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**U.S Department of Agriculture**

**Agricultural Outlook Forum 2003**

**February 20 & 21, 2003**

**THE CHANGING LANDSCAPE OF WORLD TEXTILE TRADE:  
CHALLENGES AND OPPORTUNITIES FOR U.S. COTTON**

Julia Hughes

Vice President

International Trade and Government Relations

U.S. Association of Importers of Textiles and Apparel



**The Changing Landscape  
of World Textile Trade:  
Challenges and Opportunities  
for U.S. Cotton**

**Agricultural Outlook Forum 2003**

**Textile and Apparel  
Sourcing Changes  
Dramatically in 2005**

**Quotas Still Affect  
Business Decisions  
in 2003 and 2004**

**How Do Customers  
of U.S. Cotton  
See the Challenges  
and Opportunities**

**Successful Retailers  
Sell What Customers  
Want to Buy**

# 5 Key Factors in Making the Sourcing Decision



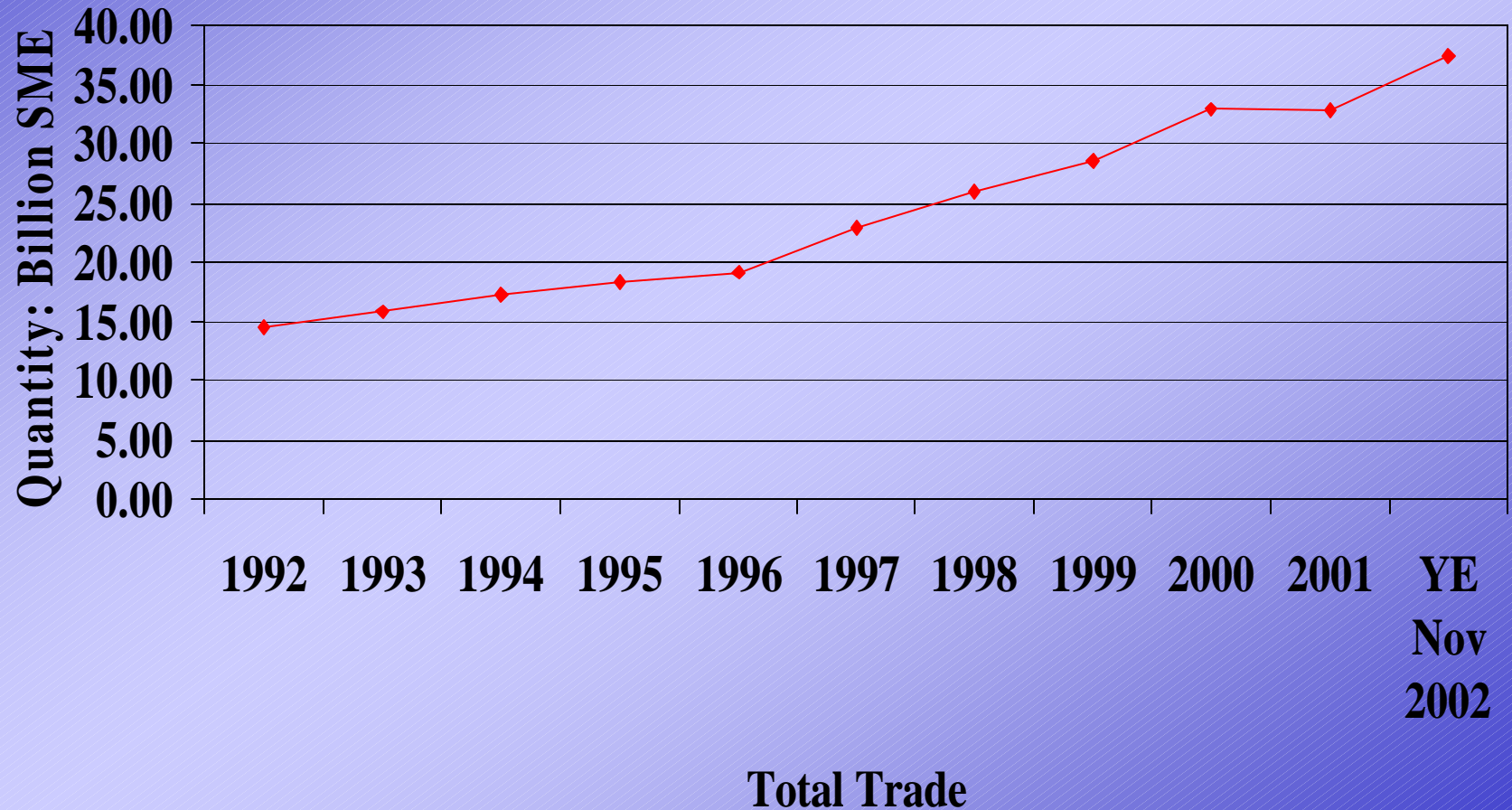
# Five Criteria For Sourcing

- Speed
- Quality
- Legal Compliance
- Logistics
- Product Costs

**What Happens in 2005**

**What Does This Mean  
for U.S. Cotton?**

# Ten Years of Increasing Imports

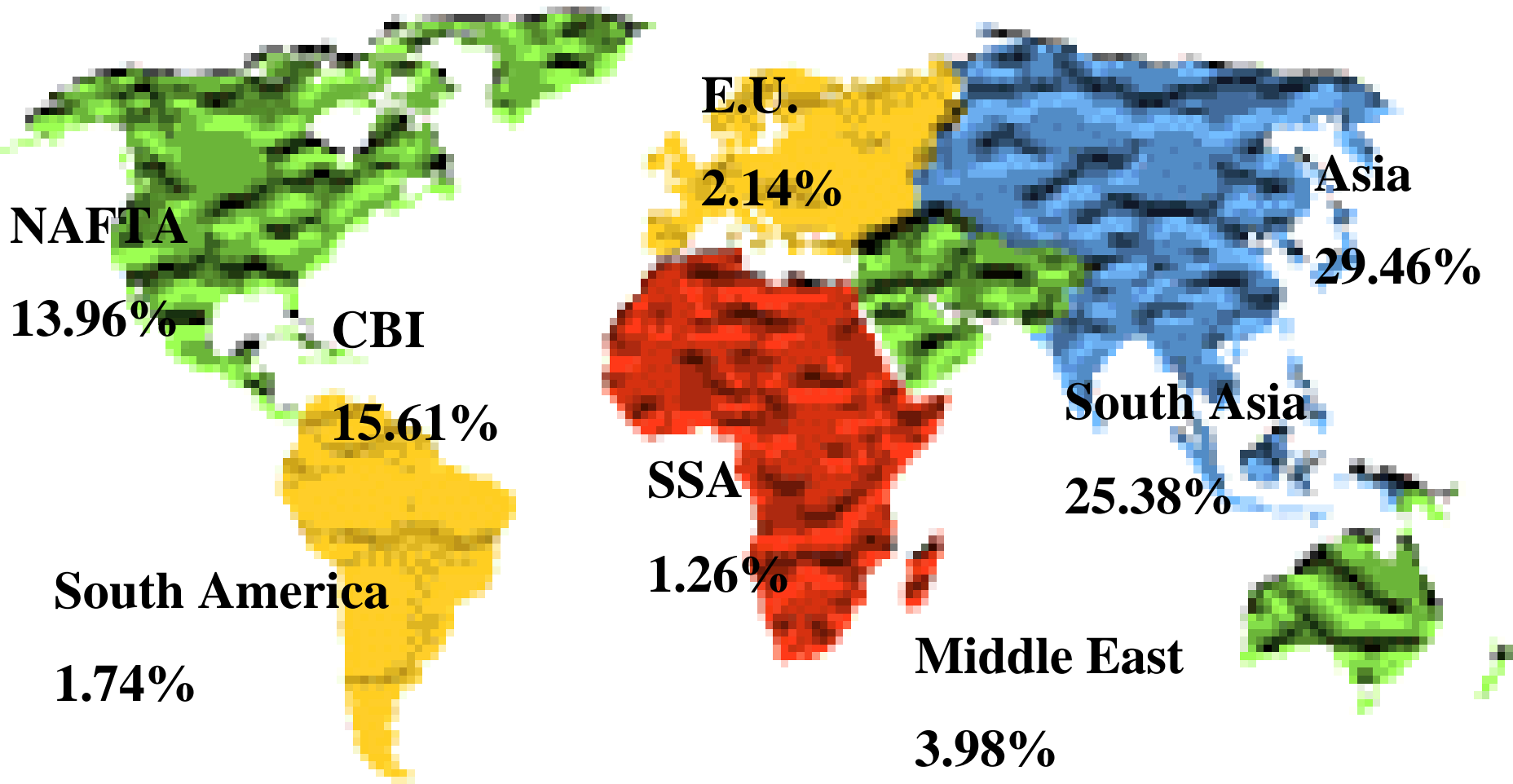


# Top 15 Suppliers of All Cotton Products

Year Ending November 2002

1. Pakistan
2. China (PRC)
3. Mexico
4. India
5. Canada
6. Honduras
7. Bangladesh
8. El Salvador
9. Turkey
10. Hong Kong
11. Thailand
12. Dominican Republic
13. Indonesia
14. Philippines
15. Cambodia

# Cotton Products by Region



# Top 15 Suppliers of Cotton Yarn

Year Ending November 2002

1. Pakistan
2. Mexico
3. Canada
4. Egypt
5. Uzbekistan
6. Brazil
7. Malaysia
8. Indonesia
9. Turkey
10. Thailand
11. Argentina
12. Italy
13. Bahrain
14. El Salvador
15. Australia

# Top 15 Suppliers of Cotton Fabrics

Year Ending November 2002

1. Pakistan
2. China (PRC)
3. Indonesia
4. Thailand
5. India
6. Korea
7. United Arab Emirates
8. Bahrain
9. Japan
10. Hong Kong
11. Turkey
12. Malaysia
13. Italy
14. Mexico
15. Uzbekistan



# Top 15 Suppliers of Cotton Apparel

Year Ending November 2002

1. Mexico
2. Honduras
3. El Salvador
4. Bangladesh
5. Dominican Republic
6. Hong Kong
7. China (PRC)
8. India
9. Pakistan
10. Turkey
11. Costa Rica
12. Cambodia
13. Philippines
14. Guatemala
15. Indonesia

# Top 15 Suppliers of Cotton Made-Ups

Year Ending November 2002

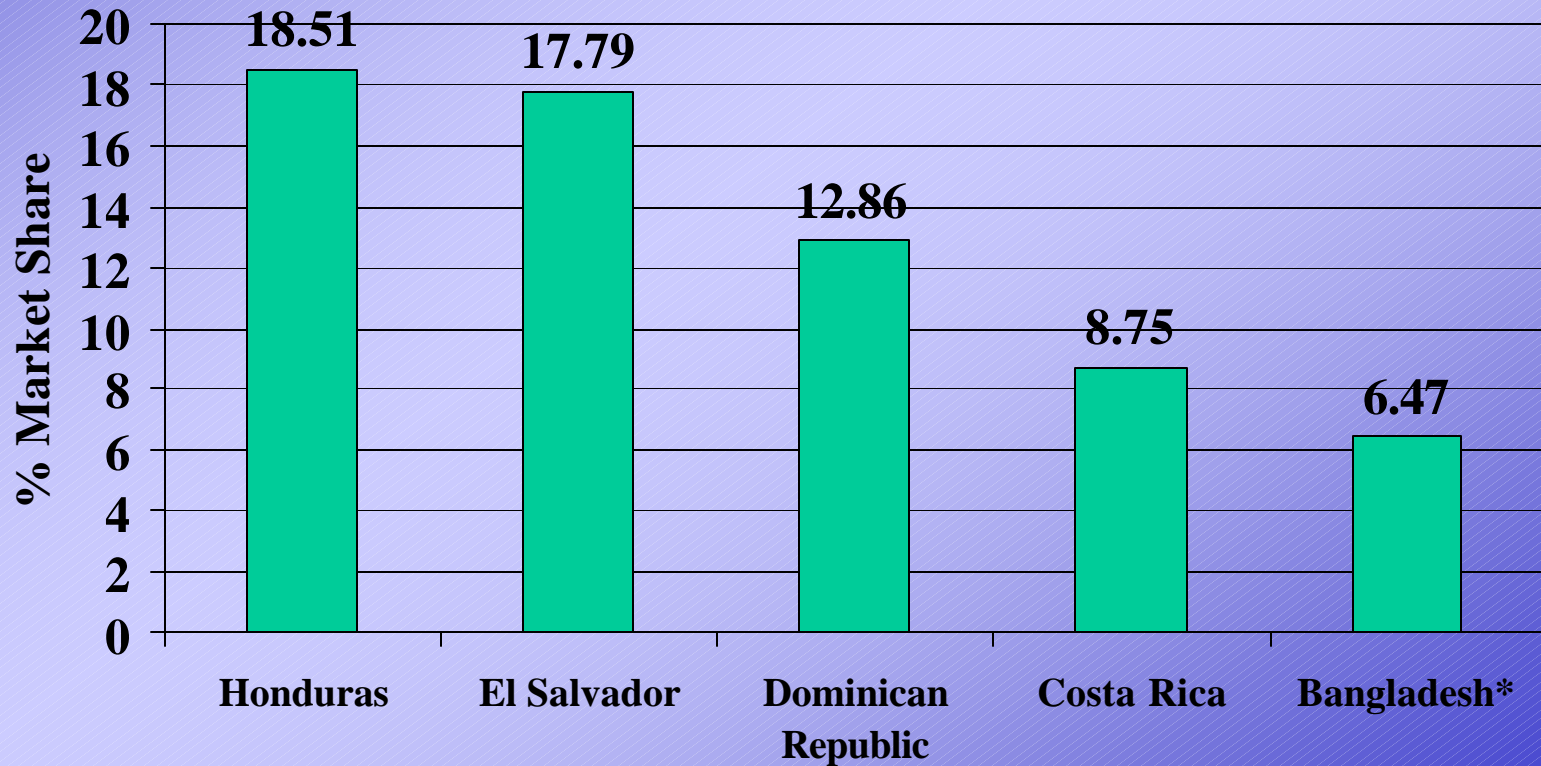
1. Pakistan
2. China (PRC)
3. India
4. Turkey
5. Portugal
6. Bangladesh
7. Mexico
8. Taiwan
9. Thailand
10. Brazil
11. Philippines
12. Israel
13. Canada
14. Egypt
15. Cambodia

# Top Cotton Countries

<b>RANK</b>	<b>COUNTRY</b>	<b>ANNUAL GROWTH RATE</b>	<b>% TRADE 807/CBTPA/NAFTA</b>
1	Pakistan	14.11	0.35
2	China (PRC)	85.04	0.21
3	Mexico	-4.41	96.92
4	India	16.18	0.26
5	Canada	-0.95	92.18
6	Honduras	5.32	91.07
7	Bangladesh	0.39	0.11
8	El Salvador	8.89	86.92
9	Turkey	14.79	0.06
10	Hong Kong	-6.58	0.94
11	Thailand	15.84	0.32
12	Dominican Republic	7.17	93.74
13	Indonesia	0.45	0.41
14	Philippines	-0.67	0.91
15	Cambodia	19.78	0.78

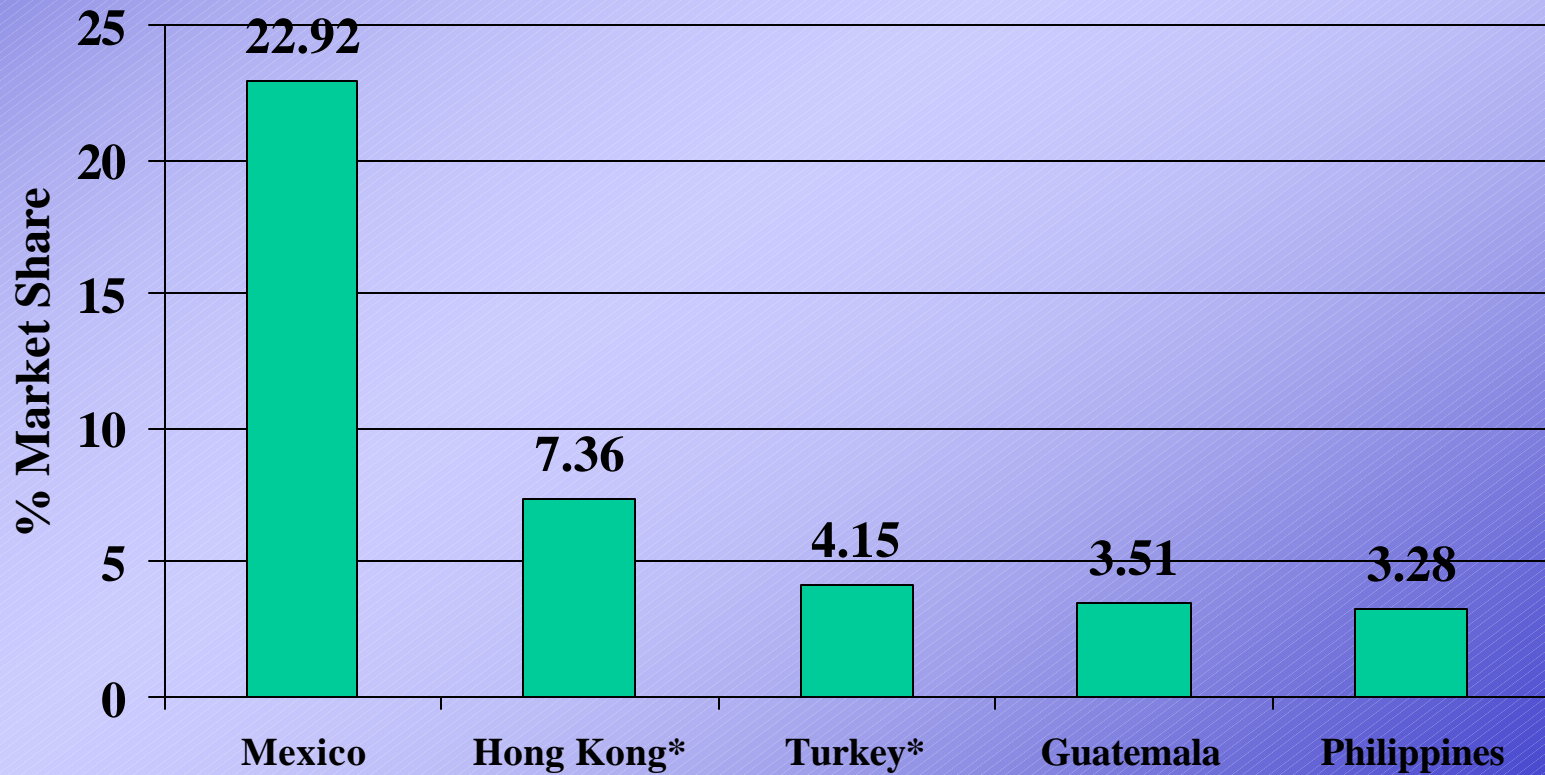
**Top Five U.S. Suppliers  
for the Year Ending November 2002**

**Cotton Underwear  
Category 352**



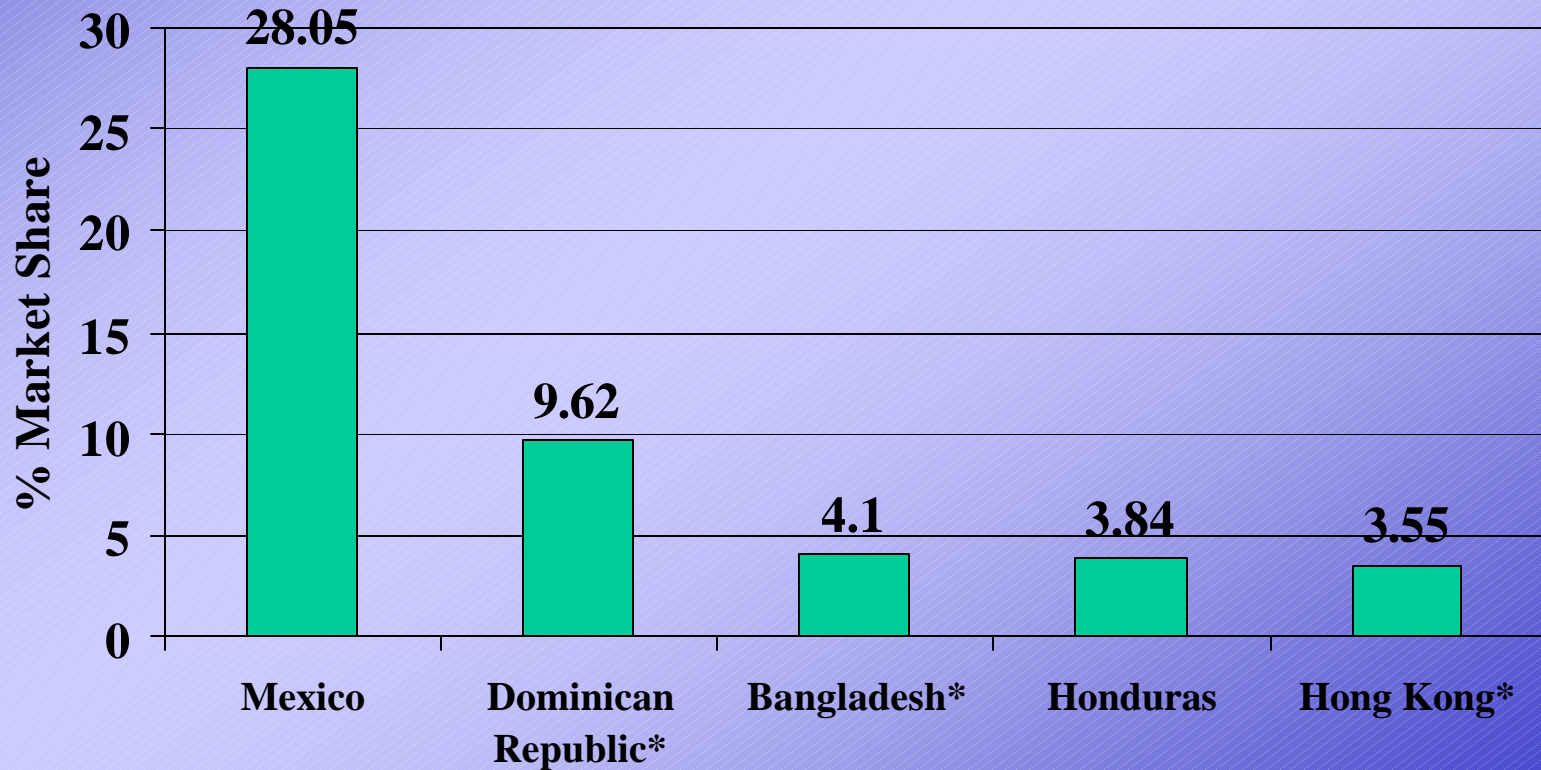
\* Subject to quota

**Top Five U.S. Suppliers  
for the Year Ending November 2002  
Cotton Shorts & Trousers, Women's & Girls'  
Category 348**



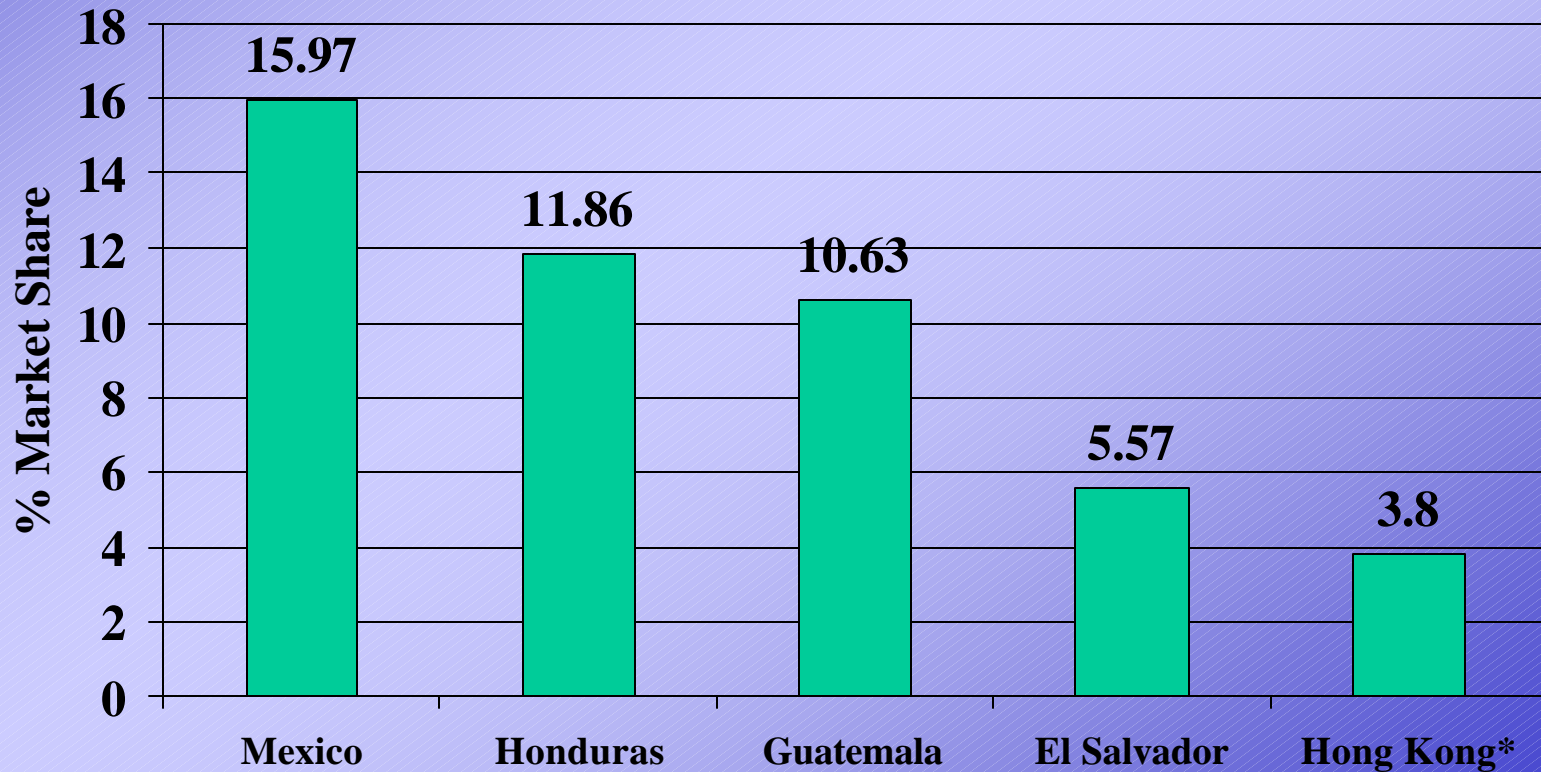
\* Subject to quota

**Top Five U.S. Suppliers**  
**for the Year Ending November 2002**  
**Cotton Shorts & Trousers, Men's & Boys'**  
**Category 347**



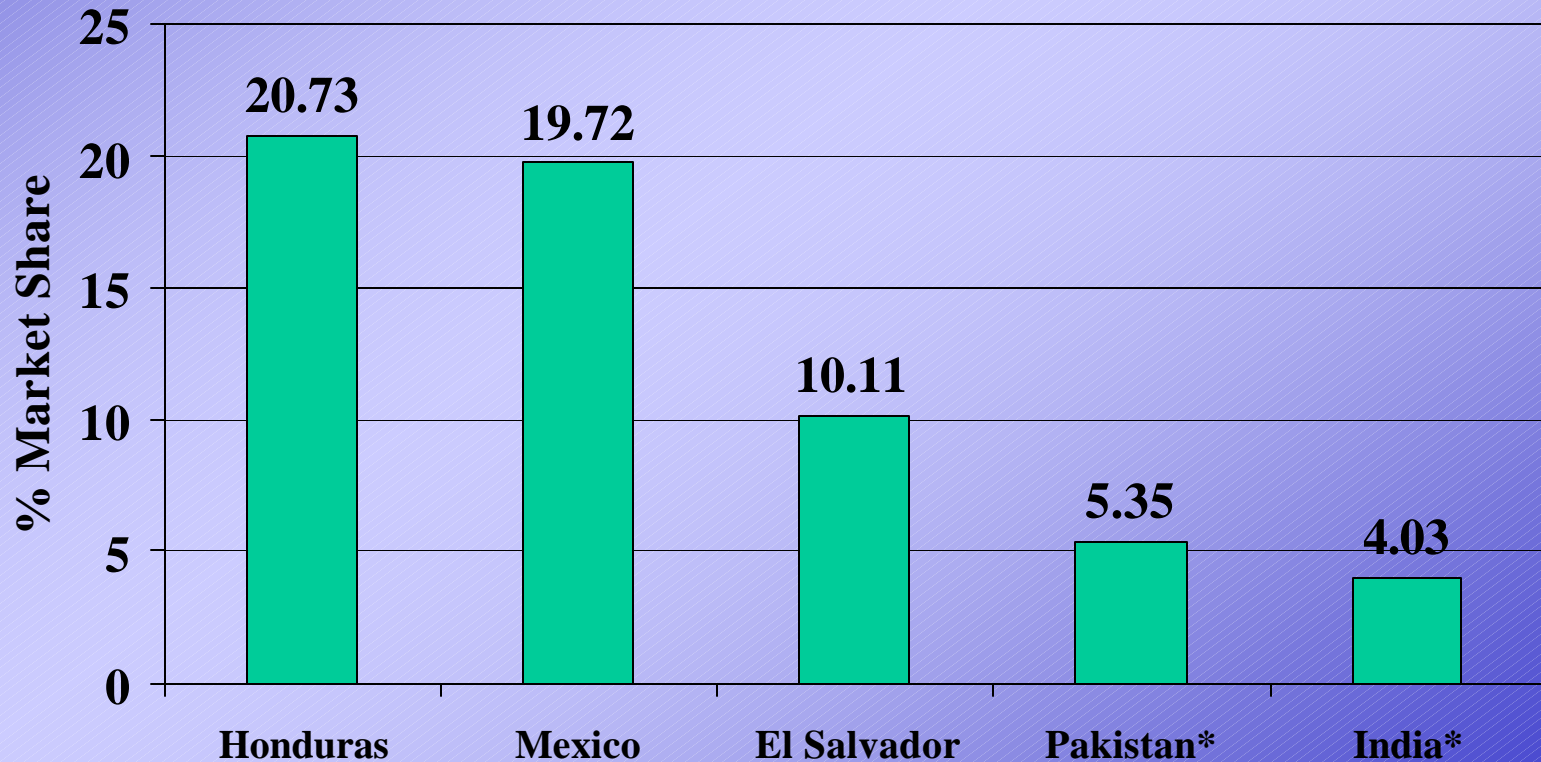
\* Subject to quota

**Top Five U.S. Suppliers**  
**for the Year Ending November 2002**  
**Cotton Knit Shirts, Women's & Girls'**  
**Category 339**



\* Subject to quota

**Top Five U.S. Suppliers**  
**for the Year Ending November 2002**  
**Cotton Knit Shirts, Men's & Boys'**  
**Category 338**



\* Subject to quota

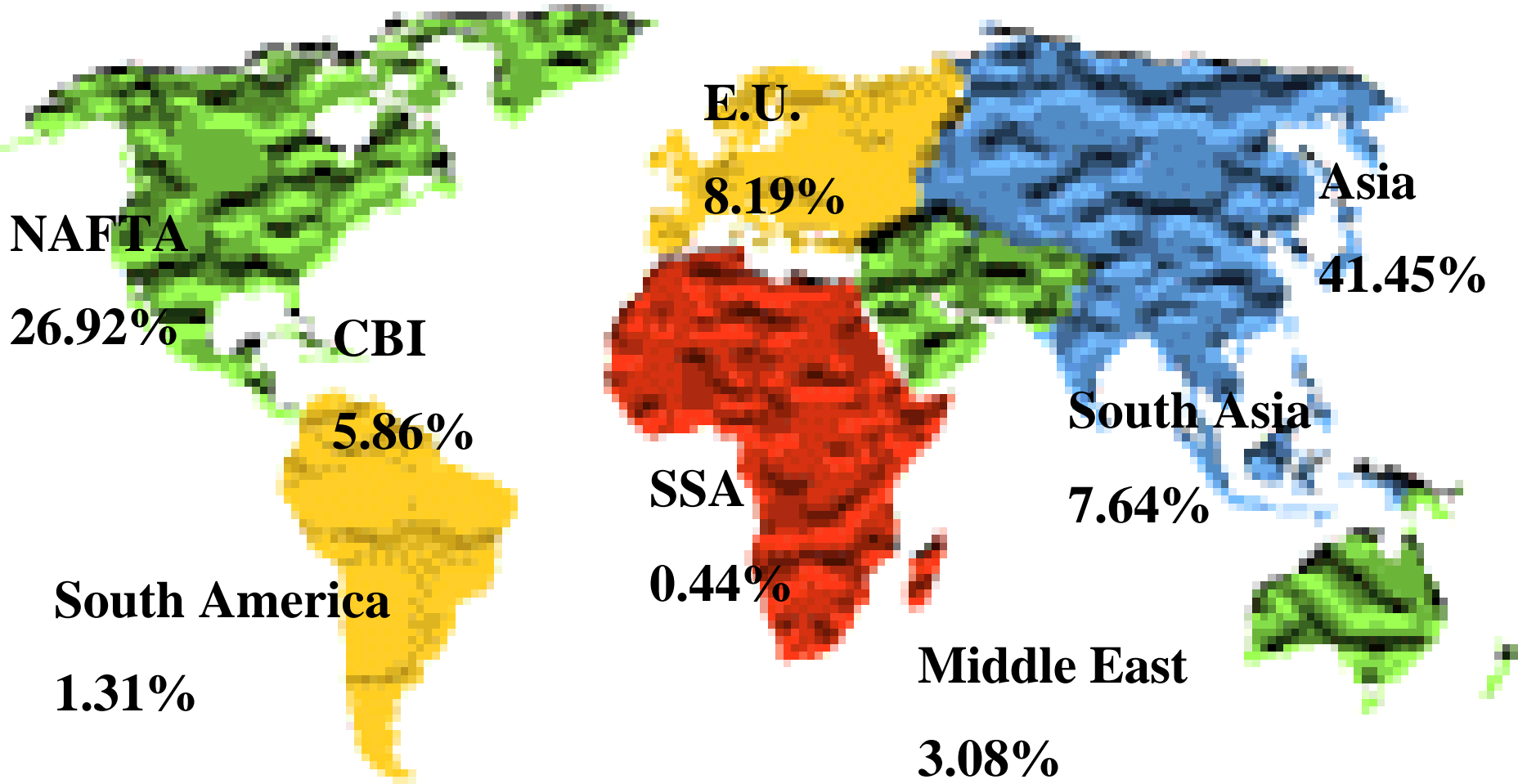


# Top 15 Suppliers of All Man-made Fiber Products

Year Ending November 2002

1. Mexico
2. Canada
3. China (PRC)
4. Korea
5. Taiwan
6. Thailand
7. Indonesia
8. Germany
9. Turkey
10. Pakistan
11. Philippines
12. Bangladesh
13. Israel
14. Italy
15. Hong Kong

# Man-made Fiber Products by Region



# Opportunities for U.S. Cotton

**Raw Cotton Sales  
Should Grow**

# Cotton Yarns and Fabrics Should Maintain Strength in Western Hemisphere

■ **NAFTA**

■ **CAFTA**

■ **FTAA**

**Cotton Home Furnishings  
Should Grow**

# Challenges for U.S. Cotton

- Must Sell U.S. Cotton to New Customers Around the Globe
- Customers Will Expect Quality **and** Price
- Be Prepared for Challenge from Synthetics



# THANK YOU

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