

## STATS WINDOW

### Global Textile and Apparel Industry at a Glance

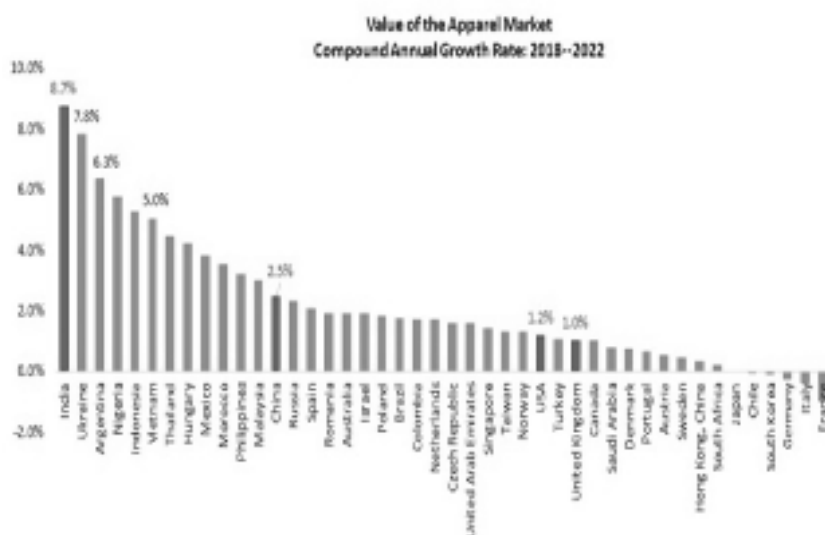
The global textile market size is projected to reach at USD 1.23 trillion by 2025 expanding at a CAGR of 4.24%.

Population growth, rising disposable income levels, and rapid urbanization in developing countries like China, India, and Mexico are likely to boost the product demand. Moreover, increasing number of supermarkets and retail outlets in these countries is expected to drive the demand further.

Moreover, development of technical textiles that are offer protection against high temperatures, electric arc flash

discharge, molten metal impact, and acid environment is estimated to fuel the textile market growth. Therefore, growing personal protective equipment market is expected to drive the demand for textile products over the projected period.

The Middle East & Africa (MEA) region is projected to witness revenue growth at a CAGR of 4.19% from 2019 to 2025 owing to constant product innovations in apparels application segment. Asia Pacific is expected to register the highest CAGR during the forecast years.



Value of the Global Apparel Market (\$million USD)						
Country	2017	2018	2019	2020	2021	2022
China	\$284,405	\$295,397	\$304,227	\$312,411	\$319,719	\$325,572
USA	\$267,473	\$270,643	\$273,954	\$277,236	\$280,440	\$283,625
India	\$50,188	\$54,801	\$59,237	\$64,332	\$70,110	\$76,645
Japan	\$66,248	\$66,038	\$65,945	\$65,926	\$65,967	\$66,035
Germany	\$63,301	\$63,370	\$63,327	\$63,171	\$62,974	\$62,709
United Kingdom	\$55,107	\$55,670	\$56,237	\$56,800	\$57,374	\$57,942
Russia	\$36,915	\$37,106	\$37,567	\$38,335	\$39,363	\$40,642
Italy	\$35,217	\$34,863	\$34,600	\$34,425	\$34,336	\$34,317
France	\$35,275	\$35,061	\$34,739	\$34,408	\$34,034	\$33,665
Brazil	\$28,299	\$28,639	\$29,082	\$29,593	\$30,115	\$30,694
Canada	\$26,958	\$27,159	\$27,398	\$27,687	\$27,978	\$28,263
South Korea	\$24,252	\$24,368	\$24,422	\$24,422	\$24,368	\$24,275
Spain	\$21,402	\$21,777	\$22,191	\$22,644	\$23,129	\$23,648
Mexico	\$14,479	\$15,051	\$15,636	\$16,235	\$16,847	\$17,486
Turkey	\$16,127	\$16,234	\$16,456	\$16,672	\$16,815	\$16,943
Saudi Arabia	\$15,604	\$16,087	\$16,148	\$16,270	\$16,411	\$16,591
Australia	\$14,699	\$14,961	\$15,237	\$15,524	\$15,825	\$16,138
United Arab Emirates	\$13,178	\$13,227	\$13,360	\$13,640	\$13,903	\$14,083
Argentina	\$9,665	\$10,167	\$10,736	\$11,389	\$12,144	\$13,004
Indonesia	\$9,280	\$9,754	\$10,259	\$10,797	\$11,371	\$11,980
Netherlands	\$10,605	\$10,750	\$10,911	\$11,090	\$11,286	\$11,495
South Africa	\$9,118	\$9,082	\$9,082	\$9,105	\$9,140	\$9,153
Philippines	\$7,511	\$7,760	\$8,013	\$8,270	\$8,532	\$8,800
Sweden	\$8,578	\$8,573	\$8,595	\$8,672	\$8,697	\$8,723
Taiwan	\$7,832	\$7,932	\$8,033	\$8,137	\$8,244	\$8,355
Austria	\$8,008	\$8,057	\$8,111	\$8,159	\$8,199	\$8,232
Thailand	\$6,528	\$6,795	\$7,082	\$7,393	\$7,728	\$8,092
Poland	\$7,286	\$7,439	\$7,589	\$7,734	\$7,872	\$8,003
Colombia	\$6,276	\$6,406	\$6,537	\$6,655	\$6,765	\$6,858
Hong Kong, China	\$6,659	\$6,660	\$6,669	\$6,689	\$6,714	\$6,750
Norway	\$6,035	\$6,124	\$6,204	\$6,292	\$6,371	\$6,447
Malaysia	\$4,993	\$5,165	\$5,336	\$5,501	\$5,662	\$5,817
Chile	\$5,823	\$5,773	\$5,744	\$5,735	\$5,739	\$5,756
Portugal	\$4,959	\$4,994	\$5,030	\$5,068	\$5,101	\$5,128
Ukraine	\$3,426	\$3,516	\$3,670	\$3,935	\$4,289	\$4,749
Denmark	\$4,200	\$4,247	\$4,287	\$4,321	\$4,351	\$4,375
Israel	\$3,624	\$3,677	\$3,740	\$3,812	\$3,886	\$3,964
Romania	\$3,002	\$3,125	\$3,191	\$3,250	\$3,311	\$3,371
Greece	\$3,339	\$3,312	\$3,270	\$3,234	\$3,218	\$3,212
Vietnam	\$2,427	\$2,572	\$2,712	\$2,846	\$2,985	\$3,128
Singapore	\$2,302	\$2,327	\$2,355	\$2,387	\$2,422	\$2,460
Hungary	\$1,891	\$1,976	\$2,058	\$2,144	\$2,228	\$2,332
Czech Republic	\$2,014	\$2,048	\$2,083	\$2,120	\$2,154	\$2,183
Morocco	\$1,270	\$1,307	\$1,346	\$1,390	\$1,443	\$1,501
Egypt	\$1,736	\$1,502	\$1,445	\$1,398	\$1,366	\$1,337
Nigeria	\$916	\$945	\$995	\$1,058	\$1,120	\$1,183
Venezuela	\$284	\$223	\$197	\$186	\$179	\$175
<b>Note: Developing countries</b>						

Brand global market shares					Unit: %	
Brand Name	Company Name (GBO)	2008	2012	2016	2017	2017 vs 2012
Nike	Nike Inc	1.7	1.9	2.8	2.8	0.90
adidas	adidas Group	1.2	1.4	1.6	1.8	0.40
H&M	H&M Hennes & Mauritz AB	0.9	1.1	1.3	1.4	0.30
Zara	Inditex, Industria de Dise�o Textil SA	0.6	0.7	0.9	1.0	0.30
Uniqlo	Fast Retailing Co Ltd	0.3	0.6	0.7	0.7	0.10
Levi's	Levi Strauss & Co	0.5	0.5	0.5	0.5	0.00
C&A	C&A Mode AG	0.6	0.5	0.4	0.4	(0.10)
Under Armour	Under Armour Inc	0.1	0.2	0.4	0.4	0.20
Old Navy	Gap Inc, The	0.4	0.3	0.4	0.4	0.10
Primark	Associated British Foods Plc	0.2	0.3	0.4	0.4	0.10
Victoria's Secre	L Brands Inc	-	-	0.4	0.3	-
Ralph Lauren	Ralph Lauren Corp	0.4	0.4	0.4	0.3	(0.10)
Puma	Kering SA	-	-	0.3	0.3	-
Gap	Gap Inc, The	0.4	0.4	0.3	0.3	(0.10)
Target	Target Corp	0.3	0.3	0.3	0.3	0.00
Asics	Asics Corp	0.2	0.3	0.3	0.3	0.00
Tommy Hilfiger	PVH Corp	-	0.3	0.3	0.3	0.00
Calvin Klein	PVH Corp	-	0.1	0.3	0.3	0.20
New Balance	New Balance Athletic Shoe Inc	0.1	0.2	0.3	0.3	0.10
Skechers	Skechers USA Inc	0.2	0.2	0.2	0.3	0.10
Hugo Boss	Hugo Boss AG	0.2	0.3	0.3	0.2	(0.10)
Forever 21	Forever 21 Inc	0.1	0.2	0.3	0.2	0.00
Heilan Home	Heilan Home Co Ltd	0.0	0.1	0.2	0.2	0.10
The North Face	VF Corp	0.2	0.2	0.2	0.2	0.00
Hanes	Hanesbrands Inc	0.2	0.2	0.2	0.2	0.00
American Eagle	American Eagle Outfitters Inc	0.2	0.2	0.2	0.2	0.00
Carter's	Carter's Inc	0.1	0.2	0.2	0.2	0.00
Converse	Nike Inc	0.1	0.1	0.2	0.2	0.10
Columbia	Columbia Sportswear Co	0.1	0.2	0.2	0.2	0.00
Next	Next Plc	0.3	0.3	0.2	0.2	(0.10)
Reebok	adidas Group	0.2	0.2	0.2	0.2	0.00
Shimamura	Shimamura Co Ltd	0.2	0.2	0.2	0.2	0.00
Deichmann	Deichmann SE	-	0.2	0.2	0.2	0.00
Decathlon	Decathlon SA	-	-	0.2	0.2	-
Bershka	Inditex, Industria de Dise�o Textil SA	0.1	0.1	0.2	0.2	0.10
Note: US companies						

### Key Highlights:

Cotton is the most widely used raw material in the global textile industry owing to its excellent durability and resistance to dust mite and hypoallergenic

In terms of volume, polyester held a market share of 28.04% in 2018 and will grow further owing to its properties, such as high strength and excellent shrink resistance

Household application segment will register a CAGR of 3.28% from 2019 to 2025 due to rising consumer preference for textured and light absorbing fabrics in home

decor

Apparel is anticipated to witness a CAGR of 4.42% from 2019 to 2025 owing to increasing demand for luxury and trending fashionable clothes

Europe is likely to witness volume growth at a CAGR of 2.32% from 2019 to 2025. Demand for silk fabrics for household and fashion & clothing applications is likely to boost the market growth

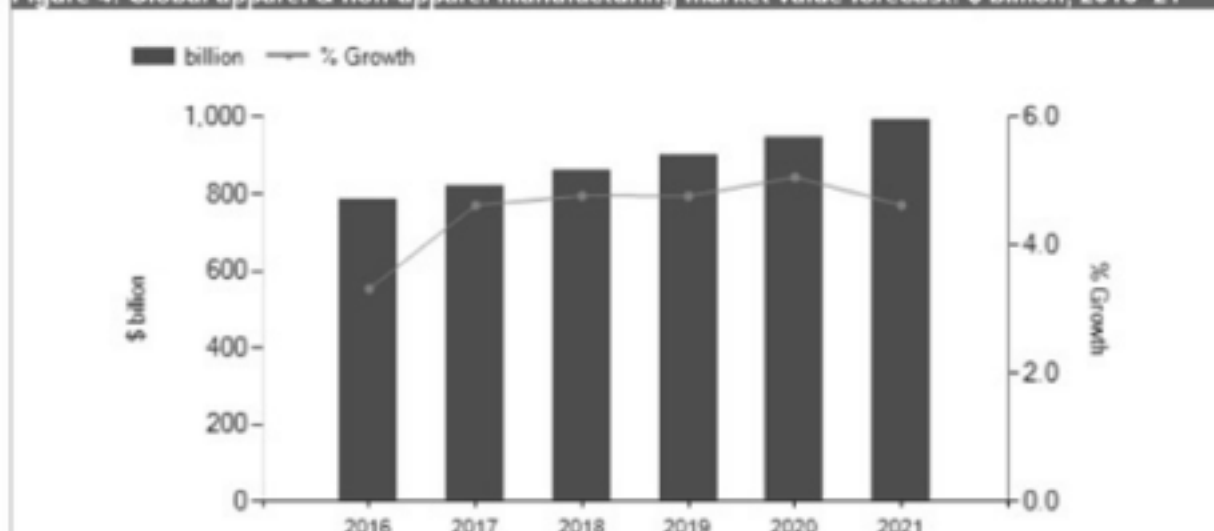
Key companies in the market are Lu Thai Textile Co., Ltd., Shandong Jining Ruyi Woolen Textile Co., Ltd., Successori Reda S.p.A., and Paramount Textile Limited

**Table 4: Global apparel & non-apparel manufacturing market value forecast: \$ billion, 2016–21**

Year	billion	% Growth
2016	785.9	3.3%
2017	822.2	4.6%
2018	861.4	4.8%
2019	902.5	4.8%
2020	948.2	5.1%
2021	992.0	4.6%
CAGR: 2016–21		4.8%

SOURCE: MARKETLINE

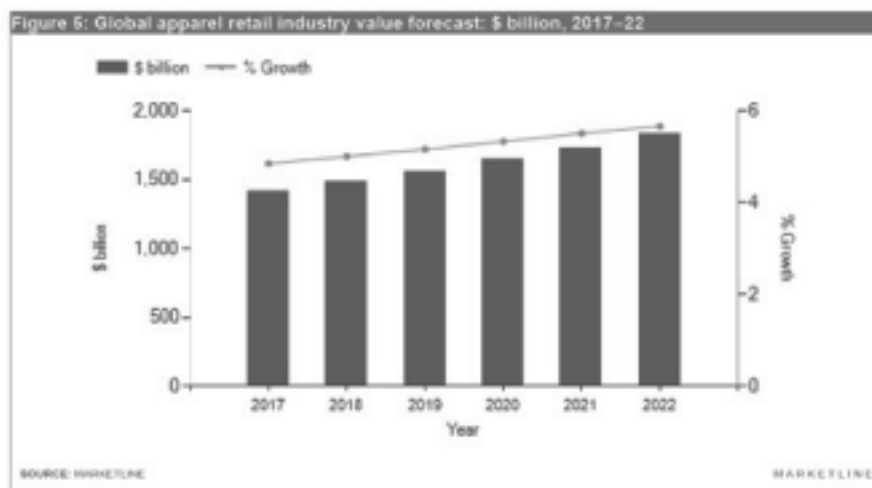
MARKETLINE

**Figure 4: Global apparel & non-apparel manufacturing market value forecast: \$ billion, 2016–21****Table 5: Global apparel retail industry value forecast: \$ billion, 2017–22**

Year	\$ billion	€ billion	% Growth
2017	1,414.1	1,249.2	4.9%
2018	1,485.0	1,311.8	5.0%
2019	1,561.7	1,379.6	5.2%
2020	1,645.0	1,453.2	5.3%
2021	1,735.7	1,533.3	5.5%
2022	1,834.0	1,620.2	5.7%
CAGR: 2017–22			5.3%

SOURCE: MARKETLINE

MARKETLINE



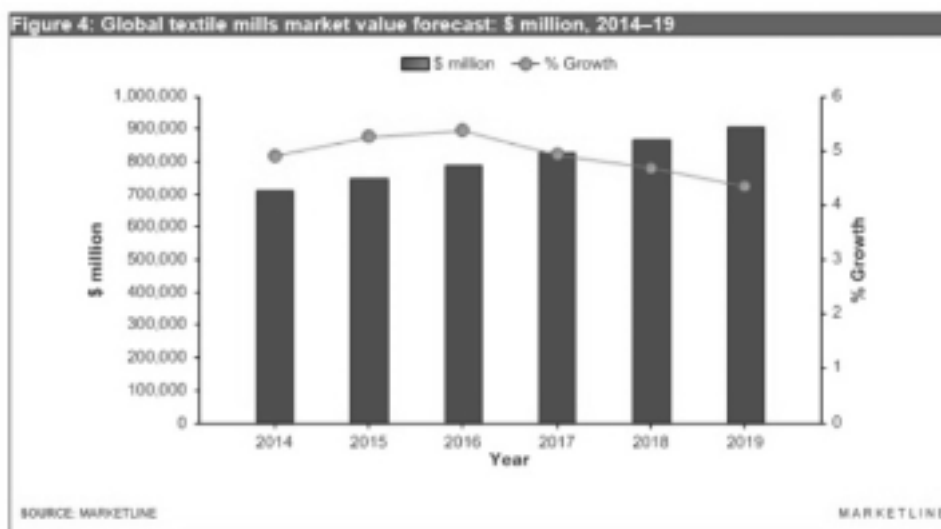
The value of the global apparel retail market totaled \$1,414.1 billion in 2017 (52.6% womenswear, 31.3% menswear and 16.1% childrenswear), up 4.9% from a year earlier. The compound annual growth rate of the market

was 4.4% between 2013 and 2017. The Asia-Pacific region accounted for 37.1% of the global apparel retail market in 2017 (up from 36.8% in 2015), followed by followed by Europe (28.5%) and the United States (23.6%).

**Table 4: Global textile mills market value forecast: \$ million, 2014–19**

Year	\$ million	€ million	% Growth
2014	713,189.4	536,636.1	4.9%
2015	750,694.8	564,856.9	5.3%
2016	791,055.6	595,226.2	5.4%
2017	830,069.6	624,582.1	4.9%
2018	869,083.4	653,937.9	4.7%
2019	906,949.7	682,430.2	4.4%
CAGR: 2014–19			4.9%

SOURCE: MARKETLINE

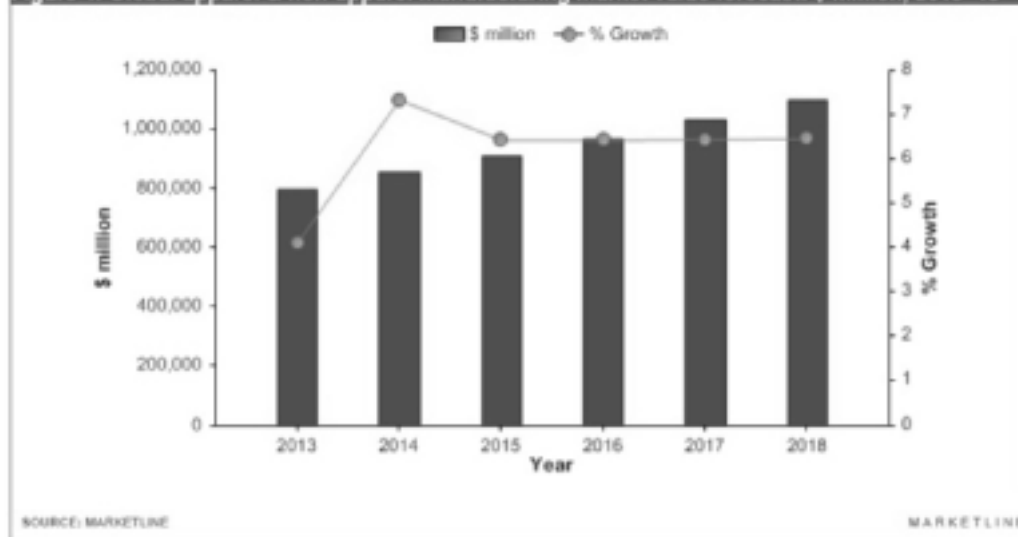


**Table 4: Global apparel & non-apparel manufacturing market value forecast: \$ million, 2013–18**

Year	\$ million	€ million	% Growth
2013	798,163.8	600,981.7	4.1%
2014	856,689.6	645,049.0	7.3%
2015	911,812.3	686,554.0	6.4%
2016	970,309.1	730,667.2	6.4%
2017	1,032,978.9	777,787.0	6.4%
2018	1,099,684.0	828,012.9	6.5%
CAGR: 2013–18			6.6%

SOURCE: MARKETLINE

MARKETLINE

**Figure 4: Global apparel & non-apparel manufacturing market value forecast: \$ million, 2013–18**

SOURCE: MARKETLINE

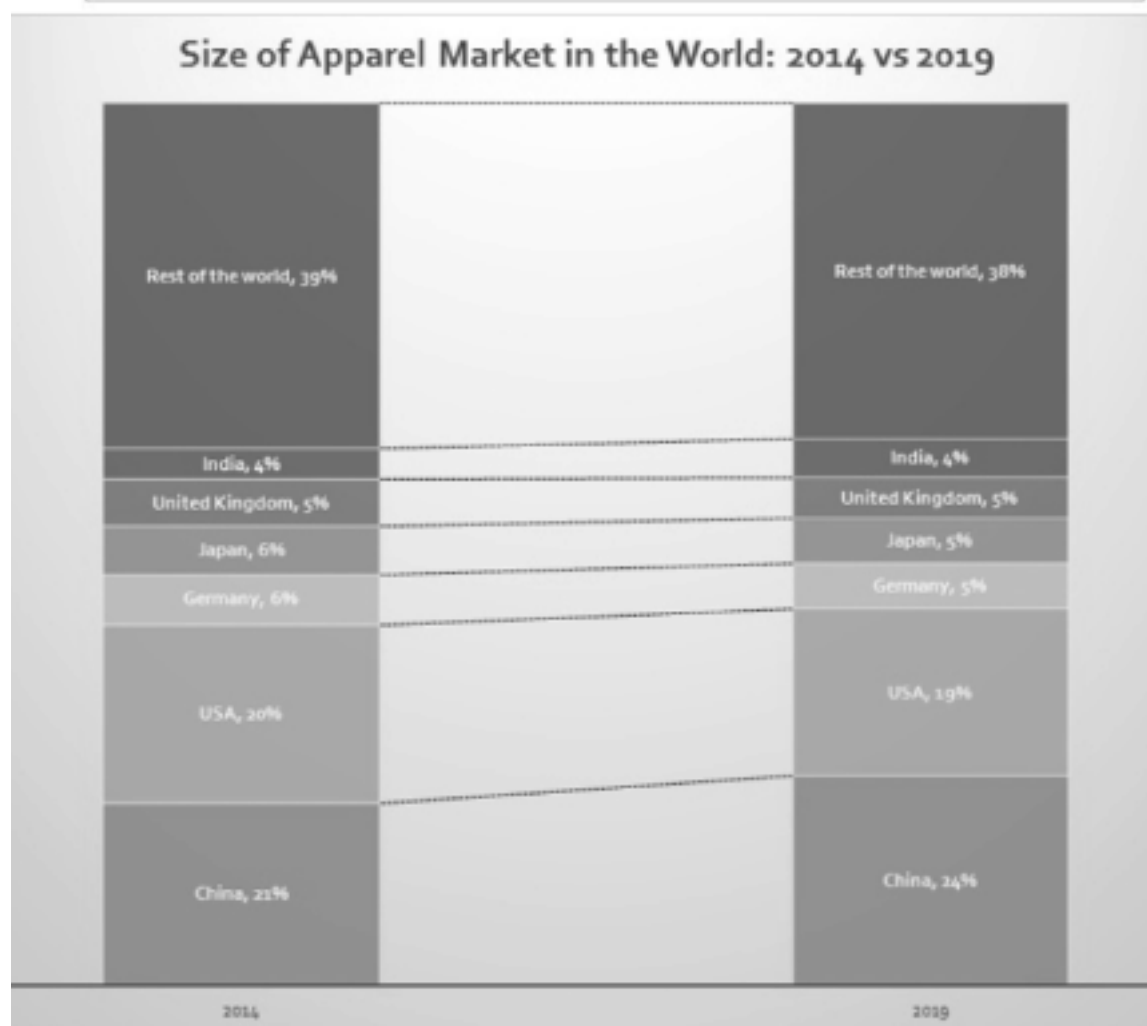
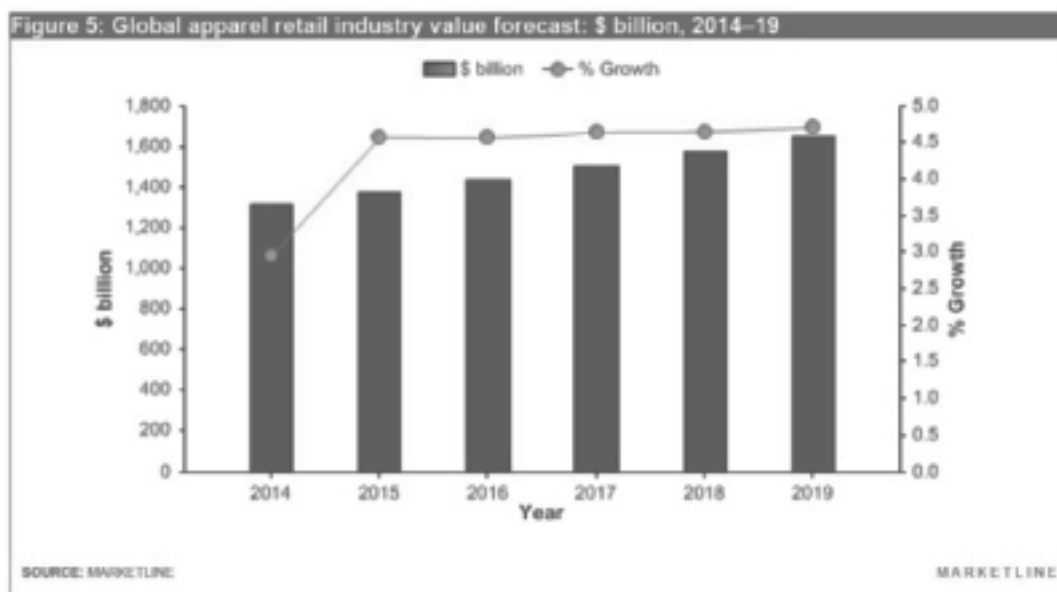
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**Table 5: Global apparel retail industry value forecast: \$ billion, 2014–19**

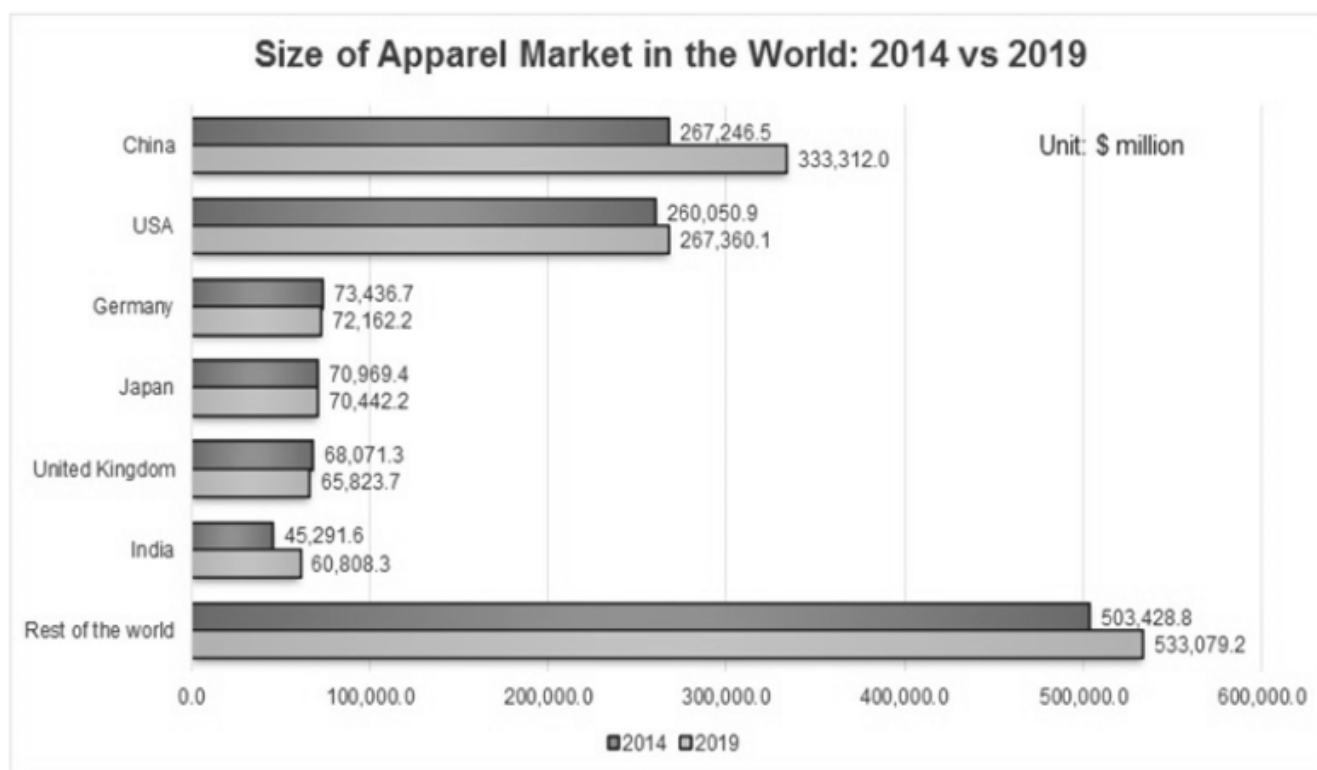
Year	\$ billion	€ billion	% Growth
2014	1,317.3	991.2	3.0%
2015	1,377.5	1,036.5	4.6%
2016	1,440.4	1,083.8	4.6%
2017	1,507.2	1,134.1	4.6%
2018	1,577.3	1,186.9	4.7%
2019	1,651.6	1,242.7	4.7%
CAGR: 2014–19			4.6%

SOURCE: MARKETLINE

MARKETLINE







However, it shall be noted that China seems to be an even more competitive apparel market than the United States. For example, no apparel brand was able to achieve a market share more than 1% in 2014 in China, whereas in the United

States, market shares of several leading apparel brands exceeded 2%. Moreover, domestic brands overall outperform international brands in the Chinese apparel market.

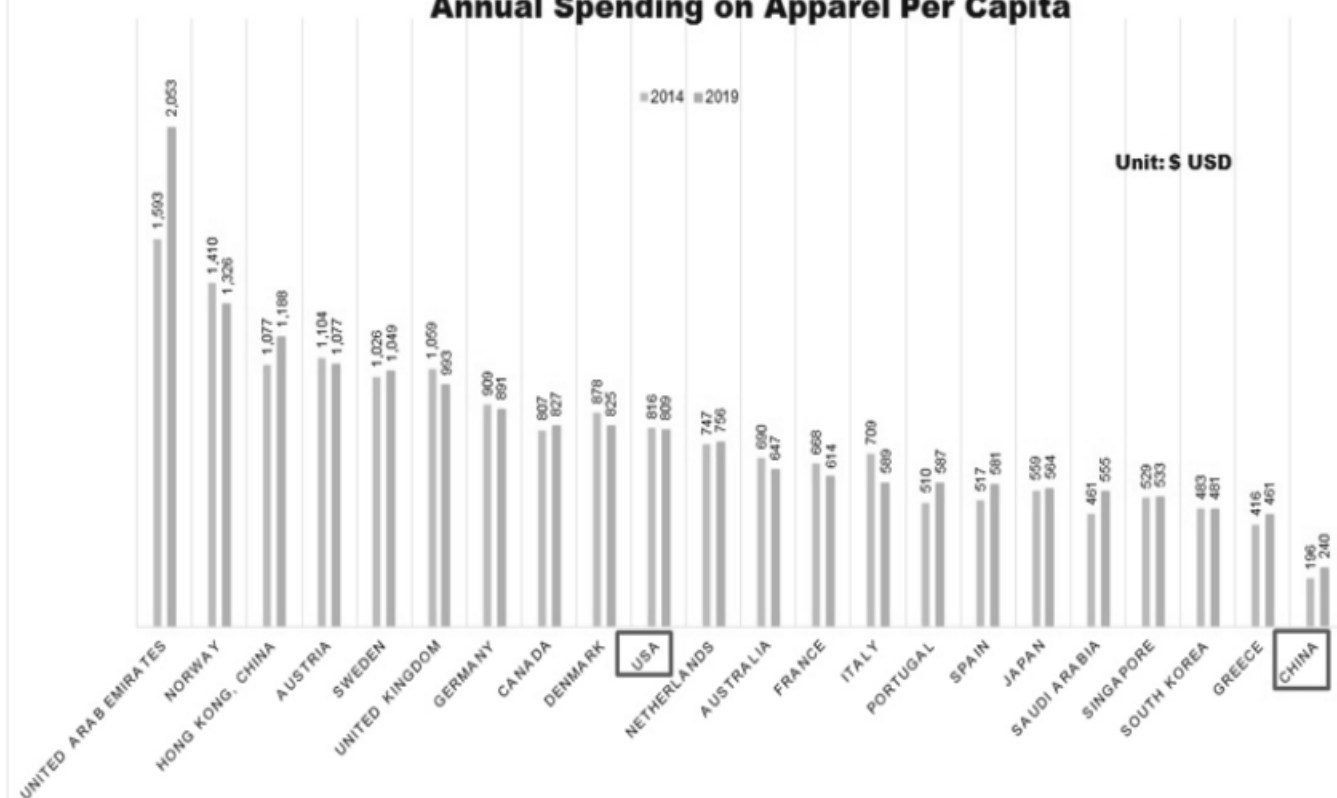
Market Share of Top Apparel Brands in China		Unit: %					
Brand	Company name (GBO)	2009	2010	2011	2012	2013	2014
Heilan Home	Heilan Home Co Ltd	0.2	0.3	0.4	0.4	0.6	1
Jack & Jones	Bestseller A/S	0.6	0.7	0.7	0.7	0.8	0.8
Uniqlo	Fast Retailing Co Ltd	0.2	0.2	0.3	0.4	0.5	0.7
E-Land	E Land Group	0.5	0.5	0.6	0.6	0.6	0.6
La Chapelle	Shanghai La Chapelle Fashion Co Ltd	0.1	0.1	0.2	0.3	0.5	0.6
adidas	adidas Group	0.4	0.4	0.5	0.5	0.5	0.5
Vero Moda	Bestseller A/S	0.4	0.5	0.5	0.5	0.5	0.5
Only	Bestseller A/S	0.4	0.5	0.5	0.5	0.5	0.5
Metersbonwe	Metersbonwe Group	0.7	0.8	1	0.8	0.6	0.5
Nike	Nike Inc	0.5	0.5	0.5	0.5	0.5	0.4
Semir	Semir Group Co Ltd	0.6	0.7	0.7	0.6	0.5	0.4
H&M	H&M Hennes & Mauritz AB	0.1	0.2	0.2	0.3	0.4	0.4
Bosideng	Bosideng International Holdings Co Ltd	0.6	0.7	0.7	0.7	0.6	0.4
Anta	Anta (China) Co Ltd	0.4	0.5	0.6	0.4	0.4	0.4
Zara	Inditex, Industria de Diseño Textil SA	0.2	0.2	0.3	0.4	0.4	0.4
Peacebird	Ningbo Peacebird Group Co Ltd	0.1	0.2	0.2	0.3	0.4	0.4
Cosmo Lady	Cosmo Lady China Holdings Co Ltd	0.1	0.1	0.2	0.2	0.3	0.3
Youngor	Youngor Group Co Ltd	0.3	0.3	0.4	0.4	0.3	0.3
Romon	Ningbo Romon Group Co Ltd	0.3	0.3	0.3	0.3	0.3	0.3
Ochirly	Trendy Group International Holdings Ltd	0.2	0.3	0.3	0.3	0.3	0.3

domestic Chinese brand

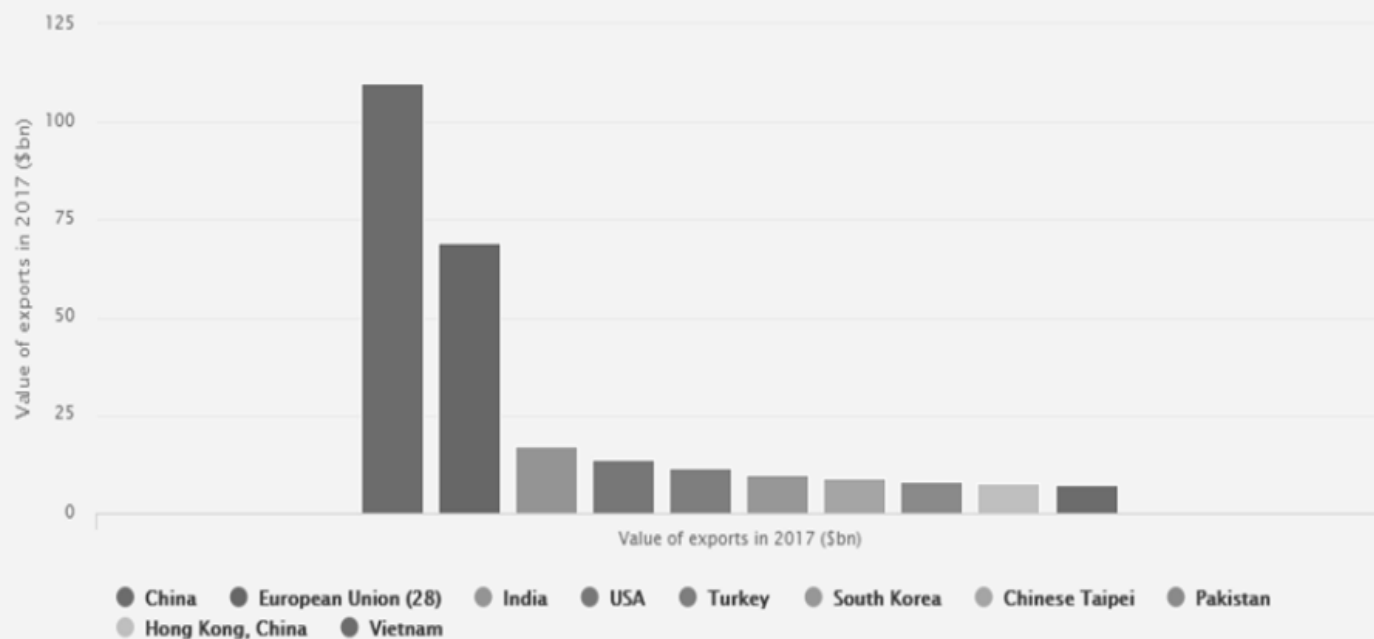


**Market Share of Top Apparel Brands in the United States**

Brand	Company name (GBO)	2009	2010	2011	2012	2013	2014
Nike	Nike Inc	1.60	1.50	1.60	1.90	2.10	2.30
Old Navy	Gap Inc, The	2.30	2.20	2.00	2.10	2.10	2.10
Victoria's Secret	L Brands Inc	-	-	-	-	1.90	2.00
Target	Target Corp	2.00	1.90	1.90	1.90	1.80	1.80
Ralph Lauren	Ralph Lauren Corp	1.50	1.50	1.70	1.70	1.80	1.80
Gap	Gap Inc, The	1.60	1.50	1.40	1.50	1.40	1.40
Hanes	Hanesbrands Inc	1.40	1.40	1.40	1.40	1.40	1.40
Forever 21	Forever 21 Inc	0.90	1.00	1.20	1.30	1.30	1.40
Levi's	Levi Strauss & Co	1.20	1.30	1.40	1.40	1.40	1.30
Carter's	Carter's Inc	0.90	0.90	1.00	1.10	1.20	1.20
Under Armour	Under Armour Inc	0.40	0.50	0.60	0.70	0.90	1.20
Heritage	PVH Corp	-	-	1.00	0.90	1.20	1.10
American Eagle Outfitters	American Eagle Outfitters Inc	1.00	1.00	1.00	1.10	1.00	1.00
Ann Taylor	Ann Inc	-	-	0.80	0.90	0.90	0.90
Fruit of the Loom	Fruit of the Loom Inc	0.90	0.90	1.00	0.90	0.90	0.90
Jones New York	Jones Group Inc, The	-	1.10	1.00	0.90	0.90	0.90
Banana Republic	Gap Inc, The	0.90	0.90	0.90	0.90	0.90	0.80
J Crew	J Crew Group Inc	0.60	0.60	0.70	0.70	0.80	0.80
H&M	H&M Hennes & Mauritz AB	0.40	0.50	0.50	0.60	0.70	0.80
Champion	Hanesbrands Inc	0.60	0.60	0.60	0.70	0.70	0.80
Express	Express Inc	-	0.80	0.80	0.80	0.80	0.80
Tommy Hilfiger	PVH Corp	-	-	0.60	0.60	0.60	0.70
The North Face	VF Corp	0.40	0.50	0.50	0.60	0.60	0.70

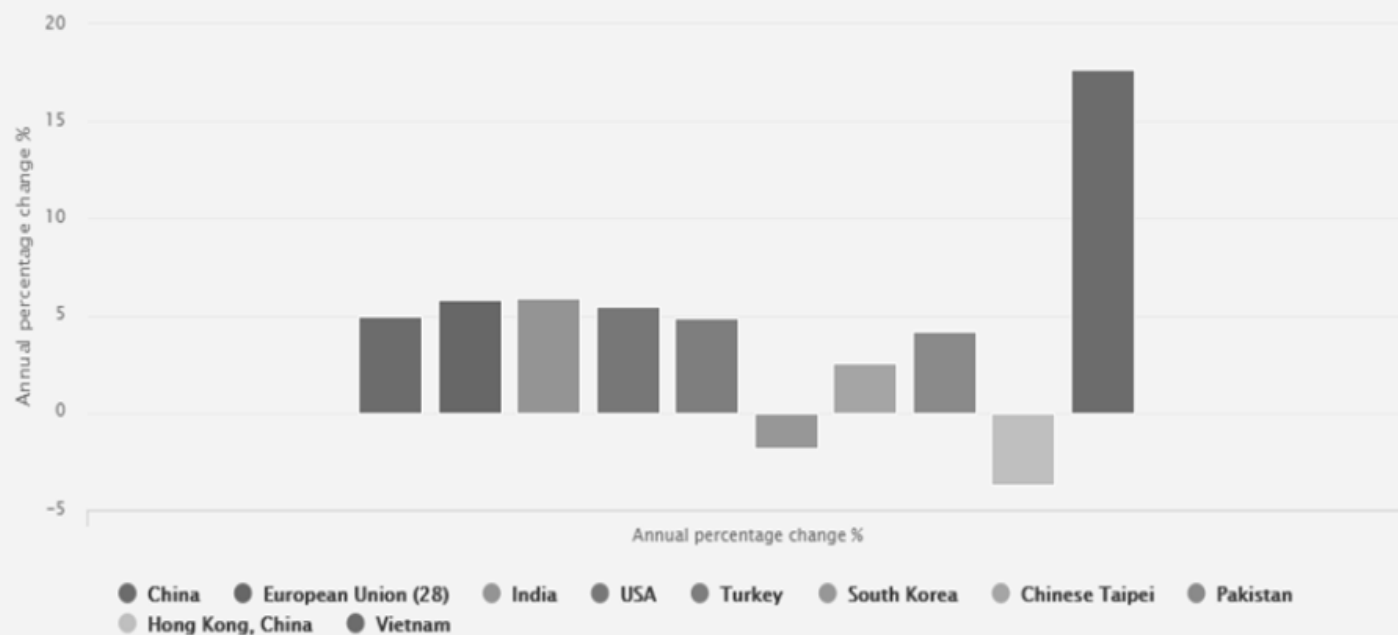
**Annual Spending on Apparel Per Capita**

### Top 10 exporters of textiles in 2017 (US\$bn)



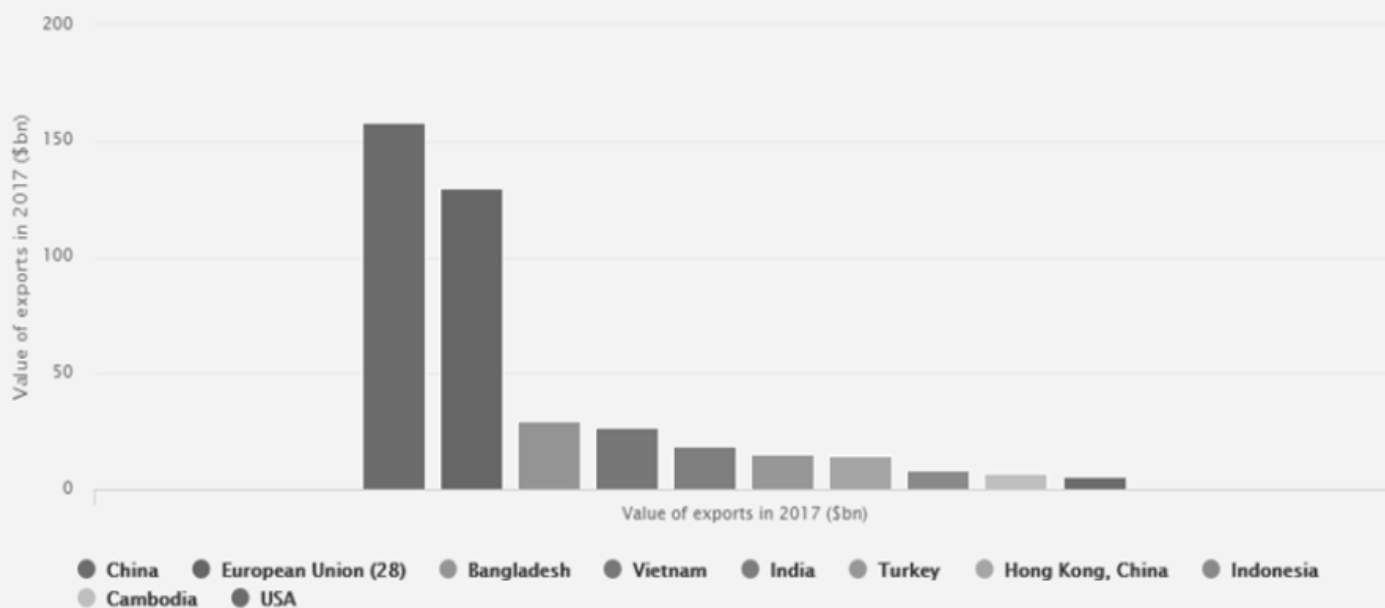
Source: WTO (2018)

### Top 10 exporters of textiles in 2017 (annual % change)



Source: WTO (2018)

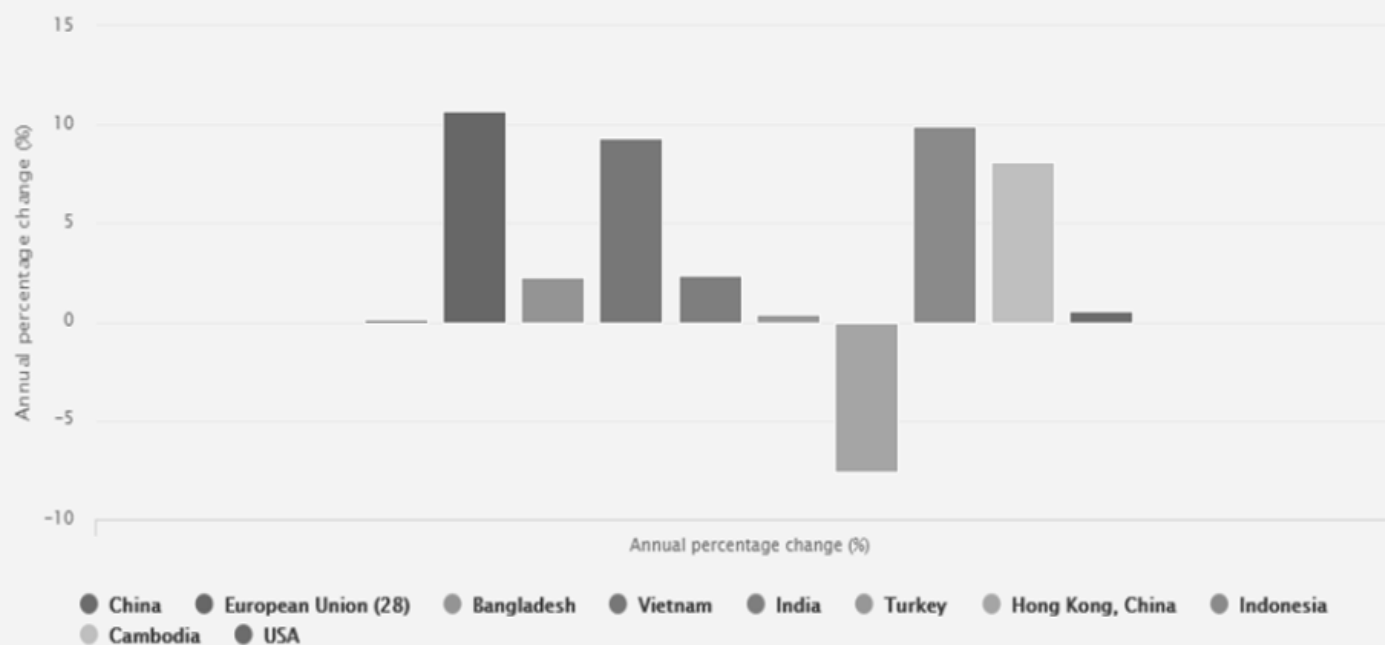
### Top 10 exporters of clothing in 2017 (US\$bn)



just-style.com

Source: WTO (2018)

### Top 10 exporters of clothing in 2017 (annual % change)



just-style.com

Source: WTO (2018)