

Changes in U.S. Cotton-Dominant Apparel Sourcing since Tariffs Increases were Applied in September (latest import data for December)

Cotton-Dom. Product	Gender/Age	China's Share 2018	Year-over-Year Sept-Dec		Notable Changes Among Non-China Suppliers Year-over-Year Sept-Dec ¹
			China	World	
Cotton-Dom Apparel	All	29%	-28%	-9%	Honduras +10% , Indonesia -11%
Knit Shirts (MFA code 338)	M&B	9%	-20%	+6%	Honduras +21% , Haiti -13%
(MFA 339)	W&G	20%	-26%	-11%	Vietnam -10%, Nicaragua -19%, Cambodia +12%
Woven Shirts (MFA 340)	M&B	19%	-37%	-14%	Bang. -8%, Vietnam -19%, Indonesia -20%, Nicaragua +20%
(MFA 341)	W&G	32%	-29%	-11%	India +16% , Vietnam -26%, Bangladesh -34%, Indonesia +16%
Jeans (HS codes in notes)	M	13%	-46%	-14%	Mex. -25%, Pakistan -16%, Sub-Saharan Africa +9% , Nic. +13%
(HS codes in notes)	W	40%	-41%	-13%	Bang. +13% , Vietnam +28% , Pakistan +15% , Cambodia +63%
Non-Denim Bottoms (MFA 347 minus jeans)	M&B	20%	-25%	-8%	Bangladesh -10%, Mexico -9%, Vietnam +7% , Pakistan -17%
(MFA 348 minus jeans)	W&G	37%	-33%	-15%	Indonesia -26%, Cambodia +17% , India +21%
Coats (MFA 334)	M&B*	42%	-38%	-11%	Bangladesh +60% , Honduras +13%
(MFA 335)	W&G	51%	-34%	-20%	Vietnam -9%, Cambodia -17%, Indonesia +41%
Dresses (MFA 336)	W&G	39%	-6%	-1%	Vietnam +9% , India +11% , Indonesia +27% , Cambodia -32%
Skirts (MFA 342)	W&G	43%	-18%	-11%	Vietnam -12%, Philippines -67%, Cambodia +185%
Hosiery (MFA 332)	All	32%	-29%	-15%	Honduras -21%, El Salvador -40%, S. Korea -20%, Mex. +11%
Nightwear/PJs (MFA 351)	All	43%	-30%	-6%	Vietnam +18% , Cambodia +43% , Bang. +26% , Pak. +35%
Sweaters (MFA 345)	All	81%	-27%	-11%	Bang. +41% , Indonesia +46% , Pak. +21% , Vietnam +303%
Underwear (MFA 352)	All	8%	-16%	-8%	Bangladesh -24%, India -28%, Honduras +22%

Sources: OTEXA, Cotton Incorporated calculations.

Notes: All data in terms of unit counts except for cotton-dominant apparel, which is in terms of square-meter equivalence.

M&B for men and boys. W&G for women and girls.

MFA codes were developed as part of the Multi-Fiber Arrangement and are aggregations of HS codes. This system, and its successor (Agreement on Textiles & Clothing), were used to enforce quotas for the U.S. and other apparel importers from the 1970s and into the 2000s.

HS codes for men's (M) jeans are 6203.42.0711, 6203.42.4511. HS codes for women's (W) jeans are 6204.62.1511, 6204.62.8011.

¹Countries that rank among the top ten suppliers with changes are nearly 10% or greater are listed. Lists are in descending order of market share.