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Apparel: United States

August 2019



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About This Report

Scope

This report forecasts to 2023 US apparel demand and shipments in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- tops
- bottoms
- intimates and sleepwear
- coats, jackets, and suits
- accessories
- dresses
- infants
- other apparel such as overalls, swimwear, and tracksuits

Total demand is also segmented by demographic as follows:

- women's and girls'
- men's and boys'

To illustrate historical trends, total demand, total shipments, the various segments, and trade are provided in annual series from 2008 to 2018.

Non-fabric or non-apparel accessories such as eyewear, footwear, handbags, jewelry, luggage, purses, and watches are excluded from the scope of this report. Single-use disposable apparel is also excluded. Re-exports of apparel are excluded from demand and trade figures.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Apparel: United States (FF15010) represents the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations
- licensed national consumer survey data

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- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 11 | NAICS & SIC Codes Related to Apparel

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
315110	Hosiery and Sock Mills	225	Knitting Mills
315190	Other Apparel Knitting Mills	231	Men's and Boys' Suits, Coats, and Overcoats
315210	Cut and Sew Apparel Contractors	232	Men's and Boys' Furnishings, Work Clothing, and Allied Garments
315220	Men's and Boy's Cut and Sew Apparel Manufacturing	233	Women's, Misses', and Juniors' Outerwear
315240	Women's, Girls', and Infants' Cut and Sew Apparel Manufacturing	234	Women's, Misses', Children's, and Infants' Undergarments
315280	Other Cut and Sew Apparel Manufacturing	235	Hats, Caps, and Millinery
315990	Apparel Accessories and Other Apparel Manufacturing	236	Girls', Children's and Infants' Outerwear
		237	Fur Goods
		238	Miscellaneous Apparel and Accessories
		315	Leather Gloves and Mittens

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both

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top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Freedonia Industry Studies

Coated Fabrics

Global E-Commerce

Global Nonwovens

Freedonia Focus Reports

Athletic Footwear: United States

Contacts, Glasses, & Sunglasses: United States

E-Commerce: United States

Footwear: United States

Leather & Fur Products: United States

Men's Clothing: United States

Repair Services: United States

Sports Equipment: United States

Women's Clothing: United States

Freedonia Custom Research

Trade Publications

Accessories Magazine

Apparel Insiders

Apparel Magazine

California Apparel News

Chain Store Age

Wearables

Women's Wear Daily

Agencies & Associations

American Apparel & Footwear Association

American Association of Textile Chemists and Colorists

American Fiber Manufacturers Association

Americas Apparel Producers' Network

National Retail Federation

Retail Industry Leaders Association

United States Department of Commerce

Office of Textiles and Apparel

United States Census Bureau

United States International Trade Commission