

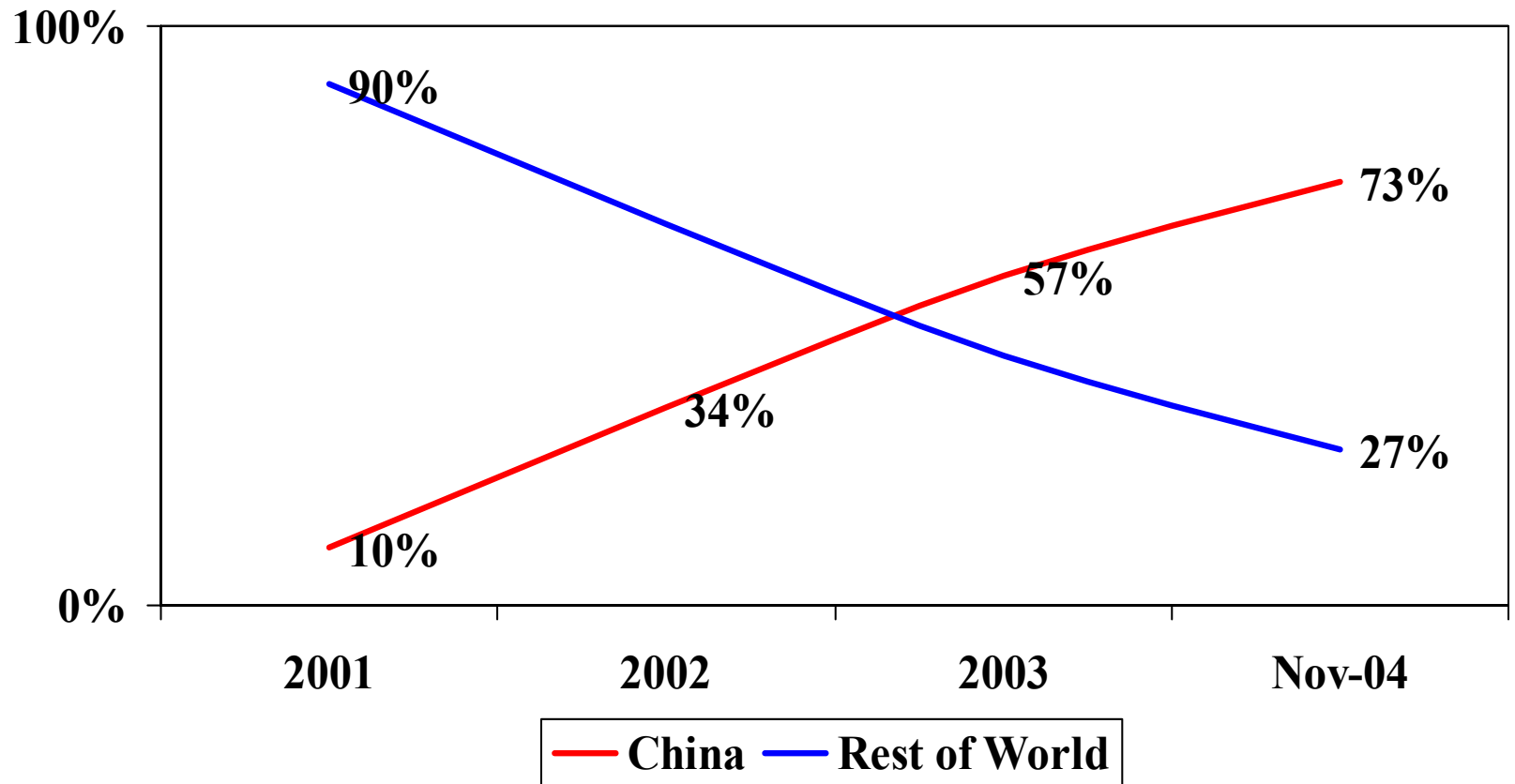
# **China Threat - Trade Update**

**GAFTT 3<sup>rd</sup> International Textile Conference**

**Cass Johnson, NCTO**

**January 26, 2004**

# De-Controlled U.S. Apparel Categories



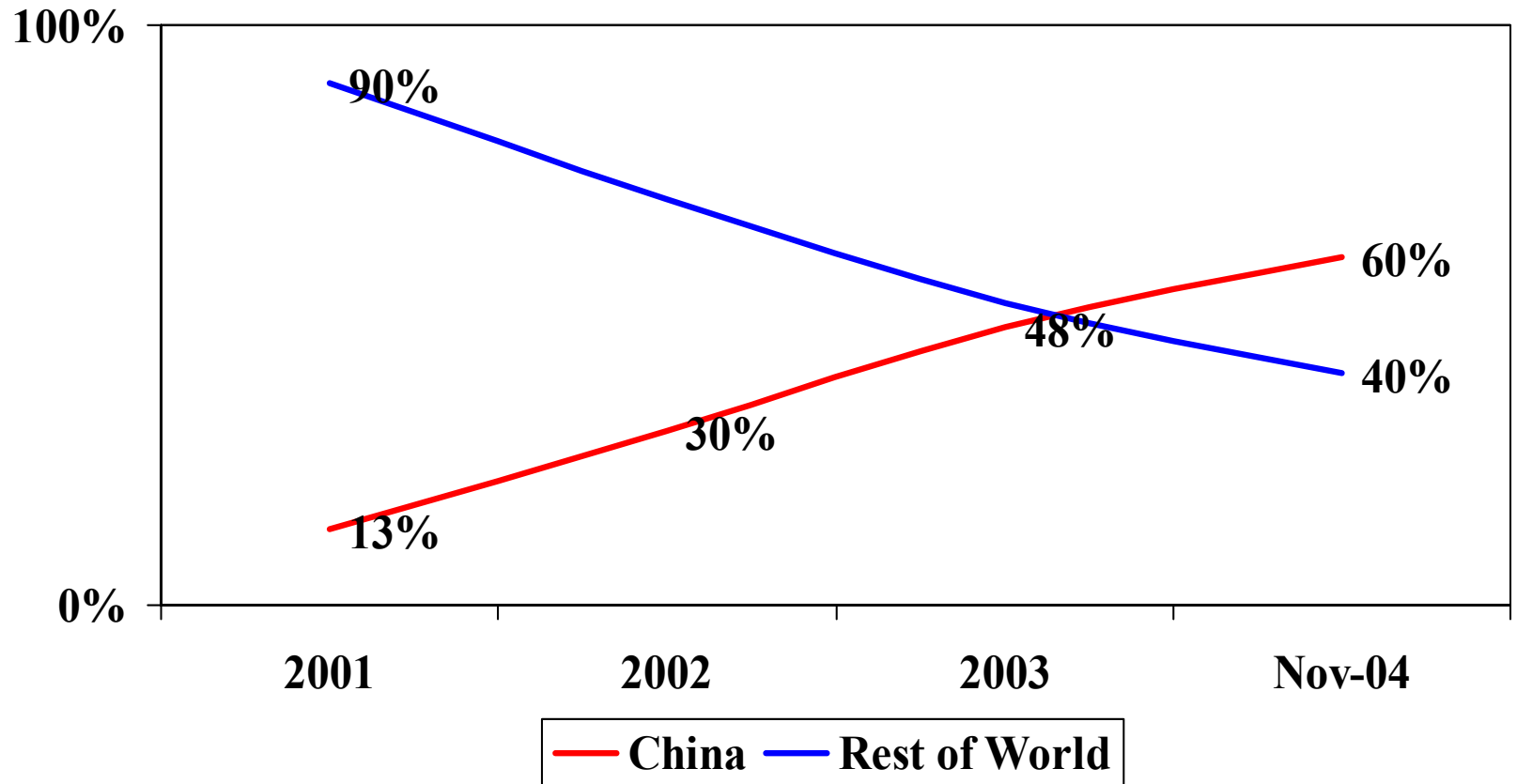
Source: Analysis using U.S. Dept of Commerce trade figures

# De-Controlled Apparel Trade Shifts

(2001 – Nov. 2004)

- **China: 10% - 73%**
- Thailand 10% - 3%
- CBI 10% - 3%
- Mexico 8% - 2%
- Taiwan 7% - 2%
- India 7% - 1%
- Bangl. 7% - 1%
- Indonesia 6% - 1%
- Philippines 6% - 2%

# De-Controlled U.S. Made-Up Tariff Lines

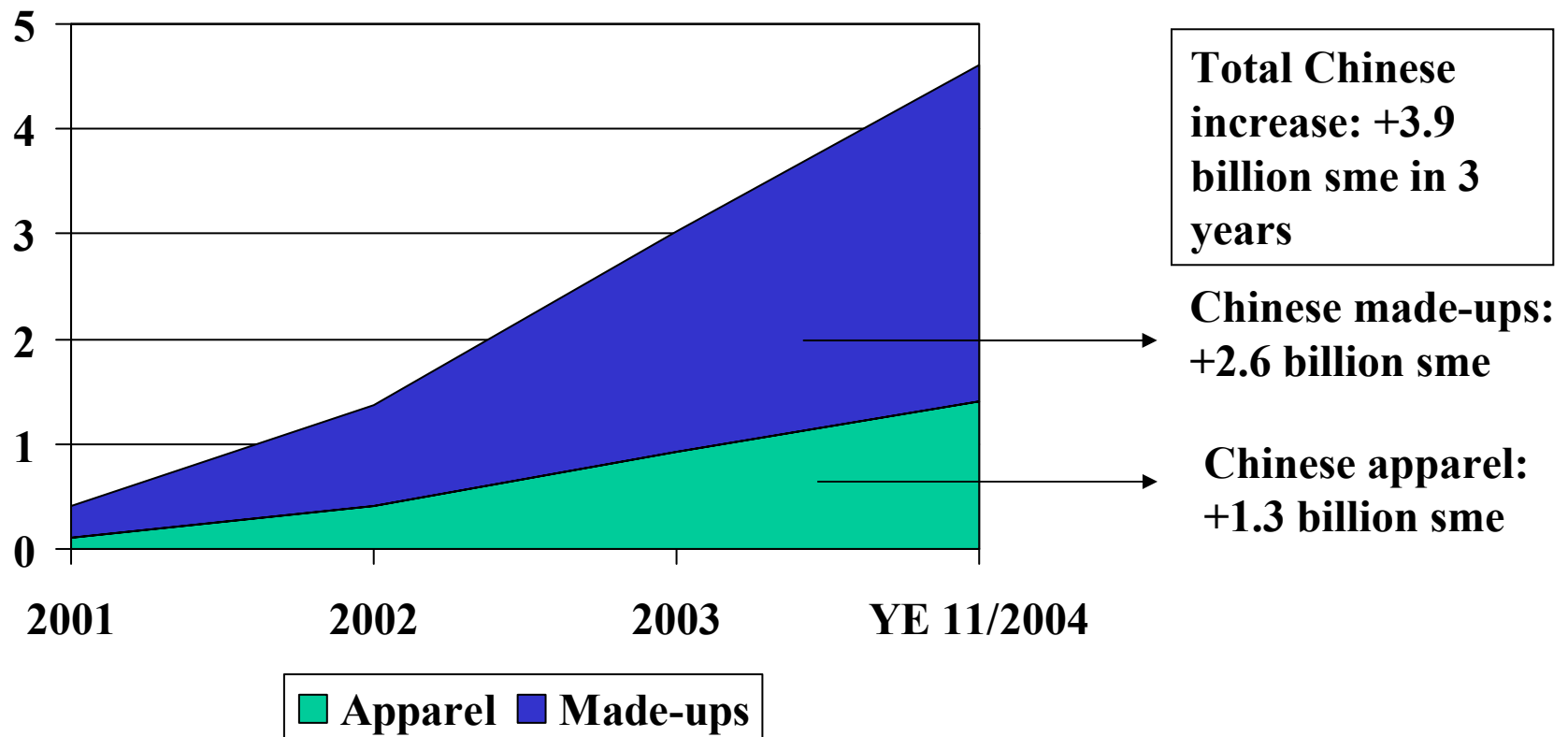


Source: 114 Home furnishings and made-up tariff lines decontrolled in 2002, using U.S. Dept of Commerce

# De-Controlled Made-Up Trade Shifts

- **China: 13% - 60%**
- Pakistan 20% - 11%
- India 16% - 7%
- Mexico 12% - 4%
- S. Korea 15% - 4%
- Taiwan 5% - 2%
- Bangl. 6% - 2%
- Turkey 4% - 1%
- Sri Lanka 4% - 0%

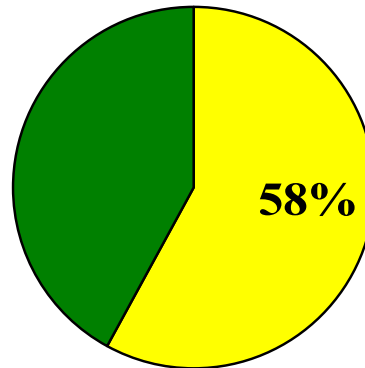
# Chinese Volume Increases: De-Controlled Products (billion sme)



Source: Analysis using U.S. Dept of Commerce trade figures

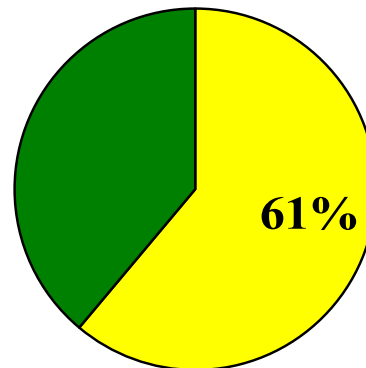
# China Share of Non-US/EU World Trade

**Cotton & MMF  
Trousers**



2003 Exports  
2.5 billion trousers

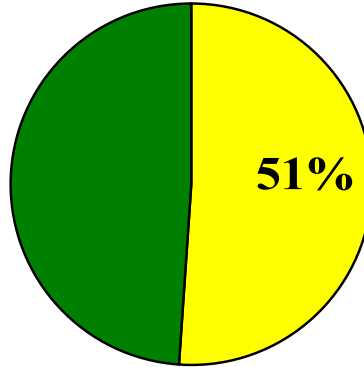
**Cotton & MMF  
Woven Shirts**



2003 Exports  
536 million shirts

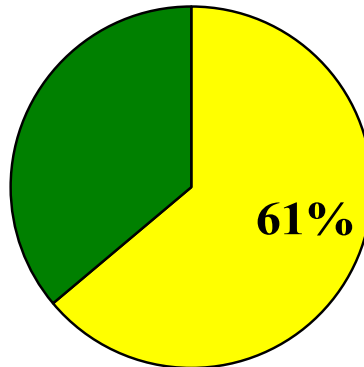
# China Share of Non-US/EU World Trade

**Cotton & MMF  
Knit Shirts**



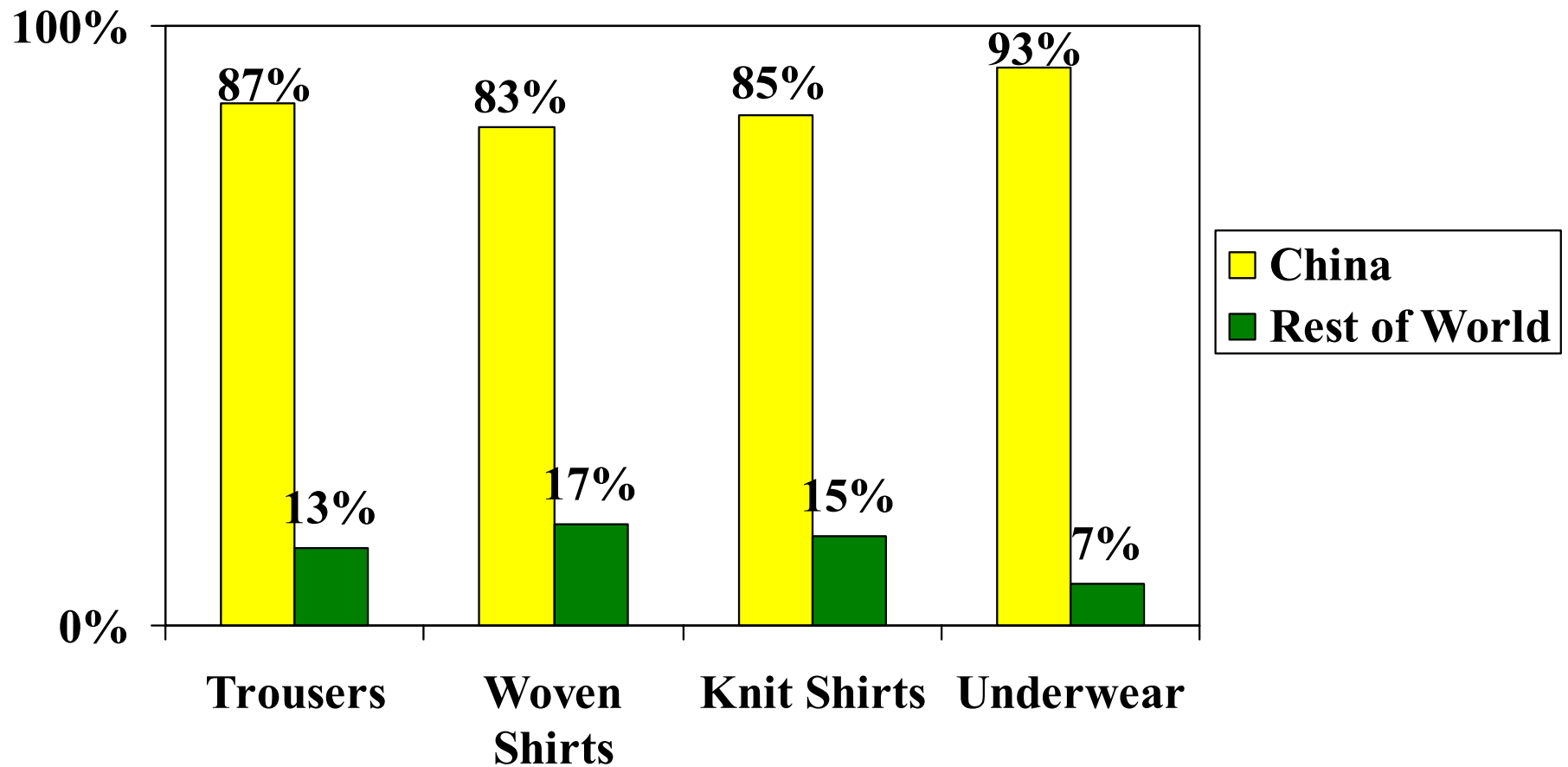
2003 Exports  
2.3 billion knit shirts

**Cotton & MMF  
Underwear**

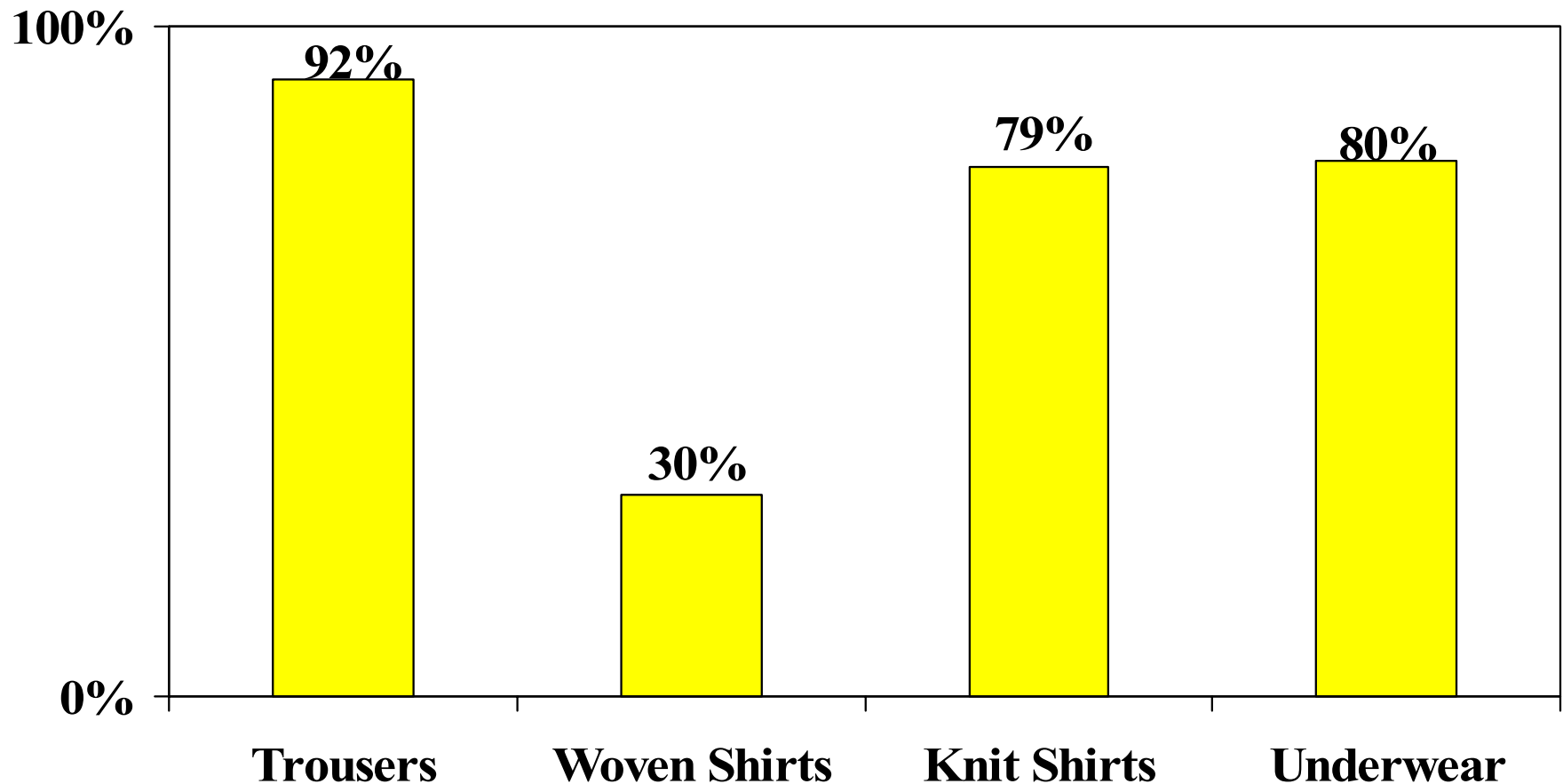


2003 Exports  
3.6 billion units of  
underwear

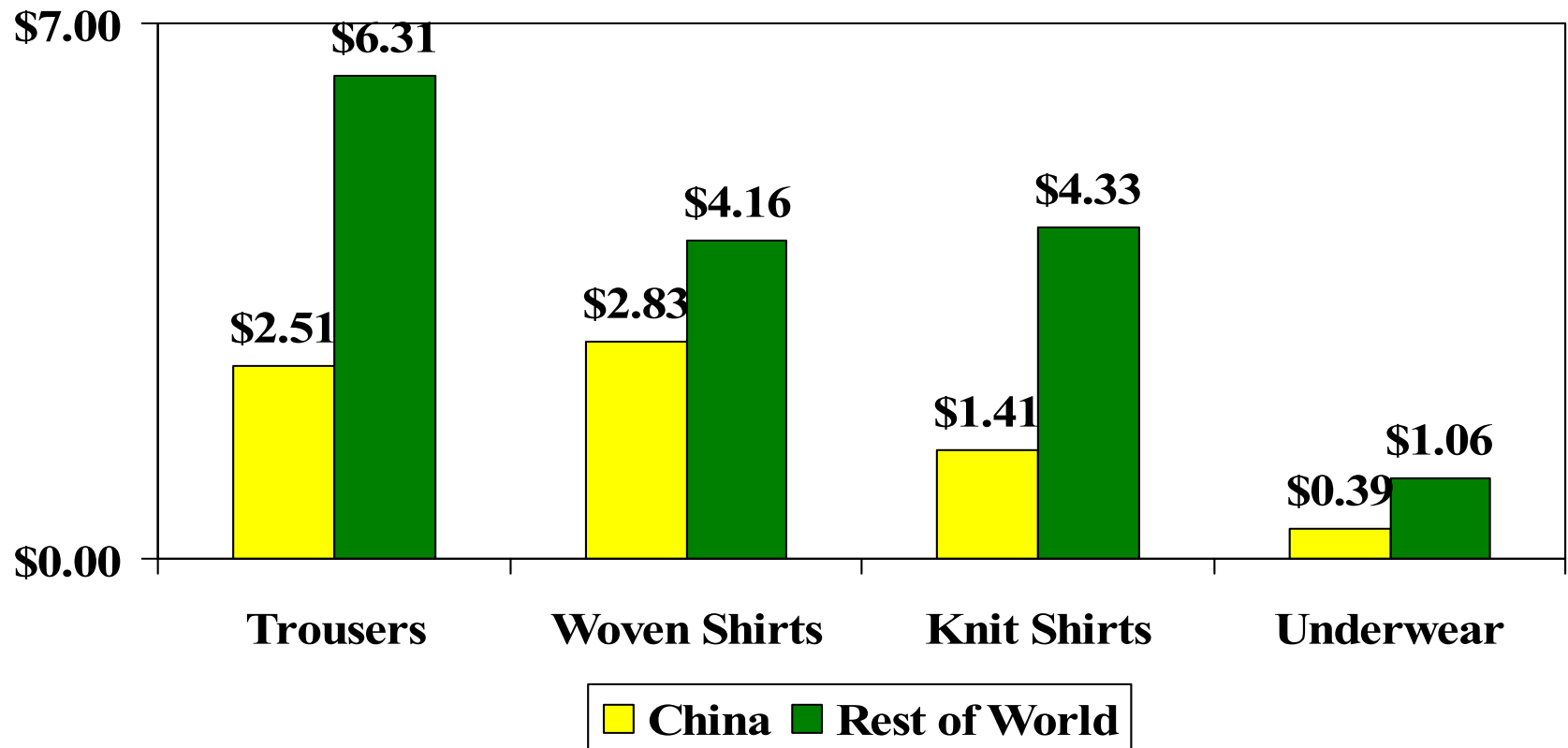
# Chinese Share of Australia/Japanese Market (no quotas)



# Increase in Chinese World Exports: last five years (98-03)



# Chinese vs. 'Rest of World' Price: Average of 58% Below



Source: UN Comtrade Database, 2003, export prices

# More Information?

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