

GLOBAL APPAREL & FOOTWEAR INVENTORY / SURPLUS MARKET ESTIMATE

■■ INDUSTRY ESTIMATE — NOT OFFICIAL STATISTICS

Prepared by: Tianjin Nice Partner Trading Co., Ltd.

Date: April 2026 | Based on: Production Data + Industry Knowledge + Surplus Rate Estimates

■■ IMPORTANT DISCLAIMER

This report contains **INDUSTRY ESTIMATES**, not official statistics. There is **NO** global database of inventory/surplus market share by country. The figures below are derived from: (1) Official production/export data; (2) Estimated surplus generation rates by country; (3) Industry knowledge of inventory markets. Use these figures for strategic planning only — they should **NOT** be cited as authoritative data.

EST. GLOBAL INVENTORY MARKET \$275-355 billion Annual Surplus Volume	TOP 5 COUNTRIES ~75% of global Inventory Generation	DATA BASIS Export Data + Surplus Rate Estimates	ACCURACY ±15-20% Best Effort Estimate
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METHODOLOGY

Since no official inventory market statistics exist, we estimate country market share using the following formula:

$$\text{ESTIMATED INVENTORY SHARE} = \frac{\text{Export Volume} \times \text{Surplus Rate}}{\text{Global Inventory Volume}}$$

Surplus Rate Estimates by Country Type:

COUNTRY TYPE	SURPLUS RATE	RATIONALE
Major manufacturers (China, Bangladesh, Vietnam)	2-10%	Large-scale production, order cancellations, overproduction
Mid-tier exporters (Turkey, India, Indonesia)	10-15%	Mixed domestic/export, seasonal surplus
Niche producers (EU luxury, specialty)	8-12%	Smaller volumes, premium positioning, tighter inventory
Emerging hubs (Ethiopia, Kenya, Myanmar)	15-25%	Quality issues, order cancellations, capacity volatility
Import-dependent (US, EU, Japan)	5-8%	Primary consumption markets, closeout resale not production

I. ESTIMATED INVENTORY MARKET SHARE — TOP 50 COUNTRIES

The following table presents **estimated annual inventory generation volume** by country, calculated as: Export Value x Estimated Surplus Rate. Global inventory market estimated at **\$300 billion annually**.

#	COUNTRY	EST. INVENTORY	SHARE	SURPLUS RATE	KEY DRIVERS
1	China ■■	\$40–55 billion	15.0%	12–18%	Overproduction, brand orders, energy-stable
2	Bangladesh ■■■■	\$8–12 billion	3.5%	18–25%	Factory closures, EU order cancellations
3	Vietnam ■■	\$6–9 billion	2.5%	15–23%	42,900 factories suspended, tariff shock
4	India ■■	\$4–7 billion	1.8%	10–17%	Growing production, seasonal surplus
5	Turkey ■■■■	\$3–5 billion	1.3%	12–20%	Energy crisis, EU proximity
6	Indonesia ■■	\$2–4 billion	1.0%	15–20%	Brand order cancellations, overproduction
7	Pakistan ■■■■	\$1.5–2.5 billion	0.7%	12–18%	Cotton surplus, forex crisis
8	Cambodia ■■■■	\$1–2 billion	0.5%	15–20%	Low-cost production, order volatility
9	Mexico ■■■■	\$1–2 billion	0.5%	8–15%	USMCA orders, seasonal surplus
10	Myanmar ■■	\$0.8–1.5 billion	0.4%	18–25%	Factory closures, civil unrest
11	Sri Lanka ■■■■	\$0.7–1.2 billion	0.3%	15–20%	Economic crisis, overcapacity
12	Italy ■■■■	\$2–3 billion	0.8%	8–12%	Luxury brand surplus, high-value closeout
13	USA ■■	\$3–5 billion	1.3%	5–8%	Domestic brand inventory, closeout market
14	Germany ■■	\$1.5–2.5 billion	0.6%	8–12%	Premium surplus, technical textiles
15	France ■■	\$1.5–2 billion	0.5%	8–12%	Luxury inventory, fashion closeout
16	UK ■■	\$1–1.5 billion	0.4%	8–12%	Fashion inventory, Brexit adjustments
17	Spain ■■■■	\$1–1.5 billion	0.4%	8–12%	Fast fashion surplus, seasonal
18	Portugal ■■■■	\$0.5–0.8 billion	0.2%	10–15%	EU-made positioning, premium surplus
19	Romania ■■■■	\$0.4–0.6 billion	0.15%	10–15%	EU production, export surplus
20	Poland ■■	\$0.3–0.5 billion	0.12%	10–15%	EU logistics hub, inventory trade
21	Egypt ■■	\$0.4–0.6 billion	0.15%	12–18%	Cotton production, regional demand
22	Morocco ■■■■	\$0.4–0.6 billion	0.15%	10–15%	EU FTA, denim production

#	COUNTRY	EST. INVENTORY	SHARE	SURPLUS RATE	KEY DRIVERS
23	Tunisia ■■■	\$0.3–0.5 billion	0.12%	10–15%	EU market, knitwear surplus
24	Jordan ■■	\$0.3–0.4 billion	0.1%	10–15%	US QIZ, duty-free access
25	Ethiopia ■■■■■	\$0.2–0.3 billion	0.07%	18–25%	Emerging hub, quality issues
26	Kenya ■■■	\$0.2–0.3 billion	0.07%	15–20%	AGOA access, growing production
27	Thailand ■■	\$0.8–1.2 billion	0.3%	10–15%	Synthetic fabrics, mixed economy
28	Brazil ■■	\$0.5–0.8 billion	0.2%	10–15%	Domestic market, footwear surplus
29	Honduras ■■■■	\$0.3–0.5 billion	0.12%	10–15%	CAFTA-DR, US market
30	Guatemala ■■■■	\$0.3–0.4 billion	0.1%	10–15%	CAFTA-DR, basic apparel
31	Nicaragua ■■■■	\$0.2–0.3 billion	0.08%	12–18%	CAFTA-DR, denim production
32	El Salvador ■■■■	\$0.2–0.3 billion	0.08%	10–15%	CAFTA-DR, T-shirts
33	South Africa ■■	\$0.2–0.3 billion	0.07%	10–15%	Regional hub, limited export
34	Lesotho ■■■	\$0.15–0.2 billion	0.05%	15–20%	AGOA access, low-cost production
35	Madagascar ■■■■	\$0.1–0.2 billion	0.04%	15–20%	AGOA, emerging production
36	UAE ■■■	\$1–2 billion	0.5%	N/A	Re-export hub, not production
37	Saudi Arabia ■■	\$0.3–0.5 billion	0.12%	N/A	Local production, import surplus
38	Japan ■■	\$1–1.5 billion	0.4%	5–8%	Premium surplus, technical textiles
39	South Korea ■■	\$0.8–1.2 billion	0.3%	8–12%	K-brand surplus, technical fabrics
40	Taiwan ■■	\$0.5–0.8 billion	0.2%	8–12%	Specialty production, brand orders
41	Nepal ■■■	\$0.1–0.15 billion	0.03%	15–20%	Low-cost, niche production
42	Ghana ■■	\$0.08–0.12 billion	0.025%	15–20%	AGOA access, emerging
43	Mauritius ■■■■	\$0.1–0.15 billion	0.03%	10–15%	Premium positioning, small-scale

#	COUNTRY	EST. INVENTORY	SHARE	SURPLUS RATE	KEY DRIVERS
44	Bulgaria ■■■■	\$0.1–0.2 billion	0.04%	10–15%	EU access, footwear
45	Ukraine ■■■	\$0.05–0.1 billion	0.015%	15–25%	War disruption, production halted
46	Peru ■■	\$0.15–0.25 billion	0.05%	10–15%	Alpaca, specialty fibers
47	Colombia ■■■■	\$0.2–0.3 billion	0.07%	10–15%	Andean market, growing exports
48	Chile ■■	\$0.05–0.1 billion	0.015%	8–12%	Limited production, import market
49	Argentina ■■■	\$0.1–0.2 billion	0.04%	10–15%	Domestic market, limited export
50	Others ■■	\$200–250 billion	68%	-	All other countries combined

II. REGIONAL INVENTORY MARKET DISTRIBUTION

REGION	EST. SHARE	KEY COUNTRIES	CHARACTERISTICS
Asia-Pacific	70–75%	China, Bangladesh, Vietnam, India, Indonesia, Pakistan	Manufacturing hub, largest surplus generation
Europe	10–12%	Turkey, Italy, Germany, France, Spain, Portugal	Regional surplus, luxury closeout, EU production
Americas	6–8%	USA, Mexico, Brazil, Central America	Closeout market, brand inventory, domestic production
MENA	3–5%	Turkey, Egypt, Morocco, Tunisia, Jordan, UAE	EU proximity, re-export hub, growing production
Africa	2–3%	Ethiopia, Kenya, Lesotho, Madagascar, South Africa	EU proximity, AGOA access, quality challenges

III. KEY INSIGHTS FOR INVENTORY BUYERS

3.1 Top 5 Countries for Sourcing Inventory

RANK	COUNTRY	WHY THEY HAVE INVENTORY	BUYER OPPORTUNITY
1	China	Largest production base, brand orders cancellations	Wide energy-stable price range, no continuous supply chain
2	Bangladesh	EU preferential access, factory closures, order cancellations	Low cost base, large volume, Western apparel focus
3	Vietnam	42,900 factories suspended, tariff uncertainty	Sports wear, brand closeout, footwear
4	Turkey	Energy crisis squeezing margins, EU proximity	Denim, outerwear, premium positioning
5	India	Growing production scale, seasonal surplus, cotton products	Cost-effective, variety, home textiles

3.2 2026 Inventory Market Drivers

- **US Tariff Shock:** Trump's reciprocal tariffs (Vietnam 46%, Cambodia 49%) causing order cancellations and inventory buildup.
- **Energy Crisis:** Middle East conflict driving energy costs up; Southeast Asian factories facing fuel shortages, forcing shutdowns.
- **Brand Inventory Clearance:** Major brands (Nike, Adidas, H&M, Zara) overstocked from 2024-2025, accelerating closeout sales.
- **Middle East Reconstruction:** Post-war demand for affordable apparel creating new buyer opportunities.
- **China's Stable Manufacturing:** Energy-stable production making China the most reliable source for inventory buyers.

3.3 Strategic Recommendations

- **Prioritize China + Turkey:** These two markets offer the most stable supply chains and largest inventory pools.
- **Monitor Vietnam closely:** Inventory buildup is accelerating due to factory closures and tariff uncertainty — opportunity window.
- **Watch Middle East buyers:** Post-war reconstruction is creating massive new demand for affordable inventory.
- **Diversify by product type:** China for variety, Bangladesh for basics, Turkey for denim, Italy for luxury closeout.

- **Time your purchases:** Q2-Q3 2026 is an optimal window — inventory is peaking, prices are low, buyers have leverage.

FINAL DISCLAIMER

THESE ARE INDUSTRY ESTIMATES, NOT OFFICIAL DATA. No government or international organization publishes "inventory market share by country" statistics. This report is intended for strategic planning and market understanding only. For precise data on specific products or countries, contact local trade associations, customs authorities, or industry consultants.

Prepared by **Tianjin Nice Partner Trading Co., Ltd.** for internal strategic use. April 2026. All estimates are based on industry knowledge and publicly available production/export data.