More Bang in the Bag

By Jennifer Marks

There wasn't a lot of movement in sheets last year on the top line — but that belies what's going on inside the bag.

Price points may be stagnant, but qualities are improving. Pure play sites, which continue to come out of the woodwork, are influencing consumer expectations about quality. And finally, thread count is moving to the back burner as a purchasing trigger. (For more on thread counts, see p. 20.)

"The challenge is price. The cotton price has had its ups and downs and the currency has also fluctuated a lot, but prices are not moving upward," said Shanthi Shrinivasan, managing director, Premier Mills. "A lot of supply has been created and this is a challenge as well. Innovation is the key in the sheeting business to stay ahead of the competition."

Hua Fang USA's customers identify their top performance priority in sheets as easy care, followed by washed/casual constructions and moisture control, according to Michael Liu, president. "The stand-alone business is still driven by solid color, but we've seen prints increasing a little," he said. "Prints are getting more dramatic in terms of color."

Amrapur Overseas supplies microfiber, all-cotton and blended sheets. Dawn Rochelle Fields, vice president of design and product development, said the company has recently seen a jump in requests for printed microfiber.

"Much of the ask was for novelty designs and fun prints — the more unique the better, with an eye on well-known trends being in the forefront," she said. "There are still a few that want the classic plaids and stripes, but the novelties are the most important."

WestPoint Home president and CEO Normand Savaria said the market is being pulled in two directions: opening price point on the one hand "and then toward making a better product and marketing it right. That's how all these disruptors [pure plays] are gaining attention," he said.

More people are talking about recycled polyester, which has become more economical, he said. "The story that's getting bigger is organic."

Organic remains very important for Welspun, said Nancy Golden, senior vice president of marketing. "The conversation is around non GMO and GMO cotton, [genetically modified]" she said. "A non-GMO seed is a cleaner seed, truer to organic."

The renewed interest in organic is also spurring more interest in BCI (Better Cotton Initiative) fibers, which hadn't been on U.S. retailers' radar until recently.

"When I joined the company four years ago, BCI was all over Europe. I had some Canadian retailers asking about it, but not a word from U.S. buyers," said Jeffrey Kambak, CEO of Trident's U.S. operations. "Now we are having a lot of great conversations about BCI." **HTT**

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Shanthi Shrinivasan
Managing director
Premier Mills

SHEETS

Distribution Channels

2017 total retail sales: $2,933 million flat from $2,933 million in 2016

	2017	2016	% CHANGE
Discount department stores/supercenters	$1,323	$1,317	0.5%
Specialty stores	$1,071	$1,072	0.0%
Department stores	$280	$298	-6.2%
Direct-to-consumer	$226	$213	6.0%
Other	$51	$51	0.0%
Warehouse clubs	$41	$41	0.0%
Total	$2,993.0	$2,993.0	0.0%

Source: PBM Strategic Insights, 2018 Home Textiles Today study
All figures are estimates and are rounded.

SHEETS

$2.99B Total Sheets Sales in 2017

$28.6B 2017 Home Textiles Universe

Up 1.8%

$28.1B 2016 Home Textiles Universe

About the Numbers

Home Textile Today's Sheets Database report reveals 2017 and 2016 market share product data through key distribution channels. All retail sales figures are estimates and are for the U.S. only. All figures are rounded.

DISTRIBUTION CHANNELS

Department stores are full-line operations carrying a variety of merchandise, including national and regional stores. Examples include Macy's, JCPenney, Bloomingdale's, Sears, Belk, Dillard's, Kohl's and The Bon-Ton Stores.

Direct-to-consumer includes retailers with primary distribution through the Internet, catalogs, television and/or home parties. Examples include Amazon, Brylane-Home, Cornerstone Brands, Hanover Direct, HSN, Lands' End and Overstock.com, among others.

Discount department stores/supercenters include discount, off-price and dollar stores, such as Walmart, Target, Kmart, T.J. Maxx/Marshalls, Ross Stores, Big Lots, Tuesday Morning, Shopko, Family Dollar and Dollar General.

Specialty stores include retailers that specialize in textiles, as well as stores that carry textiles at full price and may or may not carry housewares, small appliances, gourmet foods, apparel, jewelry and personal care items. Examples include Bed Bath & Beyond, Ikea, Home Goods, Pier 1 Imports, Restoration Hardware and Crate & Barrel.

Other includes gift and home accent specialty stores, furniture stores, home improvement centers, military exchanges and designers, among others.

Warehouse clubs include Costco, Sam's Club, BJ's Wholesale and local and regional warehouse clubs.