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Legwear Fashions Textiles

*The only monthly publication that offers
News About The Industry, From The Industry, For The Industry.*

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*The ONLY monthly magazine
dedicated to the hosiery industry*

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legislative column

by PAUL FOGLEMAN, Director, Hosiery Governmental Affairs Council

As the presidential campaign moves into high gear, a large group of voters who own small businesses are trying to determine who best would serve their interests. It's not easy.

Barack Obama and John McCain are finding that the small business community is not monolithic. Men and women, white and black and Hispanic are represented. They cover a wide base of ideology and geography. Yet, most are frustrated at the lack of details coming from either candidate.

Small business lobbying groups are especially concerned about health care policies. The National Federation of Independent Business, the National Association for the Self Employed and the National Small Business Administration are opposed to a mandate that requires employers to cover their employees health insurance costs.

This is one area where Sen. McCain seems to have the advantage. His opponent has said he would

♦♦♦

North Carolina, home to most U.S. hosiery manufacturers and textile companies, has been a red state for decades. But is it taking on a purple hue?

Both presidential candidates are spending millions of dollars in television advertising, believing the state is up for grabs. State Sen. Kay Hagan, who was a long-shot candidate, is even with incumbent GOP Sen. Elizabeth Dole in current polls. The U.S. Democratic Senate Campaign Committee reportedly has committed \$5 million on Hagan's behalf.

Observers are saying that if young and minority voters are energized and show up at the polls in November, North Carolina could go Democratic for the first time since 1976. Congressional leaders have said 125,000 new voters for Obama in North

Small business executives feel that more important is a commitment to their needs. This extends beyond taxes and insurance, but would include regulatory issues, home leave, immigration reform, and others.

require companies to offer a health insurance plan and contribute to the cost. Under Obama's plan, small businesses would not have to provide coverage, but they would be offered a tax credit to do so.

Another issue, of course, is taxes. The lobbying groups want the Bush tax cuts to be made permanent. Sen. McCain agrees. Sen. Obama would extend tax cuts to people making less than \$250,000. While McCain argues this would be a burden on small business owners, Washington tax experts say only 1.4 percent of small business owners would be affected.

Small business executives feel that more important is a commitment to their needs. This extends beyond taxes and insurance, but would include regulatory issues, home leave, immigration reform, and others. They are still waiting to hear.

Carolina could win the state for him.

♦♦♦

It used to be that presidential conventions were fun. Free food and beverages at the hospitality rooms sponsored by corporations and organizations... entertainment...party time.

But for North Carolina legislators attending the Democratic convention, the grinch was looking. Ethics reforms adopted by the General Assembly prohibit legislators from accepting food, drinks or gifts from lobbyists or their clients. At the AT&T breakfast, legislators and state employees were required to shell out \$22 to cover the cost of the meal. ■

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CLUSTERS:

Why Hosiery And Textiles Continue In 21st Century Environment

While diminished in size, hosiery and textiles continue to be cluster industries – especially in North Carolina and Alabama.

A cluster is defined by economy specialists as a geographical community of like businesses that support a supply chain within that community. In the case of hosiery and textiles, that would include fiber and yarn producers, dye and chemical sources, equipment and technology resources, and marketing support companies, i.e. hangers and advertising firms.

The North Carolina clusters have all these. More important, valuable research and development services from the Hosiery Technology Center and the Textile Technology Center are fulfilling a greater need.

A rather unique cluster of hosiery manufacturers emerged in Northern Alabama more than 50 years ago when V.I. Prewett and Sons Inc.

began operations in Fort Payne. Eventually Prewett's multi-faceted operations supported scores of small mills that became part of "the Prewett family of mills."

Two years ago, many of these mills were merged into the Prewett complex which was sold to Gildan in 2006. Even so, more than a dozen independent North Alabama hosiery companies function as a cluster, often interacting with mills in eastern Tennessee.

Just over a decade ago, the hosiery cluster in North Carolina was comprised of over 125 greige and vertical manufacturers employing more than 20,000 people. The textiles segment was even larger. In 2008, the hosiery industry is reduced by half and shrinkage has hit the textiles sector. But both remain major employers and players in the

manufacturing economy.

Most of the companies that closed their doors were smaller family-owned operations, with 15 to 225 employees. Some were the backbone of small communities, giving money to hospitals and United Way drives and writing checks for property taxes.

The sudden closure of Cannon Mills and the loss of 4,000 jobs was the exception. But the trend to source products from emerging countries hit large, medium-sized and small mills.

In the Piedmont Triad, home to Hanesbrands Inc., Harriss and Covington Hosiery, High Point, Acme-McCrary Hosiery in Asheboro, Kayser-Roth Hosiery, Bossong Hosiery, Commonwealth Hosiery, Fine Line Hosiery, Pickett Hosiery, Lakeside Finishing and dozens

of small companies, the hosiery payrolls still exceed 4,000, according to industry observers.

Cluster

The Catawba Valley region, which once shipped some 30 percent of the nation's socks, also has an important cluster. In addition to specialty manufacturers, there are sourcing and distribution operations, some staffed by members of families that once operated mills. They have brands and they are marketing-driven with an eye on sustainable products.

GoldToe/Moretz, Catawba Sox, R. Evans Hosiery, N.C. Socks, Huitt Mills, International Legwear Group Inc., Williams Hosiery, and other smaller companies employ hundreds in the western Piedmont region. Textile companies – Hickory Throwing Co., Fiber and Yarn Products, Carolina Mills, Inc., – are part of the cluster as key suppliers.

together ... people know each other ... but there are fewer players,” St. Louis acknowledges.

Kathy Willis, president of ILG, senses that clusters have diminished from what they were just five years ago. The business is so competitive and the rush to find offshore resources have affected industry relationships, she observes.

“We used to talk about partners with our suppliers,” Willis reflected. “A partner now is an exception to the rule,” she says. With its manufacturing facilities in Mexico, Willis acknowledges that the logistics in the supply chain are more complex.

Willis says the challenge is to have a supply chain that responds to the lowest cost. That involves squeezing costs out of the supply chain and making constant changes. “If you don’t pursue change you will be left behind,” she insists.

One significant change, she notes, has been the movement

successful fulfilling niche businesses. Martin was filling a large order for a New York distributor who had received a large shipment of inferior socks from Pakistan.

“With container costs shooting up with the energy crisis, they can’t be making money,” Martin said of importers.

St. Louis, who tracks U.S. production closely, also said the rush to find cheaper products overseas led to a market surplus. For years, he noted, American consumers were buying around 260 million dozens a year. Two years ago, the U.S. socks manufacturers were reporting 330 million in the supply channel. “Importers were ordering too much and the result was markdowns and large inventories,” he added.

The contraction of the cluster has resulted in a shortage of U.S.-made fine gauge socks, Martin says. Production of 200-needle socks has almost disappeared, he continues. Martin works with five greige manufacturers, a traditional benefit for a cluster participant.

Martin and Willis both would like more involvement with yarn companies. Martin even suggested the formation of a co-op by several hosiery companies to save money on shipping costs and to have access to specialty yarns that are hard to find.

Stuart Rosenfeld, a national authority on clusters, has described the hosiery cluster in North Carolina as “mature.” As such, he said, it must be redefined and re-invigorated to exist. Without a regional trade association, the leadership will come from the technology centers.

That’s a role St. Louis and John Anderson, director of the Textile Technology Center, are prepared to assume. ■

Stuart Rosenfeld, a national authority on clusters, has described the hosiery cluster in North Carolina as “mature.” As such, he said, it must be redefined and re-invigorated to exist.

“Clusters are not dead ... by no means are clusters dead,” insists Dan St. Louis, manager of the Center for Emerging Manufacturing Solutions which includes the Hosiery Technology Center.

“We still have folks working

to source goods offshore. “I think the jury may be out on the return on investment (for offshore goods),” she said.

St. Louis agrees with this observation. And so does Dennis Martin, owner of N.C. Socks which has been

Australian Wool Innovation **Targets Hosiery, Apparel Firms**

It's not your grandmother's heavy, scratchy wool.

With consumers looking for natural fibers and authenticity in the socks and apparel they buy, wool is gaining popularity.



For those shopping for fashion and looks, wool is cool. Those putting a priority on comfort, wool is hot. Such is the theme coming from the new Australian Wool Innovation (AWI) promoting Merino wool in the global marketplace. The goal is to position wool as the world's "best luxury fiber," according to Robert Langtry, AWI's chief marketing officer.

In an interview with *Trends*, Langtry acknowledged that the consumer perception of wool is "out of date." The drive to reposition wool will focus on pushing new fibers – 18 to 22 microns – to manufacturers of socks, sweaters, and specialty apparel.

AWI will spend \$120 million to push licensing programs for Australian Merino™, Superior Merino™, and Superior Merino Blend™. Their brands were rolled at the end of last month and will work alongside the Woolmark, supported by a new accreditation and testing regime, it was stressed.

Langtry said the AWI initiative represents an important turning point for Australian Merino and the 55,000 woolgrowers in that country. Their sheep graze on a quarter of the continent and produce 80 percent of the world's apparel wool.

According to Langtry, wool represented 12 to 15 percent of fiber used in apparel and hosiery. Today, that figure is 3 to 5 percent. But with research and development of new wool fibers, he is optimistic that market share will again show significant growth.

Research has shown that consumers want sustainable performance products, he observed. They want the benefits of properties, such as the extra stretch that enhance the swing of golfers.

Finally, Langtry said the AWI campaign will include rebuilding relationships with retailers. That is critical to covering all the bases of the supply chain, he said. ■

Homecoming Preview

A display promoting the Center for Emerging Manufacturing Solutions (CEMS) attracted public officials attending the official opening of the N.C. Center for Engineering Technologies in Hickory N.C. CEMS will occupy 25,000 square feet in the facility, giving the Hosiery Technology Center expanded capabilities for its testing services, research and development laboratories, and marketing support programs. **From left** are Dan St. Louis, manager of the Hosiery Technology Center, Randy Duncan, HTC technician, Tony Whitener, HTC services coordinator, and Rodney Sigmon, HTC technician. St. Louis also will direct CEMS which will provide outreach services to traditional industries in North Carolina, including furniture, plastics, and foodservice. **T**



2009 Hosiery 101/102 Class Schedule

MARCH

- Wednesday, March 4 – Hosiery 101
- Thursday, March 5 – Hosiery 102

MAY

- Wednesday, May 13 – Hosiery 101
- Thursday, May 14 – Hosiery 102

SEPTEMBER

- Wednesday, September 9 – Hosiery 101
- Thursday, September 10 – Hosiery 102

NOVEMBER

- Wednesday, November 11 – Hosiery 101
- Thursday, November 12 – Hosiery 102

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Where They Stand On Trade Issues

Recent trends suggest the flat world is dealing with a few surprise mountains, with regard to global trade. Energy, value-added taxes imposed by some countries, unstable political regimes all are prompting some re-thinking by policy-makers.

Presidential candidates John McCain and Barack Obama also are prompting the business community to consider the free trade environment. Here's where they stand:



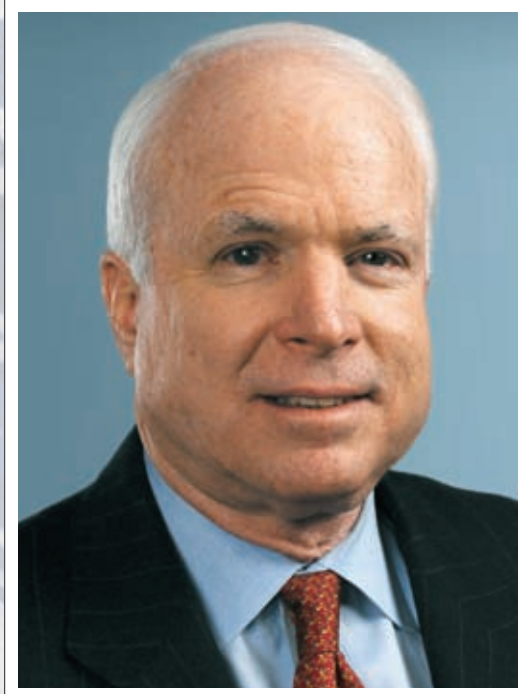
Obama

Key Positions

- Use trade as a vehicle for requiring foreign countries to improve worker treatment and labor practices in exchange for exporting goods to this country on favorable terms.
- Press the World Trade Organization (WTO) to enforce global trade rules that protect the U.S. economy from subsidized competition and unfair practices overseas.
- Expand assistance to help educate and retrain workers subject to low-cost competition from overseas.
- Revise NAFTA.
- Urge China to increase the value of its currency against the dollar as a way to help U.S. companies compete with low-cost imports from China.
- The Cato Institute, a Washington think tank, reports Obama has a mixed record on trade issues. He has opposed trade barriers 36 percent of his votes but was not a Senator when NATO was ratified in 1993.

Quote:

"I believe in free trade. But we have to acknowledge that for millions of Americans, its burdens have outweighed the benefits."



McCain

Key Positions

- End tariffs on most agricultural imports and slash federal subsidies for farmers, in exchange for expanding overseas markets for U.S. farm products.
- Press to ratify trade agreements with Colombia and South Korea, currently stalled in the U.S. Senate.
- Expand assistance to help educate and retrain workers subject to low-cost competition from abroad.
- Reduce corporate tax rates, which he claims create disadvantages for U.S.-based companies in the global marketplace.
- Opposes attaching environmental benchmarks or human rights standards to trade agreements.
- In 22 years in the Senate, McCain has a solidly pro-trade record, according to the Cato Institute. He has opposed trade barriers 88 percent of the time and voted in favor of NAFTA.

Quote:

"It sounds like a lot of fun to bash China and others, but free trade has been the engine of our economy."

Moore Joins Hohenstein Institutes As U.S. Projects Manager

Greensboro, NC – Hohenstein Institutes, the internationally recognized textile testing and research center, has announced that Samuel B. Moore will join the company as the Projects Manager for the United States market. Hohenstein Institutes is a founding member of the International Oeko-Tex Association which grants the Oeko-Tex Standard 100 Certification, an international certification process that ensures textile products are tested for harmful levels of more than 100 chemicals known to be detrimental to human health. Moore will work with Dr. Manfred Wentz, U. S. Director for Oeko-Tex, who has been responsible for the eco-label's success in the U. S. to date.

"U.S. demand for Oeko-Tex certified textile products is growing quickly among consumers and retailers," says Dr. Stefan Mecheels, Hohenstein Institute's director. "We are pleased that Sam is now in place to provide U. S. companies with additional on-site support for their Oeko-Tex certification applications as well as for other types of testing and certification that our company provides."

"Sam's expertise will be invaluable as we roll out new Oeko-Tex certification programs with major retailers and manufacturers in the upcoming months," says Dr. Manfred Wentz.

Moore brings 28 years of technical experience to his new position with Hohenstein Institutes. He previously served as an executive with Burlington Chemical Company and as

CEO of Burlington Research, Inc., an environmental consulting firm. Moore has been an active proponent of green textiles and textile processes throughout his career. He has served on various

(continued on page 13)



Samuel B. Moore



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The Hosiery Technology Center at the new Center for Emerging Manufacturing Solutions (CEMS) is supporting companies

with research and development, testing and sourcing, marketing and sales. From production to retailing, the center is engaged in supply chain services. That includes training and lean manufacturing strategies.

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Yow Joins ILG Management Team

Denise Yow has joined International Legwear Group Inc. as vice president of merchandising, according to Kathy Willis, president.

Yow is a professional with longtime ties to the hosiery industry and its retailer community. She began her career with Kayser-Roth Hosiery Co. where she worked as a designer and merchandising specialist. She also was employed at Ellis Hosiery Mills which was acquired by ILG and more recently at GoldToe/Moretz.



Denise Yow

Yow served as president of the Carolina Hosiery Association and was among industry leaders who supported the creation of the successful testing services at the Hosiery Technology Center. She also led the marketing activities of the CHA for several years. ■

Moore Joins Hohenstein Institutes

.....from page 11

industry boards and environmental task forces and has taught sustainable enterprise at several universities.

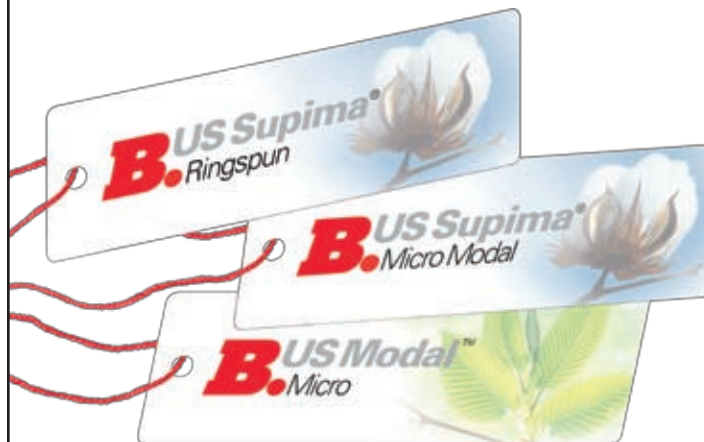
"I am excited to be working with Hohenstein Institutes and the International Oeko-Tex Association to help manufacturers produce textile products that are better for consumers and better for the environment," says Moore. "In my new position, I will help manufacturers in the U. S. ensure that the U. S. textile products market is as safe and environmentally responsible as it can be."

Moore will be headquartered in Elon, North Carolina. He will be attending Outdoor Retailer Summer Market to meet with manufacturers, retailers, and media representatives.

About Oeko-Tex

The International Oeko-Tex Association, headquartered in Zurich, Switzerland, was founded in 1992 by the Austrian Textile Research Institute and the German Hohenstein Research Institutes. Currently, its membership includes 14 independent textile research and testing institutes with offices in over 40 countries. To date, more than 60,000 certificates have been issued and 8,000 companies in 84 countries are working with Oeko-Tex to ensure that their products are tested for potentially harmful substances. For more information, visit the website at Oeko-Tex.com. ■

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US Modal Micro An incredible softness with a cool hand feel, the ability for deep color intake and an outstanding drapeability are characteristics that make textiles from this yarn an incomparable experience. Micro Modal, a cellulose fiber formed from beech wood, is very gentle and soothing to the skin.



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Industry Briefs

Implus Footcare Expands Operations

Implus Footcare, a manufacturer and distributor of socks, sheer hosiery, shoelaces and other foot-related products, is moving its operations to Durham, NC. Previously it was located in nearby Raleigh.

Implus announced it has signed a 10-year lease for a 262,940 square foot headquarters and distribution center near the Research Triangle Park on T.W. Alexander Drive.

Implus products are sold under several brand names, including Sof Sole, Sof Comfort, Airplus and apara. Within the past two years it created a hosiery division.

Implus is owned by AEA Investors of New York. Its revenue in 2007 was \$74 million. The company now employs 130, according to President Todd Vore.



Nilit Aquarius Featured In Nux Seamless Activewear

Nux, a new brand of seamless women's activewear, will feature Nilit's Aquarius nylon 6.6, according to Lourdes Lozano, Nux sales manager.

"We are pleased that Nux selected our Nilit Aquarius yarn for this beautiful, seamless performancewear for women," said Molly Kremidas, U.S. marketing director. She said the Nilit yarn was created to provide permanent, superior moisture management, especially in seamless fabrications for activewear, bodywear and intimate apparel.

Referring to the sustainability trend, Lozano said Nilit's moisture management mechanism is built into the yarn itself so they could avoid using chemical finishes which athletic purists may resist.



Wool Marketer Endorses SmartSilver Applications

NanoHorizons Inc., producer of SmartSilver additives for textile and medical industries, has received a nod of approval by the Australian Wool Innovation (AWI).

AWI has identified SmartSilver as one of the best choices for guarding wool fabrics against microbes that cause odor.

The nanotechnology behind SmartSilver protects allows it to bond permanently to fibers so it never wears off or washes out and lasts the life of the product. The nanoscale size also permits SmartSilver protection to work without compromising other features for Merino wool, including easy care, softeners and moisture management, it was reported.



Lineberger New President At GoldToeMoretz; Williams Retires

Stephen Lineberger, a former Hanesbrands executive, has been named president of GoldToeMoretz, filling a position previously held by longtime Gold Toe executive Jim Williams.

Williams, who headed up the Burlington-based Gold Toe organization prior to the merger with Moretz, has announced his retirement at the end of 2008.

Lineberger held various positions during his tenure with Hanesbrands Inc./Sara Lee Apparel, including president and CEO of the Sara Lee Underwear and Sara Lee Sock Divisions.

John Moretz, CEO and chairman, said Lineberger is a proven business leader with the credentials and experience to lead the GoldToeMoretz management team. Moretz said he will "accelerate our growth and improve the efficiency of our fulfillment organization. ■

TRENDS

Legwear Fashions Textiles



OCTOBER 2008

RETAILING: Is it true that Chinese consumers want products with a made-in-the-USA label? Are global retailers a market for U.S. manufacturers? How much business is going to online marketers? What is solidifying relations with U.S. retailers? Brands? Features and news stories cover trends. Holiday shipments are included.

NOVEMBER 2008

TECHNOLOGY CENTERS AND THEIR MISSIONS: The technology centers in Hickory, Asheboro and Belmont, North Carolina, have adjusted to the changing needs of their clients – the manufacturers. Research and development and prototyping of new products remain priorities, along with market support. Roles also have encompassed other industries that interface with textiles and hosiery.

DECEMBER 2008

NEW LEADERSHIP: The 2008 elections have brought changes to U.S. government and the halls in state legislatures. We will profile some of the new faces and offer some insight into the issues they will embrace that could affect manufacturers. Universal health insurance could be one. More doors open for organized labor could be another.

2009 Editorial Calendar

JANUARY

Brave New World For U.S. Producers. What's on the horizon for the supply chain. How manufacturers are capitalizing on innovations from fiber and yarn producers. Opportunities in retail as consumers evaluate green preferences.

FEBRUARY

Spring fashions. Colors and trends in product design. Pre-MAGIC coverage. Highlights of Outdoor Retailer Winter Market for manufacturers of sports socks and seamless apparel.

MARCH

The sustainability movement gains momentum. Organic fibers and yarn blends and how manufacturers are promoting recycled materials. What are retailers looking for in earth-friendly products?

APRIL

Nanotechnology is making inroads in hosiery and apparel manufacturing, especially healthcare products. We look at opportunities and research and development in this arena. Marketing around Earth Month is analyzed. Hosiery and Textiles Day at the North Carolina legislature is in focus.

MAY

Preview of fall fashion trends. Retailers and manufacturers are asked to look ahead.

JUNE

Sporting socks and apparel are a mainstay for U.S. manufacturers. With the Outdoor Retailer Show on the horizon, we look at trends.

JULY

Government contracts for the U.S. military have been important and the U.S. wants more companies to bid on contracts. The opportunities and the hurdles for domestic manufacturers will be cited. An update on the Berry Amendment that is supposed to give preferences to U.S. producers.

AUGUST

Marketing trends for textiles and hosiery supply chain. This entails steps to improve efficiency and deliveries and promoting new technologies in yarns and fibers.

SEPTEMBER

Coverage of the biannual MAGIC Show. Hosiery and Textile Technology Centers will analyze R&D activities. Yarn and fibers companies will be invited to report on developments adding value to their products. Holiday promotions will be evaluated.

OCTOBER

Ten months after a new administration takes over in Washington, we report on shifts in globalization. Is China still dominating global manufacturing or is the shift to the Caribbean and South America gaining traction. How is the supply chain responding?

NOVEMBER

Women hosiery fashions – sheer and socks – continue to be important to domestic manufacturing. How has technology changed this segment?

DECEMBER

Healthcare products represent the fastest growing segment in some textiles and hosiery companies. The aging of America's population and more sophisticated healthcare services are fueling this trend. The technology centers are helping companies integrate technologies into this market.

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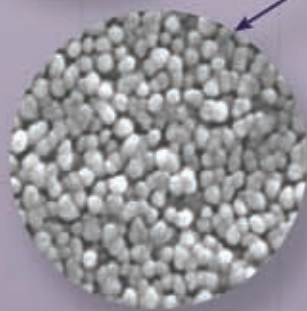
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