

U.S. Fiber, Yarn, And Thread Market. Analysis And Forecast to 2025





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- Figure 42: Number Of Establishments By Employment Size, 2012
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B 1. INTRODUCTION

1.1 REPORT DESCRIPTION

The report provides on a comprehensive analysis of the U.S. fiber market. It reveals the latest data of the market size and volume, domestic production, exports and imports, price dynamics and turnover in the industry. In addition, the report contains insightful information about the industry, including industry life cycle, business locations, productivity, employment and many other crucial aspects. The Company Profiles section contains current data on the leading players in the industry.

Countries coverage: the U.S.

Product coverage:

Yarns, spun, carded, cotton; Yarns, spun, combed, cotton; Yarns, spun, rayon, acetate, and lyocell; Yarns, spun, noncellulosic fiber and other natural fibers; Yarns, wool, including new, reused, and reprocessed; Scouring and combing mill products; Yarns, novelty and plied, excluding wool, not spun or thrown at the same establishment; Yarns, thrown, filament, excluding textured (report yarns that are both thrown and textured as texture yarns); Yarns, textured, crimped, and bulked, filament, including stretch, made from purchased filament yarn; Yarns, filament, commission receipts for throwing, texturing, or winding; Thread mills; Fiber, yarn, and thread mills, nsk, total

Companies mentioned:

Fiberweb,
 American & Efird,
 Unifi Manufacturing,
 Nilit America Corporation,
 Coats North America De Republica Dominicana,
 Mount Vernon Mills,
 Parkdale Mills,
 Frontier Spinning Mills,
 Swift Spinning,
 National Spinning Co.,
 Tuscarora Yarns,
 Drake Extrusion,
 Celanese Acetate,
 Carolina Mills,
 Pharr Yarns,
 Sapona Manufacturing Company,
 Pharr-Palomar,
 Coats American,
 United Thread Mills,
 Unifi,

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Coats & Clark,
Grp,
Clover Yarns,
Parkdale America,
Leesburg Knitting Mills,
Safer Holding,
Frontier Spinning Mills Holding Corp.

Data coverage:

- Fiber market size;
- Fiber production, value of shipments;
- Key market players and their profiles;
- Exports, imports and trade balance;
- Import and export prices;
- Forecast of the market dynamics in the medium term;
- Key industry statistics;
- Life cycle of the fiber industry;
- Number of establishments and their locations;
- Employment data;
- Fiber industry productivity.

Reasons to buy this report:

- Take advantage of the latest data;
- Find deeper insights into current market developments;
- Discover vital success factors affecting the market.

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2. EXECUTIVE SUMMARY

2.1 KEY FINDINGS

Table 1: Key Findings

Key findings in 2016

| | | |
|--------------|-------------|-----|
| Market Value | million USD | *** |
| | % to 2016 | *** |
| Production | million USD | *** |
| | % to 2016 | *** |
| Imports | tonnes | *** |
| | % to 2016 | *** |
| | million USD | *** |
| | % to 2016 | *** |
| Exports | tonnes | *** |
| | % to 2016 | *** |
| | million USD | *** |
| | % to 2016 | *** |

2.2 MARKET TRENDS

In 2015, the value of fiber production in the U.S. amounted to \$7.9B, declining by -2.7% against the previous year level. Overall, the U.S. fiber output pursued a mild decline from 2007 to 2015. The total output figures decreased at an average annual rate of -1.0%. The trend pattern, however, indicated some noticeable fluctuations throughout the analyzed period. The growth pace was the most rapid in 2010, when the output figure increased by +10% from the previous year level. Over the period under review, the total value of fiber shipments in the United States attained its maximum level of \$8.5B in 2008. Afterwards, the growth in terms of the fiber production failed to regain its strength through to 2015.

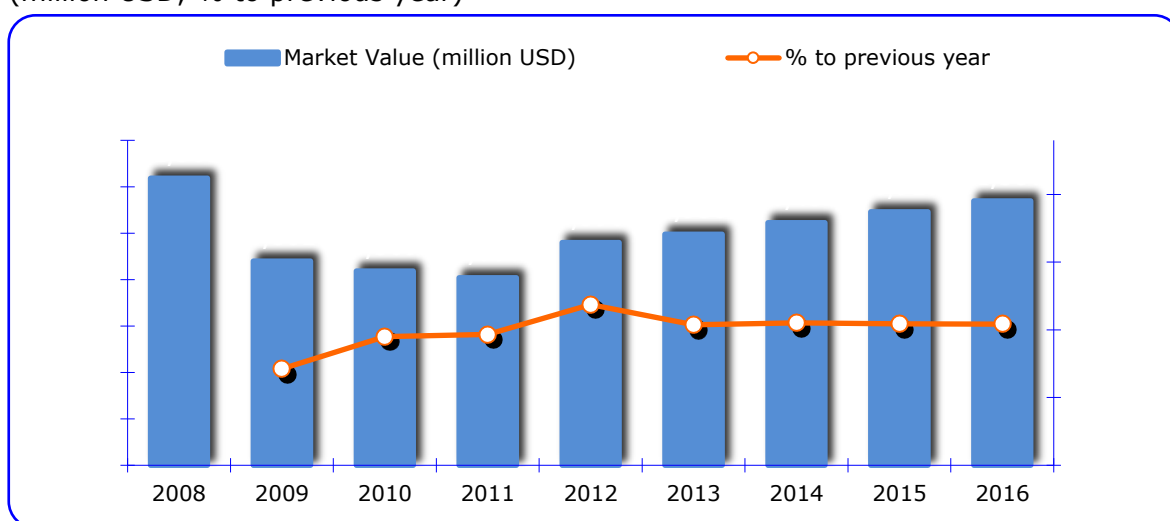
Yarns, textured, crimped, and bulked, filament, including stretch, made from purchased filament yarn accounted for the highest share (33% in 2015) of U.S. fiber manufacturing, leaving a considerable room for yarns, spun, carded, cotton (27%). The other related products with less notable individual shares together comprised approx. 40% of the total output.



B 3. MARKET OVERVIEW

3.1 MARKET VALUE

Figure 1: Market Value, 2008-2016
(million USD, % to previous year)



Source: ***

Table 2: Market Value, in Value Terms, 2008-2016
(million USD), in producer and import/export prices

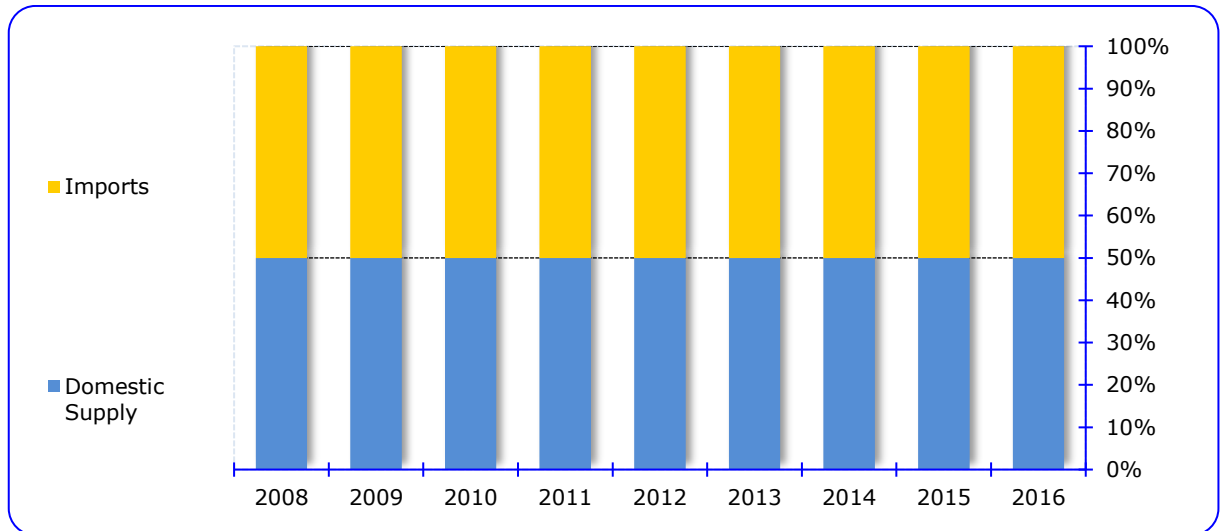
| Item | Unit | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | CAGR, 2008-2016 |
|--------------|--------------------|------|------|------|------|------|------|------|------|------|-----------------|
| Production | USD | *** | *** | *** | *** | *** | *** | *** | *** | *** | % |
| | % to previous year | - | *** | *** | *** | *** | *** | *** | *** | *** | - |
| Imports | USD | *** | *** | *** | *** | *** | *** | *** | *** | *** | % |
| | % to previous year | - | *** | *** | *** | *** | *** | *** | *** | *** | - |
| Exports | USD | *** | *** | *** | *** | *** | *** | *** | *** | *** | % |
| | % to previous year | - | *** | *** | *** | *** | *** | *** | *** | *** | - |
| Market Value | USD | *** | *** | *** | *** | *** | *** | *** | *** | *** | % |
| | % to previous year | - | *** | *** | *** | *** | *** | *** | *** | *** | - |

Source: **

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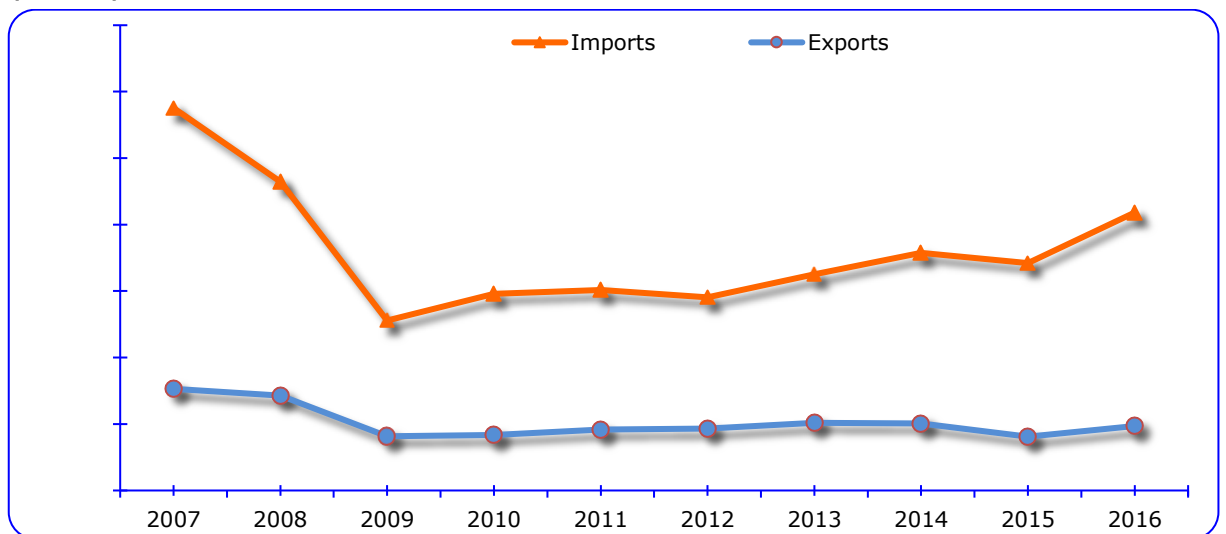
3.2 TRADE BALANCE

Figure 1: Market Structure – Domestic Supply Vs. Imports, In Value Terms, 2008-2016 (% based on USD), in exporter/importer prices



Source: ***

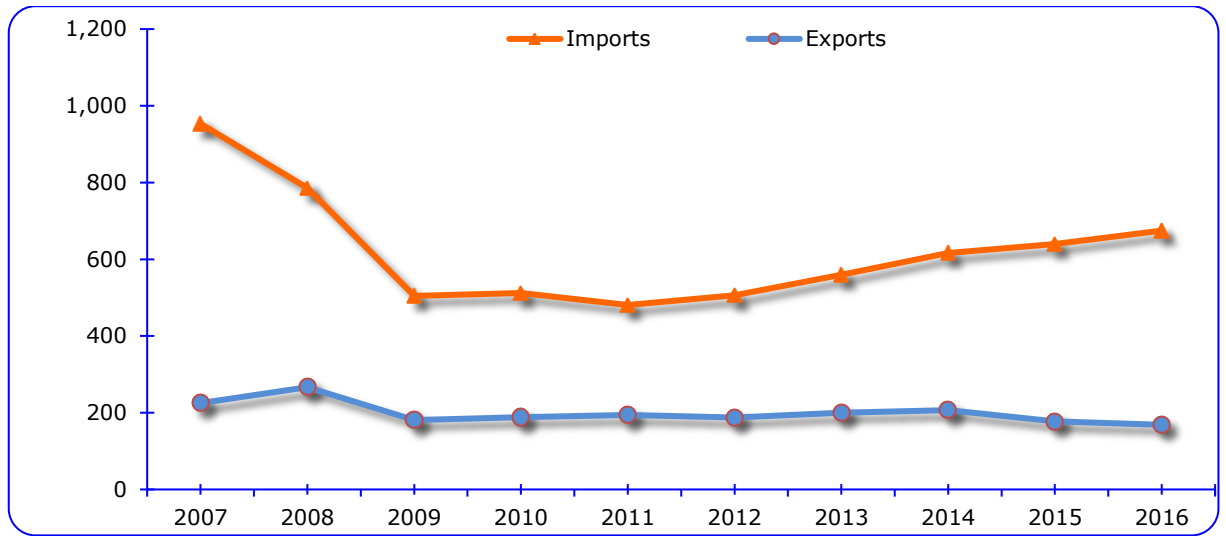
Figure 2: Trade Balance, In Physical Terms, 2007-2016 (tonnes)



Source: ***

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Figure 3: Trade Balance, In Value Terms, 2007-2016
(million USD), in import/export prices



Source: ***

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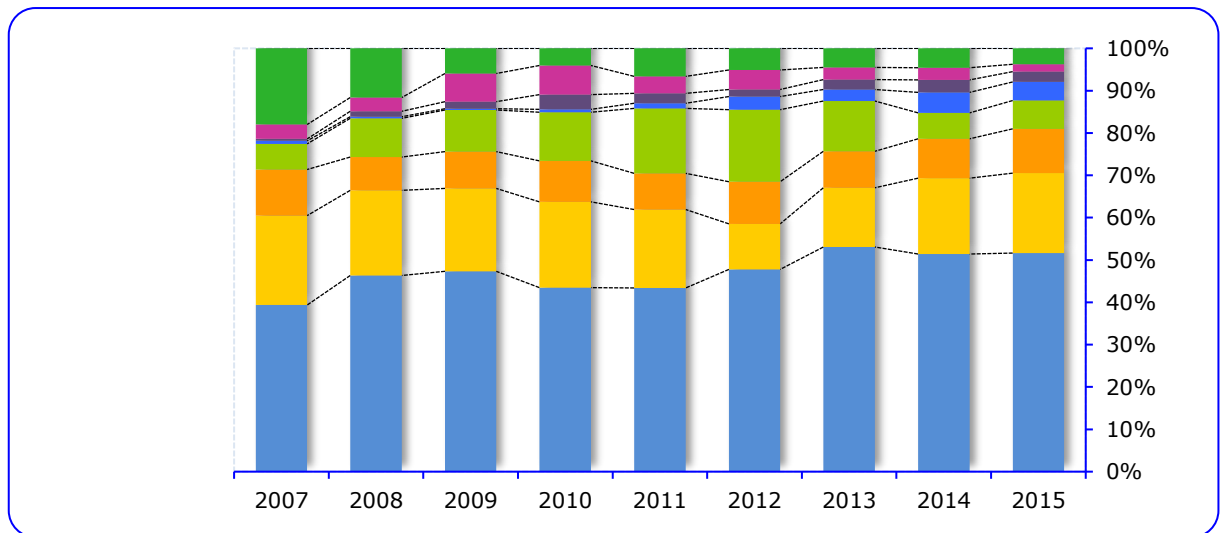
3.3 MARKET OPPORTUNITIES

Table 3: Market Opportunities, 2008-2016

| Item | Unit | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | CAGR 2008-2016 |
|----------------------------|---------------|------|------|------|------|------|------|------|------|------|----------------|
| Market Value | million USD | *** | *** | *** | *** | *** | *** | *** | *** | *** | % |
| Imports | million USD | *** | *** | *** | *** | *** | *** | *** | *** | *** | % |
| Share of imports in demand | % | % | % | % | % | % | % | % | % | % | - |
| Import price | USD per tonne | *** | *** | *** | *** | *** | *** | *** | *** | *** | % |

Source: ***

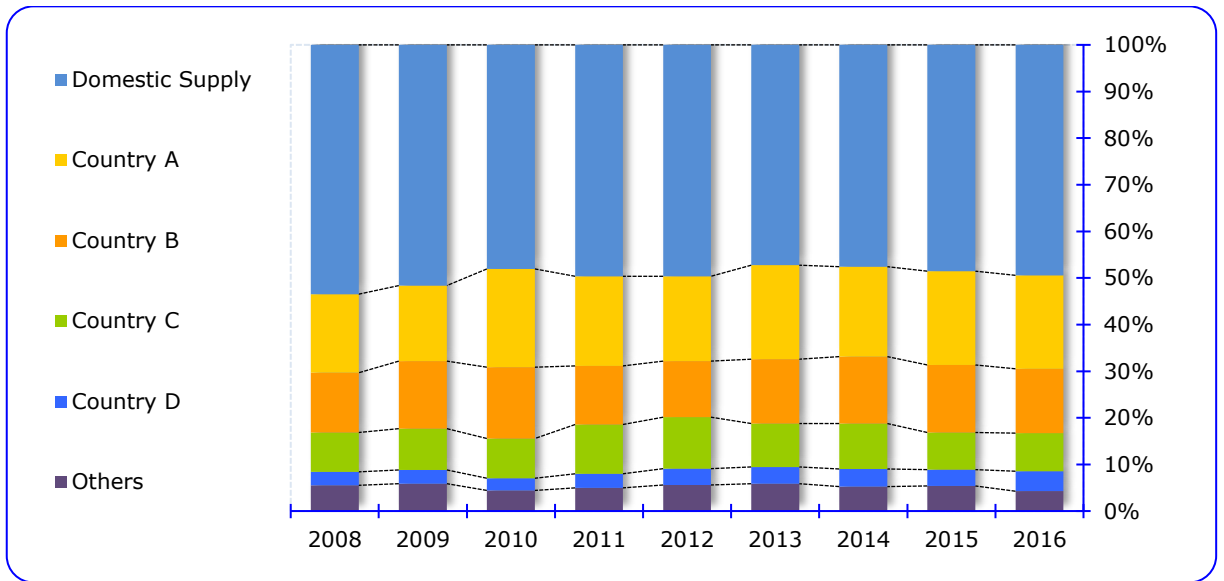
Figure 4: Global Imports, 2007-2016
(%, based on USD)



Source: ***

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Figure 5: Share Of Imports In Consumption, By Country Of Origin, 2008-2016
(%, based on USD)

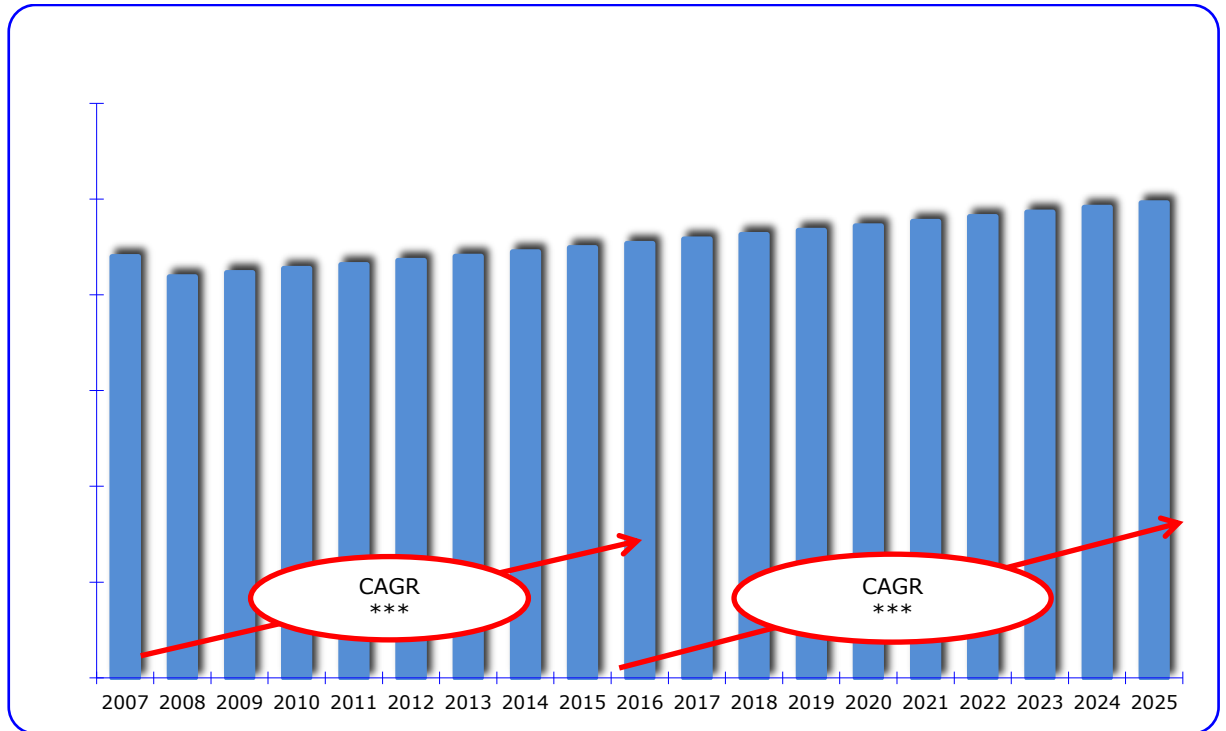


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3.4 MARKET FORECAST TO 2025

Figure 6: Market Forecast To 2025
(million USD)



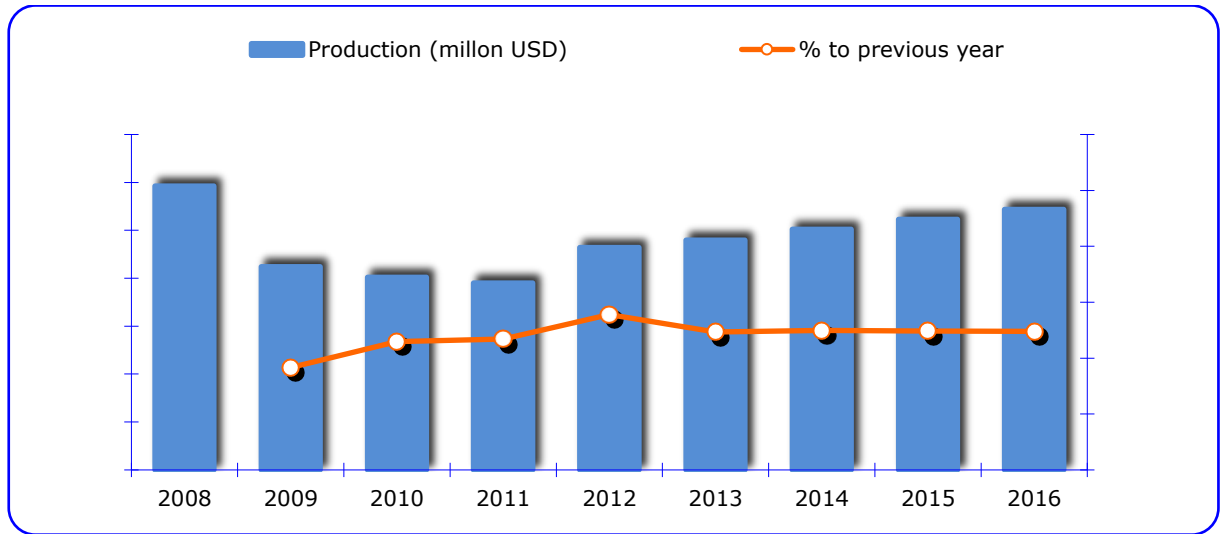
Source: ***

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4. DOMESTIC PRODUCTION

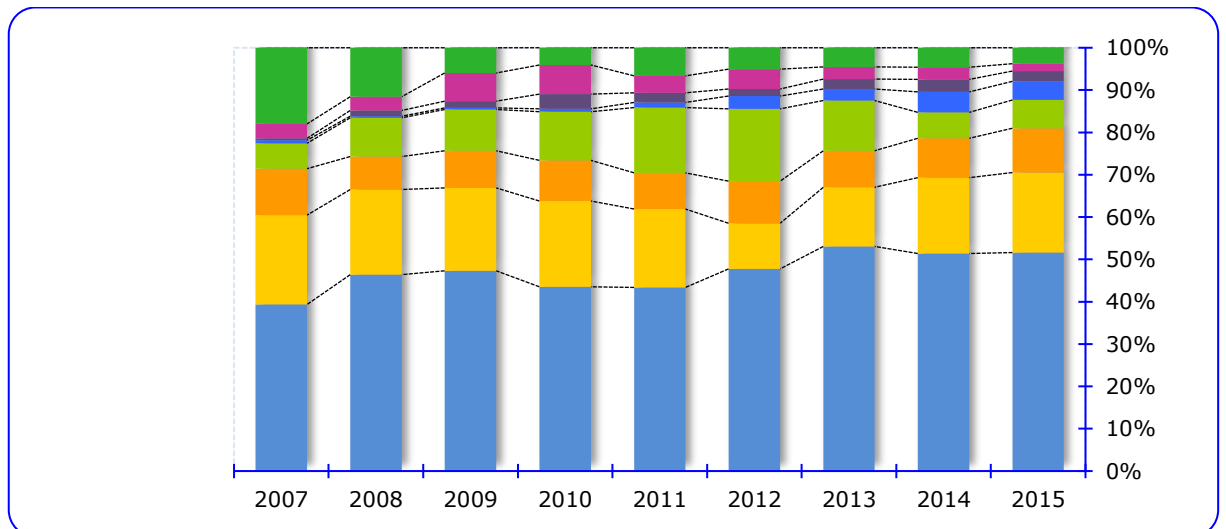
4.1 PRODUCTION IN 2008-2016

Figure 7: Production, Shipments, In Value Terms, 2008–2016 (million USD)



Source: ***

Figure 6: Global Exports, By Country, 2007-2016 (% based on USD)

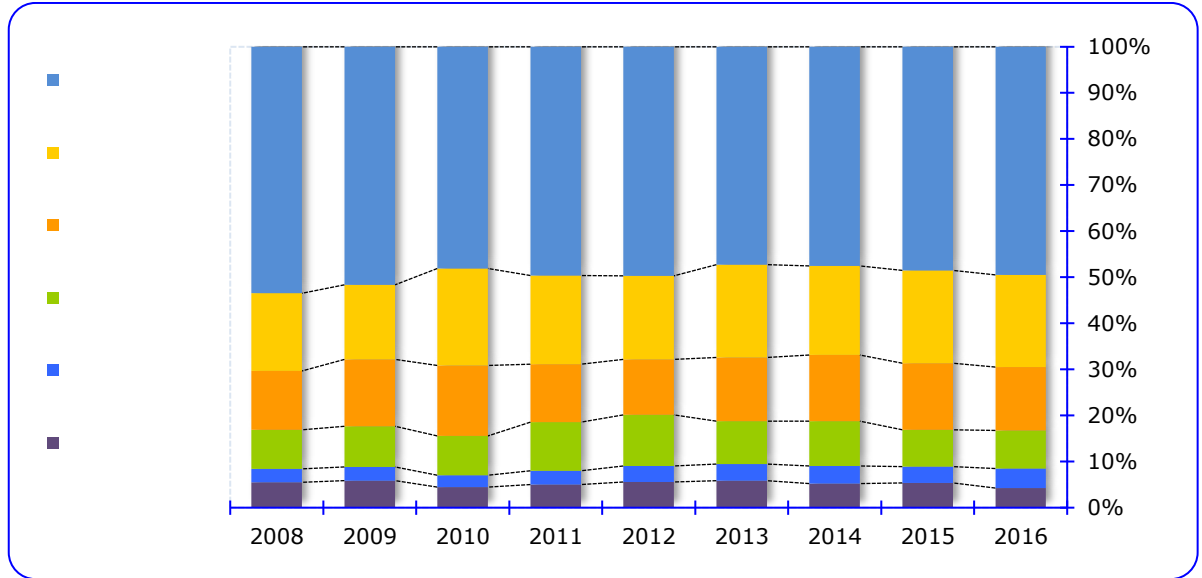


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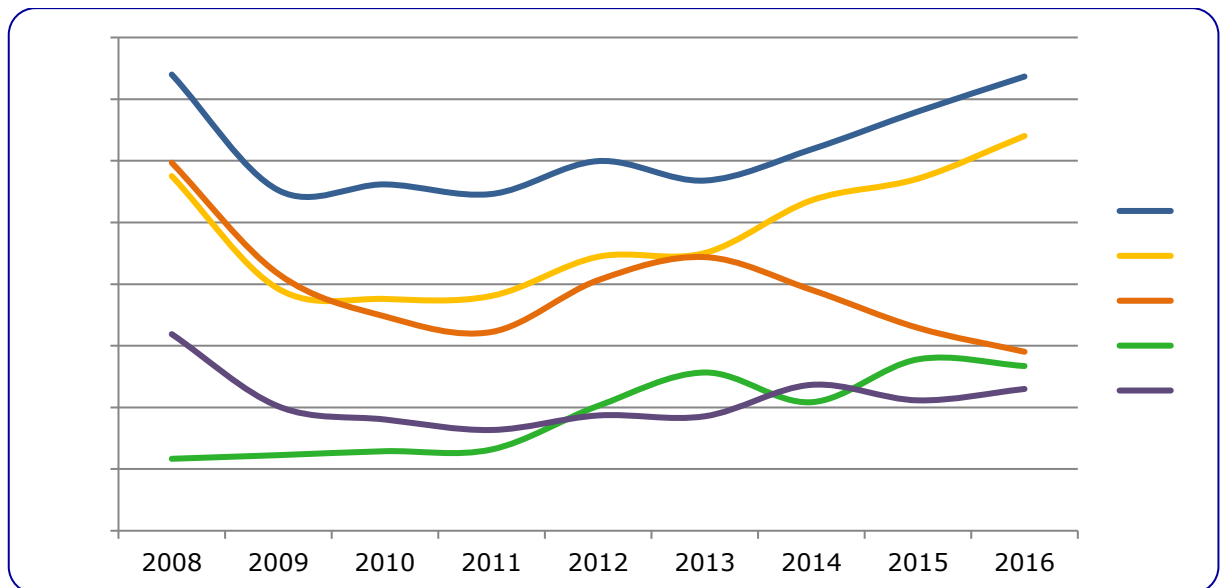
4.2 PRODUCTION BY TYPE

Figure 9: Production, By Type, 2008-2016
(%, based on USD)



Source: ***

Figure 10: Production, By Type, In Value Terms, 2008-2016
(million USD)



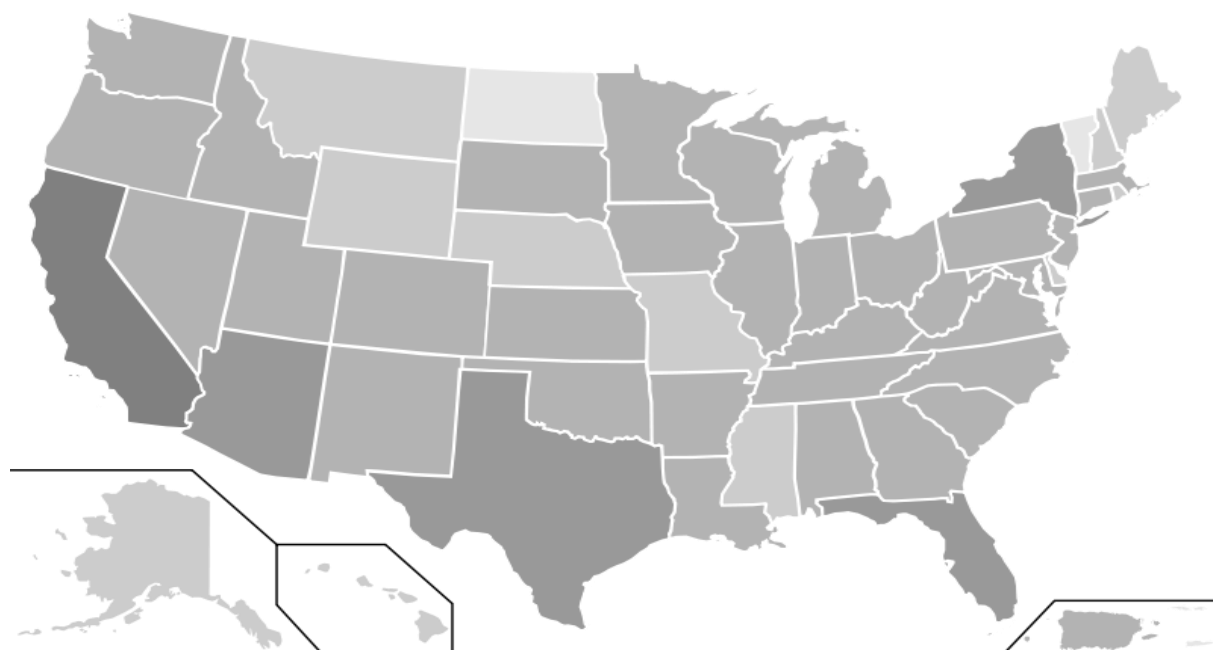
Source: ***

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4.3 PRODUCTION BY STATES

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Figure 11: Map - Value Of Shipments, By State, 2012
(million USD)



Source: ***

Table 4: Production, By State, 2012
(million USD)

| State | Value of Shipments (Mil \$) |
|----------------------|-----------------------------|
| Alabama | *** |
| Alaska | *** |
| Arizona | *** |
| Arkansas | *** |
| California | *** |
| Colorado | *** |
| Connecticut | *** |
| Delaware | *** |
| District of Columbia | *** |
| Florida | *** |
| Georgia | *** |
| Hawaii | *** |
| Idaho | *** |
| Illinois | *** |
| Indiana | *** |
| Iowa | *** |
| Kansas | *** |
| Kentucky | *** |

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| State | Value of Shipments (Mil \$) |
|----------------|-----------------------------|
| Louisiana | *** |
| Maine | *** |
| Maryland | *** |
| Massachusetts | *** |
| Michigan | *** |
| Minnesota | *** |
| Mississippi | *** |
| Missouri | *** |
| Montana | *** |
| Nebraska | *** |
| Nevada | *** |
| New Hampshire | *** |
| New Jersey | *** |
| New Mexico | *** |
| New York | *** |
| North Carolina | *** |
| North Dakota | *** |
| Ohio | *** |
| Oklahoma | *** |
| Oregon | *** |
| Pennsylvania | *** |
| Rhode Island | *** |
| South Carolina | *** |
| South Dakota | *** |
| Tennessee | *** |
| Texas | *** |
| Utah | *** |
| Vermont | *** |
| Virginia | *** |
| Washington | *** |
| West Virginia | *** |
| Wisconsin | *** |
| Wyoming | *** |

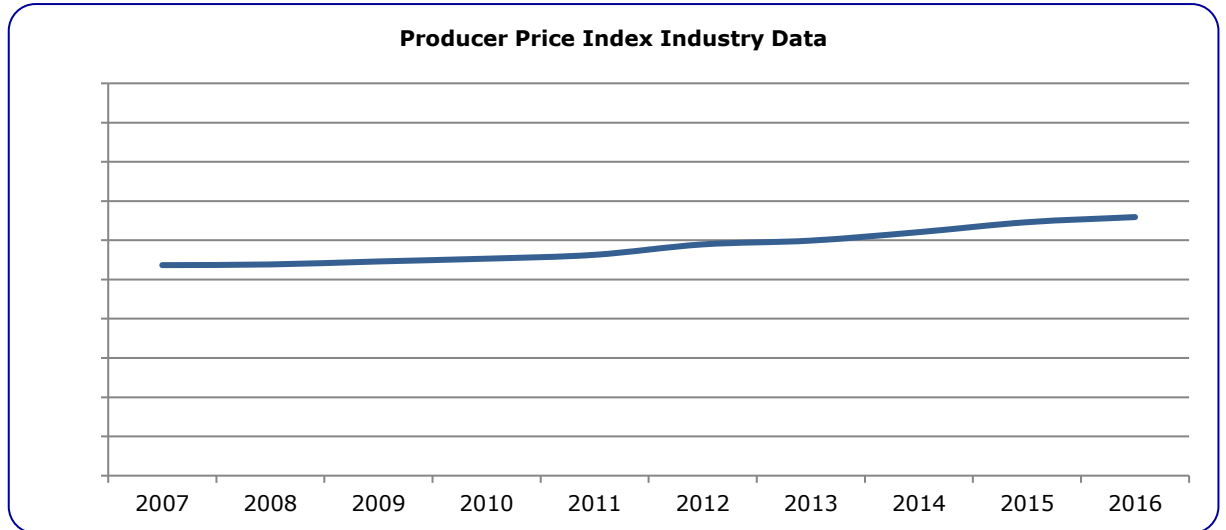
Source: ***

4.4 PRODUCER PRICES

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Figure 7: Producer Price Index Industry Data, 2007-2016



Source: ***

Table 5: Producer Price Index Industry Data, 2007-2016

1982=100

P: Preliminary. All indexes are subject to revision four months after original publication

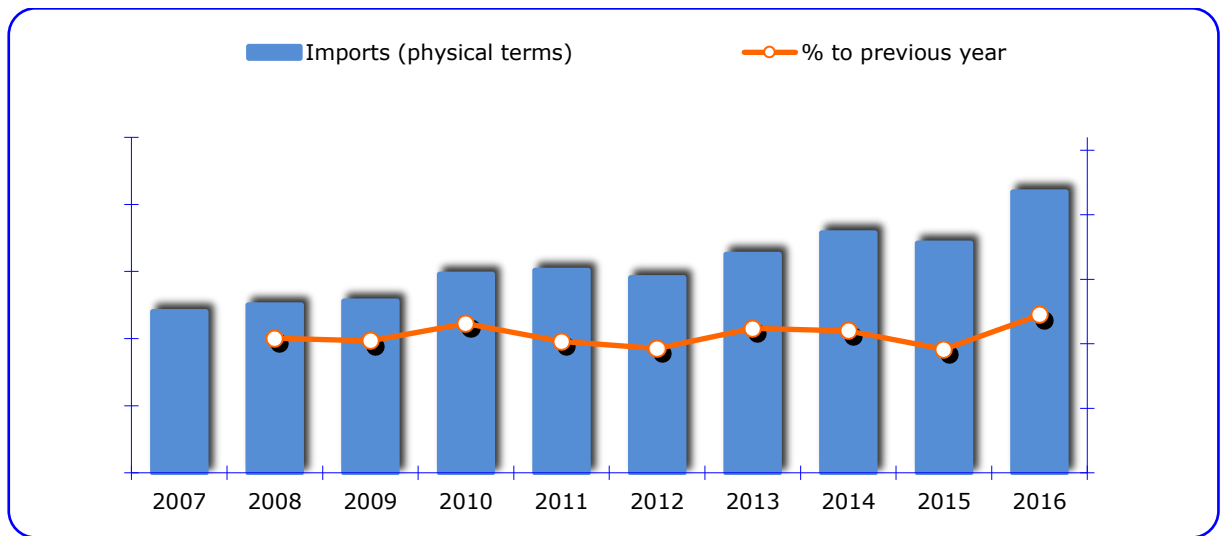
| Year | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Annual |
|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--------|
| 2007 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| 2008 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| 2009 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| 2010 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| 2011 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| 2012 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| 2012 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| 2013 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| 2014 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| 2016 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |

Source: ***

B 5. IMPORTS

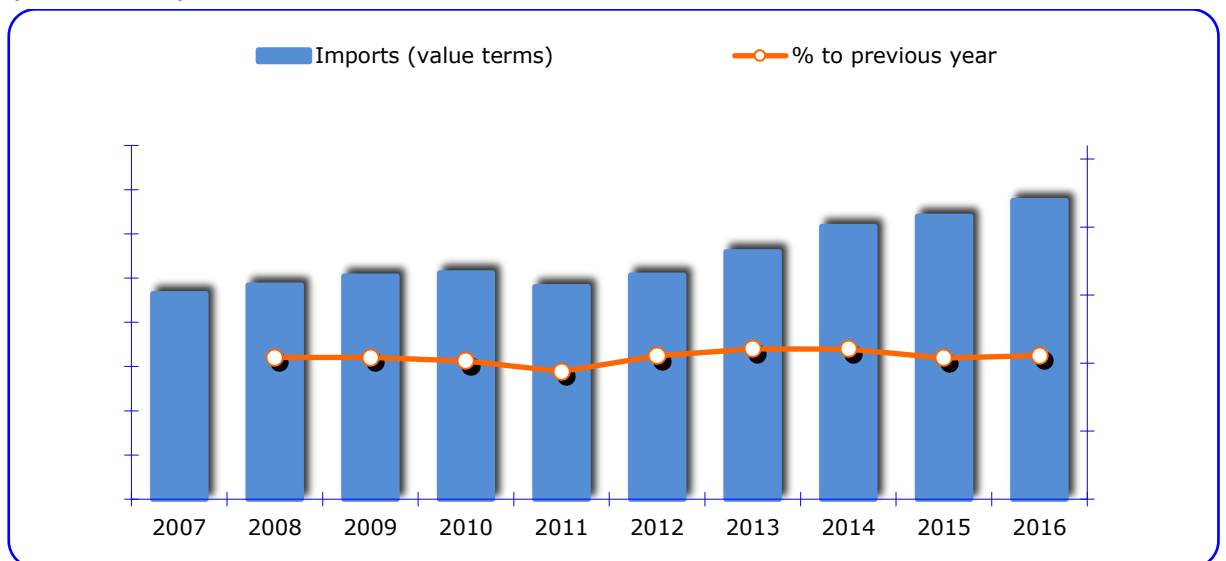
5.1 IMPORTS IN 2007-2016

Figure 8: Imports, In Physical Terms, 2007-2016 (tonnes)



Source: ***

Figure 9: Imports, In Value Terms, 2007-2016 (million USD)

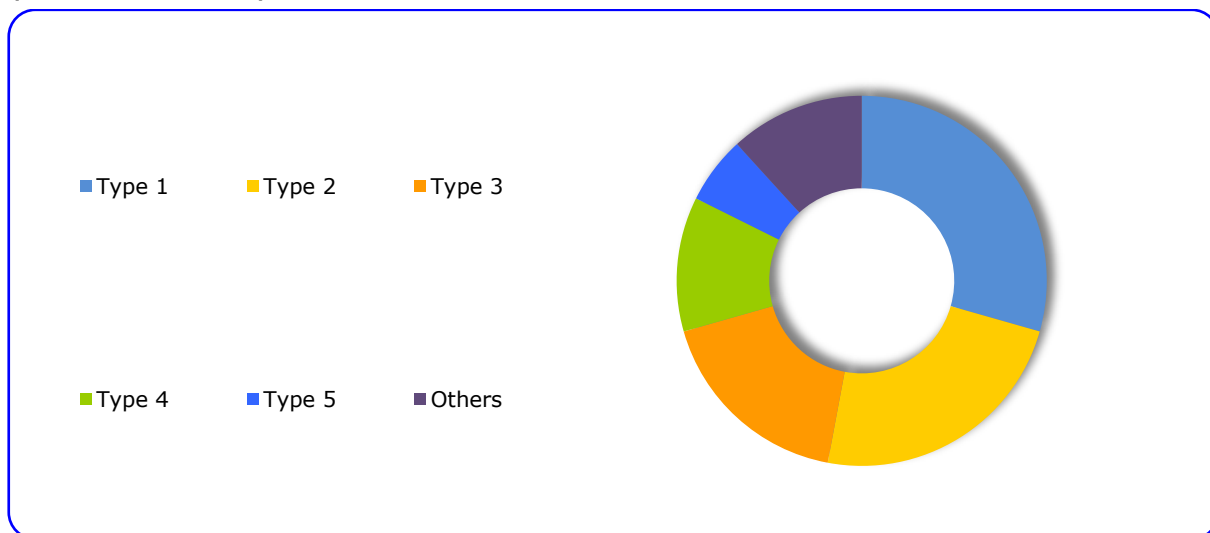


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5.2 IMPORTS BY TYPE

Figure 10: Imports, By Type, 2016
(%, based on USD)



Source: ***

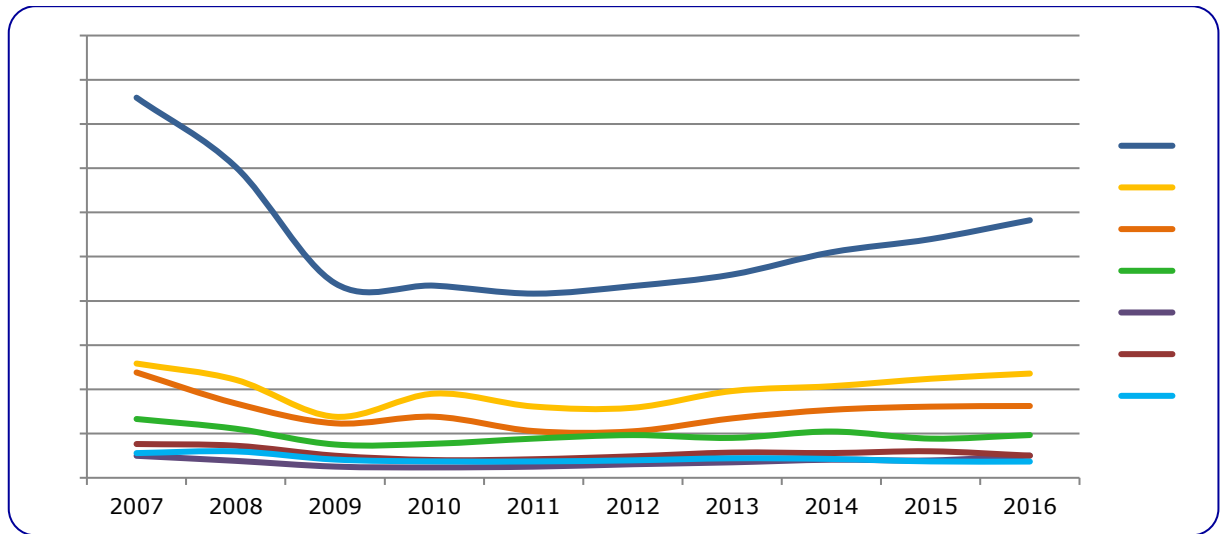
Table 6: Imports, In Physical And Value Terms, By Type, 2007-2016
(tonnes, million USD)

| Country | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | CAGR, 2007-2016 |
|-----------------------|------|------|------|------|------|------|------|------|------|------|--------------------|
| physical terms | | | | | | | | | | | |
| Type 1 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 2 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 3 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 4 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Total | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| value terms | | | | | | | | | | | |
| Type 1 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 2 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 3 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 4 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Total | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |

Source: ***

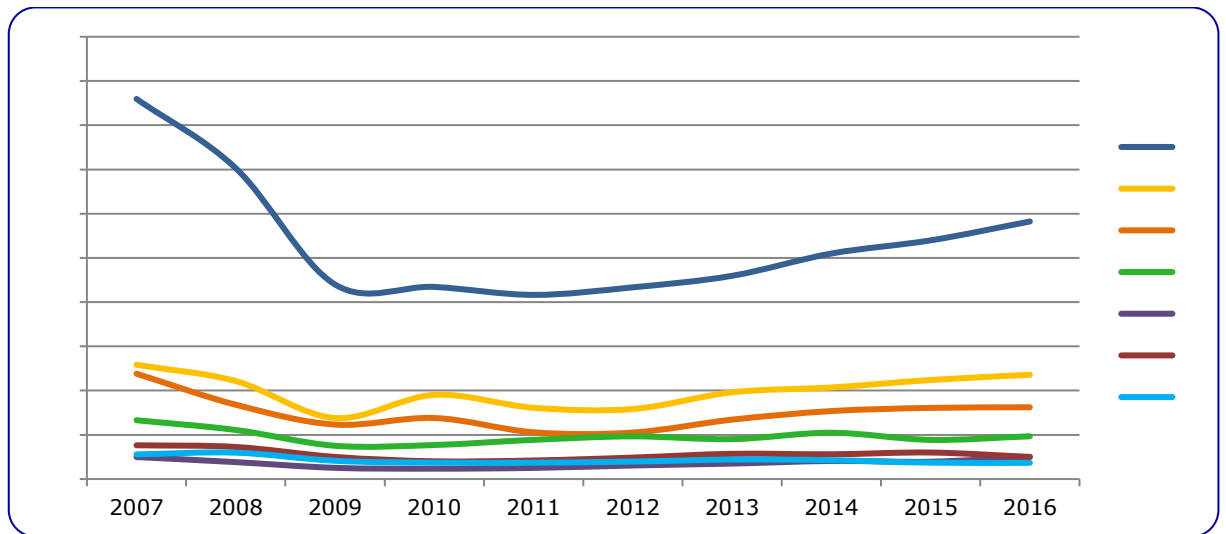
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Figure 11: Imports, In Physical Terms, By Type, 2007–2016 (tonnes)



Source: ***

Figure 12: Imports, In Value Terms, By Type, 2007–2016 (million USD)



Source: ***

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5.3 IMPORTS BY COUNTRY

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Figure 13: Imports, By Country Of Origin, 2016
(%, based on USD)



Source: ***

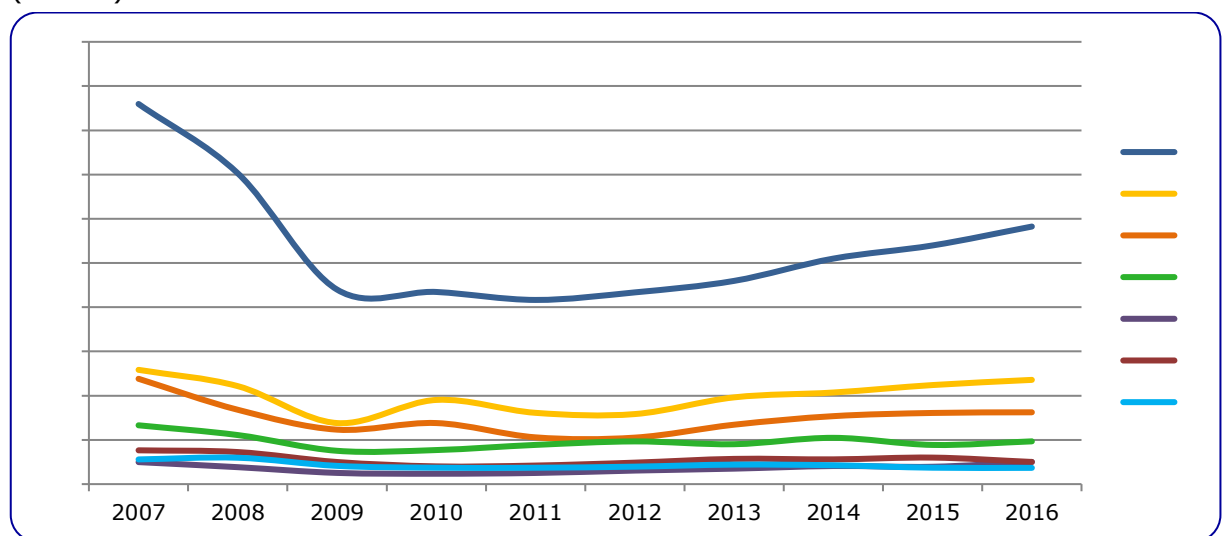
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Table 7: Imports, In Physical And Value Terms, By Country, 2007-2016 (tonnes, million USD)

| Country | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | CAGR, 2007-2016 |
|-----------------------|------|------|------|------|------|------|------|------|------|------|-----------------|
| physical terms | | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Others | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Total | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| value terms | | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Others | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Total | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |

Source: ***

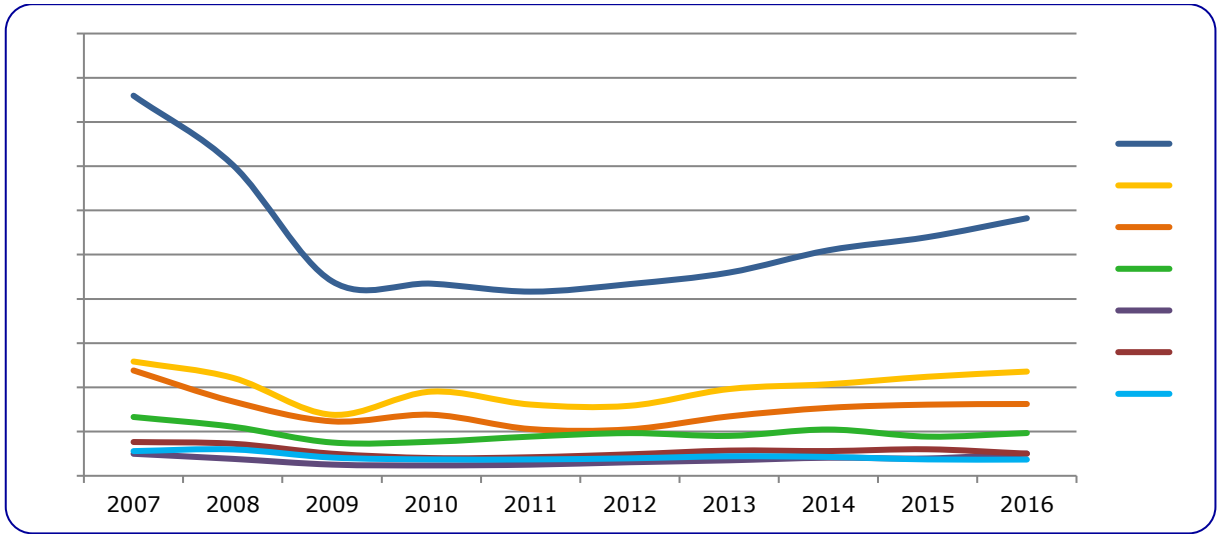
Figure 14: Imports, In Physical Terms, By Country Of Origin, 2007–2016 (tonnes)



Source: ***

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Figure 20: Imports, In Value Terms, By Country Of Origin, 2007–2016
(million USD)



Source: ***

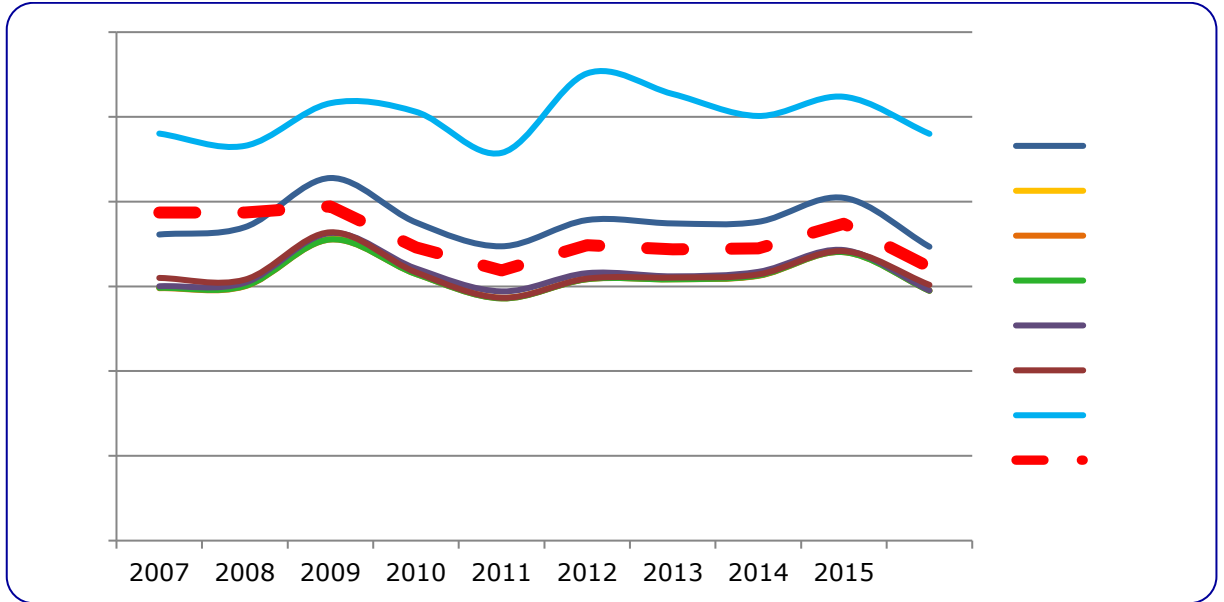
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5.4 IMPORT PRICES BY COUNTRY

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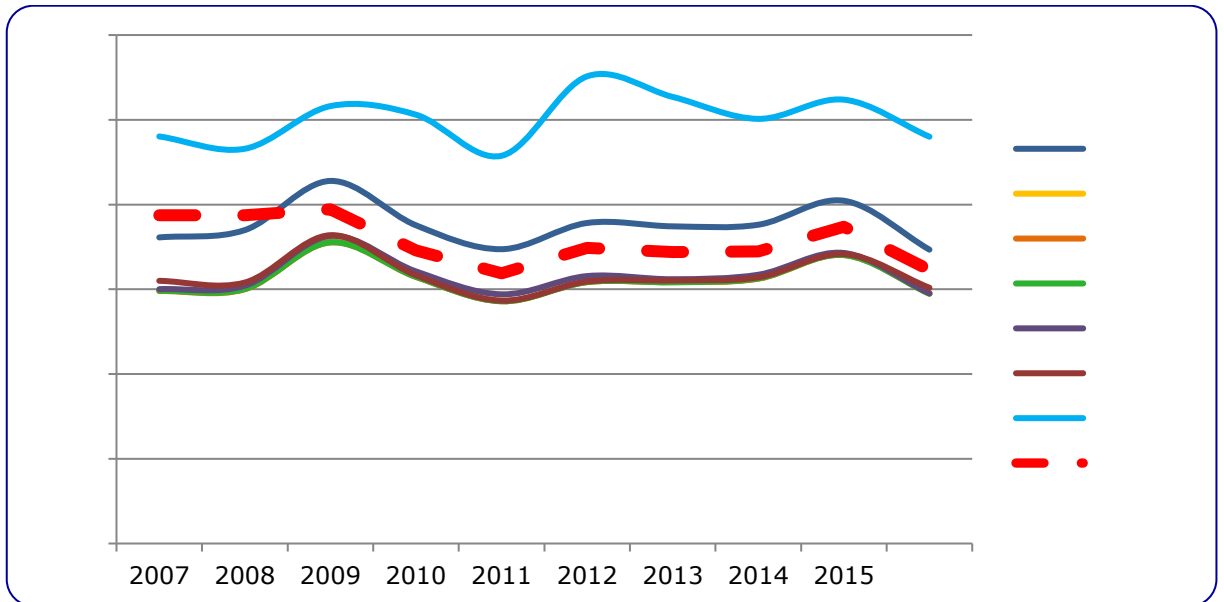
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Figure 21: Import Prices, By Country of Origin, 2007-2016
(USD per tonne)



Source: ***

Figure 22: Import Prices, By Type, 2007-2016
(USD per tonne)



Source: ***

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Table 8: Import Prices, By Type and Country Of Origin, 2007-2016
(USD per tonne)

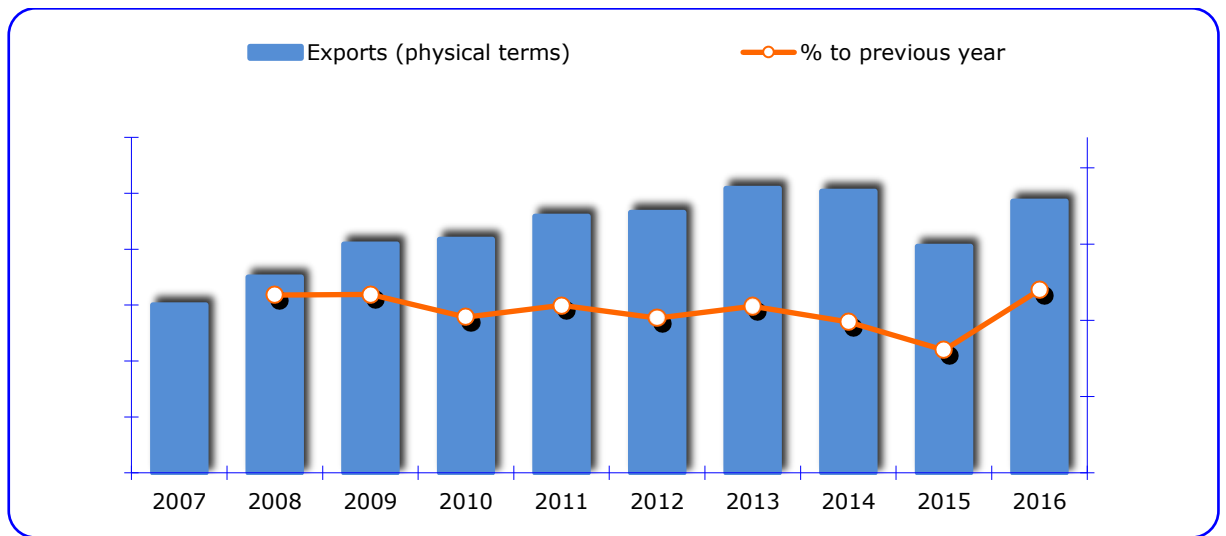
| Country/Type | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|----------------|------|------|------|------|------|------|------|------|------|------|
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |

Source: ***

B 6. EXPORTS

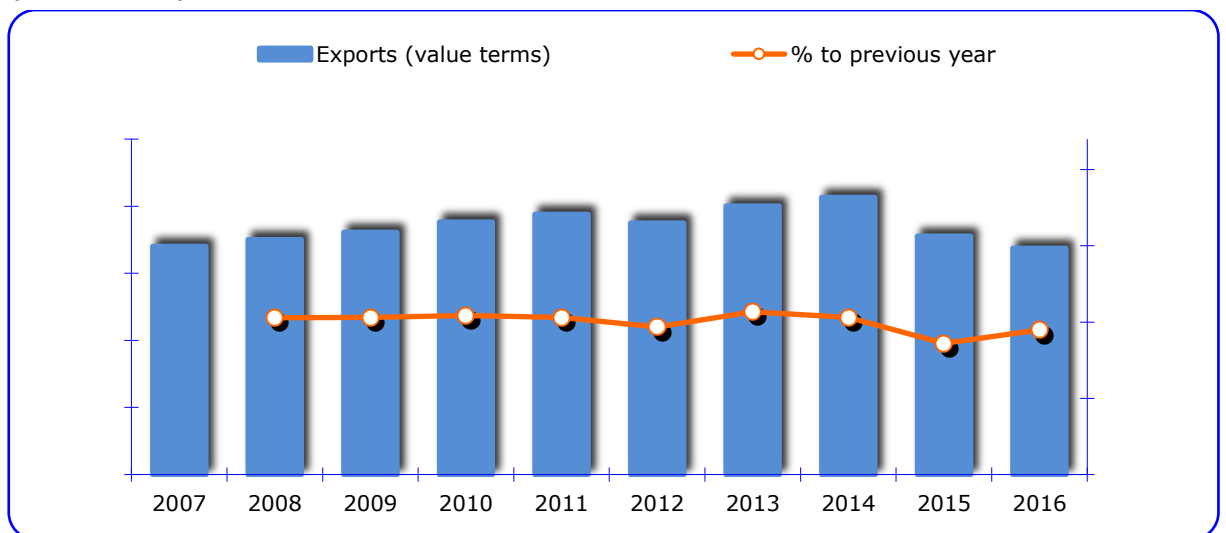
6.1 EXPORTS IN 2007-2016

Figure 15: Exports, In Physical Terms, 2007-2016 (tonnes)



Source: ***

Figure 16: Exports, In Value Terms, 2007-2016 (million USD)

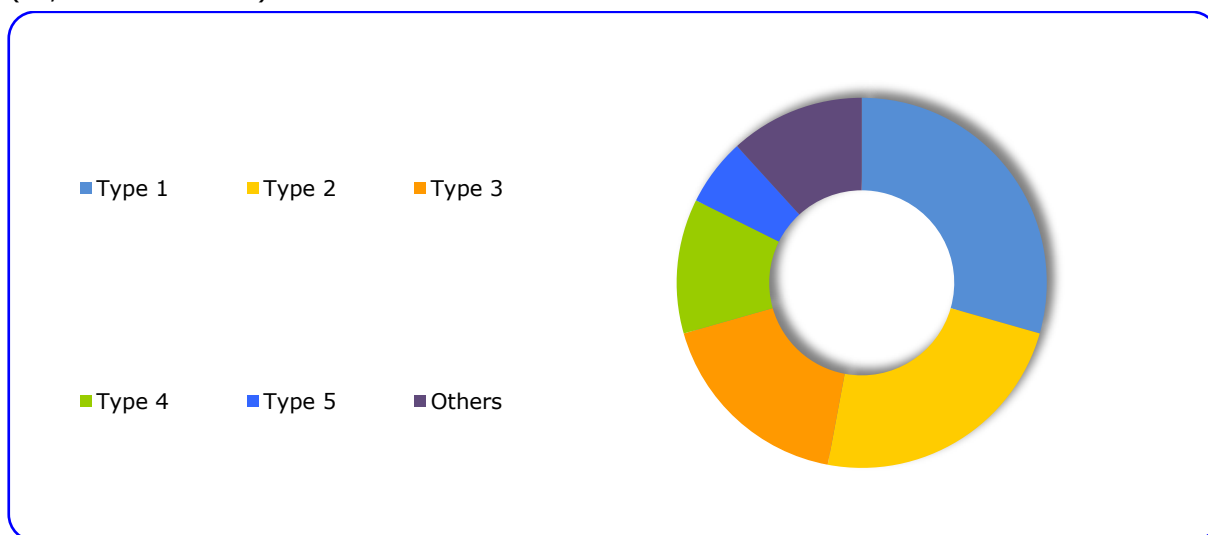


Source: ***

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6.2 EXPORTS BY TYPE

Figure 17: Exports, By Type, 2016
(%, based on USD)



Source: ***

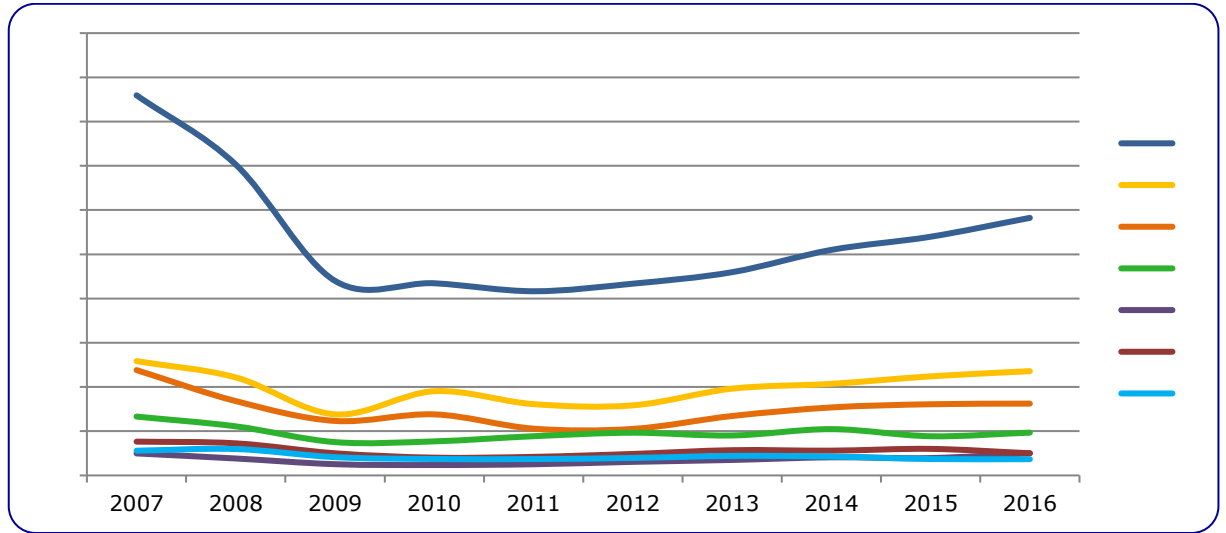
Table 9: Exports, In Physical And Value Terms, By Type, 2007-2016
(tonnes, million USD)

| Country | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | CAGR, 2007-2016 |
|-----------------------|------|------|------|------|------|------|------|------|------|------|-----------------|
| physical terms | | | | | | | | | | | |
| Type 1 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 2 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 3 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 4 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Total | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| value terms | | | | | | | | | | | |
| Type 1 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 2 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 3 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type 4 | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Total | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |

Source: ***

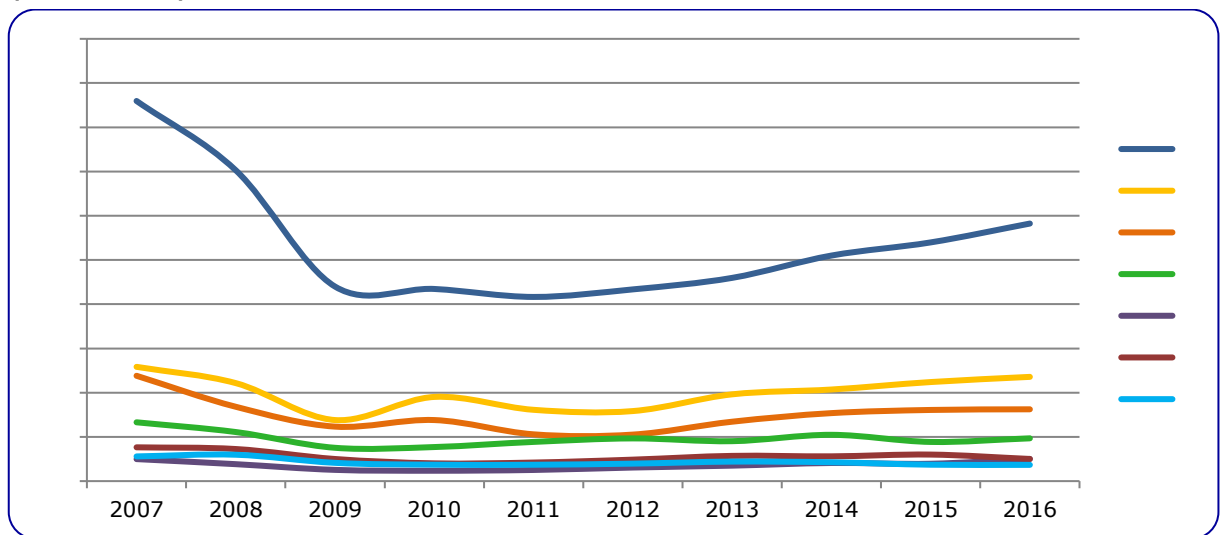


Figure 18: Exports, In Physical Terms, By Type, 2007–2016 (tonnes)



Source: ***

Figure 19: Exports, In Value Terms, By Type, 2007–2016 (million USD)

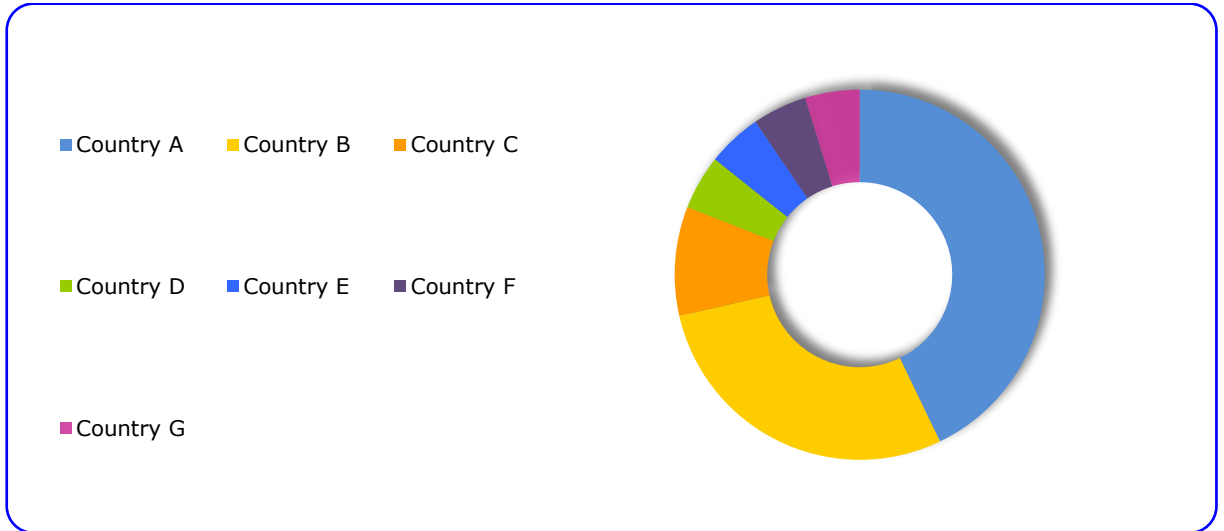


Source: ***

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6.3 EXPORTS BY COUNTRY

Figure 20: Exports, By Country Of Destination, 2016
(%, based on USD)



Source: ***

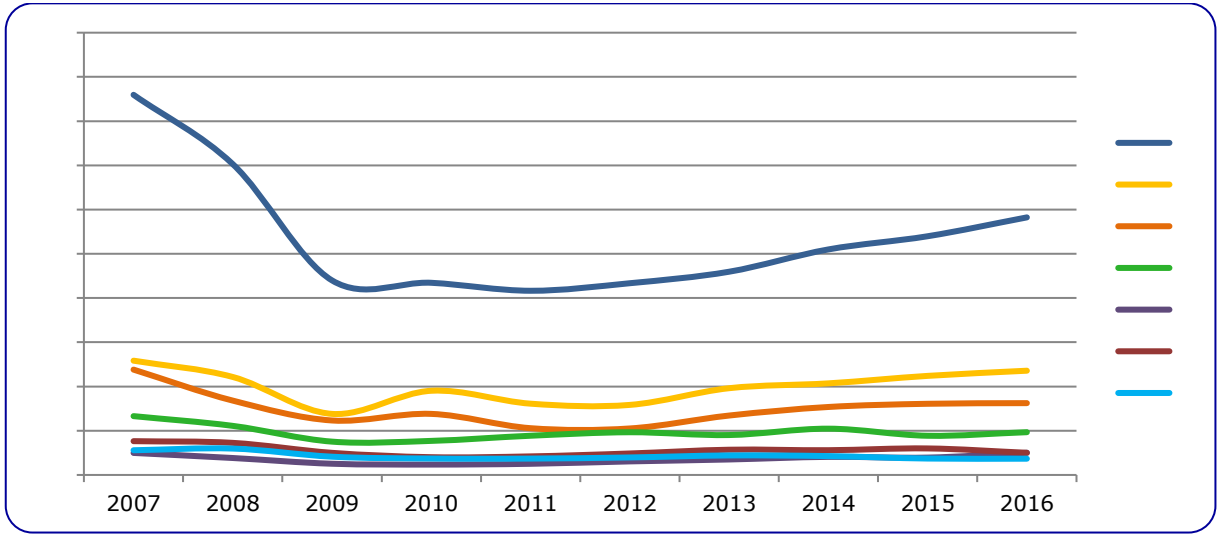
Table 10: Exports, In Physical Terms, By Country Of Destination, 2007-2016
(tonnes, million USD)

| Country | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | CAGR, 2007-2016 |
|-----------------------|------|------|------|------|------|------|------|------|------|------|--------------------|
| physical terms | | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Others | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Total | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| value terms | | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Others | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Total | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |

Source: ***

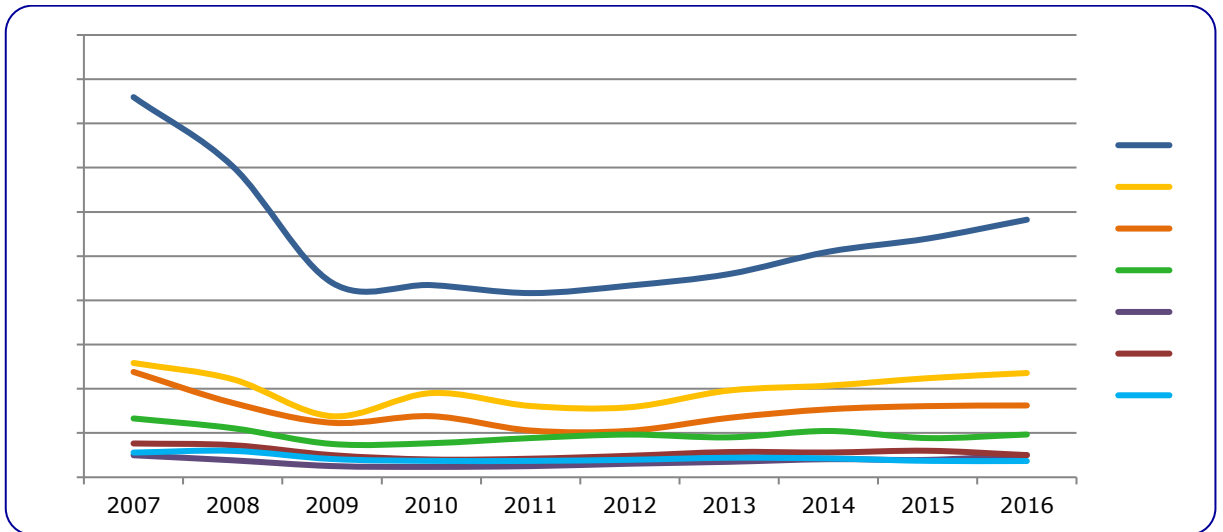
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Figure 21: Exports, In Physical Terms, By Country Of Destination, 2007–2016 (tonnes)



Source: ***

Figure 30: Exports, In Value Terms, By Country Of Destination, 2007–2016 (million USD)



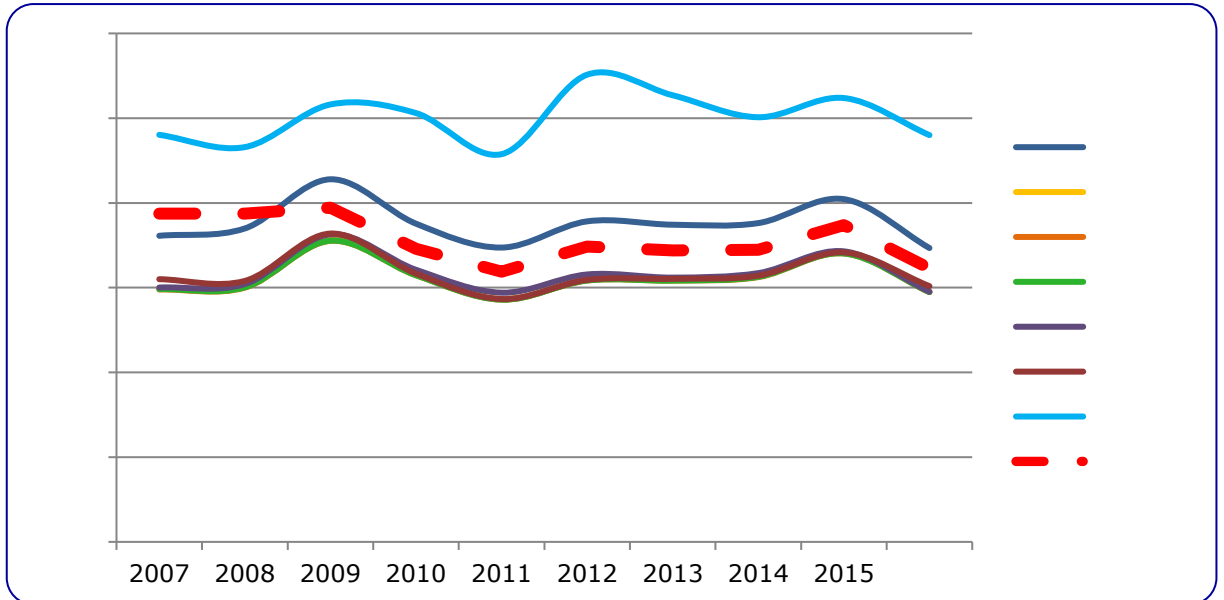
Source: ***

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6.4 EXPORT PRICES BY COUNTRY

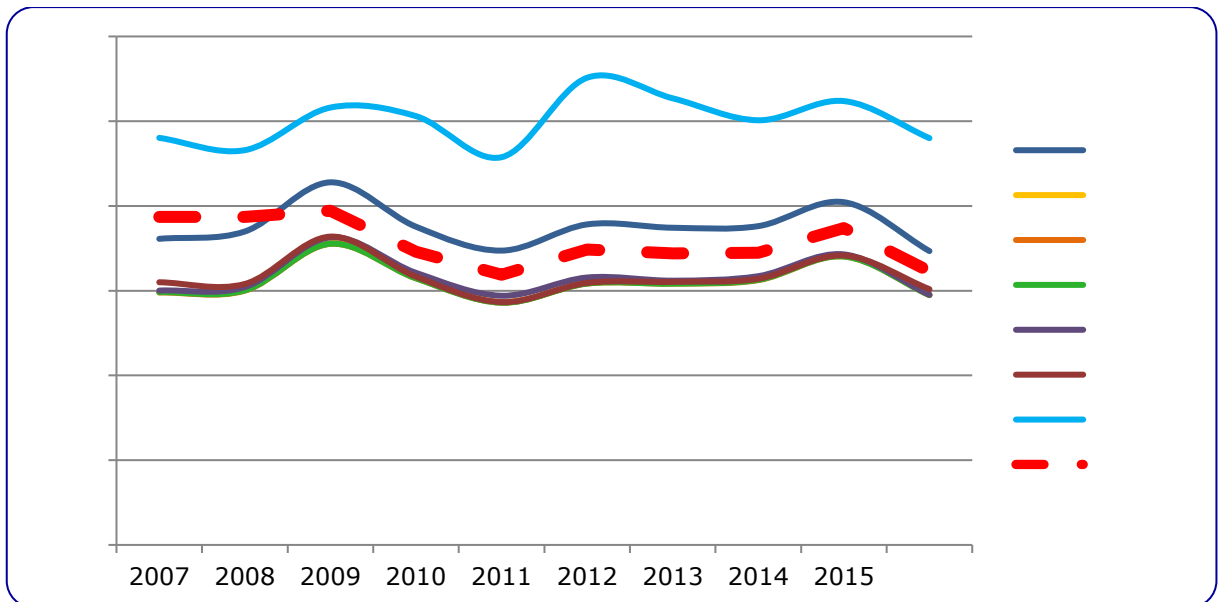
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Figure 31: Export Prices, By Country of Destination, 2007-2016 (USD per tonne)



Source: ***

Figure 32: Export Prices, By Country of Destination, 2007-2016 (USD per tonne)



Source: ***

B

Table 11: Export Prices, By Type and Country Of Destination, 2007-2016
(USD per tonne)

| Country/Type | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|----------------|------|------|------|------|------|------|------|------|------|------|
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Type*** | | | | | | | | | | |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Country | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Average | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |

Source: ***

B

7. COMPETITIVE LANDSCAPE

.
.

.

This Industry is comprised of:

.
.

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7.1 INDUSTRY SNAPSHOTS

Table 12: Key Industry Statistics: Manufacturing

| Item | 2007 | 2012 | 07-12 % Chg |
|--|------|------|-------------|
| Number of establishments | *** | *** | % |
| Value of shipments (\$ Millions) | *** | *** | % |
| Annual payroll (\$ Millions) | *** | *** | % |
| Total employment | *** | *** | % |
| Value of shipments per establishment (\$1,000) | *** | *** | % |
| Value of shipments per employee (\$1,000) | *** | *** | % |
| Value of shipments per \$ of payroll (\$) | *** | *** | % |
| Payroll per employee (\$) | *** | *** | % |
| Employees per establishment | *** | *** | % |
| Value of shipments per capita (\$) | *** | *** | % |
| Population per establishment | *** | *** | % |
| Population in the U.S. (million persons) | *** | *** | % |

Source: ***

7.2 INDUSTRY LIFE CYCLE

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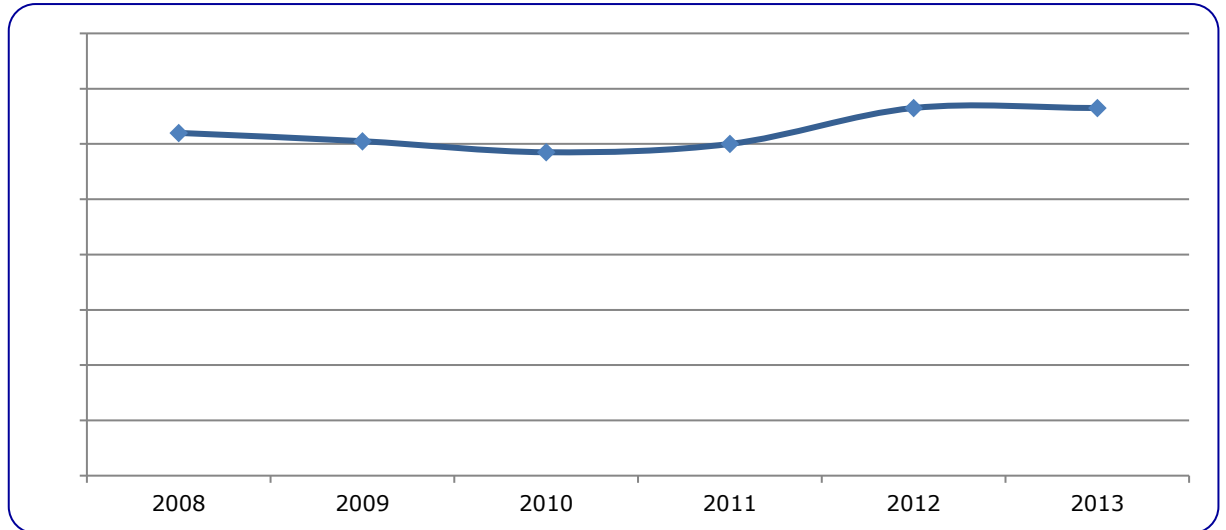
7.3 BUSINESS LOCATIONS

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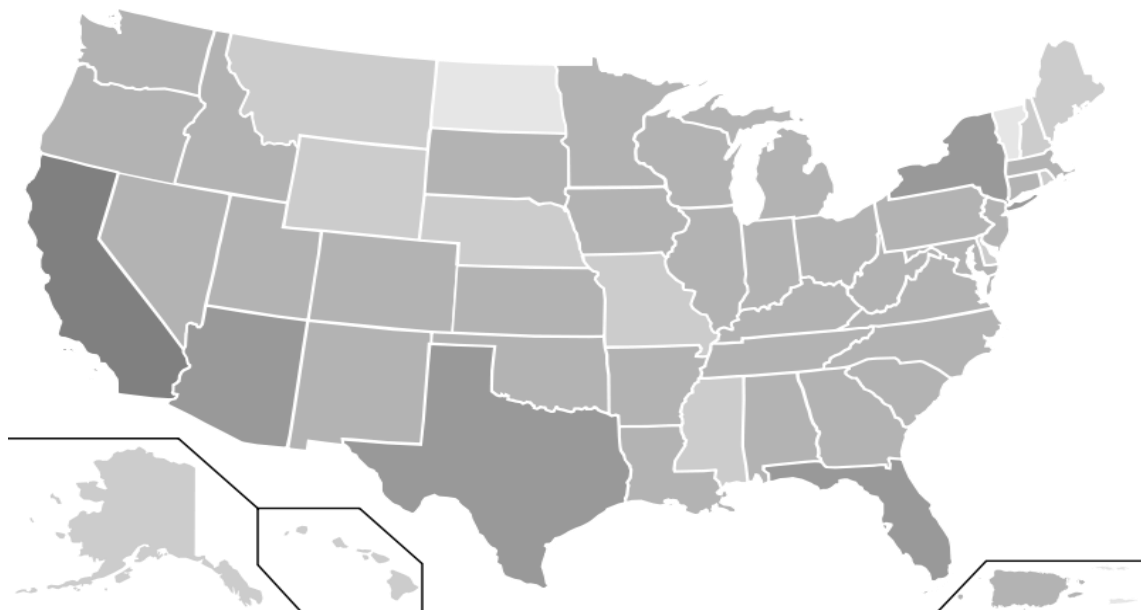
B

Figure 22: Numbers Of Establishments, 2008-2013



Source: ***

Figure 23: Map - Number Of Establishments, By State, 2012



Source: ***

Table 13: Number Of Establishments, By State, 2012

| State | Number of Establishments |
|---------|--------------------------|
| Alabama | *** |
| Alaska | *** |
| Arizona | *** |

B

| State | Number of Establishments |
|----------------------|---------------------------------|
| Arkansas | *** |
| California | *** |
| Colorado | *** |
| Connecticut | *** |
| Delaware | *** |
| District of Columbia | *** |
| Florida | *** |
| Georgia | *** |
| Hawaii | *** |
| Idaho | *** |
| Illinois | *** |
| Indiana | *** |
| Iowa | *** |
| Kansas | *** |
| Kentucky | *** |
| Louisiana | *** |
| Maine | *** |
| Maryland | *** |
| Massachusetts | *** |
| Michigan | *** |
| Minnesota | *** |
| Mississippi | *** |
| Missouri | *** |
| Montana | *** |
| Nebraska | *** |
| Nevada | *** |
| New Hampshire | *** |
| New Jersey | *** |
| New Mexico | *** |
| New York | *** |
| North Carolina | *** |

B

| State | Number of Establishments |
|----------------|---------------------------------|
| North Dakota | *** |
| Ohio | *** |
| Oklahoma | *** |
| Oregon | *** |
| Pennsylvania | *** |
| Rhode Island | *** |
| South Carolina | *** |
| South Dakota | *** |
| Tennessee | *** |
| Texas | *** |
| Utah | *** |
| Vermont | *** |
| Virginia | *** |
| Washington | *** |
| West Virginia | *** |
| Wisconsin | *** |
| Wyoming | *** |

Source: ***

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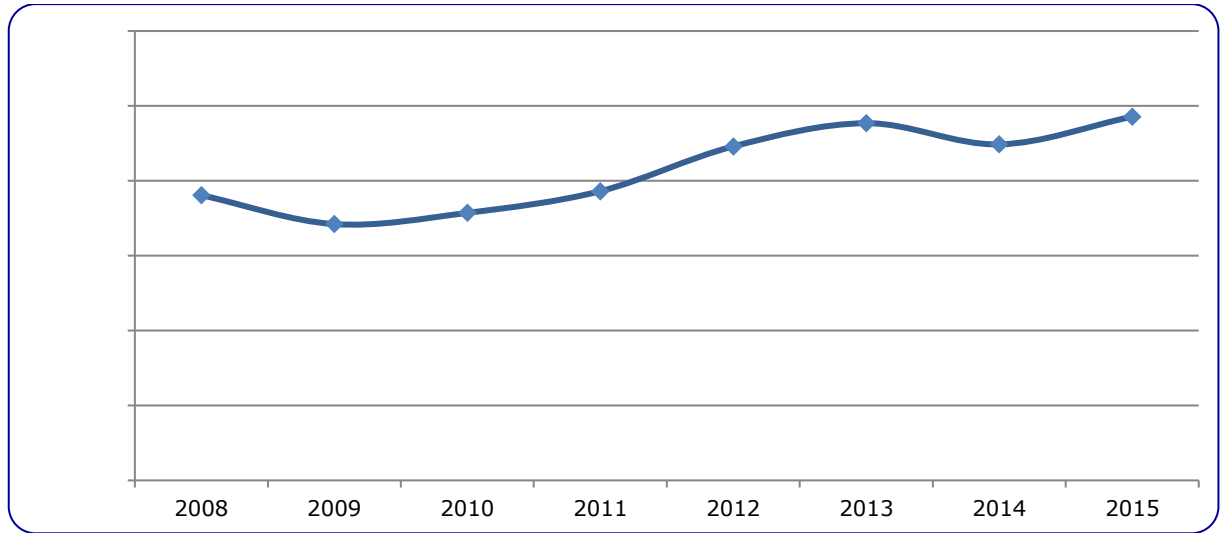
7.4 EMPLOYMENT

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For a complete list of the number of employees engaged in the industry by States, see Table below.

Figure 24: Number Of Employees, 2008-2015

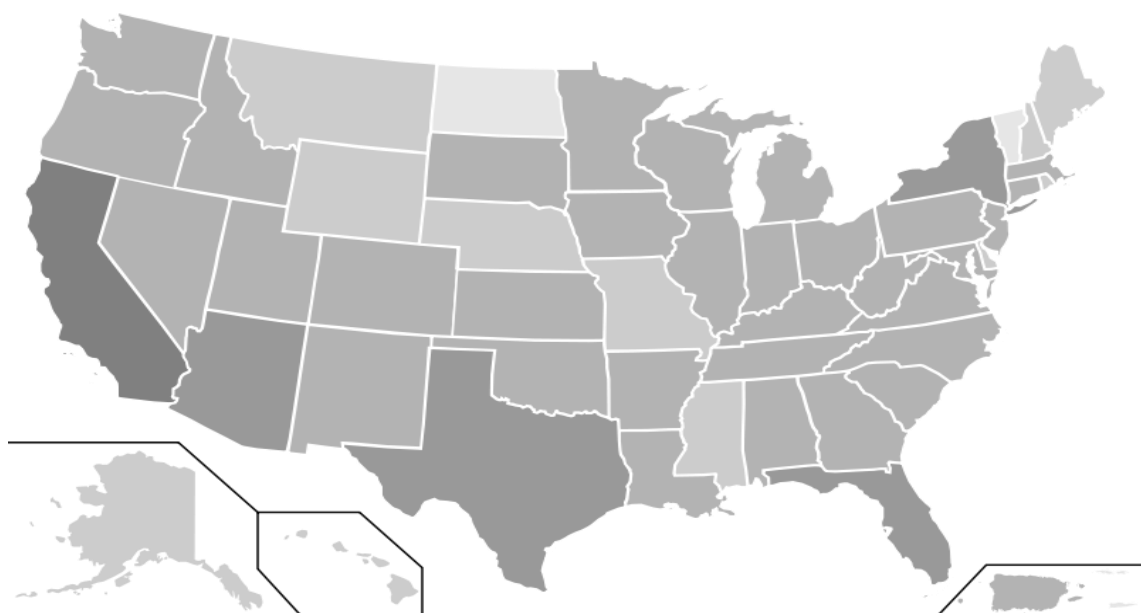


Source: ***

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Figure 37: Map - Number Of Employees, By State, 2012



Source: ***

B

Table 14: Number Of Employees, By State, 2012

| State | Number of Employees |
|----------------------|----------------------------|
| Alabama | *** |
| Alaska | *** |
| Arizona | *** |
| Arkansas | *** |
| California | *** |
| Colorado | *** |
| Connecticut | *** |
| Delaware | *** |
| District of Columbia | *** |
| Florida | *** |
| Georgia | *** |
| Hawaii | *** |
| Idaho | *** |
| Illinois | *** |
| Indiana | *** |
| Iowa | *** |
| Kansas | *** |
| Kentucky | *** |
| Louisiana | *** |
| Maine | *** |
| Maryland | *** |
| Massachusetts | *** |
| Michigan | *** |
| Minnesota | *** |
| Mississippi | *** |
| Missouri | *** |
| Montana | *** |
| Nebraska | *** |
| Nevada | *** |
| New Hampshire | *** |

B

| State | Number of Employees |
|----------------|---------------------|
| New Jersey | *** |
| New Mexico | *** |
| New York | *** |
| North Carolina | *** |
| North Dakota | *** |
| Ohio | *** |
| Oklahoma | *** |
| Oregon | *** |
| Pennsylvania | *** |
| Rhode Island | *** |
| South Carolina | *** |
| South Dakota | *** |
| Tennessee | *** |
| Texas | *** |
| Utah | *** |
| Vermont | *** |
| Virginia | *** |
| Washington | *** |
| West Virginia | *** |
| Wisconsin | *** |
| Wyoming | *** |

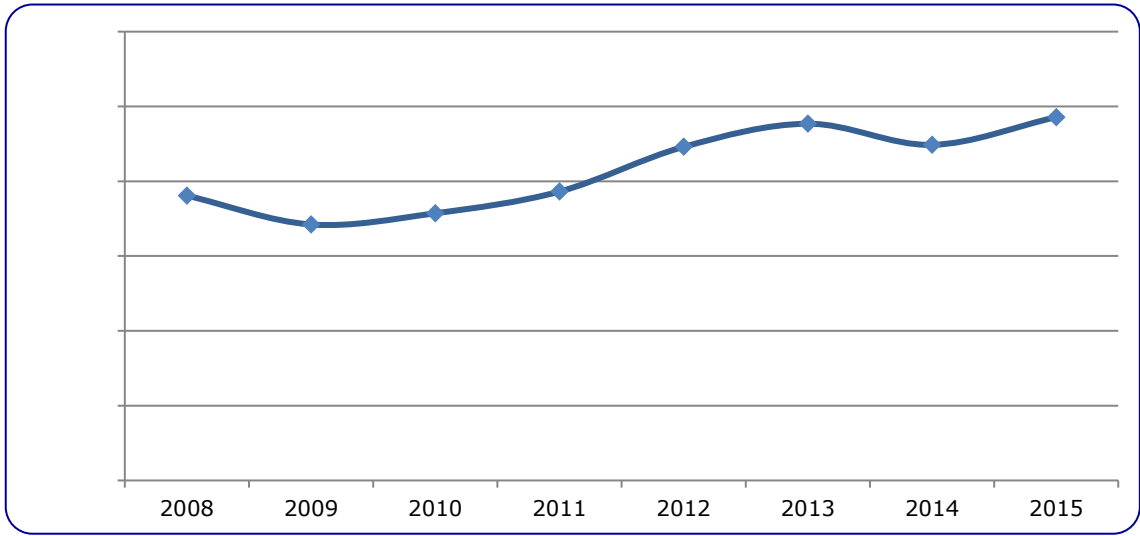
Source: ***

7.5 ANNUAL PAYROLL

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Figure 25: Annual Payroll, 2008-2016
(thousand USD)



Source: ***

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. .

BTable 15: Annual Payroll, By State, 2012
(USD)

| State | Annual Payroll (\$) |
|----------------------|----------------------------|
| Alabama | *** |
| Alaska | *** |
| Arizona | *** |
| Arkansas | *** |
| California | *** |
| Colorado | *** |
| Connecticut | *** |
| Delaware | *** |
| District of Columbia | *** |
| Florida | *** |
| Georgia | *** |
| Hawaii | *** |
| Idaho | *** |
| Illinois | *** |
| Indiana | *** |
| Iowa | *** |
| Kansas | *** |
| Kentucky | *** |
| Louisiana | *** |
| Maine | *** |
| Maryland | *** |
| Massachusetts | *** |
| Michigan | *** |
| Minnesota | *** |
| Mississippi | *** |
| Missouri | *** |
| Montana | *** |
| Nebraska | *** |
| Nevada | *** |

B

| State | Annual Payroll (\$) |
|----------------|----------------------------|
| New Hampshire | *** |
| New Jersey | *** |
| New Mexico | *** |
| New York | *** |
| North Carolina | *** |
| North Dakota | *** |
| Ohio | *** |
| Oklahoma | *** |
| Oregon | *** |
| Pennsylvania | *** |
| Rhode Island | *** |
| South Carolina | *** |
| South Dakota | *** |
| Tennessee | *** |
| Texas | *** |
| Utah | *** |
| Vermont | *** |
| Virginia | *** |
| Washington | *** |
| West Virginia | *** |
| Wisconsin | *** |
| Wyoming | *** |

Source: ***

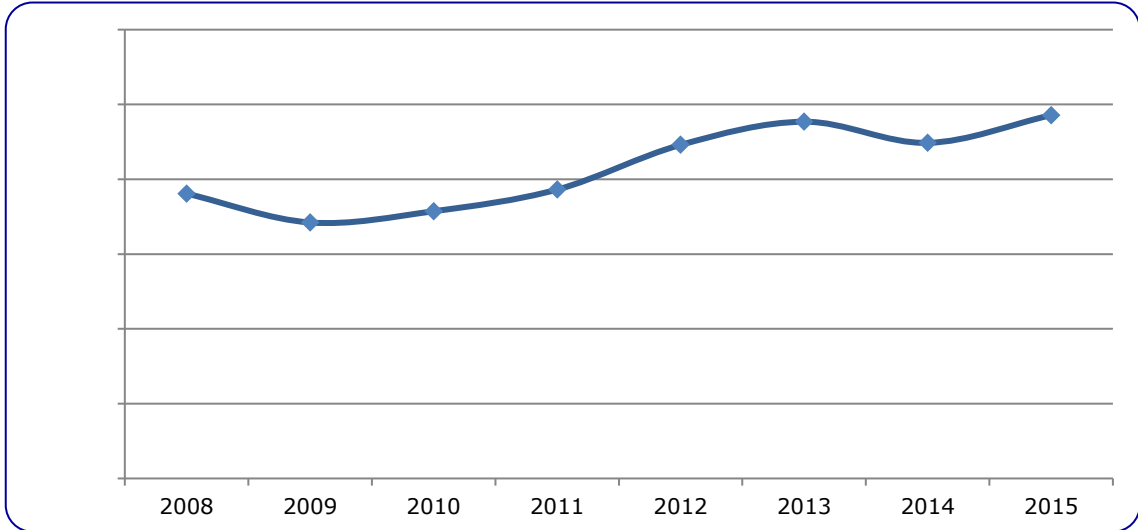
7.6 INDUSTRY PRODUCTIVITY

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Figure 26: Value Of Shipments Per Employee, By State, 2008-2015

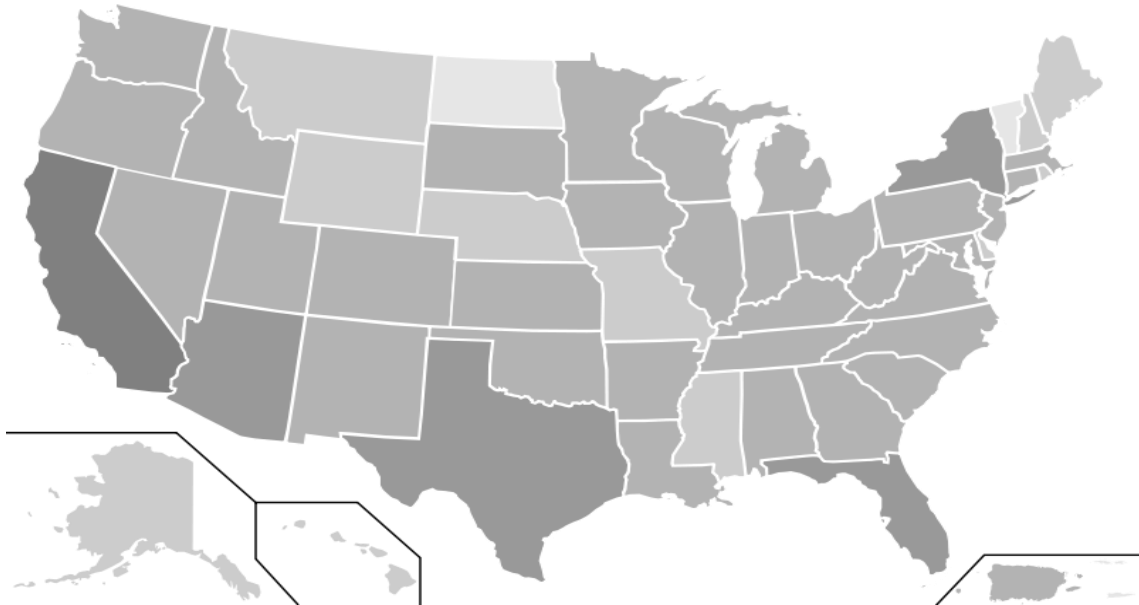


Source: ***

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Figure 40: Map - Value Of Shipments Per Employee, By State, 2012



Source: ***

Table 16: Value Of Shipments Per Employee, By State, 2012

| State | Value of Shipments per employee (\$) |
|----------------------|--------------------------------------|
| Alabama | *** |
| Alaska | *** |
| Arizona | *** |
| Arkansas | *** |
| California | *** |
| Colorado | *** |
| Connecticut | *** |
| Delaware | *** |
| District of Columbia | *** |
| Florida | *** |
| Georgia | *** |
| Hawaii | *** |
| Idaho | *** |
| Illinois | *** |
| Indiana | *** |
| Iowa | *** |
| Kansas | *** |
| Kentucky | *** |

B

| State | Value of Shipments per employee (\$) |
|----------------|--------------------------------------|
| Louisiana | *** |
| Maine | *** |
| Maryland | *** |
| Massachusetts | *** |
| Michigan | *** |
| Minnesota | *** |
| Mississippi | *** |
| Missouri | *** |
| Montana | *** |
| Nebraska | *** |
| Nevada | *** |
| New Hampshire | *** |
| New Jersey | *** |
| New Mexico | *** |
| New York | *** |
| North Carolina | *** |
| North Dakota | *** |
| Ohio | *** |
| Oklahoma | *** |
| Oregon | *** |
| Pennsylvania | *** |
| Rhode Island | *** |
| South Carolina | *** |
| South Dakota | *** |
| Tennessee | *** |
| Texas | *** |
| Utah | *** |
| Vermont | *** |
| Virginia | *** |
| Washington | *** |
| West Virginia | *** |

B

| State | Value of Shipments per employee (\$) |
|--------------|---|
| Wisconsin | *** |
| Wyoming | *** |

*Source: ****

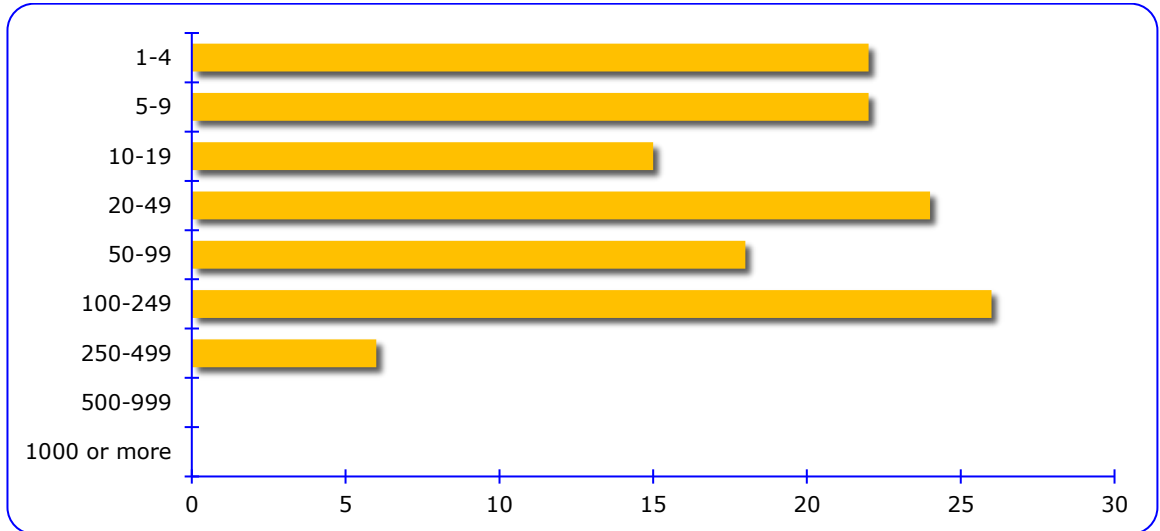
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7.7 ESTABLISHMENT SIZE AND LEGAL FORM

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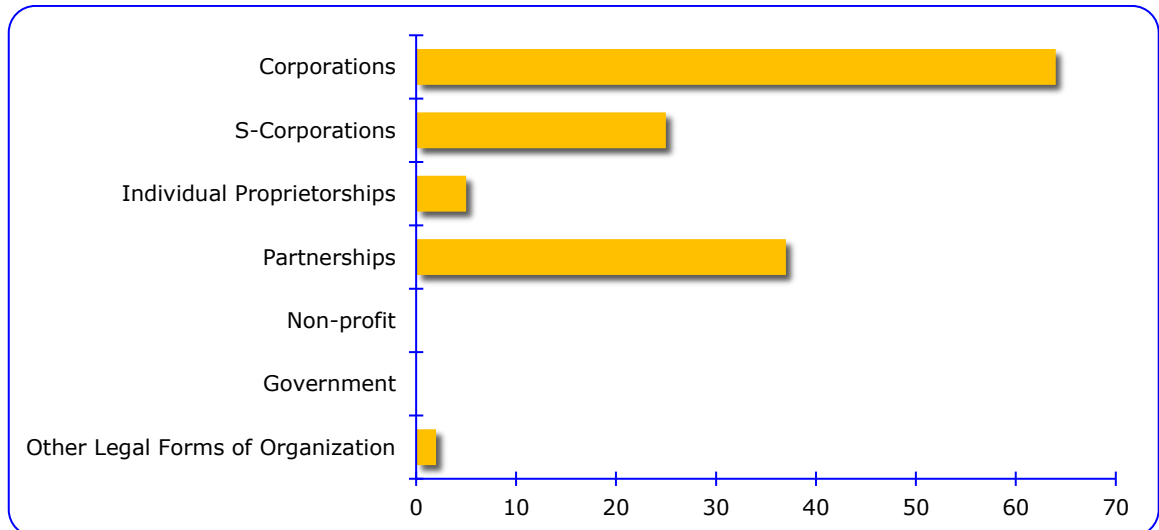
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Figure 41: Number Of Establishments By Employment Size, 2013



Source: ***

Figure 42: Number Of Establishments By Legal Form Of Organization, 2013



Source: ***

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8. COMPANY PROFILES

- .
- .
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B

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