
Textiles, Apparel, and Footwear

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Change in 2003 from 2002 for textiles and apparel:¹

U.S. trade deficit: Increased by \$5.9 billion (9 percent) to \$70.2 billion

U.S. exports: Decreased by \$265 million (1 percent) \$17.0 billion

U.S. imports: Increased by \$5.7 billion (7 percent) to \$87.2 billion

The U.S. trade deficit in textiles and apparel widened by 9 percent in 2003, up from a 4-percent increase in 2002, as U.S. imports rose and U.S. exports continued to fall (see table TX-1). U.S. production of sector goods declined significantly in 2003, by 11 percent for textiles and by 18 percent for apparel.² A large part of the increase in imports occurred in goods for which quotas were removed in 2002 (see table TX-2).³ Apparel accounted for 78 percent of the sector imports in 2003.

The widening of the trade deficit in textiles and apparel in 2003 largely stemmed from growing imports from Asia, particularly China and Vietnam. The trade deficit with Asia widened by \$4.6 billion to \$47.4 billion, as the \$4.7 billion increase in U.S. imports from the region far exceeded the \$80 million gain in U.S. exports to the region. Imports from China rose by 22 percent in 2003 to \$15.4 billion, making China the largest supplier by far with 17.7 percent of sector imports, up from 15.4 percent in 2002. The growth in China's shipments was concentrated in goods for which China became eligible for quota elimination in 2002 --namely, knit fabrics, brassieres, textile luggage, babies' apparel, and robes and dressing gowns. U.S. retailers and apparel companies view China as a desirable textile and apparel supplier because of China's low production costs, its ability to make almost any type of textile product or garment at any quality level, and its abundant labor force.⁴ In December 2003, the United States reinstated import quotas on certain of these products from China under the textile safeguard provision of China's WTO Accession Agreement.⁵

¹ Footwear is treated separately in this chapter.

² Board of Governors of the Federal Reserve System, *Federal Reserve Bulletin - Winter 2004*, "Rates of Change in Industrial Production, Market and Industry Group Summary: 1999-2003," found at <http://www.federalreserve.gov>, retrieved Mar. 16, 2004.

³ Imports will likely continue to grow following elimination of all remaining quotas on sector goods from World Trade Organization (WTO) countries on January 1, 2005, as required by the WTO Agreement on Textiles and Clothing (ATC).

⁴ For additional information on China's textile and apparel industry, see *Textiles and Apparel: Assessment of the Competitiveness of Certain Foreign Suppliers to the U.S. Market*, (Inv. No. 332-448), USITC publication 3671, Jan. 2004.

⁵ On December 24, 2003, the United States requested consultations with China and established quotas on imports from China for three groups of products (knit fabrics, robes and dressing gowns, and brassieres) that had experienced significant import growth since the removal of quotas at the end of 2001. Information on the safeguard actions is available in three notices of the Committee for the Implementation of Textile Agreements (CITA), published in the *Federal Register* of Dec. 29, 2003 (68 F.R. 74944-74949).

Table TX-1

Textiles and apparel: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<i>Million dollars</i>							
U.S. exports of domestic merchandise:							
China	166	221	261	339	405	65	19.2
Mexico	5,550	6,155	5,232	4,939	4,696	-243	-4.9
Canada	3,545	3,646	3,344	3,193	3,121	-72	-2.3
Hong Kong	295	332	313	324	313	-10	-3.1
Honduras	1,233	1,475	1,409	1,523	1,522	-1	-0.1
India	36	46	39	44	54	10	21.5
Dominican Rep	1,259	1,395	1,290	1,293	1,263	-30	-2.3
Korea	180	202	170	184	207	22	12.1
Italy	163	145	128	120	120	-1	-0.5
Thailand	40	43	41	46	71	25	54.8
All other	6,256	6,694	5,891	5,291	5,262	-30	-0.6
Total	18,723	20,353	18,118	17,298	17,033	-265	-1.5
EU-15	1,836	1,924	1,698	1,520	1,473	-46	-3.0
OPEC	312	261	269	222	202	-20	-9.0
Latin America	10,607	12,003	10,536	10,077	9,803	-273	-2.7
CBERA	4,389	5,125	4,783	4,761	4,688	-73	-1.5
Asia	1,845	2,030	1,819	1,883	1,963	80	4.3
Sub-Saharan Africa	146	136	131	124	131	6	5.0
Central and Eastern Europe	62	43	46	40	38	-2	-5.1
U.S. imports of merchandise for consumption:							
China	9,234	10,710	11,124	12,602	15,426	2,823	22.4
Mexico	9,413	10,580	9,941	9,649	9,015	-634	-6.6
Canada	3,640	3,945	3,791	3,859	3,788	-72	-1.9
Hong Kong	4,559	4,804	4,491	4,081	3,863	-218	-5.3
Honduras	2,205	2,423	2,443	2,509	2,578	68	2.7
India	2,666	3,161	3,038	3,382	3,668	286	8.5
Dominican Rep	2,388	2,478	2,337	2,242	2,210	-32	-1.4
Korea	3,189	3,479	3,316	3,287	2,986	-301	-9.2
Italy	2,314	2,484	2,420	2,380	2,526	147	6.2
Thailand	2,096	2,513	2,524	2,495	2,513	18	0.7
All other	29,565	34,332	34,521	35,099	38,668	3,570	10.2
Total	71,269	80,909	79,946	81,585	87,241	5,655	6.9
EU-15	5,019	5,360	5,190	5,163	5,391	228	4.4
OPEC	2,526	3,153	3,251	2,981	3,016	35	1.2
Latin America	19,439	21,654	20,841	20,639	20,553	-86	-0.4
CBERA	8,999	9,817	9,728	9,711	9,865	154	1.6
Asia	38,102	43,544	43,218	44,666	49,371	4,705	10.5
Sub-Saharan Africa	622	789	998	1,136	1,552	416	36.6
Central and Eastern Europe	438	511	541	515	562	47	9.1

See footnote(s) at end of table.

Table TX-1--Continued

Textiles and apparel: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002		
						Absolute	Percent	
	<i>Million dollars</i>							
U.S. merchandise trade balance:								
China	-9,068	-10,489	-10,863	-12,263	-15,021	-2,758	-22.5	
Mexico	-3,863	-4,426	-4,709	-4,710	-4,319	391	8.3	
Canada	-96	-299	-446	-666	-666	-1	-0.1	
Hong Kong	-4,264	-4,472	-4,178	-3,757	-3,549	208	5.5	
Honduras	-971	-948	-1,034	-986	-1,056	-69	-7.0	
India	-2,630	-3,115	-3,000	-3,337	-3,614	-277	-8.3	
Dominican Rep	-1,129	-1,082	-1,047	-950	-948	2	0.2	
Korea	-3,009	-3,276	-3,146	-3,103	-2,780	323	10.4	
Italy	-2,152	-2,339	-2,292	-2,259	-2,407	-147	-6.5	
Thailand	-2,057	-2,470	-2,484	-2,449	-2,442	7	0.3	
All other	-23,309	-27,639	-28,630	-29,807	-33,407	-3,599	-12.1	
Total	-52,547	-60,555	-61,828	-64,288	-70,208	-5,920	-9.2	
EU-15	-3,183	-3,436	-3,491	-3,644	-3,918	-274	-7.5	
OPEC	-2,214	-2,892	-2,982	-2,759	-2,814	-55	-2.0	
Latin America	-8,832	-9,651	-10,305	-10,563	-10,750	-187	-1.8	
CBERA	-4,610	-4,692	-4,946	-4,950	-5,176	-227	-4.6	
Asia	-36,257	-41,515	-41,399	-42,783	-47,408	-4,625	-10.8	
Sub-Saharan Africa	-476	-653	-867	-1,012	-1,421	-409	-40.5	
Central and Eastern Europe	-376	-468	-495	-474	-523	-49	-10.3	

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table TX-2
Leading changes in U.S. exports and imports of textiles and apparel, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<i>Million dollars</i>							
U.S. EXPORTS:							
Increases:							
Fibers and yarns, except raw cotton and raw wool (CH045)	2,830	3,126	2,640	2,656	2,872	216	8.1
Fabrics (CH046)	5,170	6,067	6,162	6,485	6,641	156	2.4
Decreases:							
Apparel (CH049)	7,964	8,177	6,537	5,491	4,965	-525	-9.6
Home furnishings (CH048)	398	418	403	363	339	-24	-6.6
Carpets and rugs (CH047)	772	791	711	684	681	-3	-0.5
All other	1,589	1,774	1,666	1,619	1,534	-85	-5.2
TOTAL	18,723	20,353	18,118	17,298	17,033	-265	-1.5
U.S. IMPORTS:							
Increases:							
Apparel (CH049)	56,565	64,402	63,995	63,927	68,274	4,347	6.8
Home furnishings (CH048)	2,652	3,215	3,332	4,226	5,021	795	18.8
Miscellaneous textile products (CH050)	2,696	3,005	3,198	3,340	3,754	414	12.4
Decreases:							
Men's and boys' trousers (CH049C)	6,381	7,321	6,980	6,973	7,459	486	7.0
Other wearing apparel (CH049S)	2,833	3,539	3,433	3,287	3,630	343	10.4
Fabrics (CH046)	5,563	6,052	5,466	5,922	5,854	-67	-1.1
All other	-5,420	-6,626	-6,459	-6,089	-6,751	-663	10.9
TOTAL	71,269	80,909	79,946	81,585	87,241	5,655	6.9

Note.-Calculations based on unrounded data.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Vietnam has emerged as a major supplier of apparel since the United States granted it normal trade relations (NTR) status in December 2001.⁶ Apparel imports from Vietnam totaled \$2.4 billion in 2003, up from \$905 million in 2002 and from less than \$50 million in earlier years. Imports of sector goods from Vietnam were subject to quotas for the first time, effective May 1, 2003. The quotas limited imports of numerous textile and apparel products from Vietnam and prevented even greater increases in imports of these items in 2003.⁷

In terms of industry/commodity groups, U.S. imports of apparel increased by \$4.3 billion to \$68.3 billion, reflecting a continued trend by retailers and apparel companies to increasingly source apparel from low-cost offshore providers, rather than manufacture or source the products domestically. An increase in consumer spending on apparel of 2 percent also spurred demand for imports in 2003.⁸ The increase in consumer spending was attributable to a number of factors, including growth in the economy, a rebound in the stock markets, and new fashion trends, such as dressier styles, which have encouraged consumer spending.⁹ Growth in apparel imports occurred not only in categories of products that were removed from quota in 2002, but also in categories of products that were still subject to quota for many major suppliers. Import growth for these constrained products occurred largely from countries that benefit from quota-free access to the U.S. market through preferential trade programs, such as the United States-Caribbean Basin Trade and Partnership Act (CBTPA).

U.S. imports of home furnishings grew by \$795 million to \$5.0 billion in 2003. Growth in imports of home furnishings products was concentrated in items that were removed from quota in 2002, including bedspreads and other furnishings, kitchen and bath linens and towels, and curtains.

U.S. exports of textiles and apparel declined for the third consecutive year during 2002-03, by 1 percent, to \$17.0 billion, their lowest level since 1996. The decline in 2003 largely reflected smaller shipments to the major foreign markets for the U.S. textile and apparel sector--namely, NAFTA signatories Mexico and Canada, and beneficiary countries under the Caribbean Basin Economic Recovery Act (CBERA). The NAFTA and CBERA countries together accounted for 73 percent of U.S. exports of sector goods by value in 2003. Exports of apparel, which consisted mostly of cut apparel pieces, declined by \$525 million to \$5.0 billion in 2003. Instead, U.S. firms are exporting lower value-added inputs for apparel, particularly knit fabrics, which grew by \$309 million to \$1.4 billion in 2003.

The United States posted a decline in textile and apparel trade with its NAFTA partners Canada and especially Mexico in 2003. U.S. firms have reduced their apparel sourcing from Mexico, leading to a decline in U.S. exports of textile inputs to Mexico for use in production of apparel for export to the United States. Imports of apparel from Mexico have declined since 2000, and this decline was partly attributable, at least initially, to NAFTA restrictions on the use of duty drawback, which went into effect in 2001.¹⁰ The decline in textile and apparel trade with Mexico also reflected greater competition from

⁶ NTR status means that imports of goods from Vietnam are now subject to much lower rates of duty.

⁷ The bilateral textile agreement with Vietnam was initialed on April 25, 2003, and signed on July 17, 2003. See *Federal Register* notices of the Committee for the Implementation of Textile Agreements, "Establishment of Import Limits . . .," May 16, 2003 (68 F.R. 26575), and "Establishment of an Export Visa Arrangement . . .," July 30, 2003 (68 F.R. 44748).

⁸ Data on consumer spending are from the U.S. Department of Commerce, Bureau of Economic Analysis, "Table 2.4.5U - Personal Consumption Expenditures by Type of Product," Mar. 2, 2004, available at <http://www.bea.gov>.

⁹ Standard & Poors, "Apparel & Footwear: Current Environment," Mar. 4, 2004, found at <http://www.netadvantage.standardsandpoor.com>, retrieved on Mar. 10, 2004; and Emerging Textiles, "Global Textile Market Could Be Boosted By the Rebound In U.S. Apparel Sales," Apr. 13, 2004, found at <http://www.emergingtextiles.com>, retrieved on Apr. 14, 2004.

¹⁰ NAFTA had permitted duty drawback, or the refund of duties paid on imports of certain apparel components that were not required to originate in a NAFTA country (e.g., nonvisible interlinings and other trimmings). Stephen Lamar, Senior Vice President, American Apparel & Footwear Association, Arlington, VA, interview by Commission (continued...)

CBERA countries benefitting from new U.S. trade preferences for the region (see below) and from lower cost countries in Asia, particularly China, following quota elimination for certain sector goods in 2002.

The textile and apparel trade deficit with CBERA countries widened by \$227 million (5 percent), as imports from the region rose by \$154 million (2 percent) and exports to the region fell by \$73 million (2 percent). The pattern of U.S.-CBERA textile and apparel trade has changed since implementation of the CBTPA in October 2000. Prior to that time, in order for imports of most apparel made in CBERA countries to qualify for both reduced duties under HTS heading 9802.00.80 and preferential quotas under the special access program, the fabrics used in the production of the goods had to be made and cut into garment parts in the United States.¹¹ Following implementation of CBTPA, which grants duty-free and quota-free entry to qualifying apparel assembled from fabrics made in the United States of U.S.-made yarns, uncut fabrics may now be shipped to CBERA countries for both cutting and assembly into qualifying apparel. In addition, CBTPA grants duty-free entry to limited quantities of knit apparel made in CBERA countries from fabrics knitted in the countries, provided that the fabrics are made of U.S. yarns. As such, yarns and uncut fabrics have replaced higher valued-added cut garment parts in trade with CBERA countries.

The textile and apparel trade deficit with sub-Saharan African (SSA) countries rose by \$409 million (41 percent) in 2003, reflecting substantial growth in apparel imports under the African Growth and Opportunity Act (AGOA), which grants duty-free and quota-free treatment to imports of qualifying textile and apparel articles from SSA countries. AGOA permits lesser developed SSA countries (all eligible SSA countries except Gabon, Mauritius, Seychelles, and South Africa) with apparel visas to use third-country (e.g., Asian) fabrics in their production of apparel for export to the United States and still qualify for AGOA preferences.

¹⁰ (...continued)
staff, Feb. 10, 2004.

¹¹ Under heading 9802.00.80 of the Harmonized Tariff Schedule of the United States, U.S. importers receive a partial duty exemption for articles assembled abroad in whole or in part of U.S. components. In general, the duty is assessed only on the value added abroad (mainly the cost of sewing the parts together). The fabric for making the apparel parts can be of either U.S. or foreign origin as long as the fabric is cut to shape in the United States, exported ready for assembly, and not advanced in value abroad except by assembly and incidental operations. The special access program provided CBERA countries, in addition to the reduced duties, virtually unlimited market access for apparel assembled there from fabrics wholly made and cut in the United States (known as “807A” trade).

Change in 2003 from 2002 for footwear:

U.S. trade deficit: Increased by \$205 million (1 percent) to \$15.1 billion

U.S. exports: Decreased by \$25 million (5 percent) to \$495 million

U.S. imports: Increased by \$180 million (1 percent) to \$15.6 billion

The U.S. trade deficit in footwear widened in 2003, primarily because of a continued increase in imports, which account for more than 90 percent of the U.S. footwear market (see table TX-3). The remainder of the U.S. footwear market is supplied by the domestic footwear industry, which comprises primarily niche product manufacturers that compete on the basis of nonprice factors such as specialized types of footwear (e.g., sizes/widths and hand-sewn items), quality, exclusive channels of distribution at retail, rapid responsiveness, and brand-names.¹² Consumer spending on footwear in 2003 rose 3 percent over 2002 to \$50.6 billion.¹³ The average price of footwear continued to decline, as lower priced casual shoes accounted for a greater share of consumer purchases.¹⁴ Leading footwear companies like Nike Inc. and Reebok International Ltd. focused on expanding internationally and diversifying further into apparel and sporting goods. U.S. producers' footwear shipments in 2003 fell by an estimated \$780 million from 2002 to \$2.7 billion.¹⁵

China is the largest source of footwear imports, accounting for 68 percent of the imports by value in 2003. China's dominance in the U.S. market can likely be attributed to its price competitiveness, owing to low wages and an established production infrastructure. Footwear imports from China rose by \$305 million (3 percent). Imports of footwear from Vietnam have increased significantly since the United States granted the country NTR status in December 2001, rising by \$101 million to \$325 million in 2003.

¹² Peter T. Mangione, President, Footwear Distributors and Retailers of America, written submission to the Commission, Jan. 22, 2004.

¹³ U.S. Department of Commerce, Bureau of Economic Analysis, available at <http://www.bea.gov>.

¹⁴ Yogeesh Wagle, "Apparel & Footwear," *Standard & Poor's*, Mar. 4, 2004, found at <http://www.netadvantage.standardandpoors.com>, retrieved Mar. 10, 2004.

¹⁵ Data are estimated by the Commission based on data from the U.S. Census Bureau, *Current Industrial Reports, Footwear Production: 2002*, issued June 2003.

Table TX-3

Footwear: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<i>Million dollars</i>							
U.S. exports of domestic merchandise:							
China	41	43	46	35	36	2	4.6
Italy	5	4	5	5	6	1	30.1
Brazil	2	1	1	1	2	(2)	20.1
Indonesia	14	14	13	15	12	(3)	-22.0
Mexico	94	114	123	95	90	(5)	-5.7
Vietnam	30	27	19	18	23	5	27.6
Thailand	5	7	5	4	5	1	37.8
Spain	4	3	5	6	6	(2)	-3.7
Dominican Rep	57	54	51	30	27	(2)	-7.8
Canada	85	72	70	65	57	(8)	-12.7
All other	357	324	300	246	231	(15)	-6.1
Total	693	664	638	520	495	(25)	-4.8
EU-15	82	65	67	57	59	2	4.1
OPEC	30	34	37	35	26	(9)	-25.9
Latin America	216	234	246	196	177	(19)	-9.8
CBERA	98	94	97	75	67	(8)	-10.7
Asia	263	253	218	164	158	(6)	-3.9
Sub-Saharan Africa	17	14	10	13	15	3	20.1
Central and Eastern Europe	2	1	3	2	4	2	96.2
U.S. imports of merchandise for consumption:							
China	8,438	9,206	9,767	10,242	10,546	305	3.0
Italy	1,185	1,259	1,261	1,182	1,241	59	5.0
Brazil	960	1,149	1,162	1,080	1,040	(40)	-3.7
Indonesia	751	731	725	731	570	(161)	-22.1
Mexico	354	351	312	279	275	(3)	-1.2
Vietnam	146	125	132	224	325	101	44.9
Thailand	325	329	315	278	285	7	2.6
Spain	327	325	273	269	235	(34)	-12.8
Dominican Rep	237	181	193	140	138	(1)	-0.9
Canada	89	76	79	68	64	(4)	-5.3
All other	1,261	1,123	1,031	887	840	(47)	-5.3
Total	14,074	14,856	15,249	15,379	15,560	180	1.2
EU-15	2,038	2,044	1,951	1,826	1,764	(62)	-3.4
OPEC	752	732	725	731	570	(161)	-22.1
Latin America	1,593	1,709	1,693	1,516	1,475	(41)	-2.7
CBERA	259	196	206	148	149	1	0.4
Asia	10,142	10,841	11,330	11,797	12,046	249	2.1
Sub-Saharan Africa	3	1	1	1	1	(2)	7.1
Central and Eastern Europe	148	135	145	126	159	32	25.7

See footnote(s) at end of table.

Table TX-3--Continued

Footwear: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
	<i>Million dollars</i>						
U.S. merchandise trade balance:							
China	-8,397	-9,163	-9,721	-10,207	-10,510	-303	-3.0
Italy	-1,180	-1,255	-1,256	-1,178	-1,235	-58	-4.9
Brazil	-958	-1,148	-1,160	-1,078	-1,038	40	3.7
Indonesia	-738	-717	-712	-716	-558	158	22.1
Mexico	-260	-237	-189	-183	-185	-2	-1.1
Vietnam	-116	-97	-113	-206	-302	-96	-46.4
Thailand	-320	-322	-311	-274	-280	-6	-2.1
Spain	-323	-322	-268	-263	-229	34	13.0
Dominican Rep	-180	-127	-142	-110	-111	-1	-0.9
Canada	-5	-4	-9	-3	-8	-5	-140.9
All other	-903	-799	-731	-641	-609	32	5.1
Total	-13,380	-14,192	-14,611	-14,860	-15,065	-205	-1.4
EU-15	-1,956	-1,978	-1,883	-1,769	-1,705	65	3.7
OPEC	-722	-698	-688	-696	-544	152	21.9
Latin America	-1,377	-1,474	-1,447	-1,320	-1,298	22	1.7
CBERA	-161	-102	-109	-73	-81	-9	-12.0
Asia	-9,879	-10,588	-11,113	-11,632	-11,888	-255	-2.2
Sub-Saharan Africa	13	13	9	11	14	2	21.7
Central and Eastern Europe	-146	-134	-142	-124	-155	-31	-24.6

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²Less than \$500,000.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table TX-4

Textiles, apparel, and footwear : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
<i>Million dollars</i>								
CH045	Fibers and yarns, except raw cotton and raw wool:							
	Exports	2,830	3,126	2,640	2,656	2,872	216	8.1
	Imports	2,547	2,771	2,545	2,641	2,676	36	1.3
	Trade balance	282	355	95	16	196	181	1,159.7
CH046	Fabrics:							
	Exports	5,170	6,067	6,162	6,485	6,641	156	2.4
	Imports	5,563	6,052	5,466	5,922	5,854	-67	-1.1
	Trade balance	-393	15	696	563	786	223	39.7
CH046A	Broadwoven fabrics:							
	Exports	2,475	3,100	2,997	3,003	2,575	-428	-14.3
	Imports	3,418	3,622	3,058	3,243	3,036	-206	-6.4
	Trade balance	-943	-521	-61	-240	-462	-222	-92.6
CH046B	Knit fabrics:							
	Exports	621	787	918	1,082	1,392	309	28.6
	Imports	926	1,004	1,014	1,080	1,026	-54	-5.0
	Trade balance	-305	-217	-96	3	365	363	14,479.1
CH046C	Specialty fabrics:							
	Exports	503	481	465	572	489	-84	-14.6
	Imports	322	374	346	383	410	27	7.0
	Trade balance	180	107	119	190	79	-111	-58.4
CH046D	Coated and other fabrics:							
	Exports	906	912	1,003	995	1,154	158	15.9
	Imports	522	591	570	679	743	64	9.4
	Trade balance	384	322	433	316	411	95	30.0
CH046E	Glass fiber fabrics:							
	Exports	78	99	84	87	118	31	35.5
	Imports	89	100	104	105	96	-9	-8.2
	Trade balance	-11	-1	-20	-18	21	39	(³)
CH046F	Other fabrics:							
	Exports	588	688	696	744	914	170	22.8
	Imports	285	362	374	432	543	111	25.6
	Trade balance	302	326	322	312	371	59	18.9
CH047	Carpets and rugs:							
	Exports	772	791	711	684	681	-3	-0.5
	Imports	1,248	1,464	1,410	1,531	1,662	131	8.6
	Trade balance	-475	-674	-699	-846	-981	-134	-15.9
CH048	Home furnishings:							
	Exports	398	418	403	363	339	-24	-6.6
	Imports	2,652	3,215	3,332	4,226	5,021	795	18.8
	Trade balance	-2,254	-2,797	-2,929	-3,863	-4,682	-819	-21.2
CH048A	Blankets:							
	Exports	36	36	34	32	29	-4	-11.0
	Imports	149	214	230	353	391	38	10.6
	Trade balance	-113	-178	-196	-321	-362	-41	-12.8
CH048B	Pillowcases and sheets:							
	Exports	111	94	90	76	78	1	1.8
	Imports	658	723	765	903	1,046	144	15.9
	Trade balance	-547	-629	-675	-826	-968	-142	-17.2

See footnote(s) at end of table.

Table TX-4--Continued

Textiles, apparel, and footwear : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
<i>Million dollars</i>								
CH048C	Table/kitchen linens and towels:							
	Exports	108	113	109	93	85	-8	-8.7
	Imports	891	1,039	1,080	1,236	1,418	182	14.7
	Trade balance	-783	-926	-970	-1,143	-1,333	-190	-16.6
CH048D	Curtains:							
	Exports	38	40	35	39	30	-9	-22.5
	Imports	267	361	397	576	725	148	25.8
	Trade balance	-230	-321	-362	-537	-695	-157	-29.2
CH048E	Bedspreads and other furnishing articles:							
	Exports	27	45	43	41	43	2	4.2
	Imports	376	547	515	735	1,001	266	36.2
	Trade balance	-350	-502	-472	-694	-958	-264	-38.1
CH048F	Pillows, cushions, and sleeping bags:							
	Exports	78	90	91	81	74	-7	-8.3
	Imports	307	326	340	417	437	20	4.8
	Trade balance	-228	-237	-250	-336	-363	-27	-8.0
CH048G	Tapestries and other wall hangings:							
	Exports	1	1	1	1	1	(⁴)	3.3
	Imports	4	5	5	6	4	-3	-42.8
	Trade balance	-3	-4	-4	-5	-2	3	52.1
CH049	Apparel:							
	Exports	7,964	8,177	6,537	5,491	4,965	-525	-9.6
	Imports	56,565	64,402	63,995	63,927	68,274	4,347	6.8
	Trade balance	-48,601	-56,225	-57,458	-58,436	-63,308	-4,872	-8.3
CH049A	Men's and boys' suits and sports coats:							
	Exports	61	82	66	46	39	-7	-15.7
	Imports	1,157	1,196	1,026	974	1,143	169	17.3
	Trade balance	-1,095	-1,114	-960	-928	-1,104	-176	-19.0
CH049B	Men's and boys' coats and jackets:							
	Exports	120	114	99	92	91	-1	-1.2
	Imports	1,739	1,976	1,992	1,876	2,001	125	6.6
	Trade balance	-1,619	-1,862	-1,893	-1,784	-1,910	-126	-7.0
CH049C	Men's and boys' trousers:							
	Exports	1,056	997	728	625	573	-52	-8.3
	Imports	6,381	7,321	6,980	6,973	7,459	486	7.0
	Trade balance	-5,325	-6,324	-6,252	-6,348	-6,887	-538	-8.5
CH049D	Women's and girls' trousers:							
	Exports	595	587	454	357	287	-70	-19.6
	Imports	6,241	7,419	7,668	7,996	8,923	927	11.6
	Trade balance	-5,646	-6,832	-7,214	-7,639	-8,636	-997	-13.1
CH049E	Shirts and blouses:							
	Exports	1,848	2,052	1,533	1,219	1,097	-122	-10.0
	Imports	18,213	20,159	19,676	19,765	21,285	1,520	7.7
	Trade balance	-16,365	-18,107	-18,143	-18,546	-20,188	-1,642	-8.9
CH049F	Sweaters:							
	Exports	29	37	36	38	32	-6	-16.1
	Imports	2,033	2,506	2,933	2,959	2,729	-230	-7.8
	Trade balance	-2,005	-2,469	-2,897	-2,921	-2,697	224	7.7

See footnote(s) at end of table.

Table TX-4--Continued

Textiles, apparel, and footwear : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
<i>Million dollars</i>								
CH049G	Women's and girls' suits, skirts, and coats:							
	Exports	239	249	211	154	136	-18	-11.8
	Imports	3,870	4,304	4,417	4,235	4,803	568	13.4
	Trade balance	-3,631	-4,055	-4,206	-4,081	-4,667	-587	-14.4
CH049H	Women's and girls' dresses:							
	Exports	102	106	81	62	59	-3	-4.4
	Imports	1,800	1,889	1,675	1,470	1,550	79	5.4
	Trade balance	-1,699	-1,783	-1,594	-1,409	-1,491	-82	-5.8
CH049I	Robes, nightwear, and underwear:							
	Exports	923	1,028	906	744	715	-29	-3.9
	Imports	4,601	4,842	4,796	4,961	5,044	83	1.7
	Trade balance	-3,678	-3,814	-3,889	-4,218	-4,329	-111	-2.6
CH049J	Hosiery:							
	Exports	445	423	362	344	339	-5	-1.5
	Imports	847	950	923	1,031	1,091	59	5.8
	Trade balance	-402	-527	-560	-687	-751	-64	-9.4
CH049K	Body-supporting garments:							
	Exports	543	445	330	385	289	-97	-25.1
	Imports	1,370	1,439	1,434	1,648	1,579	-70	-4.2
	Trade balance	-828	-993	-1,104	-1,263	-1,290	-27	-2.1
CH049L	Neckwear, handkerchiefs, and scarves:							
	Exports	38	40	28	24	23	-1	-5.9
	Imports	428	510	457	432	494	62	14.3
	Trade balance	-390	-470	-429	-408	-471	-63	-15.4
CH049M	Gloves, including gloves for sports:							
	Exports	180	185	181	122	109	-13	-10.5
	Imports	1,991	2,076	2,119	2,176	2,386	210	9.6
	Trade balance	-1,811	-1,891	-1,938	-2,054	-2,277	-222	-10.8
CH049N	Headwear:							
	Exports	92	107	116	91	89	-2	-1.9
	Imports	1,063	1,245	1,288	1,279	1,358	79	6.2
	Trade balance	-971	-1,138	-1,172	-1,188	-1,269	-81	-6.8
CH049O	Leather apparel and accessories:							
	Exports	90	94	100	95	92	-3	-2.9
	Imports	1,275	2,028	2,121	1,869	1,743	-126	-6.8
	Trade balance	-1,185	-1,934	-2,021	-1,775	-1,651	123	7.0
CH049P	Fur apparel and other fur articles:							
	Exports	54	48	34	25	19	-5	-21.0
	Imports	151	241	264	245	285	40	16.4
	Trade balance	-97	-193	-230	-220	-265	-45	-20.5
CH049Q	Rubber, plastic, and coated-fabric apparel:							
	Exports	83	102	123	99	95	-5	-4.6
	Imports	251	390	381	349	371	22	6.4
	Trade balance	-168	-288	-258	-250	-276	-27	-10.8
CH049R	Nonwoven apparel:							
	Exports	48	42	52	47	37	-10	-21.1
	Imports	320	373	411	401	401	(⁴)	(⁵)
	Trade balance	-271	-330	-360	-353	-364	-10	-2.9

See footnote(s) at end of table.

Table TX-4--Continued

Textiles, apparel, and footwear : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
		<i>Million dollars</i>						
CH049S	Other wearing apparel:							
	Exports	1,417	1,437	1,095	922	845	-77	-8.3
	Imports	2,833	3,539	3,433	3,287	3,630	343	10.4
	Trade balance	-1,416	-2,102	-2,338	-2,366	-2,785	-420	-17.7
CH050	Miscellaneous textile products:							
	Exports	1,589	1,774	1,666	1,619	1,534	-85	-5.2
	Imports	2,696	3,005	3,198	3,340	3,754	414	12.4
	Trade balance	-1,106	-1,231	-1,532	-1,721	-2,220	-499	-29.0
CH051	Footwear:							
	Exports	693	664	638	520	495	-25	-4.8
	Imports	14,074	14,856	15,249	15,379	15,560	180	1.2
	Trade balance	-13,380	-14,192	-14,611	-14,860	-15,065	-205	-1.4

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes

³Not meaningful for purposes of comparison.

⁴Less than \$500,000.

⁵Less than 0.05 percent.

Note.—Calculations based on unrounded data.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table TX-5

Textiles, apparel, and footwear sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH045	Fibers and yarns, except raw cotton and raw wool:						
	Number of establishments	871	904	900	896	891	-0.6
	Employees (thousands)	166.0	162.0	150.0	140.0	133.0	-5.0
	Capacity utilization (percent)	69	77	75	69	64	-7.2
	U.S. shipments (million dollars)	23,540	22,630	21,675	20,801	19,969	-4.0
	U.S. exports (million dollars)	2,830	3,126	2,640	2,656	2,872	8.1
	U.S. imports (million dollars)	2,547	2,771	2,545	2,641	2,676	1.3
	Apparent U.S. consumption (million dollars)	23,258	22,275	21,580	20,785	19,773	-4.9
	Trade balance (million dollars)	282	355	95	16	196	1,159.7
	Ratio of imports to consumption (percent)	11.0	12.4	11.8	12.7	13.5	6.3
	Ratio of exports to shipments (percent)	12.0	13.8	12.2	12.8	14.4	12.5
CH046	Fabrics:						
	Number of establishments	3,716	3,589	3,595	3,128	2,799	-10.5
	Employees (thousands)	314.0	297.0	262.0	228.0	204.0	-10.5
	Capacity utilization (percent)	79	76	71	67	(¹)	(¹)
	U.S. shipments (million dollars)	38,894	37,478	32,385	30,600	28,050	-8.3
	U.S. exports (million dollars)	5,170	6,067	6,162	6,485	6,641	2.4
	U.S. imports (million dollars)	5,563	6,052	5,466	5,922	5,854	-1.1
	Apparent U.S. consumption (million dollars)	39,287	37,463	31,689	30,037	27,264	-9.2
	Trade balance (million dollars)	-393	15	696	563	786	39.7
	Ratio of imports to consumption (percent)	14.2	16.2	17.2	19.7	21.5	9.1
	Ratio of exports to shipments (percent)	13.3	16.2	19.0	21.2	23.7	11.8
CH047	Carpets and rugs:						
	Number of establishments	478	441	437	437	397	-9.2
	Employees (thousands)	56.0	57.0	55.0	55.0	50.0	-9.1
	Capacity utilization (percent)	83	79	77	75	(¹)	(¹)
	U.S. shipments (million dollars)	11,690	11,983	12,176	12,176	12,480	2.5
	U.S. exports (million dollars)	772	791	711	684	681	-0.5
	U.S. imports (million dollars)	1,248	1,464	1,410	1,531	1,662	8.6
	Apparent U.S. consumption (million dollars)	12,165	12,657	12,875	13,022	13,461	3.4
	Trade balance (million dollars)	-475	-674	-699	-846	-981	-15.9
	Ratio of imports to consumption (percent)	10.3	11.6	11.0	11.8	12.3	4.2
	Ratio of exports to shipments (percent)	6.6	6.6	5.8	5.6	5.5	-1.8

See footnote(s) at end of table.

Table TX-5—Continued

Textiles, apparel, and footwear sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH048	Home furnishings:						
	Number of establishments	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Employees (thousands)	75.0	73.0	66.0	60.0	57.0	-5.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	9,433	9,688	9,134	9,800	10,000	2.0
	U.S. exports (million dollars)	398	418	403	363	339	-6.6
	U.S. imports (million dollars)	2,652	3,215	3,332	4,226	5,021	18.8
	Apparent U.S. consumption (million dollars)	11,687	12,485	12,063	13,663	14,682	7.5
	Trade balance (million dollars)	-2,254	-2,797	-2,929	-3,863	-4,682	-21.2
	Ratio of imports to consumption (percent)	22.7	25.7	27.6	30.9	34.2	10.7
	Ratio of exports to shipments (percent)	4.2	4.3	4.4	3.7	3.4	-8.1
CH049	Apparel:						
	Number of establishments	16,721	16,505	15,478	14,182	13,736	-3.1
	Employees (thousands)	578.0	520.0	426.0	354.0	321.0	-9.3
	Capacity utilization (percent)	77	75	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	62,305	60,339	54,598	46,954	41,789	-11.0
	U.S. exports (million dollars)	7,964	8,177	6,537	5,491	4,965	-9.6
	U.S. imports (million dollars)	56,565	64,402	63,995	63,927	68,274	6.8
	Apparent U.S. consumption (million dollars)	110,906	116,564	112,056	105,390	105,097	-0.3
	Trade balance (million dollars)	-48,601	-56,225	-57,458	-58,436	-63,308	-8.3
	Ratio of imports to consumption (percent)	51.0	55.3	57.1	60.7	65.0	7.1
	Ratio of exports to shipments (percent)	12.8	13.6	12.0	11.7	11.9	1.7
CH051	Footwear:						
	Number of establishments	400	389	381	364	339	-6.9
	Employees (thousands)	35.0	31.0	26.0	21.0	20.0	-4.8
	Capacity utilization (percent)	67	64	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	3,797	3,760	3,511	3,498	2,718	-22.3
	U.S. exports (million dollars)	693	664	638	520	495	-4.8
	U.S. imports (million dollars)	14,074	14,856	15,249	15,379	15,560	1.2
	Apparent U.S. consumption (million dollars)	17,177	17,952	18,122	18,358	17,783	-3.1
	Trade balance (million dollars)	-13,380	-14,192	-14,611	-14,860	-15,065	-1.4
	Ratio of imports to consumption (percent)	81.9	82.8	84.1	83.8	87.5	4.4
	Ratio of exports to shipments (percent)	18.3	17.6	18.2	14.9	18.2	22.1

¹Not available.

Note.—Calculations based on unrounded data.

Source: These data have been estimated by the Commission's international trade analysts on the basis of primary and secondary data sources including discussions with various Government and industry contacts. These estimated data are subject to change either from secondary sources or from detailed surveys the Commission often conducts in the course of statutory investigations or other work. Further, these data may undergo adjustments based on revisions in tariff nomenclature, classification practices, or redefinitions of industry classes.