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Appendices

Appendix 1:

Category 1: Total Apparel Imports (MFA)		Quantity in SME						
Months in 2019	China	Vietnam	Bangladesh	Indonesia	India	Cambodia	Honduras	Mexico
August	12,025.64	3,933.40	2,006.93	1,157.92	1,134.65	1,015.57	1,011.09	817.69
September	11,848.47	3,963.70	1,993.82	1,160.81	1,134.13	1,041.31	1,010.53	812.19
October	11,444.13	3,934.24	2,003.28	1,149.87	1,127.99	1,033.91	1,009.70	803.37
November	11,270.55	3,929.57	2,014.91	1,137.97	1,128.41	1,043.39	1,008.04	796.37
December	11,076.09	3,955.42	2,012.21	1,130.13	1,124.35	1,044.43	1,014.01	791.32
% Change	-8%	1%	0%	-2%	-1%	3%	0%	-3%

Appendix 2:

Category 2: Total Non-Apparel imports (MFA)	Quantities in SME						
Month in 2018	China	India	Vietnam	Mexico	Korean republic	Canada	Pakistan
July	21225.437	4268.483	1297.781	1691.387	1683.654	1101.16	2002.51

August	21267.058	4328.579	1339.888	1707.507	1706.411	1094.969	2047.3
September	21372.421	4366.422	1323.593	1704.779	1731.246	1090.743	2021.976
October	21675.877	4385.868	1301.841	1714.023	1766.045	1077.182	2031.503
November	21778.666	4437.13	1277.562	1720.055	1802.889	1062.872	2014.324
December	22138.52	4472.921	1216.119	1736.597	1843.581	1053.169	2014.04
% Change	4%	5%	-6%	3%	9%	-4%	1%

Appendix 3:

Cat.2: Total Non-Apparel imports (MFA)			Quantities in Square Metre Equivalent (SME)				
Months in 2019	China	India	Pakistan	Korean republic	Mexico	Vietnam	Canada
April	22,170.40	4,729.67	2,074.37	1,981.58	1,795.40	1,270.72	958.29
May	22,309.81	4,782.11	2,076.72	2,017.83	1,814.25	1,308.75	933.46
June	22,201.59	4,789.64	2,071.73	2,016.52	1,821.70	1,310.73	931.78
July	22,297.19	4,826.14	2,101.20	2,037.40	1,834.92	1,298.97	918.89
August	22,428.93	4,841.16	2,099.80	2,071.51	1,829.20	1,294.52	911.36
September	22,402.58	4,868.94	2,125.55	2,076.27	1,834.05	1,301.30	907.45
October	22,202.41	4,892.17	2,146.93	2,080.20	1,835.60	1,324.07	894.11
November	22,037.57	4,922.82	2,164.52	2,084.62	1,824.31	1,368.66	886.86
December	21,750.30	4,951.96	2,192.51	2,066.24	1,818.41	1,408.51	887.86
% change	-2%	5%	6%	4%	1%	11%	-7%

Appendix 4:

Category 11: Total Yarn Imports	Quantities in SME						
Months in 2018	China	India	Indonesia	Mexico	Korea	Canada	Turkey
August	847.56	269.409	207.134	282.685	708.622	149.13	153.831
September	847.691	275.883	210.954	287.13	729.077	151.144	149.6
October	853.984	282.733	213.76	294.652	751.677	154.265	150.196
November	873.162	297.559	212.561	298.256	778.127	154.756	148.747
December	953.578	312.713	204.85	306.415	799.947	150.824	149.318

% Change	13%	16%	-1%	8%	13%	1%	-3%

Appendix 5:

Category 11: Total Yarn Imports	Quantities in SME					
Months in 2019	China	Korean republic	Mexico	India	Indonesia	Canada
April	874.882	854.189	345.65	333.997	195.297	159.796
May	856.437	866.788	349.516	330.47	196.433	159.748
June	845.869	864.306	351.871	332.771	201.425	161.088
July	778.232	872.094	353.597	327.798	204.13	159.806
August	742.397	889.338	355.479	322.525	201.892	158.914
September	731.351	882.868	360.396	314.422	201.996	156.391
October	699.495	884.488	363.711	305.738	205.56	154.406
November	663.259	868.686	368.661	292.548	207.871	153.953
December	591.805	851.803	367.742	278.303	215.658	154.063
% Change	-32%	0%	6%	-17%	10%	-4%

Appendix 6:

Category 12: Total Fabric Imports	Quantities in SME					
Months in 2018	China	India	Korean republic	Vietnam	Canada	Mexico
August	5,089.24	1,271.47	938.32	832.10	813.33	580.94
September	5,107.74	1,292.46	940.77	822.44	809.26	580.91
October	5,136.41	1,279.36	952.30	817.93	797.90	579.90
November	5,153.53	1,288.64	963.38	819.43	786.16	580.84
December	5,277.64	1,289.37	980.73	770.29	782.19	594.49
% change	4%	1%	5%	-7%	-4%	2%

Appendix 7:

Category 12: Total Fabric Imports	Quantities in SME					
Months in 2019	China	India	Korean Republic	Vietnam	Canada	Mexico
April	4,899.04	1,442.30	1,060.03	854.53	687.18	613.50
May	4,800.04	1,467.06	1,083.09	908.30	662.98	623.21
June	4,610.31	1,447.06	1,083.64	925.46	657.99	627.20
July	4,447.61	1,453.85	1,099.24	930.56	650.88	632.14
August	4,321.32	1,467.01	1,117.40	936.86	644.77	628.31
September	4,210.78	1,470.77	1,128.50	946.73	643.55	628.48
October	4,089.77	1,498.59	1,135.49	972.21	632.56	629.48
November	3,952.90	1,510.00	1,152.74	1,006.46	624.02	624.76
December	3,715.42	1,515.42	1,148.54	1,036.90	623.97	618.87
% Change	-24%	5%	8%	21%	-9%	1%

Appendix 8:

Category 31: Cotton Apparel Products			Quantities in SME			
Months in 2019	China	Vietnam	Bangladesh	India	Honduras	Pakistan
August	3272.414	1552.815	1445.868	797.868	515.574	487.857
September	3207.752	1566.177	1431.664	796.77	521.332	493.246
October	3093.92	1553.04	1439.272	790.916	523.644	491.98
November	3017.496	1553.299	1445.423	791.105	525.958	491.833
December	2946.422	1567.28	1437.856	788.151	532.494	497.901
% Change	-9.96%	0.93%	-0.55%	-1.22%	3.28%	2.06%

Appendix 9:

Category 32: Cotton Non-Apparel Imports	Quantities in SME					
Months in 2019	China	India	Pakistan	Mexico	Korean Republic	Vietnam
April	2,894.73	2,087.94	1,839.48	165.42	123.77	117.80

May	2,879.69	2,096.03	1,839.94	162.57	125.37	121.63
June	2,830.84	2,066.23	1,831.06	158.30	124.84	121.65
July	2,792.33	2,050.77	1,860.44	155.58	122.42	129.91
August	2,765.07	2,030.01	1,851.38	149.53	124.42	138.43
September	2,740.37	2,027.67	1,865.34	142.51	126.38	144.53
October	2,661.59	2,029.84	1,879.80	137.77	125.77	150.20
November	2,609.11	2,032.26	1,892.10	134.35	122.50	154.17
December	2,533.97	2,045.33	1,911.12	132.10	123.72	162.67
% change	-12%	-2%	4%	-20%	0%	38%

Appendix 10:

Category 61: Man-Made Fibre Apparel Products				Quantities in SME		
Months in 2019	China	Vietnam	Indonesia	Cambodia	Bangladesh	Honduras
August	8,429.47	2,323.50	644.02	578.36	538.02	495.22
September	8,319.27	2,339.80	643.00	601.49	537.52	488.92
October	8,036.85	2,323.28	638.84	592.86	540.11	485.88
November	7,944.62	2,318.81	633.21	591.51	545.66	481.86
December	7,827.59	2,330.52	634.15	592.65	549.81	481.27
% Change	-7%	0%	-2%	2%	2%	-3%

Appendix 11:

Category 338: M/B Knit Shirts, Cotton	Data in Doz, 6.00 M2 per Doz.					
Month in 2019	World	Honduras	Nicaragua	Vietnam	China	India
August	208,712,702	25,618,338	19,521,069	19,278,775	19,233,039	17,162,921
September	209,560,586	25,747,019	19,489,511	19,397,381	19,061,423	17,167,649
October	209,958,507	26,075,721	19,816,396	19,364,475	18,334,878	17,035,526
November	211,257,735	26,454,008	19,981,766	19,377,086	18,103,386	17,134,412
December	212,441,175	27,416,187	19,870,923	19,534,704	17,915,787	17,128,931
% Change	2%	7%	2%	1%	-7%	0%

Appendix 12:

Category 339: W/G Knit Shirts/Blouses, Cotton	Data in Doz, 6.00 M2 per Doz.					
Month in 2019	World	Vietnam	China	Nicaragua	Honduras	Guatemala
August	155,890,893	31,516,634	31,317,262	15,089,251	11,796,471	11,806,111
September	155,676,904	31,437,681	30,738,312	15,041,243	11,985,844	11,681,490
October	153,256,612	31,130,643	29,745,734	14,719,469	12,059,432	11,589,186
November	152,024,300	30,904,631	29,234,013	14,681,889	11,945,833	11,449,383
December	150,252,444	30,560,236	28,506,273	14,157,762	11,952,908	11,097,787
% Change	-4%	-3%	-9%	-6%	1%	-6%

Appendix 13:

Category 340: M/B Cotton Shirts, Not Knit	Data in Doz, 12.10 M2 per Doz.					
Month in 2019	World	Bangladesh	China	Vietnam	India	Indonesia
August	32,485,506.00	10,405,396.00	5,633,710.00	3,968,624.00	3,201,269.00	2,844,827.00
September	32,264,626.00	10,371,825.00	5,436,976.00	3,895,073.00	3,198,535.00	2,877,447.00
October	31,738,582.00	10,414,314.00	5,140,958.00	3,768,043.00	3,157,752.00	2,799,272.00
November	31,320,824.00	10,355,223.00	4,959,194.00	3,762,930.00	3,144,036.00	2,711,500.00
December	30,870,945.00	10,107,932.00	4,810,955.00	3,690,452.00	3,214,429.00	2,647,003.00
% Change	-5%	-3%	-15%	-7%	0%	-7%

Appendix 14:

Category 341: W/G Cot. Shirts/ Blouses, N-Knit	Data in Doz, 12.10 M2 per Doz.					
Month in 2019	World	India	China	Vietnam	Indonesia	Bangladesh
August	13,900,398.00	3,673,262.00	3,827,130.00	1,849,428.00	1,266,546.00	1,235,575.00

September	13,807,614.00	3,721,541.00	3,681,681.00	1,845,032.00	1,328,174.00	1,195,958.00
October	13,588,871.00	3,754,343.00	3,564,127.00	1,745,961.00	1,332,989.00	1,148,068.00
November	13,400,680.00	3,749,504.00	3,461,510.00	1,708,894.00	1,322,666.00	1,124,290.00
December	13,420,685.00	3,822,184.00	3,466,026.00	1,688,390.00	1,324,861.00	1,083,902.00
% Change	-3%	4%	-9%	-9%	5%	-12%

Appendix 15:

Category 445: M/B Sweaters, Wool	Data in Doz, 12.40 M2 per Doz.					
Month in 2019	World	China	Italy	Vietnam	Hong-Kong	Bangladesh
August	384,518.00	286,193.00	47,270.00	4,436.00	7,317.00	4,518.00
September	393,532.00	282,420.00	50,003.00	53,655.00	8,228.00	5,691.00
October	374,083.00	254,326.00	53,655.00	10,893.00	8,550.00	8,321.00
November	368,337.00	246,120.00	53,131.00	11,648.00	8,793.00	7,865.00
December	371,054.00	248,365.00	52,593.00	11,699.00	8,841.00	7,911.00
% Change	-4%	-13%	11%	164%	21%	75%

Appendix 16:

Category 446: W/G Sweaters, Wool	Data in Doz, 12.40 M2 per Doz.					
Month in 2019	World	China	Italy	Peru	Cambodia	Hong Kong
August	1,505,014.00	1,311,732.00	61,892.00	27,734.00	11,698.00	24,031.00
September	1,507,492.00	1,296,817.00	69,970.00	27,358.00	22,344.00	19,219.00
October	1,412,238.00	1,192,160.00	72,727.00	27,080.00	23,670.00	14,434.00
November	1,385,433.00	1,155,750.00	72,269.00	28,019.00	28,393.00	10,399.00
December	1,401,580.00	1,168,029.00	73,305.00	27,724.00	30,791.00	9,509.00
% Change	-7%	-11%	18%	0%	163%	-60%

Appendix 17:

Category 638: M/B MMF Knit Shirts	Data in Doz, 15.00 M2 per Doz.				
Month in 2019	World	Honduras	Nicaragua	Salvador	China
August	99,812,635.00	17,353,129.00	11,446,576.00	10,610,538.00	9,686,402.00
September	99,222,642.00	17,086,537.00	11,284,989.00	10,514,181.00	9,595,226.00
October	99,291,414.00	17,137,719.00	11,372,127.00	10,425,086.00	9,307,670.00
November	99,304,323.00	16,985,143.00	11,268,361.00	10,366,906.00	9,265,252.00
December	99,154,267.00	17,010,997.00	11,211,173.00	10,267,028.00	9,089,605.00
% Change	-1%	-2%	-2%	-3%	-6%

Appendix 18:

Category 639: W/G MMF Knit Shirts / Blouses	Data in Doz, 12.50 M2 per Doz.					
Month in 2019	World	China	Vietnam	Indonesia	Mexico	Guatemala
August	117,917,516.00	41,199,295.00	22,337,914.00	7,349,542.00	6,024,163.00	5,717,995.00
September	116,999,412.00	40,591,942.00	22,308,866.00	7,347,765.00	5,980,191.00	5,688,885.00
October	115,906,355.00	39,644,710.00	22,279,026.00	7,266,008.00	6,037,687.00	5,627,359.00
November	115,051,621.00	38,970,823.00	22,082,426.00	7,185,916.00	6,156,655.00	5,655,836.00
December	113,784,606.00	38,288,137.00	22,040,358.00	7,078,523.00	6,182,078.00	5,542,822.00
% Change	-4%	-7%	-1%	-4%	3%	-3%

Appendix 19:

Category 643: M/B MMF suits		Data in Nos, 3.76 M2 per Nos.			
Months in 2019	China	Vietnam	Egypt	Dominican Republic	India
August	3,186,045.00	741,048.00	131,459.00	145,784.00	82,227.00
September	3,129,099.00	690,288.00	135,200.00	138,226.00	84,957.00
October	3,025,326.00	612,739.00	147,494.00	136,853.00	68,127.00
November	2,906,158.00	585,055.00	142,492.00	138,518.00	62,116.00

December	2,823,656.00	551,739.00	142,721.00	133,910.00	65,780.00
% Change	-11%	-26%	9%	-8%	-20%

Appendix 20:

Category 644: W/G MMF Suits	Data in Nos, 3.76 M2 per Nos.				
Months in 2019	China	Vietnam	Bangladesh	India	Mexico
August	780,659.00	232,651.00	37,996.00	11,078.00	8,567.00
September	853,337.00	244,345.00	38,623.00	10,990.00	9,608.00
October	1,013,320.00	263,802.00	32,666.00	11,080.00	10,838.00
November	1,003,667.00	305,568.00	34,446.00	11,472.00	13,414.00
December	1,090,287.00	306,237.00	27,679.00	11,558.00	15,718.00
% Change	40%	32%	-27%	4%	83%

Appendix 21:

Category 0: Total Apparel and textile imports	Quantities in SME					
Country	World	China	Dominican Republic	Philippines	Indonesia	Bangladesh
1994	17,277,792,687.63	2,042,048,860.47	608,371,773.73	533,593,025.36	516,001,813.68	487,036,565.16
1995	18,307,532,584.68	1,771,573,712.20	710,234,952.17	610,311,659.39	540,356,262.43	603,262,297.13
1996	19,063,272,529.38	1,643,909,885.00	718,884,557.95	621,849,979.13	604,776,820.52	625,272,097.85
1997	22,894,520,624.25	2,094,944,411.05	863,314,530.83	659,070,414.95	855,047,130.95	764,510,158.41
1998	25,944,586,329.12	1,943,215,144.00	886,406,323.97	795,580,626.39	974,751,216.51	865,537,372.29

1999	28,614,986,356.90	2,035,486,817.20	900,252,042.89	905,265,003.91	907,304,859.73	910,519,316.73
2000	32,864,151,338.67	2,217,897,169.13	858,891,762.85	928,860,136.55	1,052,666,598.29	1,130,770,188.83
2001	32,811,746,901.36	2,210,674,206.91	772,755,301.09	915,558,809.79	1,164,628,883.06	1,169,040,939.67
2002	38,288,154,089.94	4,963,116,351.50	743,275,521.67	817,389,590.03	1,215,355,134.63	1,149,765,047.08
2003	42,226,774,742.16	8,287,651,470.06	758,315,521.65	794,273,815.33	1,150,768,347.84	1,109,782,953.13
2004	46,936,141,139.82	11,662,292,058.38	772,363,707.93	710,971,801.03	1,274,800,353.63	1,108,545,652.91
2005	50,836,314,163.15	16,763,033,819.00	724,583,160.65	643,403,306.79	1,354,239,283.55	1,313,673,114.48
2006	52,149,545,587.25	18,613,501,810.75	587,711,229.63	693,655,178.99	1,598,810,044.44	1,494,529,172.88
2007	53,127,335,752.95	21,389,672,606.50	390,065,058.13	558,429,930.07	1,625,168,063.61	1,552,495,042.13
2008	50,361,475,990.13	20,612,687,033.00	366,223,110.75	462,773,240.66	1,614,280,362.14	1,664,656,839.23
2009	46,606,928,136.75	20,719,945,778.00	249,377,313.92	388,380,358.09	1,494,254,578.06	1,622,745,601.19
2010	55,444,079,269.91	25,997,930,731.50	245,979,706.74	418,478,893.02	1,756,606,461.80	1,866,908,237.61
% Change	221%	1173%	-60%	-22%	240%	283%

Appendix 22:

Category 1: Total Apparel Imports (MFA)		Quantities in SME					
Year	World	China	Hong Kong	Taiwan	Dom. Republic	Mexico	Bangladesh

1994	8,421,449,791.21	934,151,011.67	864,443,263.55	650,646,954.77	545,536,838.83	481,912,006.04	430,309,902.36
1995	9,254,889,925.07	862,089,583.51	820,869,343.39	598,337,759.23	631,614,376.07	774,219,724.25	519,233,624.93
1996	9,658,472,153.27	862,062,184.41	759,678,873.17	573,742,526.03	653,117,433.55	1,099,223,877.94	529,422,311.05
1997	11,349,130,157.45	947,375,680.15	736,450,342.79	589,585,981.05	796,923,546.23	1,555,103,372.91	671,762,867.91
1998	12,885,669,450.26	910,255,798.81	862,468,676.19	620,651,651.39	831,569,515.87	1,984,577,189.13	743,515,539.79
1999	14,102,856,499.59	910,406,522.71	840,948,391.89	637,434,527.95	857,517,164.79	2,306,887,790.94	773,077,066.53
2000	16,035,348,460.19	929,159,282.95	916,305,779.21	670,736,693.61	836,581,704.15	2,526,814,252.72	966,611,942.43
2001	16,103,471,620.06	975,979,534.11	916,931,191.61	614,130,292.79	753,006,400.29	2,290,141,584.38	965,941,955.87
2002	17,255,657,432.84	1,564,963,032.22	821,260,564.27	575,759,272.97	730,029,554.07	2,157,195,993.63	927,717,082.59
2003	18,863,746,194.36	2,289,847,414.91	785,439,971.33	590,776,686.71	750,160,920.65	1,977,284,850.14	913,029,078.33
2004	19,950,995,982.02	2,972,522,846.09	738,962,752.01	571,980,559.95	761,412,770.83	1,896,210,936.94	941,684,938.71
2005	22,009,812,085.19	5,883,430,984.06	596,581,580.75	391,478,280.80	715,453,369.95	1,703,425,351.33	1,124,829,782.69
2006	22,539,239,194.82	6,506,084,528.13	523,340,606.70	359,186,100.71	583,909,322.34	1,477,174,057.50	1,306,918,705.48
2007	23,332,110,800.66	8,033,594,191.69	358,196,784.66	302,807,994.04	382,313,301.13	1,210,459,669.45	1,351,828,298.22
2008	22,694,039,729.58	7,788,658,095.81	258,157,647.56	244,273,747.26	359,566,310.76	1,035,166,050.51	1,436,236,867.73
2009	21,317,221,071.28	8,623,273,229.75	48,764,393.86	166,393,391.92	239,631,960.82	882,903,336.59	1,383,832,928.69

2010	24,743,986,749.31	10,386,779,443.25	37,850,603.72	171,862,049.32	236,022,572.04	952,341,663.53	1,606,062,881.22
% Change	194%	1012%	-96%	-74%	-57%	98%	273%

Appendix 23:

Category 11: Total Yarn imports		Quantities in SME					
Year	World	Canada	Mexico	Germany	Brazil	Egypt	Thailand
1994	1,566,538,215.29	360,988,142.00	169,811,296.60	155,595,472.00	77,093,070.10	61,206,710.50	56,215,928.40
1995	1,672,977,727.78	470,015,261.29	257,161,135.30	153,751,052.50	67,714,981.50	61,632,295.50	51,881,167.10
1996	1,896,024,262.58	576,301,392.20	346,316,863.20	157,410,516.30	42,205,945.30	35,560,297.70	56,355,108.00
1997	2,300,211,236.08	585,738,560.80	425,647,104.10	205,533,442.50	44,730,851.20	60,756,704.10	109,756,586.30
1998	2,575,826,784.97	682,763,612.99	511,313,405.09	160,508,813.00	26,558,667.20	95,649,770.80	124,350,488.30
1999	2,942,096,705.18	751,533,783.70	646,987,690.49	178,295,992.50	39,644,102.60	51,438,761.90	120,774,987.20
2000	3,417,753,205.17	838,425,613.30	718,441,103.99	190,599,287.10	58,924,440.80	63,663,165.70	141,618,851.30
2001	2,928,808,746.58	772,678,073.09	603,373,057.09	132,704,858.80	11,271,436.90	100,888,158.80	132,515,435.30
2002	3,143,222,532.48	837,245,144.40	566,304,438.80	139,027,320.50	57,369,531.10	93,645,274.00	143,300,303.00
2003	3,048,756,270.38	809,411,985.80	555,596,987.99	131,882,203.70	76,582,147.40	84,181,446.20	113,288,179.90
2004	3,514,764,510.78	924,615,911.20	520,101,643.60	146,228,150.70	78,201,500.30	42,925,610.60	120,809,601.40

2005	3,629,934,044.57	855,762,489.59	503,208,482.60	166,376,785.10	31,649,673.90	32,938,803.90	130,967,758.70
2006	3,628,964,369.26	724,438,212.49	356,472,980.20	125,923,267.60	80,875,229.50	25,076,477.60	123,411,460.20
2007	3,275,304,538.17	514,356,329.00	387,344,020.00	84,032,065.40	13,419,927.10	30,052,540.90	120,657,706.80
2008	2,912,056,799.87	363,345,823.80	380,935,081.60	69,020,526.80	1,954,838.20	19,090,004.70	121,200,018.30
2009	2,377,648,537.68	406,819,949.10	272,404,659.30	43,386,366.70	1,750,339.30	13,802,684.10	75,420,235.60
2010	2,887,487,544.47	438,157,673.70	359,681,487.80	53,125,442.40	1,679,061.50	15,060,389.20	87,138,267.10
% change	84%	21%	112%	-66%	-98%	-75%	55%

Appendix 24:

Category 12: Total Fabric Imports	Quantities in SME						
Year	World	Canada	China	Taiwan	Pakistan	Japan	Korea, South
1994	4,461,912,457.17	762,714,609.89	401,575,627.80	332,619,301.50	320,090,269.70	267,810,975.80	254,233,744.60
1995	4,216,400,474.27	864,803,453.29	329,910,950.30	322,299,036.20	282,217,015.70	204,162,226.50	254,444,805.60
1996	4,244,334,222.17	939,740,404.49	276,367,254.50	374,019,750.39	260,797,103.10	194,287,548.10	270,825,138.20
1997	5,395,326,175.05	1,154,540,058.78	437,959,516.50	394,033,936.39	391,484,308.30	213,234,969.70	328,316,190.80
1998	5,859,573,702.15	1,389,733,809.28	352,864,613.50	350,738,813.39	477,048,962.90	241,152,500.20	391,211,388.30

1999	6,222,085,270.04	1,591,696,332.28	381,711,206.10	401,437,115.70	370,498,269.50	216,403,539.90	519,461,651.59
2000	7,007,056,889.04	1,790,727,103.48	405,316,679.90	341,024,720.50	449,745,094.20	233,547,767.10	573,744,612.79
2001	6,987,732,583.44	1,861,818,394.48	331,064,964.30	383,263,371.70	475,591,721.60	190,474,083.70	615,223,175.49
2002	8,685,236,016.73	1,874,780,868.08	612,630,205.90	610,190,741.30	695,947,506.99	200,376,497.90	959,909,547.89
2003	8,721,403,255.02	1,936,581,522.19	717,408,755.49	507,359,354.50	626,617,540.59	193,967,351.90	1,106,498,554.28
2004	9,250,048,199.32	1,823,263,406.08	927,308,722.59	509,830,325.49	630,972,742.30	248,163,844.90	1,213,567,337.98
2005	9,521,755,139.02	1,734,962,236.28	1,651,858,101.39	486,535,431.79	520,811,198.20	239,631,688.60	1,162,273,048.89
2006	8,873,101,541.61	1,355,726,704.19	1,491,581,039.98	522,892,125.39	439,968,677.00	267,353,776.90	1,257,257,116.08
2007	8,618,597,485.21	1,082,255,185.89	1,559,020,963.48	537,130,667.79	275,032,296.20	284,879,080.20	1,123,141,605.48
2008	7,816,096,907.43	734,943,014.09	1,688,491,270.98	504,024,081.89	188,149,988.20	280,566,563.80	947,053,006.29
2009	7,399,433,114.63	573,127,671.20	1,901,950,710.48	341,292,603.89	151,914,570.50	215,009,910.50	902,627,612.09
2010	9,136,695,594.53	686,422,774.49	2,622,666,608.19	403,731,165.39	158,519,530.50	216,014,280.50	870,727,219.89
% Change	105%	-10%	553%	21%	-50%	-19%	242%

Appendix 25:

Category 229: Special purpose fabrics	Quantities in KG					

Year	Canada	Taiwan	Mexico	Korea, South	Thailand	Germany
1997	359,034,179.20	66,998,876.80	54,493,731.20	44,951,264.00	32,994,851.20	28,755,336.80
1998	403,357,816.79	64,959,040.00	60,599,124.80	110,788,116.00	43,016,446.40	30,041,611.20
1999	437,159,651.19	62,900,435.20	53,721,754.40	183,781,886.40	24,186,838.40	33,858,872.80
2000	533,113,716.79	68,715,128.80	65,653,007.20	272,502,968.79	29,041,508.00	30,663,117.60
2001	589,290,556.79	69,479,489.60	69,630,993.60	268,933,363.20	24,666,306.40	50,783,039.20
2002	672,081,848.79	144,396,680.80	140,233,720.80	293,938,160.00	24,814,288.00	51,919,958.40
2003	680,528,251.19	115,256,423.20	158,946,232.80	338,767,690.39	30,580,470.40	42,175,912.00
% Change	90%	72%	192%	654%	-7%	47%

Appendix 26:

Category 666: Other MMF Furnishings		Quantities in KG.				
Country	Mexico	Pakistan	Turkey	Taiwan	Thailand	China
2001	24,804,111.00	15,351,664.00	8,852,699.00	5,624,922.00	4,830,758.00	4,485,057.00
2002	31,140,841.00	16,614,889.00	9,739,699.00	5,936,748.00	3,772,311.00	53,469,111.00
2003	26,588,677.00	17,156,500.00	8,465,491.00	5,505,648.00	3,460,231.00	145,594,807.00
2004	29,399,341.00	18,309,354.00	8,685,798.00	4,582,045.00	2,377,934.00	218,621,190.00
2005	30,369,540.00	14,458,163.00	5,704,282.00	4,141,157.00	1,412,777.00	261,578,099.00

2006	26,582,259.00	10,818,866.00	6,809,639.00	6,313,092.00	1,632,025.00	301,293,021.00
2007	23,860,844.00	8,501,638.00	5,457,362.00	7,512,020.00	888,737.00	315,132,732.00
% Change	-4%	-45%	-38%	34%	-82%	6926%