



MILITARY TEXTILES: MAKING STRIDES

*NOVEMBER 10, 2009
PRESENTED BY SALLY KAY
THA PRESIDENT & CEO*

WHO WE ARE

- Founded in 1905, The Hosiery Association (THA) is the trade association and leading advocate for quality legwear manufacturers (socks, pantyhose, tights, leggings, medical, and compression products) their suppliers and resource partners.
- With a united, global and diverse membership, the industry employs approximately 40,000 people across 21 states as well as various countries.
- In 2008 the US industry generated over \$6.3 billion dollars in retail sales.

PUMP'D

TOTALLY

THE
HOSIERY
Association

RELEVANT - VALUABLE - EFFECTIVE

MEMBER BENEFITS

- Member Only Access Section of Our Website
- Monthly Conference Calls with Sandler Travis and Rosenberg on Legislative/Regulatory Issues
- 15% Discount on Sandler Travis Consulting Services
- Discounts on Sock Sizing Forms
- Direct Access to Hosiery Technology Center
- Listing on THA website
- Posting of Marketing/Press Materials on THA Website
- Networking
- Educational Webinars
- Annual Global Conference & Convention
- Retailer Referrals

- Economy
- Government Relations
- Consumer Insights

ECONOMY



GOVERNMENT RELATIONS

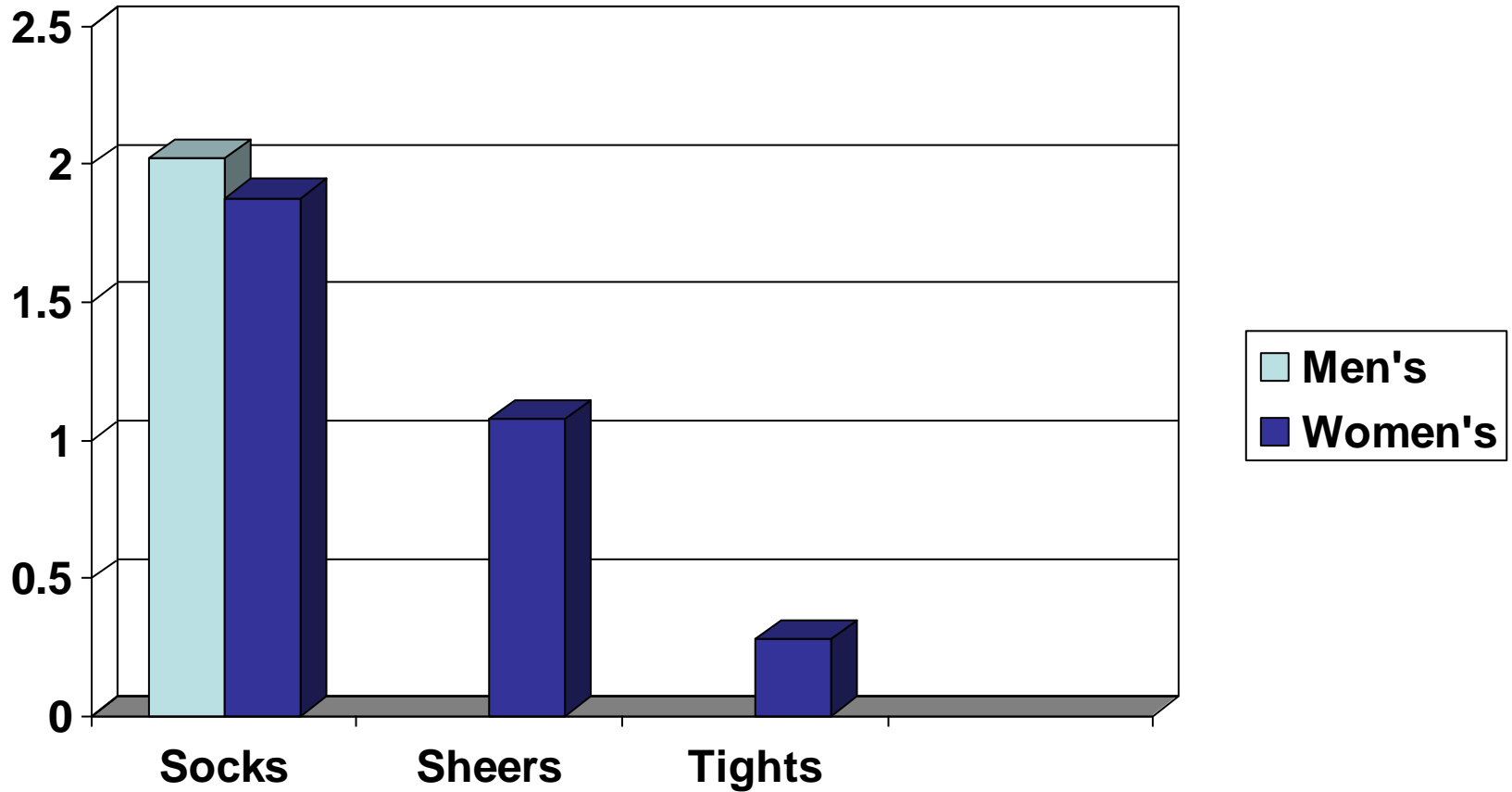


- Consumer Product Safety Improvement Act (CPSIA)
- Lacey Act Amendment
- Restricted Substances List (RSL)

CONSUMER INSIGHTS

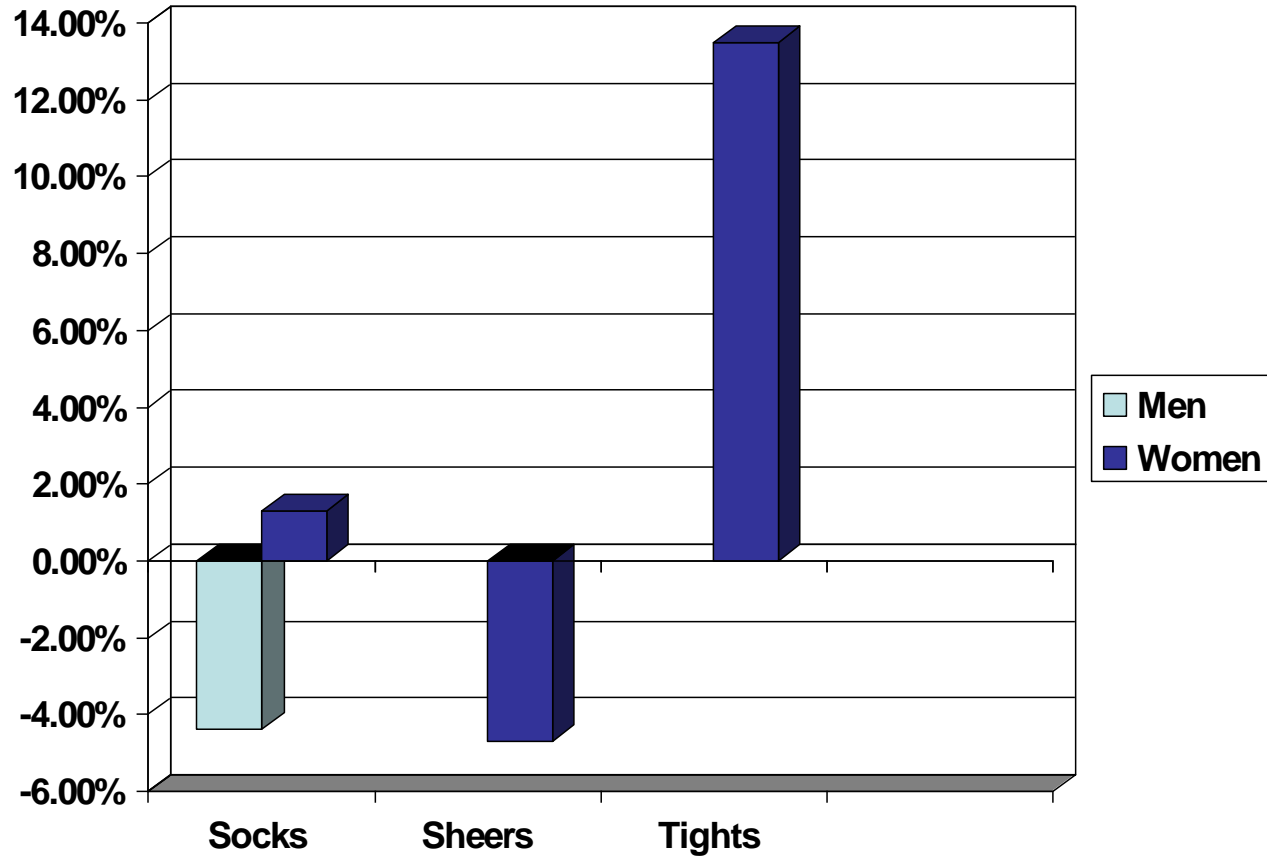


TOTAL RETAIL SALES*



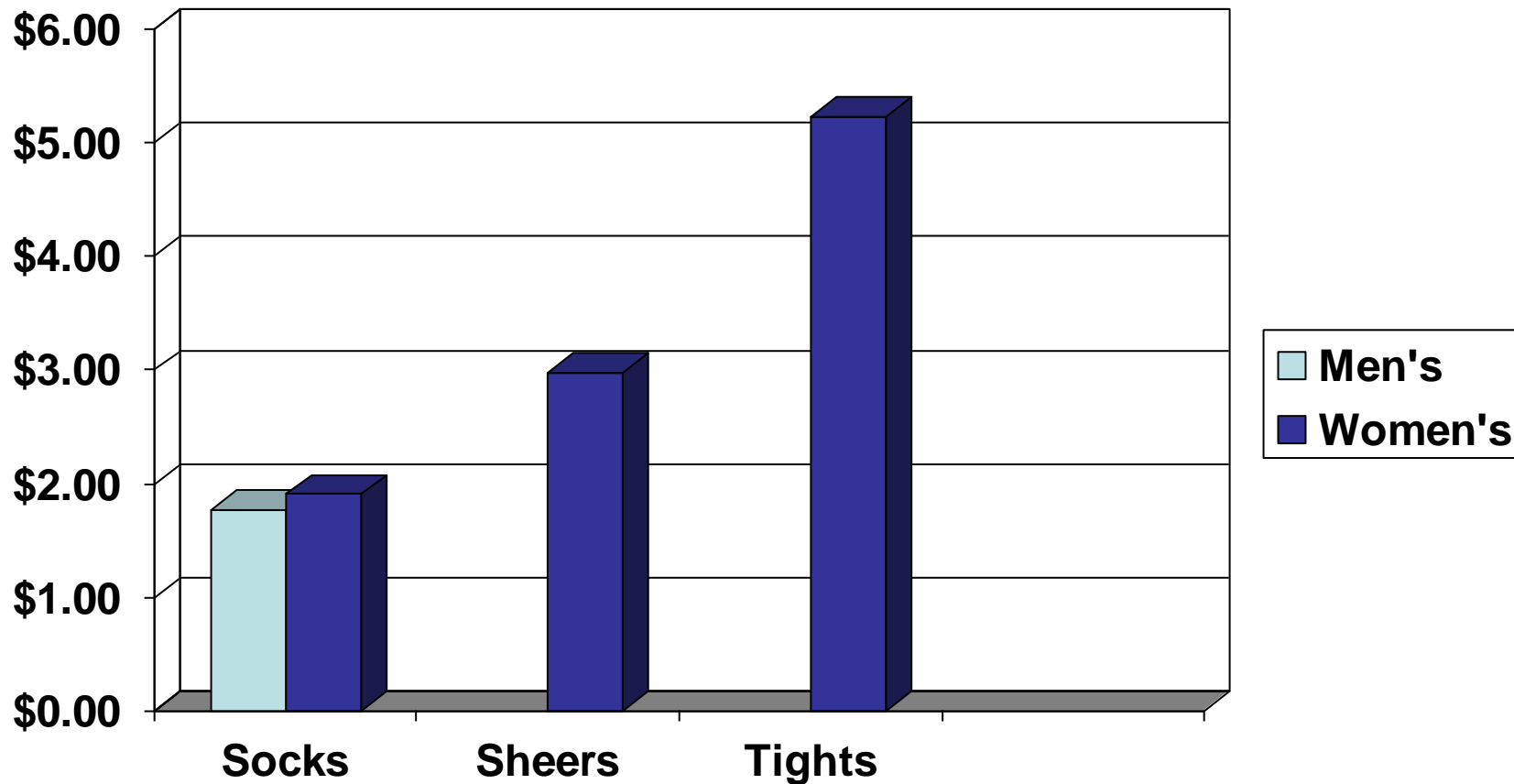
*NPD Group

COMPARED TO 2008 SALES*



*NPD Group

PRODUCT PRICING*



*NPD Group

MILITARY MOVIE TRIVIA

The main advice Forrest Gump receives from Lieutenant Dan is to keep his feet clean and dry and to change his socks often.



HISTORICAL HIGHLIGHTS

- 1940 – 40,000,000 pairs of wool socks
–25,000,000 pairs of cotton socks
- 1990 – Guncovers for Operation Desert Storm
- 2008 - Operation Team Cody-”No Cold Feet”

NOCOLDFEETTM
MAKING STRIDES IN TRANSFORMING LIVES

CURRENT BUSINESS ENVIRONMENT

- 32 million dollars of socks purchased this year thus far
- Some companies include Thor-lo, Fox River Mills, Robinson Hosiery, Special T Hosiery, Pickett Hosiery, Graham Dyeing and Finishing, Wigwam Mills

“ Supplying to the military is in our company’s DNA. We made a corporate decision to operate on less of a margin and give the best pricing possible. We are committed to the military.”

Jim Jessor, Thor-Ios®

- Retail Examples
 - Army & Airforce Exchange Service (AAES)
 - Department of Defense (DOD)
 - Navy Exchange Service Command (NEXCOM)
 - Marine Corps Exchange (MCEX)
- Bid Process

- Raw Material Scarcity
 - yarns and fibers
- Berry Amendment
 - Country of origin, i.e. Japan and France vs Germany?
- Kissell Act
 - Spirit is good, but logistically complex
 - Mixed Views



- Knit Construction – cushioning
- Yarns & Fibers
- Moisture Management
- Antimicrobial Agents
- EPA compliant



CONCLUDING REMARKS

- Legwear remains a healthy segment within the US textile industry.
- Contract work is vitally important to US hosiery industry.
- Important for government agencies to work closely with industry to make educated decisions on regulations.

QUESTIONS?

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