

Marketing Study on Apparel Market In USA



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USA market:

Overview on USA's economy with a review of the most important geographical, economic and demographic indicators.

The following table shows the most important geographical, economic and demographic indicators of USA:

Geographical Indicators	
Indicator	Value
Land Area	9 833 517 Km2
Location	Located in Northern America , bordered by Canada to the north and Mexico to the south.
Economic Indicators	
Indicator	Value
GDP	\$ 27,72 trillion (2025)
Annual growth of GDP (%)	2.9 % (2025)
GDP by Sector (2025)	Agriculture 1 %, Industry 18%, and Services and other activities 81%
Inflation rate	2,7 % (2025)
Unemployment rate	4.3 % (2025)
Total Exports	\$2,17 Trillion (2025)
Main Exported Commodities	oil and mineral fuels , Nuclear reactors, Electrical machinery, Aircraft, Natural or cultured pearls.
Exports - Partners	Mexico 15,5%, Canda 15,1%, China 4,9% United kingdom 4,5%, Netherlands 4,4% (2025)
Total Imports	\$ 3,50 Trillion (2025)
Main Imported Commodities	Nuclear reactors ,Electrical machinery, Vehicles, oil and mineral fuels, Pharmaceutical products.
Imports - Partners	Mexico 15.4%, Canda 11.2%, China 9.3% , Taipei, Chinese 5,8 % , Viet nam 5,7 % (2025)
Demographical Indicators	
Indicator	Value
Population	347,276 million(2025)
Demographics	0-14 years: 17,1% 15- 60 years: 58,3% Above 60 years: 24,6%
Population growth rate	0.5%(2025)
Average income per capita	80,706 \$ (2025)
<ol style="list-style-type: none"> UNData app People's Republic of USA and the IMF Trade Map - List of supplying markets for a product imported by USA 	

U.S. Apparel Production & Labor Landscape

The U.S. apparel production sector is currently characterized by a sharp transition from domestic manufacturing to international sourcing due to economic and labor pressures. This shift is driven by the following factors:

Domestic Manufacturing Decline & Labor Costs:

- **Rapid Employment Decrease:** Employment within the U.S. apparel manufacturing industry has decreased rapidly over the past several decades as the sector transitioned to other regions in search of cheaper labor.
- **High Domestic Wages:** Current data shows that the mean hourly wage for "Textile, Apparel, and Furnishings Workers" is **\$16.55**, which translates to an annual mean wage of **\$34,410**.
- **Strategic Impact:** This data clearly illustrates that the high cost of hourly labor in the U.S.—which reaches **\$32.38** in specialized roles like patternmaking—is a primary driver for the U.S. market's reliance on imports.

Occupation code	Occupation title (click on the occupation title to view an occupational profile)	Level	Employment	Employment RSE	Percent of total employment	Median hourly wage	Mean hourly wage	Annual mean wage	Mean wage RSE
51-6000	Textile, Apparel, and Furnishings Workers	minor	40,200	2.4%	44.62%	\$16.12	\$16.55	\$34,410	0.7%
51-6090	Miscellaneous Textile, Apparel, and Furnishings Workers	broad	3,580	6.8%	3.98%	\$17.51	\$21.58	\$44,880	3.0%
51-6092	Fabric and Apparel Patternmakers	detail	1,130	9.7%	1.26%	\$31.97	\$32.38	\$67,350	3.9%
51-6099	Textile, Apparel, and Furnishings Workers, All Other	detail	2,440	8.2%	2.71%	\$16.16	\$16.59	\$34,500	1.0%

Source : [U.S. Bureau of Labor Statistics](#)

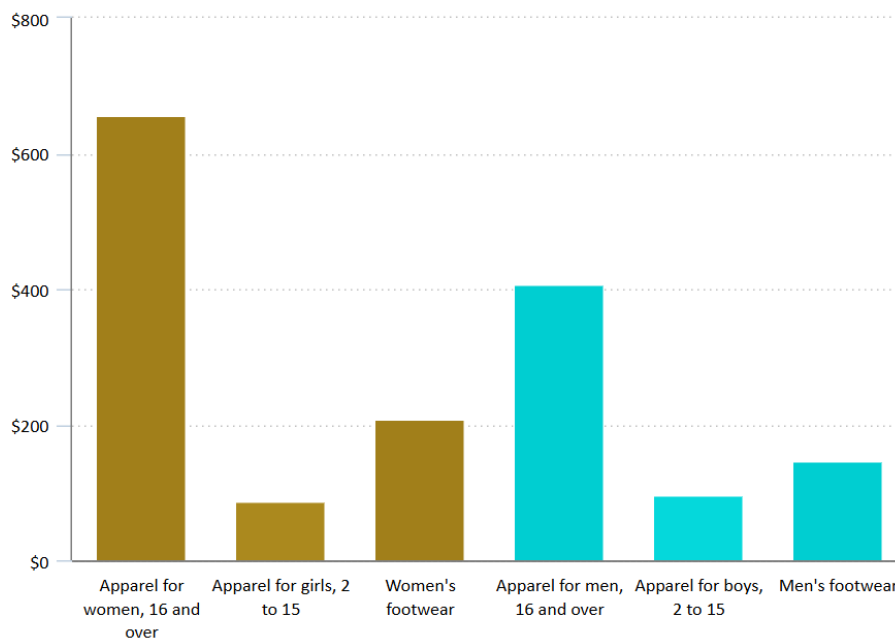
U.S. Apparel Consumption & Expenditure Analysis

The United States solidified its position as the world's largest apparel market in 2024, with total revenues reaching approximately **\$359 billion**. This growth is part of a global upward trend where the industry hit \$1.8 trillion, fueled largely by a massive shift toward e-commerce which generated nearly **\$135 billion** in the U.S. alone during the same year. While 2024 reflects the overall market's strength, a closer look at 2023 household data reveals the specific segments driving this demand:

- **Women's Apparel (16+):** Remains the dominant consumption category, with an average annual household expenditure exceeding **\$650**.
- **Men's Apparel (16+):** Represents a significant market share with a yearly expenditure of approximately **\$400** per household.
- **Footwear:** Total household spending on footwear (Men's and Women's) reached a combined total of roughly **\$350** annually.
- **Children's Segment (Ages 2-15):** Consumption is stable but more conservative, with spending for both girls and boys averaging below **\$100** per category.

These expenditure patterns highlight a strategic opportunity for international exporters. As U.S. domestic manufacturing continues to decline due to the search for more cost-effective labor regions, the market increasingly relies on high-quality imports to satisfy this massive and diverse consumer demand.

Average annual expenditures for apparel, selected categories, per household, 2023



Source : [U.S. Bureau of Labor Statistics](https://www.bls.gov)

Trade Movement in USA for Apparel

1. With Countries all over the world:

Exports of apparel (including knitting products) decreased to reach to \$5,54 billion in 2025 compared to \$ 6,01 billion in 2024, decreased by **7.82%**. **Imports** of the same item also reached \$81,75 billion in 2025 compared to \$ 83,70 billion in 2024 decreased by **2.33 %**.

the table below shows the main destinations for exporting and importing apparels to / from USA in 2025:

American Exports		American Imports	
Country	The value "One thousand" dollars	Country	The value "One thousand" dollars
Total Exports	5,547,015	Total Imports	81,751,498
Canda	1,921,375	Vietnam	17,019,559
Mexico	1,472,639	China	11,952,203
UK	164,005	Bangladesh	8,208,560
Nicaragua	136,972	India	5,187,135
Japan	122,956	Cambodia	5,068,947
China	103,516	Indonesia	4,822,988
Italy	100,938	Mexico	2,796,764
Australia	99,499	Pakistan	2,557,334
Germany	94,376	Italy	2,254,447
United Arab Emirates	91,148	Honduras	2,175,019

Source: [ITC](#)

2. Trade Movement between USA for Apparel (Knits) and other countries from all over the world in 2023-2025:

In 2025, USA's total imports of knits amounted to **\$46,63 billion**, while its total exports for the same category reached **\$2,99 billion**. The following table shows the most important imported/exported apparel (knits) from/to USA. The table shows that the imports were topped by **Jerseys and Pullovers (HS code 6110)**, which amounted to **\$13,28 billion** in 2025, compared to the most important exports from USA of this chapter, which are the **T-shirts and other vests (HS code 6109)**, whose exports amounted to **\$892,26 million**.

Code	Product label (↔)	Imported value in 2023	Imported value in 2024	Imported value in 2025▼
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. ...)	13,355,568	13,420,687	13,283,055
6109	T-shirts, singlets and other vests, knitted or crocheted	6,931,007	6,905,230	6,733,851
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	5,243,010	5,574,554	5,666,196
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, negligés, bathrobes, ...	3,030,304	3,290,929	3,027,441
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	2,208,960	2,332,580	2,544,928
6115	Pantyhose, tights, stockings, socks and other hosiery, incl. graduated compression hosiery ...	2,314,932	2,541,652	2,362,302
6106	Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted (excl. T-shirts and ...)	1,188,399	2,024,764	2,210,314
6105	Men's or boys' shirts, knitted or crocheted (excl. nightshirts, T-shirts, singlets and other ...)	2,228,177	2,216,089	2,183,912
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	1,535,718	1,715,454	1,611,365
6107	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar ...	1,612,993	1,750,347	1,558,001
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	1,576,325	1,553,021	1,420,864
6116	Gloves, mittens and mitts, knitted or crocheted (excl. for babies)	1,044,333	1,126,681	1,124,323
6102	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	859,774	861,145	903,839
6101	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	828,494	855,029	867,396
6112	Track-suits, ski-suits and swimwear, knitted or crocheted	736,371	693,670	676,752
6117	Made-up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments ...	303,492	315,463	283,430
6113	Garments, knitted or crocheted, rubberised or impregnated, coated or covered with plastics ...	246,653	197,623	179,657

Code	Product label (↔)	Exported value in 2023	Exported value in 2024	Exported value in 2025▼
6109	T-shirts, singlets and other vests, knitted or crocheted	1,134,276	1,135,914	892,368
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. ...)	700,828	702,223	687,991
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	295,039	330,832	299,452
6115	Pantyhose, tights, stockings, socks and other hosiery, incl. graduated compression hosiery ...	196,012	172,247	178,454
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, negligés, bathrobes, ...	169,264	142,664	126,888
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	132,289	121,620	125,349
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	116,755	116,643	115,950
6105	Men's or boys' shirts, knitted or crocheted (excl. nightshirts, T-shirts, singlets and other ...)	104,233	93,889	94,616
6116	Gloves, mittens and mitts, knitted or crocheted (excl. for babies)	85,935	86,489	80,685
6106	Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted (excl. T-shirts and ...)	72,229	76,992	70,072
6107	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar ...	69,013	57,662	58,239
6101	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	64,385	53,136	56,032
6117	Made-up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments ...	59,759	52,038	54,834
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	70,831	55,704	45,184
6102	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	36,147	41,344	39,383
6112	Track-suits, ski-suits and swimwear, knitted or crocheted	70,266	43,682	37,736
6113	Garments, knitted or crocheted, rubberised or impregnated, coated or covered with plastics ...	16,766	28,487	30,018

3. Trade Movement between USA for Apparel (Woven) and other countries from all over the world in 2023-2025:

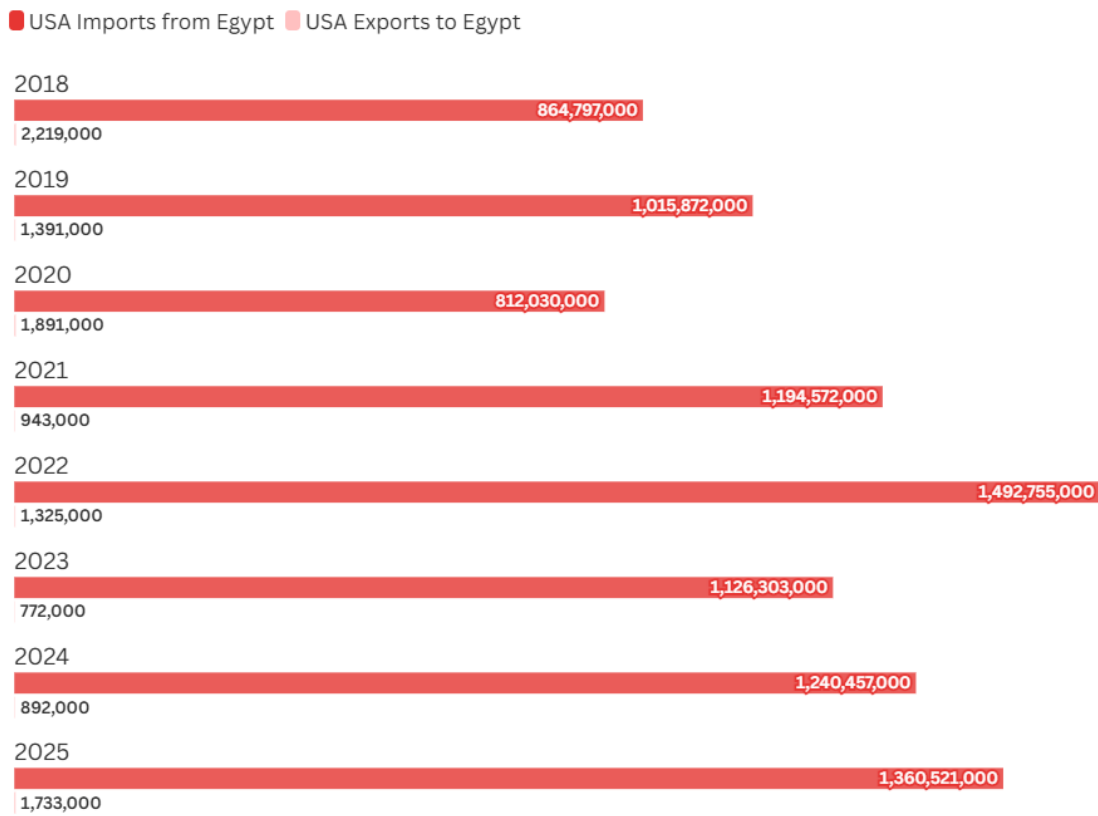
In 2025, USA's total imports of woven reached **\$35.11 billion**, compared to **\$2,55 billion** total exports for the same category. The following table shows USA's exports and imports for (woven) apparel. In 2025, **Women's suits, ensembles and jackets** showed the highest value of USA's imports which amounted to **\$10,34 billion**, and at the same year showed the highest value of USA's exports which amounted to **\$629,88 million**.

Code	Product label	Imported value in 2023	Imported value in 2024	Imported value in 2025▼
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	10,048,247	10,432,895	10,344,894
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	8,189,498	8,167,134	8,053,444
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	3,018,790	2,791,096	2,706,392
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excl. knitted or crocheted)	2,518,663	2,401,951	2,280,876
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated; ...	2,236,676	2,284,901	2,181,142
6212	Brassieres, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, ...	2,257,341	2,376,553	2,077,738
6201	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	2,185,718	2,041,341	1,971,297
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	2,048,394	1,968,995	1,907,677
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	1,839,623	1,843,224	1,689,654
6208	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, ...	462,224	511,038	505,751
6209	Babies' garments and clothing accessories of textile materials (excl. knitted or crocheted ...	341,664	330,847	310,445
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles (excl. knitted or crocheted)	341,400	331,433	294,299
6216	Gloves, mittens and mitts, of all types of textile materials (excluding knitted or crocheted ...	321,968	291,272	255,554
6207	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, ...	216,623	229,363	234,152
6217	Made-up clothing accessories and parts of garments or clothing accessories, of all types of ...	194,354	211,627	199,070
6215	Ties, bow ties and cravats of textile materials (excl. knitted or crocheted)	94,911	94,803	78,481
6213	Handkerchiefs, of which no side exceeds 60 cm (excl. knitted or crocheted)	30,804	26,132	23,005

Code	Product label	Exported value in 2023	Exported value in 2024	Exported value in 2025▼
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	766,558	760,212	629,885
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	388,132	403,787	376,326
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excl. knitted or crocheted)	408,047	308,197	328,969
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated; ...	241,693	236,540	262,404
6212	Brassieres, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, ...	269,213	232,932	183,144
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	166,646	159,810	154,387
6217	Made-up clothing accessories and parts of garments or clothing accessories, of all types of ...	98,736	94,483	150,695
6201	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	139,820	147,024	148,932
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	96,501	119,965	107,596
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	135,184	123,389	100,604
6208	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, ...	46,112	48,028	44,619
6216	Gloves, mittens and mitts, of all types of textile materials (excluding knitted or crocheted ...	38,993	30,892	30,398
6209	Babies' garments and clothing accessories of textile materials (excl. knitted or crocheted ...	12,219	12,649	12,909
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles (excl. knitted or crocheted)	16,683	14,677	10,397
6207	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, ...	9,255	6,365	8,022
6215	Ties, bow ties and cravats of textile materials (excl. knitted or crocheted)	2,722	3,554	2,507
6213	Handkerchiefs, of which no side exceeds 60 cm (excl. knitted or crocheted)	2,626	2,072	1,968

4.Trade Movement for Apparel between USA and Egypt in 2018-2025:

Egypt’s apparel trade with the United States has demonstrated remarkable growth and strategic expansion over the past eight years. Egyptian exports to the U.S. climbed from \$864.80 million in 2018 to a record high of \$1.36 billion by 2025, reflecting the increasing global competitiveness of Egyptian textiles. This upward trajectory, particularly the recovery observed in 2025, underscores Egypt's ability to maintain a dominant trade surplus and solidify its position as a key supplier to the American market. The following figure illustrates the evolution of this robust trade partnership between Egypt and the USA for apparel from 2018 to 2025:



Source: ITC

a- Trade Movement for Apparel (Knits) between USA and Egypt in 2023-2025 :

The following table shows the trade movement for apparel(knits) between Egypt and USA, it noted that the Egyptian exports of knits apparel in this chapter to USA amounted to\$ **919,92** million during 2025, topped by **HS Code 6110** (Jerseys and Pullovers) with\$ **249,59** million.

Product code	Product label ⇄	United States of America's imports from Egypt		
		Value in 2023	Value in 2024	Value in 2025▼
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. . . .	212,268	243,077	249,594
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, . . .	58,339	109,055	145,054
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches . . .	101,723	126,565	124,170
6109	T-shirts, singlets and other vests, knitted or crocheted	108,326	105,286	122,106
6105	Men's or boys' shirts, knitted or crocheted (excl. nightshirts, T-shirts, singlets and other . . .	70,759	67,845	68,203
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, négligés, bathrobes, . . .	28,542	37,486	43,274
6101	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	17,419	15,409	39,533
6106	Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted (excl. T-shirts and . . .	19,428	19,212	38,859
6115	Pantyhose, tights, stockings, socks and other hosiery, incl. graduated compression hosiery . . .	4,861	10,904	28,249
6107	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar . . .	14,317	20,763	24,005
6102	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	16,019	10,745	17,630
6116	Gloves, mittens and mitts, knitted or crocheted (excl. for babies)	9,034	9,130	8,896
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	3,738	3,557	5,168
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	1,958	3,167	3,031
6112	Track-suits, ski-suits and swimwear, knitted or crocheted	2,570	1,723	1,722
6117	Made-up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments . . .	83	116	349
6113	Garments, knitted or crocheted, rubberised or impregnated, coated or covered with plastics . . .	322	52	87

Product code	Product label ⇄	United States of America's exports to Egypt		
		Value in 2023	Value in 2024	Value in 2025▼
6116	Gloves, mittens and mitts, knitted or crocheted (excl. for babies)	30	17	104
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, . . .	93	77	67
6105	Men's or boys' shirts, knitted or crocheted (excl. nightshirts, T-shirts, singlets and other . . .	8	19	18
6113	Garments, knitted or crocheted, rubberised or impregnated, coated or covered with plastics . . .	0	0	0
6117	Made-up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments . . .	0	6	0
6107	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar . . .	0	0	0
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, négligés, bathrobes, . . .	0	0	0
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. . . .	51	97	0
6102	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	0	0	0
6106	Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted (excl. T-shirts and . . .	3	0	0
6115	Pantyhose, tights, stockings, socks and other hosiery, incl. graduated compression hosiery . . .	0	0	0
6101	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	22	0	0
6112	Track-suits, ski-suits and swimwear, knitted or crocheted	16	0	0
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	0	17	0
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches . . .	0	13	0
6109	T-shirts, singlets and other vests, knitted or crocheted	3	41	0
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	0	0	0

b- Trade Movement for Apparel (Woven) between USA and Egypt in 2023-2025:

The following table shows the trade movement for apparel (woven) between Egypt and USA; Egyptian exports of woven apparel in this chapter amounted to USA **\$440,59 million** in 2025, with **HS Code 6203** (men's suits and jackets) topping the list at **\$228,1 million**, representing **more than half** of the total woven apparel exports.

Product code	Product label	United States of America's imports from Egypt		
		Value in 2023	Value in 2024	Value in 2025▼
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches . . .	237,695	233,703	228,134
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, . . .	147,647	160,461	138,452
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excl. knitted or crocheted)	23,138	27,449	24,761
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	22,705	15,529	19,953
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	2,819	2,216	8,938
6201	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	15,264	5,450	7,340
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	3,454	5,462	5,872
6212	Brassieres, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, . . .	1,129	846	2,749
6208	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, . . .	248	807	2,067
6209	Babies' garments and clothing accessories of textile materials (excl. knitted or crocheted . . .	1,028	1,439	1,411
6207	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, . . .	227	1,654	448
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated, . . .	908	728	290
6217	Made-up clothing accessories and parts of garments or clothing accessories, of all types of . . .	305	557	124
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles (excl. knitted or crocheted)	32	41	54
6216	Gloves, mittens and mitts, of all types of textile materials (excluding knitted or crocheted . . .	0	0	0
6215	Ties, bow ties and cravats of textile materials (excl. knitted or crocheted)	0	22	0
6213	Handkerchiefs, of which no side exceeds 60 cm (excl. knitted or crocheted)	0	0	0

Product code	Product label	United States of America's exports to Egypt		
		Value in 2023	Value in 2024	Value in 2025▼
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, . . .	164	124	1,020
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excl. knitted or crocheted)	42	251	238
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches . . .	68	47	102
6201	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	43	24	68
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	40	0	41
6216	Gloves, mittens and mitts, of all types of textile materials (excluding knitted or crocheted . . .	42	21	31
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated, . . .	14	58	28
6217	Made-up clothing accessories and parts of garments or clothing accessories, of all types of . . .	130	66	12
6207	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, . . .	0	0	5
6209	Babies' garments and clothing accessories of textile materials (excl. knitted or crocheted . . .	0	0	0
6215	Ties, bow ties and cravats of textile materials (excl. knitted or crocheted)	0	0	0
6213	Handkerchiefs, of which no side exceeds 60 cm (excl. knitted or crocheted)	0	0	0
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	0	0	0
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	3	13	0
6208	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, . . .	0	0	0
6212	Brassieres, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, . . .	0	0	0
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles (excl. knitted or crocheted)	0	0	0

Tariffs on Egyptian Exports for apparel:

Product code	Product description	MFN tariffs	Effectively applied tariffs
6101	Men's or boys' overcoats, car coats, capes, cloaks, anoraks (including ski jackets), windcheaters, wind-jackets and similar articles, knitted or crocheted, other than those of heading 6103	15.03%	15.03%
6102	Women's or girls' overcoats, car coats, capes, cloaks, anoraks (including ski jackets), windcheaters, wind-jackets and similar articles, knitted or crocheted, other than those of heading 6104	16.53%	16.53%
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts (other than swimwear), knitted or crocheted	16.33%	16.33%
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, bib and brace overalls, breeches and shorts (other than swimwear), knitted or crocheted	13.98%	13.98%
6105	Men's or boys' shirts, knitted or crocheted	20%	20%
6106	Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted	20.47%	20.47%
6107	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar articles, knitted or crocheted	8.73%	8.73%
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, négligés, bathrobes, dressing gowns and similar articles, knitted or crocheted	10.74%	10.74%
6109	T-shirts, singlets and other vests, knitted or crocheted	15.95%	15.95%
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	12.45%	12.45%
6111	Babies' garments and clothing accessories, knitted or crocheted	15.30%	15.30%
6112	Tracksuits, ski suits and swimwear, knitted or crocheted	24.13%	24.13%
6113	Garments, made up of knitted or crocheted fabrics of heading 5903, 5906 or 5907	5.45%	5.45%
6114	Other garments, knitted or crocheted	19.13%	19.13%
6115	Pantyhose, tights, stockings, socks and other hosiery, including graduated compression hosiery (for example, stockings for varicose veins) and footwear without applied soles, knitted or crocheted	12.54%	12.54%
6116	Gloves, mittens and mitts, knitted or crocheted	10.44%	10.13%
6117	Other made-up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments or of clothing accessories	7.94%	7.03%

Source: [ITC](#)

Product code	Product description	MFN tariffs ^①	Effectively applied tariffs ^①
6201	Men's or boys' overcoats, car-coats, capes, cloaks, anoraks (including ski-jackets), wind-cheaters, wind-jackets and similar articles, other than those of heading 6203	13.09%	13.09%
6202	Women's or girls' overcoats, car-coats, capes, cloaks, anoraks (including ski-jackets), wind-cheaters, wind-jackets and similar articles, other than those of heading 6204	13.24%	13.24%
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts (other than swimwear)	10.79%	10.79%
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, bib and brace overalls, breeches and shorts (other than swimwear)	9.78%	9.64%
6205	Men's or boys' shirts	14.46%	14.46%
6206	Women's or girls' blouses, shirts and shirt-blouses	10.26%	10.26%
6207	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar articles	7.31%	7.31%
6208	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, pyjamas, négligés, bathrobes, dressing gowns and similar articles	10.82%	10.82%
6209	Babies' garments and clothing accessories	14.23%	14.23%
6210	Garments, made up of fabrics of heading 5602, 5603, 5903, 5906 or 5907	5.57%	5.38%
6211	Tracksuits, ski suits and swimwear; other garments	12.30%	12.30%
6212	Brassières, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, whether or not knitted or crocheted	10.65%	10.65%
6213	Handkerchiefs	8.69%	8.61%
6214	Shawls, scarves, mufflers, mantillas, veils and the like	6.25%	6.14%
6215	Ties, bow ties and cravats	8.03%	8.03%
6216	Gloves, mittens and mitts	8.87%	8.55%
6217	Other made-up clothing accessories; parts of garments or of clothing accessories, other than those of heading 6212	9.91%	6.45%

Source: [ITC](#)

Tariffs imposed by USA:

1. Current Market Tariff Trends: The U.S. apparel sector (HS Chapters 61 & 62) has witnessed a historic surge in import duties. The average tariff rate for apparel imports reached a record high of **35.1% in December 2025**, representing a significant leap from the **14.7%** recorded in January 2025. This sharp increase makes customs duties the most critical cost factor for international exporters today.

2. The QIZ Agreement (Qualified Industrial Zones): Amidst rising global tariffs, the QIZ agreement provides a vital competitive edge for Egyptian manufacturers:

- **Duty-Free Access:** Qualifying apparel products manufactured within designated Egyptian industrial zones enter the U.S. market at **0% Duty**.
- **Mandatory Requirements:** To qualify for this exemption, garments must meet the mandatory **10.5% Israeli component** requirement. This is a strict prerequisite for duty-free verification.
- **Strategic Impact:** By utilizing the QIZ framework, Egyptian exporters can bypass the high **Most Favored Nation (MFN)** rates—which typically range from **5% to 25%** for non-exempt apparel—offering a substantial price advantage over global competitors.

Distribution Channels:

The U.S. apparel market is undergoing a structural transformation in how products reach the end consumer, driven by technological integration and changing shopping habits.

1. Online Retail: The Primary Growth Engine

- **Market Outlook:** Online retail is projected to lead the distribution landscape with a **CAGR of 2.6%** during the 2026-2035 forecast period.
- **Digital Shift:** This growth is fueled by the continued migration toward digital shopping and the broadening reach of e-commerce platforms.
- **Emerging Trends:** The rise of **Social Commerce** (shopping via platforms like TikTok and Instagram) and **M-commerce** (mobile shopping) is reshaping order patterns. This trend is shifting demand toward smaller, more frequent batches to keep pace with fast-moving digital trends and viral fashion cycles.

2. Offline Retail: Innovation and Strategic Adaptation

- **Market Outlook:** While still a significant channel, physical retail is anticipated to grow at a more moderate rate of **2.2% CAGR**.
- **Competitive Pressure:** Brick-and-mortar stores face intense pressure from online alternatives, necessitating a shift from traditional sales to "experience-driven" retail.
- **Omnichannel Integration:** Physical stores are increasingly adopting **Omnichannel strategies**, such as "Buy Online, Pick Up In Store" (BOPIS), effectively transforming retail outlets into hybrid fulfillment centers.
- **Resilient Segments:** The **Off-price retail segment** (e.g., discount department stores) continues to show remarkable resilience, serving as a high-volume secondary channel for international exporters looking to move large inventories.



U.S. APPAREL MARKET DISTRIBUTION CHANNELS



A structural transformation driven by technological integration and changing shopping habits.

1. ONLINE RETAIL: THE PRIMARY GROWTH ENGINE

MARKET OUTLOOK
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RESILIENT SEGMENTS
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KEY TAKEAWAY

Online retail is the primary growth engine, driven by digital adoption, social commerce, and m-commerce.

Offline retail is adapting through innovation, experience-driven strategies, and omnichannel integration.

The future lies in seamless integration across channels to meet evolving consumer expectations and optimize fulfillment.

Off-price retail remains a resilient, high-volume channel for exporters to move large inventories.

Success in the U.S. apparel market depends on agility, speed, and channel synergy—delivering the right product, in the right place, at the right time.

USA Apparel Future Market Outlook (Strategic Trends 2026-2035)

- **The Rise of "Agentic Shopping" and AI Integration:** 2026 marks a turning point where AI agents increasingly mediate product discovery and purchasing decisions. As traditional advertising loses effectiveness, brands must pivot from standard SEO to **Generative Engine Optimization (GEO)**. Ensuring that product metadata is structured, enriched, and "machine-readable" has become a critical competitive asset to remain visible in an AI-driven shopping ecosystem.
- **Redefining the Price-Value Ratio:** U.S. consumers are shifting away from "ultra-fast fashion" and overpriced luxury, focusing instead on the intrinsic value of garments. There is a strategic pivot toward **transparency, quality, and durability**. Data indicates that mid-market and premium brands that enhance their product assortments with verified quality and ethical credibility are generating the highest value and customer loyalty.
- **Sustainability as a Regulatory Mandate:** Sustainability has transitioned from a marketing choice to a mandatory requirement. With the introduction of **Digital Product Passports** and stricter environmental labeling rules, transparency is now a prerequisite for market access. Brands and suppliers that fail to provide comprehensive traceability data risk losing visibility and facing penalties, making digital data collection a strategic imperative for serving the U.S. market.

The Most Important American Ports:

Maritime Ports:

Port of New York and New Jersey- Port of Savannah - Port of Los Angeles - Port of Long Beach - Port of Norfolk - Port of Miami.

Airports:

John F. Kennedy International Airport (JFK) - Los Angeles International Airport (LAX) - Chicago O'Hare International Airport (ORD) - Miami International Airport (MIA).

The most important specialized exhibitions:

The following list contains the most important international exhibitions for apparel which are organized annually in USA; where it is important to participate in them (both supply and attendance) in order to access the Egyptian products into the American market.

□ SOURCING at MAGIC (Las Vegas & New York)

- Specialization: This is the ultimate destination for Apparel Manufacturing and Private Label. It is specifically designed for factories to meet with retailers and brands. It covers all apparel categories including casual, formal, and accessories.
- Location: Las Vegas (Convention Center) & New York (Javits Center).
- Website: <https://www.sourcingatmagic.com/>
- Contact Email: sales@fashionbyinforma.com

□ Apparel Sourcing USA (New York City)

- Specialization: An exhibition dedicated exclusively to Finished Apparel, contract manufacturing, and private label development. It is co-located with textile shows but operates as a distinct section for garment manufacturers.
- Location: New York City (Javits Center).
- Website: apparelsourcing-usa.com
- Contact Email: twsales@usa.messefrankfurt.com

□ Apparel Sourcing (Los Angeles)

- Specialization: Focuses on the West Coast apparel market. It is ideal for manufacturers of Ready-to-Wear, Young Contemporary, and fast-fashion garments looking for California-based buyers and designers.
- Location: Los Angeles (California Market Center - CMC).
- Website: apparelsourcing-la.com
- Contact Email: twsales@usa.messefrankfurt.com

Comments

The U.S. apparel market is currently undergoing a profound structural transformation. While global import tariffs have surged to historic highs—reaching 35.1% as of December 2025—Egypt remains uniquely positioned to capture market share. The QIZ Agreement serves as a critical strategic lever, offering a 0% duty-free advantage that bypasses the high MFN rates typically ranging between 15% and 32%. However, competitiveness in 2026 is no longer defined by price alone; it is now dictated by digital maturity, traceability, and the ability to integrate into AI-driven distribution ecosystems.

Recommendations to Increase Apparel Exports

- **Capitalizing on the QIZ Pricing Edge:** Exporters should aggressively leverage the duty-free status to position Egypt as the primary alternative to high-tariff regions like China and India, particularly for synthetic and cotton categories subject to maximum MFN rates.
- **Prioritizing Digital Traceability:** In alignment with new U.S. and global regulatory mandates, Egyptian manufacturers must adopt **Digital Product Passports** and robust data-tracking systems. Transparency is no longer optional; it is a prerequisite for visibility in a market where AI agents increasingly mediate purchasing decisions.
- **Transitioning to "Agile" Production Models:** With the rise of **Social Commerce** and **M-commerce** driving viral fashion cycles, factories should diversify from "bulk-only" production to flexible, **small-batch manufacturing**. This agility is essential to meet the U.S. demand for frequent inventory replenishment.
- **Strategic Logistical Positioning:** To maintain a "Lead Time" advantage, exporters should prioritize the **Port of New York/New Jersey** for bulk sea freight and utilize **JFK International Airport** for high-velocity samples and fast-fashion replenishment.
- **Embedding Sustainability into Brand Identity:** As U.S. consumers shift toward **Circular Fashion** and eco-scoring systems, Egyptian brands should market their sustainability credentials as a core value proposition. Reliability in environmental data collection is now a competitive asset required to serve the premium U.S. segments.