



Freedonia Focus Reports
US Collection

Women's Clothing: United States

August 2019



CLICK TO ORDER
FULL REPORT **BROCHURE** CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	6
Trade	7
Retail Overview	10
Department Stores	11
Internet-Only Retailers	12
Mass Merchants	14
Off-Price Retailers	14
Specialty Stores	15
Other Retailers	15
Consumer Trends	17
3. Segmentation & Forecasts	19
Products	19
Tops	21
Bottoms	22
Intimates & Sleepwear	23
Dresses	24
Coats, Jackets, & Suits	25
Accessories	26
Other Clothing	27
4. Industry Structure	30
Industry Characteristics	30
Market Leaders	32
Amazon	32
Kohl's	32
The TJX Companies	33
5. About This Report	35
Scope	35
Sources	35
Industry Codes	36
Freedonia Methodology	36
Resources	38

List of Tables & Figures

Figure 1 Key Trends in US Women’s Clothing Demand, 2018 – 2023	3
Figure 2 US Women’s Clothing Demand Trends, 2008 – 2018	4
Table 1 Key Indicators for US Women’s Clothing Demand, 2008 – 2023 (US\$ bil)	6
Figure 3 US Women’s Clothing Imports, 2008 – 2018 (US\$ mil)	7
Table 2 US Women’s Clothing Imports, 2008 – 2018 (US\$ mil)	8
Figure 4 Survey: US Adult Population that Purchased Women’s Clothing in Last 12 Months by Type, 2018 (%)	17
Table 3 Survey: US Population Women’s Clothing Purchasing Habits by Demographic, 2019	18
Figure 5 US Women’s Clothing Demand by Product, 2008 – 2023 (US\$ bil)	19
Table 4 US Women’s Clothing Demand by Product, 2008 – 2023 (US\$ bil)	19
Figure 6 US Women’s Clothing Demand by Product Performance Index, 2008 – 2023 (2008=100)	20
Table 5 Intimate & Sleepwear Products	23
Figure 7 US Women’s Clothing Demand by Product, 2008 – 2023 (%)	28
Table 6 Leading Retailers to the US Women’s Clothing Market by Type	34
Table 7 NAICS & SIC Codes Related to Women’s Clothing	36

About This Report

Scope

This report forecasts to 2023 US women's clothing personal consumption expenditures (PCE) in nominal US dollars at the retail level. Total demand is segmented by product in terms of:

- tops
- bottoms
- intimates and sleepwear
- dresses
- coats, jackets, and suits
- accessories
- other clothing, such as jumpsuits, overalls, and tracksuits

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

For the purposes of this report, the term "PCE" is considered to be interchangeable with retail-level demand. Clothing for infants is excluded from the scope of this report. Re-exports of women's clothing 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

Women's Clothing: United States (FF15019) 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
- 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

About This Report

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

Industry Codes

Table 7 | NAICS & SIC Codes Related to Women's Clothing

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
448120	Women's Clothing Stores	5137	Women's, Children's, and Infants' Clothing and Accessories
448140	Family Clothing Stores	5311	Department Stores
448150	Clothing Accessories Stores	5399	Miscellaneous General Merchandise
448190	Other Clothing Stores	5621	Women's Clothing Stores
451110	Sporting Goods Stores	5632	Women's Accessory and Specialty Stores
452210	Department Stores	5651	Family Clothing Stores
452311	Warehouse Clubs and Supercenters	5699	Miscellaneous Apparel and Accessories
454110	Electronic Shopping and Mail-Order Houses	5941	Sporting Goods and Bicycle Shops
		5961	Catalog and Mail-order Houses

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 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

About This Report

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.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Freedonia Industry Studies

Clothes Washers & Dryers in the US

Coated Fabrics

Global Nonwovens

Retail E-Commerce Packaging Market in the US

Freedonia Focus Reports

Apparel: United States

Athletic Footwear: United States

E-Commerce: United States

Footwear: United States

Jewelry & Watches: United States

Leather & Fur Products: United States

Men's Clothing: United States

Repair Services: United States

Freedonia Custom Research

Trade Publications

Apparel Insiders

Apparel Magazine

California Apparel News

Chain Store Age

Retail Dive

Wearables.com

Women's Wear Daily

Agencies & Associations

American Apparel & Footwear Association

American Fiber Manufacturer's Association

National Retail Federation

United States Department of Commerce

Bureau of Economic Analysis

United States Census Bureau

Office of Textiles and Apparel

United States Department of Labor

Bureau of Labor Statistics

United States International Trade Commission