



US & EU Apparel Import Update

25th November 2020



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Summary

US Market:

- Jan. to Oct. 2020 store sales stand at US\$ 100 bn., approx. 33% less than same period last year. The sales recovered sharply in Jun. 2020, and then again in Sep. after a period of drastic reduction since March.
- US apparel imports are recovering steadily after hitting lowest in May 2020. Jan. to Sep. 2020 apparel imports stand at US\$ 47 bn., approx. 28% less than same period last year.
- China has lost 8% share in the US apparel imports which has mainly been taken up by Vietnam, Bangladesh and Cambodia.

EU Market:

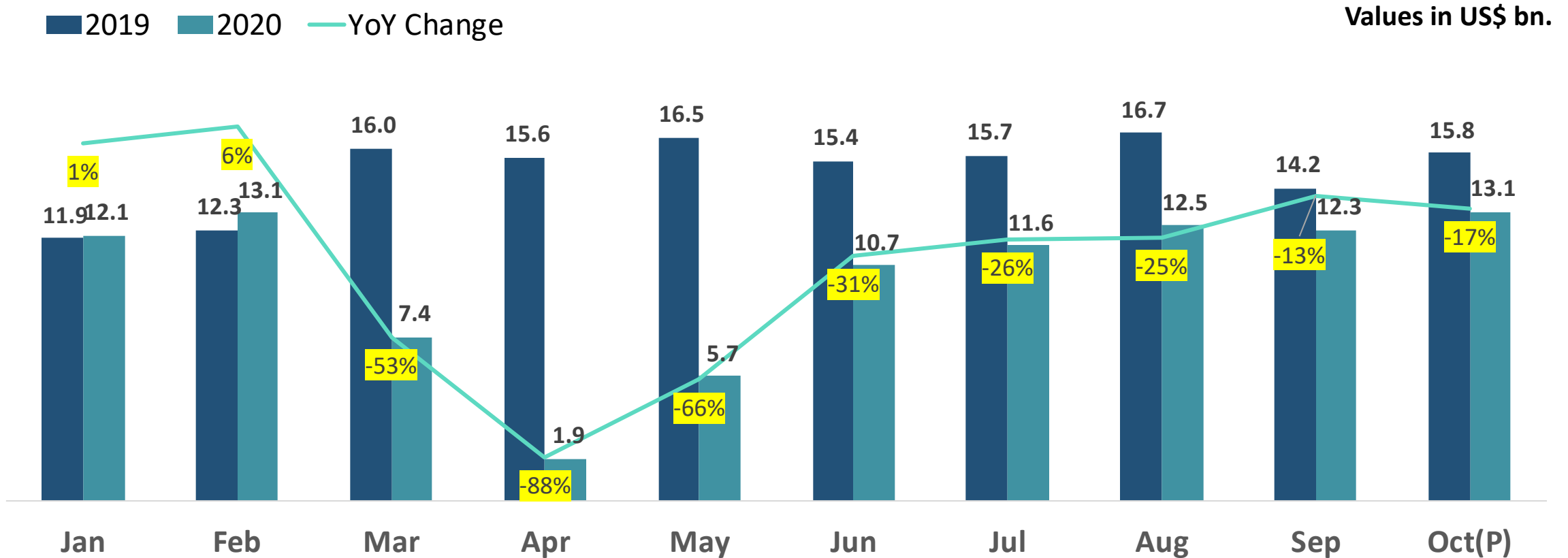
- EU-27 apparel imports are recovering steadily since Jun. 2020. Jan. to Aug. 2020 apparel imports were € 44 bn., approx. 17% less than same period last year.
- China's share increased by 2% in the EU-27 apparel imports during Jan. to Aug. 2020. The main losers were Bangladesh, UK and India.



US Market Scenario



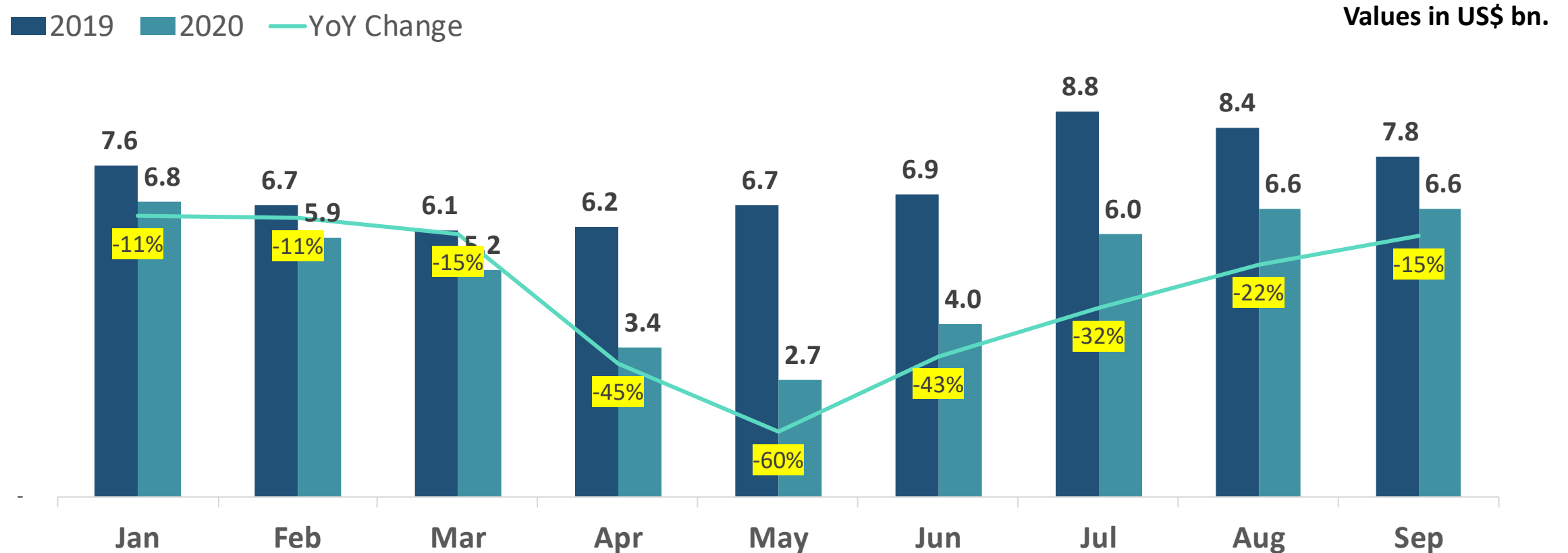
Monthly Apparel Store Sales



Data Source: US Census Bureau

Jan. to Oct. 2020 store sales stand at US\$ 100 bn., approx. 33% less than same period last year. The sales recovered sharply in Jun. 2020, and then again in Sep. after a period of drastic reduction since March.

Monthly Apparel Import Update



Data Source: The Office of Textiles and Apparel (OTEXA), USA

US apparel imports are recovering steadily after hitting lowest in May 2020. Jan. to Sep. 2020 apparel imports stand at US\$ 47 bn., approx. 28% less than same period last year.

Share Change of Top 10 Suppliers

Data from Jan to Sep 2020

Country	Import Value (US\$ mn.)	YoY share Change
China	10,984	-7.6%
Vietnam	9,415	4.1%
Bangladesh	3,960	1.4%
Indonesia	2,675	0.5%
India	2,267	-0.1%
Cambodia	2,090	1.3%
Mexico	1,603	-0.3%
Honduras	1,252	-0.5%
Jordan	1,186	0.4%
Sri Lanka	1,091	0.2%
Others	10,508	0.6%

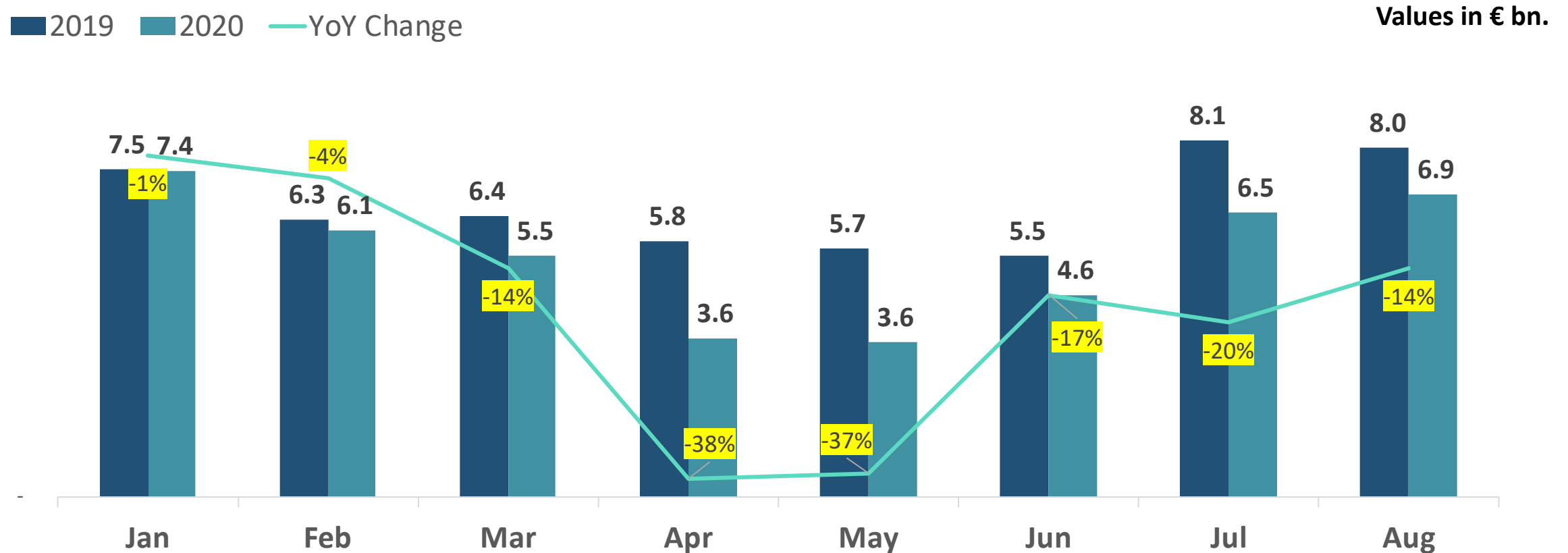
China has lost approx. 8% share in the US apparel imports which has mainly been taken up by Vietnam, Bangladesh and Cambodia



EU Market Scenario



Monthly Apparel Import Update



Data Source: Eurostat; Extra EU-27 Imports Data

EU-27 apparel imports are recovering steadily since Jun. 2020. Jan. to Aug. 2020 apparel imports were € 44 bn., approx. 17% less than same period last year.

Share Change of Top 10 Suppliers

Data from Jan to Aug 2020

Country	Import Value (€ mn.)	YoY share Change
China	13,257	2.0%
Bangladesh	8,391	-0.6%
Turkey	5,112	0.5%
UK	2,138	-0.9%
India	2,116	-0.8%
Vietnam	1,721	0.2%
Cambodia	1,696	-0.2%
Pakistan	1,416	0.1%
Myanmar	1,246	0.4%
Morocco	1,232	-0.6%
Others	5,928	-0.1%

China's share increased by 2% during Jan to Aug. 2020. The main losers were Bangladesh, UK, and India.

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