

# Apparel and Footwear in the US

November 2023

Table of Contents

## Apparel and Footwear in the US

### EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for apparel and footwear?

### MARKET DATA

Table 1 - Sales of Apparel and Footwear by Category: Volume 2018-2023

Table 2 - Sales of Apparel and Footwear by Category: Value 2018-2023

Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2018-2023

Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2019-2023

Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2020-2023

Table 7 - Distribution of Apparel and Footwear by Format: % Value 2018-2023

Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2023

Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028

Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2023-2028

Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Childrenswear in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Childrenswear negatively impacted by rising household and school costs

The decline of childrenswear specialists and the rise of general fashion players

Parents embrace health and wellness, driving demand for children's sportswear

#### PROSPECTS AND OPPORTUNITIES

Childrenswear will face economic headwinds and a declining birth rate

Driven by parental activism, childrenswear is increasingly embracing inclusivity

Connecting with children in the digital world to nurture next-generation loyalty

### CATEGORY DATA

Table 13 - Sales of Childrenswear by Category: Volume 2018-2023

Table 14 - Sales of Childrenswear by Category: Value 2018-2023

Table 15 - Sales of Childrenswear by Category: % Volume Growth 2018-2023

Table 16 - Sales of Childrenswear by Category: % Value Growth 2018-2023

Table 17 - NBO Company Shares of Childrenswear: % Value 2019-2023

Table 18 - LBN Brand Shares of Childrenswear: % Value 2020-2023

Table 19 - Forecast Sales of Childrenswear by Category: Volume 2023-2028

Table 20 - Forecast Sales of Childrenswear by Category: Value 2023-2028

Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2023-2028

Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2023-2028

## Apparel Accessories in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Volume demand for apparel accessories remains on a declining trajectory  
Digital marketplaces becoming preferred destinations for purchases of apparel accessories

#### PROSPECTS AND OPPORTUNITIES

Apparel accessories faces a long road to recovery  
Thriving in apparel accessories: Tapping into lifestyle and economic trends

#### CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2018-2023  
Table 24 - Sales of Apparel Accessories by Category: Value 2018-2023  
Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2018-2023  
Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2018-2023  
Table 27 - NBO Company Shares of Apparel Accessories: % Value 2019-2023  
Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2020-2023  
Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2023-2028  
Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2023-2028  
Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028  
Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2023-2028

## Menswear in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Menswear continues to slightly outperform womenswear, while challenges remain  
Men's growing focus on fashion and style is backed by diverse evidence  
Multipurpose items thrive in an era of casual dress, hybrid working, and tight budgets

#### PROSPECTS AND OPPORTUNITIES

Menswear to see flat volume growth in the short term, but optimism for the long term  
Menswear embraces inclusivity in terms of both size and gender  
Generative AI expected to increasingly reshape menswear

#### CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2018-2023  
Table 34 - Sales of Menswear by Category: Value 2018-2023  
Table 35 - Sales of Menswear by Category: % Volume Growth 2018-2023  
Table 36 - Sales of Menswear by Category: % Value Growth 2018-2023  
Table 37 - NBO Company Shares of Menswear: % Value 2019-2023  
Table 38 - LBN Brand Shares of Menswear: % Value 2020-2023  
Table 39 - NBO Company Shares of Men's Nightwear: % Value 2019-2023  
Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2020-2023  
Table 41 - NBO Company Shares of Men's Outerwear: % Value 2019-2023  
Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2020-2023  
Table 43 - NBO Company Shares of Men's Swimwear: % Value 2019-2023  
Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2020-2023  
Table 45 - NBO Company Shares of Men's Underwear: % Value 2019-2023  
Table 46 - LBN Brand Shares of Men's Underwear: % Value 2020-2023  
Table 47 - Forecast Sales of Menswear by Category: Volume 2023-2028

Table 48 - Forecast Sales of Menswear by Category: Value 2023-2028

Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2023-2028

Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2023-2028

## Womenswear in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Consumers continue to spend on womenswear, but buy less

Varied consumer perceptions of value shape polarised performances

The expansion of online marketplaces: Shein, Temu, and TikTok

#### PROSPECTS AND OPPORTUNITIES

Navigating economic uncertainties in the short term, with longer term optimism

Retailers continue to invest in omnichannel strategies

Shifting sustainability trends: Consumer sentiment and regulatory support

#### CATEGORY DATA

Table 51 - Sales of Womenswear by Category: Volume 2018-2023

Table 52 - Sales of Womenswear by Category: Value 2018-2023

Table 53 - Sales of Womenswear by Category: % Volume Growth 2018-2023

Table 54 - Sales of Womenswear by Category: % Value Growth 2018-2023

Table 55 - NBO Company Shares of Womenswear: % Value 2019-2023

Table 56 - LBN Brand Shares of Womenswear: % Value 2020-2023

Table 57 - NBO Company Shares of Women's Nightwear: % Value 2019-2023

Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2020-2023

Table 59 - NBO Company Shares of Women's Outerwear: % Value 2019-2023

Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2020-2023

Table 61 - NBO Company Shares of Women's Swimwear: % Value 2019-2023

Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2020-2023

Table 63 - NBO Company Shares of Women's Underwear: % Value 2019-2023

Table 64 - LBN Brand Shares of Women's Underwear: % Value 2020-2023

Table 65 - Forecast Sales of Womenswear by Category: Volume 2023-2028

Table 66 - Forecast Sales of Womenswear by Category: Value 2023-2028

Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2023-2028

Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2023-2028

## Jeans in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Consumer demand for jeans decreases, facing multiple challenges

Economy and standard jeans outperform premium and super premium jeans

Sustainability remains a crucial focus for players in jeans

#### PROSPECTS AND OPPORTUNITIES

Weak growth anticipated over the forecast period

Jeans set to see more inclusivity and diversity

Two keys to success: Improving comfort, and fashion

#### CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2018-2023

- Table 70 - Sales of Jeans by Category: Value 2018-2023
- Table 71 - Sales of Jeans by Category: % Volume Growth 2018-2023
- Table 72 - Sales of Jeans by Category: % Value Growth 2018-2023
- Table 73 - Sales of Men's Jeans by Category: Volume 2018-2023
- Table 74 - Sales of Men's Jeans by Category: Value 2018-2023
- Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2018-2023
- Table 76 - Sales of Men's Jeans by Category: % Value Growth 2018-2023
- Table 77 - Sales of Women's Jeans by Category: Volume 2018-2023
- Table 78 - Sales of Women's Jeans by Category: Value 2018-2023
- Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2018-2023
- Table 80 - Sales of Women's Jeans by Category: % Value Growth 2018-2023
- Table 81 - NBO Company Shares of Jeans: % Value 2019-2023
- Table 82 - LBN Brand Shares of Jeans: % Value 2020-2023
- Table 83 - Forecast Sales of Jeans by Category: Volume 2023-2028
- Table 84 - Forecast Sales of Jeans by Category: Value 2023-2028
- Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2023-2028
- Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2023-2028
- Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2023-2028
- Table 88 - Forecast Sales of Men's Jeans by Category: Value 2023-2028
- Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2023-2028
- Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2023-2028
- Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2023-2028
- Table 92 - Forecast Sales of Women's Jeans by Category: Value 2023-2028
- Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2023-2028
- Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2023-2028

## Hosiery in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Consumer demand for hosiery continues to decline
- The ballet trend drives the return of leg warmers

#### PROSPECTS AND OPPORTUNITIES

- Hosiery expected to deliver only low volume growth over the forecast period
- Digital marketplaces will threaten leading hosiery brands

#### CATEGORY DATA

- Table 95 - Sales of Hosiery by Category: Volume 2018-2023
- Table 96 - Sales of Hosiery by Category: Value 2018-2023
- Table 97 - Sales of Hosiery by Category: % Volume Growth 2018-2023
- Table 98 - Sales of Hosiery by Category: % Value Growth 2018-2023
- Table 99 - NBO Company Shares of Hosiery: % Value 2019-2023
- Table 100 - LBN Brand Shares of Hosiery: % Value 2020-2023
- Table 101 - Forecast Sales of Hosiery by Category: Volume 2023-2028
- Table 102 - Forecast Sales of Hosiery by Category: Value 2023-2028
- Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2023-2028
- Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2023-2028

## Footwear in the US

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Footwear sees another year of declining demand  
Versatile footwear wins in an era of rising living costs  
Footwear players continue their sustainability journey with diverse practices

## PROSPECTS AND OPPORTUNITIES

Footwear expected to experience another reset year  
Charting success: Differentiation and specialisation in footwear in the US  
Footwear players expected to continue their investment in omnichannel strategies

## CATEGORY DATA

Table 105 - Sales of Footwear by Category: Volume 2018-2023  
Table 106 - Sales of Footwear by Category: Value 2018-2023  
Table 107 - Sales of Footwear by Category: % Volume Growth 2018-2023  
Table 108 - Sales of Footwear by Category: % Value Growth 2018-2023  
Table 109 - NBO Company Shares of Footwear: % Value 2019-2023  
Table 110 - LBN Brand Shares of Footwear: % Value 2020-2023  
Table 111 - Distribution of Footwear by Format: % Value 2018-2023  
Table 112 - Forecast Sales of Footwear by Category: Volume 2023-2028  
Table 113 - Forecast Sales of Footwear by Category: Value 2023-2028  
Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2023-2028  
Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2023-2028

## Sportswear in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sportswear continues to outperform non-sportswear in challenging times  
Sports footwear outpaces sports apparel, in contrast to the situation in apparel and footwear more broadly  
Continued consumer shift: Sportswear as everyday fashion

#### PROSPECTS AND OPPORTUNITIES

Sportswear will continue to outshine non-sportswear, yet faces deceleration  
Unlocking success: Fostering brand loyalty amongst the next generation of consumers  
Sportswear players will continue to invest in physical and digital immersive worlds

#### CATEGORY DATA

Table 116 - Sales of Sportswear by Category: Value 2018-2023  
Table 117 - Sales of Sportswear by Category: % Value Growth 2018-2023  
Table 118 - NBO Company Shares of Sportswear: % Value 2019-2023  
Table 119 - LBN Brand Shares of Sportswear: % Value 2020-2023  
Table 120 - Distribution of Sportswear by Format: % Value 2018-2023  
Table 121 - Forecast Sales of Sportswear by Category: Value 2023-2028  
Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/apparel-and-footwear-in-the-us/report](http://www.euromonitor.com/apparel-and-footwear-in-the-us/report).