

U.S. Apparel Imports under the 2025 Tariffs: Costs, Volumes, and Sourcing Shifts

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Executive summary

This report examines U.S. apparel imports from January 2020 through June 2026 across all 49 broad OTEXA apparel categories classified as cotton-dominant or man-made-fiber (MMF)-dominant.³ It evaluates changes in import value, square-meter-equivalent (SME) volume, calculated duty, border cost, and sourcing after the 2025 tariff changes. The results show sharply higher duty burdens, weaker imports in 2026, and a large shift away from China, with sourcing concentration moving in different directions for cotton- and MMF-dominant apparel.

- ***Calculated duty burdens rose sharply for both fiber groups.*** From 2024 to 2025, the effective calculated-duty rate increased 9.5 percentage points for cotton-dominant apparel and 10.2 points for MMF-dominant apparel. Calculated duty rose by 75.7% for cotton and 51.2% for MMF. During January-June 2026, the effective rates remained 6.5 and 5.2 percentage points, respectively, above the same period of 2025.
- ***Import value weakened across the broad apparel market.*** Cotton-dominant import value was essentially unchanged in 2025, while MMF-dominant value declined by 3.4%, reducing combined import value to \$72.7 billion. During January-June 2026, import value was 8.5% lower for cotton and 8.2% lower for MMF than in the same months of 2025.
- ***Sourcing shifted sharply away from China, but concentration changed differently by fiber group.*** China's share fell by 5.6 percentage points for cotton and 11.2 points for MMF in 2025 relative to the 2020-2024 averages. By January-June 2026, the gaps widened to 6.7 and 13.1 points. Cotton sourcing became modestly more concentrated, while MMF sourcing became more diversified and involved more effective suppliers. Nevertheless, expanding countries replaced only 19.8% of gross cotton SME losses and 38.3% of MMF losses during January-June 2026.

³ Dominant fiber classification follows the primary-fiber designation of each OTEXA/MFA apparel category. The broad scope includes 24 cotton-dominant categories and 25 MMF-dominant categories; Appendix Table A1 lists all categories and their 2025 value-share rankings. Data obtained from the U.S. Department of Commerce, Office of Textiles and Apparel (OTEXA).

Market Overview

From 2020 to 2022, U.S. apparel import value⁴ rose from \$60.9 billion in 2020 to \$77.8 billion in 2021 and peaked at \$94.8 billion in 2022 as importers replenished inventories after the pandemic disruption (Figure 1). Cotton- and MMF-dominant apparel followed similar trajectories during this expansion: cotton import value increased from \$30.2 billion to \$48.0 billion, while MMF import value rose from \$30.8 billion to \$46.8 billion. Combined import value subsequently fell to \$73.0 billion in 2023 as demand and inventories normalized, recovered modestly to \$74.0 billion in 2024, and eased to \$72.7 billion in 2025. During 2023–2024, annual import value remained close to \$37 billion for each fiber group. The 2025 decline was concentrated in MMF-dominant apparel, whose import value fell to \$35.8 billion, while cotton-dominant apparel remained nearly unchanged at \$37.0 billion. Cotton-dominant and MMF-dominant apparel represented 50.8% and 49.2%, respectively, of combined apparel import value in 2025, indicating a nearly even market split. During January–June 2026, imports totaled \$32.7 billion, comprising \$16.9 billion in cotton-dominant apparel and \$15.8 billion in MMF-dominant apparel.

⁴ Import value is general import customs value, excluding calculated duty and other import charges. These figures measure general imports at the U.S. border and therefore describe importer demand rather than final consumer retail demand.

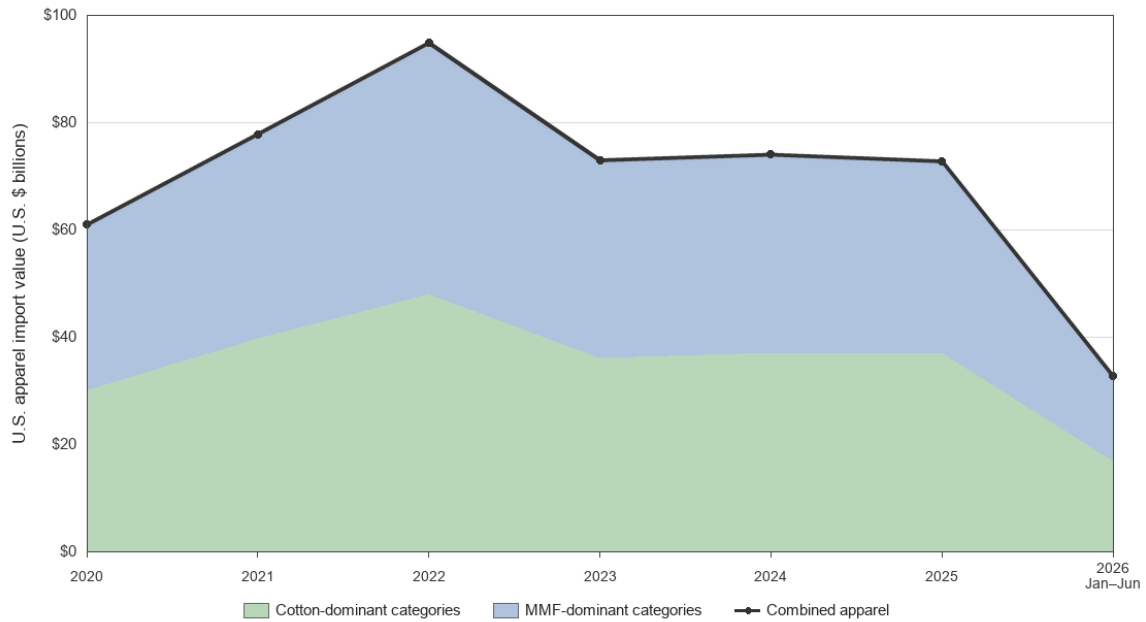


Figure 1 U.S. Apparel Import Value: Cotton- and MMF-Dominant Categories, Jan. 2020 – Jun. 2026

Source: Author’s calculations based on data from OTEXA and U.S. Census Bureau International Trade data.

2025 Tariff Escalation and Short-Term Import Adjustment

The 2025 tariff changes occurred in several stages rather than as a single policy event. Table 1 summarizes the principal effective dates relevant to the import data through June 2026; a more complete chronology, including announcement dates, legal authorities, implementation details, and official sources, is provided in Appendix Table A4. The monthly effective duty rate⁵ rose from 17% in March 2025 to 24% in May, reached approximately 34% in October, and remained near that level at its January 2026 peak (Figure 2). It then declined to 23% in June 2026. Although the rate had eased considerably from the peak, it remained 7 percentage points above the 16% recorded in January 2025.

⁵ Monthly effective duty rates shown here are calculated from Census calculated duty divided by customs value, which are observed rates rather than announced statutory rates.

Table 1 Timeline of Major Tariff Developments Affecting U.S. Apparel Imports, 2025 – Jun. 2026

Effective date	Major development	Relevance to this analysis
February 4, 2025	Additional 10% tariff on imports from China	Beginning of the 2025 China-specific tariff increase
March 4, 2025	China additional tariff increased to 20%	Further increased China's tariff exposure
April 5, 2025	Broad 10% reciprocal tariff took effect	Extended additional tariffs across most sourcing countries
May 14, 2025	China's reciprocal-tariff component was reduced	Lowered, but did not eliminate, China's additional tariff burden
August 7, 2025	Country-specific reciprocal rates took effect	Created wider tariff-rate differences among major suppliers
August 29, 2025	Duty-free de minimis treatment ended worldwide	Changed the treatment of qualifying low-value shipments
February 20, 2026	Supreme Court invalidated the use of IEEPA for the tariffs	Ended the principal legal authority supporting the 2025 measures
February 24, 2026	Temporary 10% Section 122 surcharge took effect	Replaced part of the discontinued tariff structure

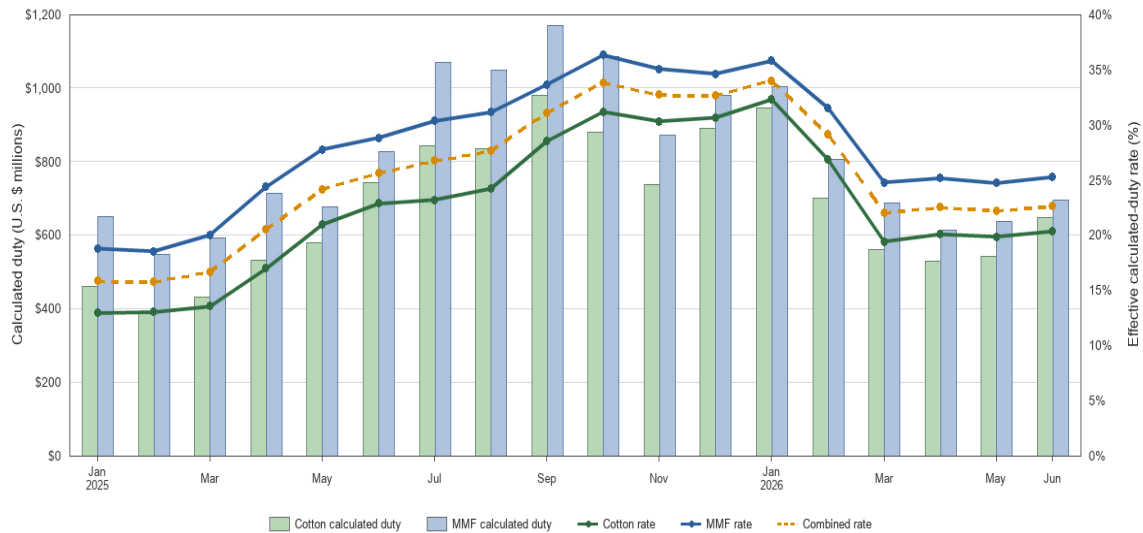


Figure 2 U.S. Apparel Calculated Duty and Effective Duty Rates, Jan. 2025 – Jun. 2026

Note: Bars show monthly calculated duty on imports; lines show effective duty rates.

Source: Author's calculations based on data from OTEXA and U.S. Census Bureau International Trade data.

Tariff burdens increased substantially for both fiber groups, with MMF-dominant apparel consistently facing the higher effective duty rate (Figure 2). The cotton rate rose from 13% in January 2025 to a peak of 32% in January 2026 before declining to 20% in

June. The MMF rate increased from 19% in January 2025 to a peak of 36% in October 2025 and remained at 25% in June 2026. Monthly calculated duty peaked in September 2025 at \$979.2 million for cotton-dominant apparel, about 113% above its January 2025 level, and \$1.17 billion for MMF-dominant apparel, 80% above its January 2025 level. By June 2026, monthly calculated duty had moderated to \$648.4 million for cotton and \$694.1 million for MMF. Nevertheless, the June effective rates remained 7.4 percentage points above the January 2025 level for cotton and 6.5 percentage points higher for MMF. Overall, the results indicate that the revised tariff environment raised the border-duty burden across both fiber groups, with MMF-dominant products continuing to face the higher effective rate.

Year-over-year comparisons in Figure 3 show strong import growth in early 2025 followed by a broad pullback as effective duty rates rose. Cotton-dominant apparel import value was 14.2% above its prior-year level in March 2025 and 12.1% higher in April, while MMF-dominant import value increased by 6.9% and 9.4%, respectively. This timing is consistent with some shipments being advanced ahead of the tariff rollout. By May 2025, import value had fallen 4.0% below its prior-year level for cotton and 9.7% for MMF, while effective duty rates were 8.8 and 10.6 percentage points higher, respectively. The import declines deepened in October to 20.5% for cotton and 18.1% for MMF, as the corresponding duty-rate increases reached approximately 18 percentage points for both groups.

Import values generally remained below their prior-year levels in early 2026; in January, cotton and MMF values were down 11.3% and 16.6%, while their effective duty rates were 19.4 and 17.0 percentage points higher. Conditions improved by May, when cotton import value was nearly unchanged and MMF value was 4.8% higher than a year earlier. In June, however, import value was again lower by 1.1% for cotton and 4.1% for MMF. The smaller June declines indicate that the year-over-year import gap had narrowed substantially from late 2025 and early 2026.⁶ Detailed category-level comparisons of changes in key indicators for the top four cotton- and MMF-dominant

⁶ Duty-rate changes turned negative by May–June 2026 because the comparison months in 2025 already reflected elevated rates; this does not indicate a return to pre-tariff duty levels.

categories, all remaining categories, and each fiber group overall for full-year 2025 and January–June 2026 are provided in Appendix Tables A2 and A3.

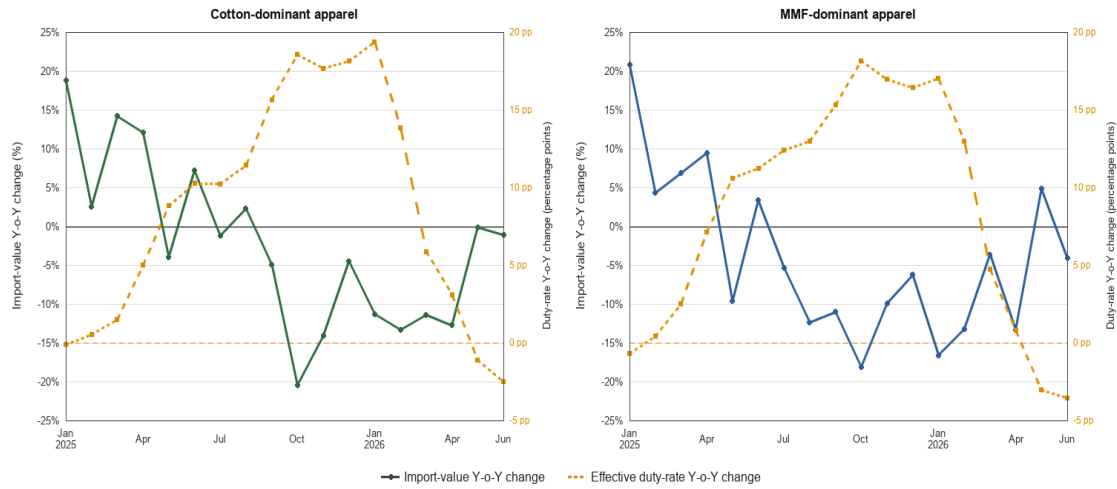


Figure 3 U.S. Cotton- and MMF-Dominant Apparel Imports: Year-over-Year Change in Import Value and Effective Duty Rates, Jan. 2025 – Jun. 2026

Note: Current month compared with the same month one year earlier. Year-over-year change of Effective duty rates is measured in percentage points on the right axis.

Source: Author’s calculations based on data from OTEXA and U.S. Census Bureau International Trade data.

Higher tariffs can affect sourcing through both country reallocation and changes in the overall supplier base. The following section examines these adjustments in two stages. First, it considers whether U.S. importers shifted market share away from more heavily tariffed countries toward alternative suppliers. Second, it assesses whether expanding countries replaced the physical imports lost from declining sources and whether these shifts resulted in a more diversified or concentrated sourcing structure.

Sourcing Responses to Higher Tariffs

Market Shares

The market-share evidence indicates that U.S. apparel sourcing shifted markedly away from China during 2025 and the first half of 2026. Figures 4 and 5 present the market shares and effective tariff rates of the five leading suppliers in each fiber group. Table 2 evaluates these changes against period-matched historical benchmarks: full-year 2025 is compared with average full-year shares during 2020-2024, while January-June

2026 is compared with the average for the same months during 2020-2024. Using corresponding periods reduces the risk of interpreting normal seasonal variation as a change in sourcing patterns.

Based on 2025 import value, the leading suppliers of cotton-dominant apparel were Vietnam, Bangladesh, India, China, and Cambodia. Figure 4 shows a marked change in their market share over time. China's share fell from a 13.8% average during 2020-2024 to 8.2% in 2025 and declined further to 6.6% in January-June 2026. In contrast, Bangladesh's share rose from 13.8% to 16.6%, while Vietnam's increased from 16.0% to 17.8%, making Vietnam the largest individual supplier of cotton apparel. India and Cambodia also exceeded their historical shares, accounting for 9.6% and 6.1%, respectively, in January-June 2026.

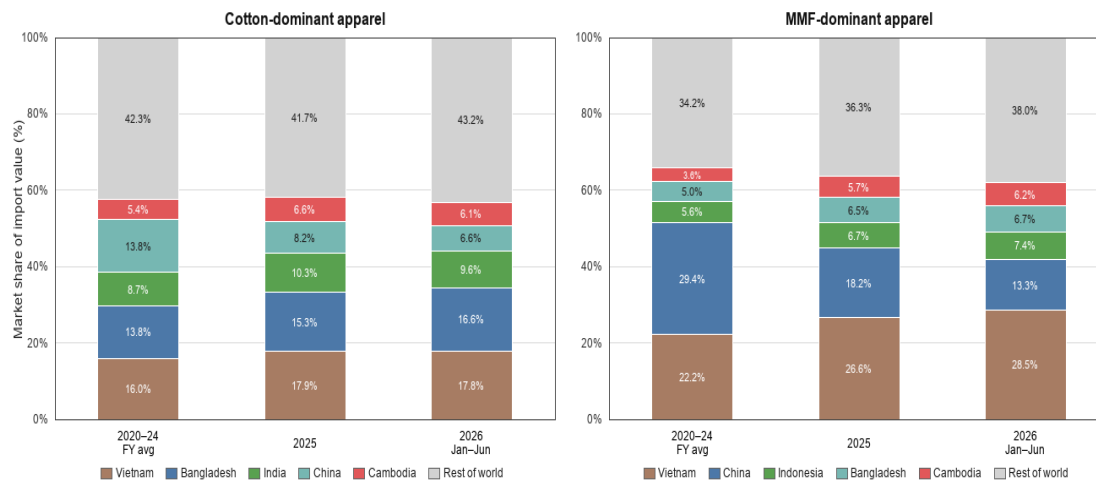


Figure 4 U.S. Cotton- and MMF-Dominant Apparel Imports: Market Shares of Leading Suppliers

Note: Shares are based on import customs value. Major suppliers are the five largest in 2025

Source: Author's calculations based on data from OTEXA.

The rest-of-world (ROW) share was 0.6 percentage point below its benchmark in 2025 but 1.0 point above the matched benchmark in January-June 2026 (Table 2). This suggests that the early-2026 cotton sourcing extended beyond the five leading suppliers, although the aggregate ROW category does not reveal whether the gains went to new suppliers or to established countries with previously smaller market shares. As Figure 5 indicates, these leading suppliers generally faced effective tariff rates above the overall

cotton-category rate, with particularly high rates for China and India. These tariff differences are consistent with importers shifting some sourcing toward countries facing lower effective rates, although production capacity, costs, product specialization, and other commercial considerations also likely influenced the adjustment. Because the 2026 results cover only January through June, continued monitoring is needed to determine whether this broader sourcing shift persists.

Table 2 U.S. Apparel Market Shares by Major Supplier and Dominant Fiber Group

Supplier	2020-2024 full-year average	2025	Change (pp)	2020-2024 Jan.-Jun. average	2026 Jan.-Jun.	Change (pp)
Cotton-dominant apparel						
Vietnam	16.0%	17.9%	+1.9	16.0%	17.8%	+1.8
Bangladesh	13.8%	15.3%	+1.5	14.0%	16.6%	+2.6
India	8.7%	10.3%	+1.6	9.5%	9.6%	+0.2
China	13.8%	8.2%	-5.6	13.3%	6.6%	-6.7
Cambodia	5.4%	6.6%	+1.2	5.1%	6.1%	+1.0
ROW	42.3%	41.7%	-0.6	42.2%	43.2%	+1.0
MMF-dominant apparel						
Vietnam	22.2%	26.6%	+4.5	22.6%	28.5%	+5.9
China	29.4%	18.2%	-11.2	26.4%	13.3%	-13.1
Indonesia	5.6%	6.7%	+1.0	6.0%	7.4%	+1.4
Bangladesh	5.0%	6.5%	+1.5	5.3%	6.7%	+1.4
Cambodia	3.6%	5.7%	+2.1	3.5%	6.2%	+2.6
ROW	34.2%	36.3%	+2.1	36.2%	38.0%	+1.8

Note: Shares are based on import customs value. Major suppliers are the five largest in 2025; ROW denotes all remaining countries. Changes are percentage-point (pp) differences.

Source: Author's calculations based on data from OTEXA.

For MMF-dominant apparel, import shares changed substantially across major suppliers over the period as shown in Figure 4, primarily reflecting China's declining market position and Vietnam's continued expansion. China's share fell from an average of 29.4% during 2020-2024 to 18.2% in 2025 and 13.3% in January-June 2026 (Table 2).⁷ Meanwhile, Vietnam strengthened its position as the leading supplier, with its share

⁷ The data do not separately identify low-value imports entering through the de minimis channel. Changes in that channel may have influenced China's measured share, particularly during the longer-term decline that began around 2019, but the magnitude cannot be determined from the available data.

rising from 22.2% to 26.6% in 2025 and 28.5% in January-June 2026. Among the other major suppliers, Cambodia recorded the largest gain relative to its matched historical benchmark, increasing 2.6 percentage points to 6.2%. Bangladesh and Indonesia each gained approximately 1.4 points, reaching shares of 6.7% and 7.4%, respectively. The ROW share also increased to 38.0%, 1.8 points above its matched benchmark. Overall, China's decline coincided with gains among Vietnam, other leading suppliers, and smaller sources, resulting in a more diversified MMF-apparel sourcing base.

The sourcing shifts coincided with substantial differences in effective duty rates across countries (Figure 5). China recorded the highest observed rates in both fiber groups, peaking in May 2025 at 70% for cotton-dominant apparel and 73% for MMF-dominant apparel. Although China's rates subsequently declined, they remained above the corresponding overall fiber-group rates in June 2026, 31% for cotton and 35% for MMF, compared with overall rates of 20% and 25%, respectively. India also faced unusually high rates for cotton-dominant apparel: its rate rose from 45% in September 2025 to 63% in October, remained the level through January 2026, and then declined to 41% in February and 23% in June. This pattern coincided with the implementation and subsequent removal of an additional 25% IEEPA-based tariff on imports from India, which took effect on August 27, 2025, and was removed effective February 7, 2026. By comparison, the other leading cotton suppliers ended June with rates of approximately 25%. Within the MMF group, June rates ranged from 28% for Bangladesh to 34% for Cambodia, remaining below China's rate. These cross-country differences are consistent with tariffs contributing to sourcing reallocation, although product mix, production capacity, costs, and buyer-specific factors likely influenced importers' decisions as well.

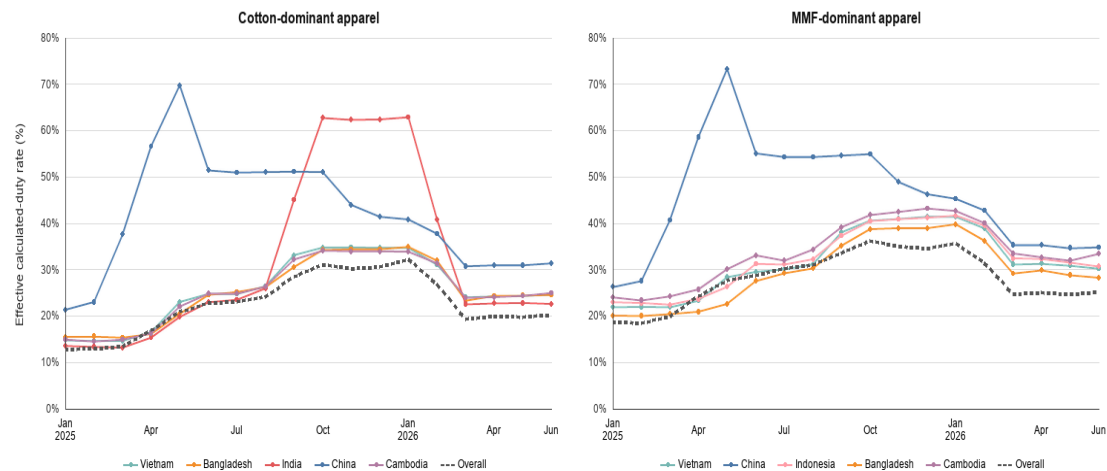


Figure 5 Monthly Effective Calculated-Duty Rates for Leading U.S. Apparel Suppliers, Jan. 2025–Jun. 2026

Note: Solid lines show selected leading suppliers; black dashed lines show the overall rate across all suppliers in each fiber group. Monthly effective calculated-duty rates equal calculated duty divided by imports custom value.

Source: Author’s calculations based on data from OTEXA and U.S. Census Bureau International Trade data.

Market-share changes alone do not show whether expanding suppliers replaced the physical imports lost from declining sources or whether the supplier base became more diversified. Tables 3 and 4 address these questions using SME replacement rates and supplier-concentration measures.

Physical replacement

Market-share gains did not fully offset the physical-volume declines among shrinking suppliers. Table 3 shows that expanding source countries replaced only part of the physical import volume lost among declining suppliers. Physical volume is measured in square-meter equivalents (SME), which convert quantities reported in different category units into a common measure. In 2025, gains replaced 38.3% of gross cotton SME losses and 49.1% of gross MMF SME losses, leaving 61.7% and 50.9%, respectively, unreplaced. The higher MMF replacement rate shows that expanding suppliers offset a greater share of lost import volume than their cotton counterparts.

Replacement weakened further in January-June 2026, particularly for cotton-dominant apparel. Relative to the matched historical benchmark, expanding suppliers replaced only 19.8% of cotton SME losses, leaving 80.2% unreplaced, compared with a 38.3% replacement rate and a 61.7% unreplaced share for MMF. These preliminary results indicate a larger net contraction in cotton volume and a stronger, though still incomplete, offset among MMF suppliers. Because the results cover only the first half of 2026, they may reflect both tariff-related sourcing responses and inventory adjustments. Additional data will be needed to determine whether the contraction and the differences between the two fiber groups persist.

Table 3 Gross Replacement of Declining Apparel Imports by Expanding Source Countries

Dominant fiber	Physical basis	Gross gains (million)	Gross losses (million)	Replacement rate	Unreplaced share
Full-year 2025 vs. 2020-2024 full-year average					
Cotton	SME	452.9	1,181.8	38.3%	61.7%
MMF	SME	1,286.1	2,621.4	49.1%	50.9%
Jan.-Jun. 2026 vs. 2020-2024 Jan.-Jun. average					
Cotton	SME	134.0	675.1	19.8%	80.2%
MMF	SME	602.6	1,575.0	38.3%	61.7%

Note: Gross gains are positive country-level SME changes; gross losses are the absolute value of negative changes. Replacement equals gross gains divided by gross losses.

Source: Author's calculations based on data from OTEXA.

Supplier concentration

The Herfindahl–Hirschman Index (HHI)⁸ measures how concentrated imports are across supplying countries. A higher HHI indicates that imports are distributed more unevenly among fewer suppliers, while a lower HHI indicates a more diversified supplier base. Table 4 shows that concentration changed differently across the two fiber groups. For cotton-dominant apparel, the HHI increased modestly from the 2020-2024 full-year benchmark of 0.087 to 0.089 in 2025 and from the matched January-June benchmark of

⁸ It is calculated by summing up the squared market shares of all suppliers.

0.087 to 0.090 in 2026. The effective number of suppliers⁹ declined from 11.6 to 11.2 in both comparisons. The top three suppliers' combined share was nearly unchanged in 2025, declining by 0.1 percentage point to 43.5%, but increased by 0.8 point to 44.1% in January – June 2026. These results indicate a modest increase in cotton sourcing concentration.

MMF-dominant apparel followed the opposite pattern. Its HHI fell from 0.149 to 0.123 in 2025 and from 0.136 to 0.120 in January-June 2026. At the same time, the effective number of suppliers increased from 6.7 to 8.1 in 2025 and from 7.4 to 8.3 in January-June 2026. The top three suppliers' share also declined by 5.7 percentage points in 2025 and 6.0 points in January-June 2026. Overall, these findings indicate that the shift away from China was absorbed by a narrower group of suppliers in the cotton market but distributed more broadly across the MMF supplier base.

Table 4 Supplier Concentration in U.S. Cotton- and MMF-Dominant Apparel Imports

Concentration measure	2020-2024 full-year benchmark	2025	Change	2020-2024 Jan.-Jun. benchmark	2026 Jan.-Jun.	Change
Cotton-dominant apparel						
HHI	0.087	0.089	+0.003	0.087	0.090	+0.003
Top three supplier share	43.6%	43.5%	-0.1 pp	43.3%	44.1%	+0.8 pp
Effective number of suppliers	11.6	11.2	-0.4	11.6	11.2	-0.4
MMF-dominant apparel						
HHI	0.149	0.123	-0.026	0.136	0.120	-0.015
Top three supplier share	57.2%	51.5%	-5.7 pp	55.1%	49.1%	-6.0 pp
Effective number of suppliers	6.7	8.1	+1.4	7.4	8.3	+0.9

Note: pp are percentage-point differences. The top three supplier share is the combined share of the three largest suppliers in each period; supplier identities may change between periods. Supplier counts include countries with positive imports.

Source: Author's calculations based on data from OTEXA.

⁹ Calculated as $1/\text{HHI}$, it translates the index into a more intuitive estimate of the number of equally sized suppliers.

Taken together, the evidence points to sourcing reallocation rather than a uniform movement toward diversification. China lost substantial market share in both fiber groups, but expanding suppliers replaced only part of the physical decline among shrinking sources. MMF-dominant apparel achieved a higher replacement rate and became more diversified, as reflected in its lower HHI, smaller top three supplier share, and greater effective number of suppliers. Cotton-dominant apparel experienced weaker replacement and a larger unreplaced decline in early 2026, while its HHI increased and its effective number of suppliers fell. The shift away from China therefore produced different sourcing outcomes: cotton imports became modestly more concentrated among the remaining suppliers, whereas MMF imports were distributed more broadly across the supplier base.

Implications and Limitations

Overall, the evidence indicates that the 2025 tariff changes coincided with substantially higher effective duty rates, duty burdens, and border costs for both cotton- and MMF-dominant apparel. Import activity remained relatively strong in early 2025 but weakened later in the year; during January-June 2026, import value was approximately 8% below the corresponding 2025 level for both fiber groups. Sourcing shifted sharply away from China toward alternative suppliers, including Vietnam and Bangladesh for cotton-dominant apparel and Vietnam, Cambodia, Indonesia, and Bangladesh for MMF-dominant apparel. However, expanding countries replaced only part of the physical volume lost among declining suppliers: 19.8% for cotton and 38.3% for MMF in January-June 2026. Concentration outcomes also differed. Cotton sourcing became modestly more concentrated, with a higher HHI and fewer effective suppliers, while MMF sourcing became more diversified, with a lower HHI, a smaller top three supplier share, and more effective suppliers. The adjustment therefore involved both sourcing reallocation and an overall contraction in physical imports rather than a uniform broadening of the supplier base.

Several limitations should be considered when interpreting these findings. The analysis measures import values, physical volumes, duties, and costs at the U.S. border. It cannot determine whether higher costs were absorbed by foreign suppliers, U.S.

importers, or retailers, or ultimately passed through to consumers. Accordingly, the results should not be interpreted as direct evidence of changes in retail prices or consumer demand. In addition, the 2026 findings cover only January through June and remain preliminary. Continued monitoring is needed to determine whether import volumes recover, sourcing becomes more diversified, and higher border costs lead to changes in retail prices, product quality, or fiber composition.

Appendix: Product Coverage and Detailed Import Indicators

This appendix documents all 49 broad OTEXA apparel categories: 24 cotton-dominant and 25 MMF-dominant. Appendix Table A1 ranks categories within each fiber group by 2025 general-import value share. Appendix Tables A2 and A3 report indicator changes for the four highest-value categories, the remaining categories outside the top four, and the overall group for full-year 2025 and January-June 2026. Appendix Table A4 summarizes the tariff timeline and official sources.

Appendix Table A1 Broad Cotton- and MMF-Dominant Apparel Category Coverage

Fiber group	Value-share rank	MFA	Category description	Unit	SME factor	Share of 2025 import value	Share of 2025 SME
Cotton-dominant							
	1	338	Doz M&B KNIT SHIRTS, COTTON	DOZ	6	10.8%	5.6%
	2	348	Doz W&G COTTON TROUSERS/SLACKS/SHORTS	DOZ	14.9	7.3%	5.0%
	3	347	Doz M&B COT. TROUSERS/BREECHES/SHORTS	DOZ	14.9	7.2%	4.2%
	4	339	Doz W&G KNIT SHIRTS/BLOUSES, COTTON	DOZ	6	7.0%	3.2%
	5	352	Doz COTTON UNDERWEAR	DOZ	9.2	2.6%	5.4%
	6	239	Kg BABIES' GARM. & CLOTH. ACCESS.	KG	6.3	2.5%	2.8%
	7	340	Doz M&B COTTON SHIRTS, NOT KNIT	DOZ	20.1	2.3%	1.6%
	8	336	Doz COTTON DRESSES	DOZ	37.9	1.9%	2.5%
	9	359	Kg OTHER COTTON APPAREL	KG	8.5	1.4%	2.5%
	10	341	Doz W&G COT. SHIRTS/BLOUSES,N-KNIT	DOZ	12.1	1.2%	0.5%
	11	334	Doz OTHER M&B COATS, COTTON	DOZ	34.5	1.1%	0.9%
	12	345	Doz COTTON SWEATERS	DOZ	30.8	1.1%	1.1%
	13	332	Dpr COTTON HOSIERY	DPR	3.8	1.0%	1.5%
	14	335	Doz W&G COTTON COATS	DOZ	34.5	1.0%	0.8%
	15	351	Doz COTTON NIGHTWEAR/PAJAMAS	DOZ	43.5	0.9%	2.9%
	16	342	Doz COTTON SKIRTS	DOZ	14.9	0.5%	0.3%
	17	237	DOZ PLAYSUITS, SUNSUITS, ETC	DOZ	19.2	0.2%	0.2%
	18	350	Doz COTTON DRESSING GOWNS, ROBES ETC.	DOZ	42.6	0.2%	0.5%
	19	349	Doz BRASSIERES, OTHER BODY SUPPORT GAR	DOZ	4	0.2%	0.1%
	20	333	Doz M&B SUIT-TYPE COATS, COTTON	DOZ	30.3	0.1%	0.1%
	21	331	Dpr COTTON GLOVES AND MITTENS	DPR	2.9	0.1%	0.2%
	22	353	Doz M&B DOWN-FILLED COATS	DOZ	34.5	0.0%	0.0%

Fiber group	Value-share rank	MFA	Category description	Unit	SME factor	Share of 2025 import value	Share of 2025 SME
	23	330	Doz COTTON HANDKERCHIEFS	DOZ	1.4	0.0%	0.0%
	24	354	Doz W&G DOWN-FILLED COATS	DOZ	34.5	0.0%	0.0%
Cotton-dominant overall	24 categories					50.8%	42.0%
MMF-dominant							
	1	638	Doz M&B MMF KNIT SHIRTS	DOZ	15	6.6%	6.0%
	2	659	Kg OTHER MMF APPAREL	KG	14.4	5.9%	13.5%
	3	648	Doz W&G MMF SLACKS/BREECHES/SHORTS	DOZ	14.9	5.0%	3.3%
	4	647	Doz M&B MMF TROUSERS/BREECHES/SHORTS	DOZ	14.9	4.8%	3.1%
	5	639	Doz W&G MMF KNIT SHIRTS & BLOUSES	DOZ	12.5	4.6%	3.6%
	6	636	Doz MMF DRESSES	DOZ	37.9	3.2%	4.0%
	7	635	Doz W&G MMF COATS	DOZ	34.5	2.8%	2.1%
	8	634	Doz OTHER M&B MMF COATS	DOZ	34.5	2.6%	1.8%
	9	649	Doz MMF BRAS & OTH BODY SUPPORT GARM	DOZ	4	2.4%	0.6%
	10	652	Doz MMF UNDERWEAR	DOZ	13.4	1.9%	4.9%
	11	632	Dpr MMF HOSIERY	DPR	3.8	1.8%	4.1%
	12	651	Doz MMF NIGHTWEAR & PAJAMAS	DOZ	43.5	1.6%	5.6%
	13	640	Doz M&B NOT-KNIT MMF SHIRTS	DOZ	20.1	1.2%	0.9%
	14	641	Doz W&G NOT-KNIT MMF SHIRTS & BLOUSES	DOZ	12.1	1.1%	0.7%
	15	631	Dpr MMF GLOVES AND MITTENS	DPR	2.9	1.0%	0.6%
	16	642	Doz MMF SKIRTS	DOZ	14.9	0.8%	0.5%
	17	646	Doz W&G MMF SWEATERS	DOZ	30.8	0.5%	0.8%
	18	650	Doz MMF ROBES, DRESSING GOWNS, ETC.	DOZ	42.6	0.5%	1.5%
	19	654	Doz W&G MMF DOWN-FILLED COATS	DOZ	34.5	0.4%	0.1%

Fiber group	Value-share rank	MFA	Category description	Unit	SME factor	Share of 2025 import value	Share of 2025 SME
	20	633	Doz M&B MMF SUIT-TYPE COATS	DOZ	30.3	0.3%	0.1%
	21	653	Doz M&B MMF DOWN-FILLED COATS	DOZ	34.5	0.3%	0.1%
	22	645	Doz M&B MMF SWEATERS	DOZ	30.8	0.1%	0.1%
	23	643	Nos M&B MMF SUITS	NO	3.76	0.1%	0.0%
	24	644	Nos W&G MMF SUITS	NO	3.76	0.0%	0.0%
	25	630	Doz MMF HANDKERCHIEFS	DOZ	1.4	0.0%	0.0%
MMF-dominant overall			25 categories			49.2%	58.0%

Note: Categories are ranked within each dominant-fiber group by their share of 2025 general-import value. The broad scope contains 24 cotton-dominant and 25 MMF-dominant categories. Doz. denotes dozen; SME denotes square-meter equivalent.

Source: Author's calculations based on data from OTEXA.

Appendix Table A2 Changes in Major U.S. Apparel Import Indicators for Top Four Categories, 2025 versus 2024

Cotton-dominant categories top four volume and value indicators

MFA	Category	Unit	Import value change \$ million (%)	Quantity change million units (%)	SME change million (%)	Import value per SME change \$ (%)
338	Doz M&B KNIT SHIRTS, COTTON	DOZ	\$+17.6 (+0.2%)	+7.4 (+3.4%)	+44.6 (+3.4%)	\$-0.19 (-3.1%)
348	Doz W&G COTTON TROUSERS/SLACKS/SHORTS	DOZ	\$+191.8 (+3.7%)	+0.6 (+0.7%)	+8.3 (+0.7%)	\$+0.13 (+3.0%)
347	Doz M&B COT. TROUSERS/BREECHES/SHORTS	DOZ	\$+27.5 (+0.5%)	-0.9 (-1.3%)	-13.5 (-1.3%)	\$+0.10 (+1.9%)
339	Doz W&G KNIT SHIRTS/BLOUSES, COTTON	DOZ	\$-128.9 (-2.5%)	-6.7 (-5.0%)	-40.5 (-5.0%)	\$+0.17 (+2.7%)
Others	Excluding top 4	--	\$-98.9 (-0.7%)	--	-27.1 (-0.5%)	\$-0.01 (-0.3%)
Overall	All categories	--	\$+9.1 (+0.0%)	--	-28.1 (-0.3%)	\$+0.01 (+0.3%)

Cotton-dominant categories top four duty and border-cost indicators

MFA	Category	Effective calculated-duty rate change pp (%)	Calculated-duty change \$ million (%)	Duty per SME change \$ (%)	Full border cost per SME change \$ (%)
338	Doz M&B KNIT SHIRTS, COTTON	+8.4 pp (+78.5%)	\$+659.2 (+77.6%)	\$+0.47 (+73.3%)	\$+0.29 (+4.2%)
348	Doz W&G COTTON TROUSERS/SLACKS/SHORTS	+9.5 pp (+60.8%)	\$+551.7 (+67.3%)	\$+0.44 (+65.5%)	\$+0.55 (+10.5%)
347	Doz M&B COT. TROUSERS/BREECHES/SHORTS	+7.9 pp (+62.0%)	\$+436.0 (+64.3%)	\$+0.43 (+65.4%)	\$+0.54 (+9.0%)
339	Doz W&G KNIT SHIRTS/BLOUSES, COTTON	+9.9 pp (+70.7%)	\$+491.9 (+66.1%)	\$+0.68 (+74.4%)	\$+0.81 (+10.5%)
Others	Excluding top 4	+10.6 pp (+89.2%)	\$+1,434.4 (+88.2%)	\$+0.25 (+87.7%)	\$+0.22 (+8.1%)
Overall	All categories	+9.5 pp (+75.6%)	\$+3,573.2 (+75.7%)	\$+0.35 (+75.5%)	\$+0.34 (+7.9%)

MMF-dominant categories top four volume and value indicators

MFA	Category	Unit	Import value change \$ million (%)	Quantity change million units (%)	SME change million (%)	Import value per SME change \$ (%)
638	Doz M&B MMF KNIT SHIRTS	DOZ	+\$134.6 (+2.9%)	+1.8 (+2.0%)	+27.6 (+2.0%)	+\$0.03 (+0.9%)
659	Kg OTHER MMF APPAREL	KG	-\$271.8 (-6.0%)	-20.0 (-8.2%)	-288.0 (-8.2%)	+\$0.03 (+2.4%)
648	Doz W&G MMF SLACKS/BREECHES/SHORTS	DOZ	+\$160.2 (+4.6%)	+0.2 (+0.4%)	+3.1 (+0.4%)	+\$0.19 (+4.2%)
647	Doz M&B MMF TROUSERS/BREECHES/SHORTS	DOZ	+\$230.1 (+7.1%)	+3.1 (+6.7%)	+46.9 (+6.7%)	+\$0.02 (+0.4%)
Others	Excluding top 4	--	-\$1,514.5 (-7.2%)	--	-632.6 (-7.6%)	+\$0.01 (+0.5%)
Overall	All categories	--	-\$1,261.3 (-3.4%)	--	-842.9 (-5.7%)	+\$0.06 (+2.5%)

MMF-dominant categories top four duty and border-cost indicators

MFA	Category	Effective calculated-duty rate change pp (%)	Calculated-duty change \$ million (%)	Duty per SME change \$ (%)	Full border cost per SME change \$ (%)
638	Doz M&B MMF KNIT SHIRTS	+8.5 pp (+65.6%)	+\$427.1 (+70.3%)	+\$0.28 (+66.5%)	+\$0.30 (+7.8%)
659	Kg OTHER MMF APPAREL	+10.5 pp (+61.5%)	+\$409.8 (+52.5%)	+\$0.14 (+65.4%)	+\$0.17 (+11.0%)
648	Doz W&G MMF SLACKS/BREECHES/SHORTS	+9.7 pp (+43.0%)	+\$387.9 (+49.0%)	+\$0.49 (+49.1%)	+\$0.66 (+11.7%)
647	Doz M&B MMF TROUSERS/BREECHES/SHORTS	+7.4 pp (+43.2%)	+\$303.6 (+54.3%)	+\$0.35 (+43.9%)	+\$0.36 (+6.4%)
Others	Excluding top 4	+11.2 pp (+59.4%)	+\$1,937.1 (+48.1%)	+\$0.29 (+59.7%)	+\$0.28 (+8.9%)
Overall	All categories	+10.2 pp (+56.4%)	+\$3,465.5 (+51.2%)	+\$0.27 (+59.9%)	+\$0.32 (+10.4%)

Note: The four individual categories are the largest within each dominant-fiber group by full-year 2025 general-import value. 'Others' aggregates all categories outside the top four, and 'Overall' covers every category in the fiber group. Doz. denotes dozen. Each cell reports the absolute change followed by the percentage change. Raw category quantities are not aggregated because units differ; SME provides the common physical-volume measure.

Note: Import value and import value per SME use Census general imports. Effective calculated-duty rates, calculated duty, duty per SME, and full border cost use imports for consumption. Full border cost equals CIF value plus calculated duty.

Source: Author's calculations based on data from OTEXA and U.S. Census Bureau International Trade data.

Appendix Table A3 Changes in Major U.S. Apparel Import Indicators for Top Four Categories, January-June 2026 versus January-June 2025

Cotton-dominant categories top four volume and value indicators

MFA	Category	Unit	Import value change \$ million (%)	Quantity change million units (%)	SME change million (%)	Import value per SME change \$ (%)
338	Doz M&B KNIT SHIRTS, COTTON	DOZ	\$-490.1 (-12.7%)	-12.7 (-11.3%)	-76.0 (-11.3%)	\$-0.09 (-1.6%)
348	Doz W&G COTTON TROUSERS/SLACKS/SHORTS	DOZ	\$-81.9 (-3.0%)	-1.1 (-2.7%)	-16.5 (-2.7%)	\$-0.02 (-0.4%)
347	Doz M&B COT. TROUSERS/BREECHES/SHORTS	DOZ	\$-251.9 (-9.7%)	-3.1 (-8.9%)	-45.7 (-8.9%)	\$-0.04 (-0.9%)
339	Doz W&G KNIT SHIRTS/BLOUSES, COTTON	DOZ	\$-77.3 (-3.1%)	-4.2 (-6.2%)	-25.1 (-6.2%)	\$+0.21 (+3.4%)
Others	Excluding top 4	--	\$-661.1 (-9.7%)	--	-202.7 (-7.1%)	\$-0.07 (-2.9%)
Overall	All categories	--	\$-1,562.2 (-8.5%)	--	-366.0 (-7.2%)	\$-0.05 (-1.4%)

Cotton-dominant categories top four duty and border-cost indicators

MFA	Category	Effective calculated-duty rate change pp (%)	Calculated-duty change \$ million (%)	Duty per SME change \$ (%)	Full border cost per SME change \$ (%)
338	Doz M&B KNIT SHIRTS, COTTON	+4.3 pp (+30.1%)	\$+68.4 (+12.3%)	\$+0.23 (+28.2%)	\$+0.14 (+2.1%)
348	Doz W&G COTTON TROUSERS/SLACKS/SHORTS	+6.6 pp (+33.1%)	\$+146.0 (+26.5%)	\$+0.28 (+32.4%)	\$+0.27 (+5.0%)
347	Doz M&B COT. TROUSERS/BREECHES/SHORTS	+6.9 pp (+44.0%)	\$+113.4 (+26.7%)	\$+0.35 (+42.8%)	\$+0.30 (+4.9%)
339	Doz W&G KNIT SHIRTS/BLOUSES, COTTON	+6.2 pp (+33.9%)	\$+133.3 (+28.6%)	\$+0.44 (+38.4%)	\$+0.68 (+9.0%)
Others	Excluding top 4	+7.5 pp (+45.9%)	\$+337.7 (+29.9%)	\$+0.16 (+41.8%)	\$+0.10 (+3.5%)
Overall	All categories	+6.5 pp (+39.3%)	\$+798.7 (+25.5%)	\$+0.23 (+37.4%)	\$+0.18 (+4.2%)

MMF-dominant categories top four volume and value indicators

MFA	Category	Unit	Import value change \$ million (%)	Quantity change million units (%)	SME change million (%)	Import value per SME change \$ (%)
638	Doz M&B MMF KNIT SHIRTS	DOZ	\$-67.6 (-2.8%)	-3.0 (-6.3%)	-45.7 (-6.3%)	\$+0.12 (+3.6%)
659	Kg OTHER MMF APPAREL	KG	\$-187.5 (-8.6%)	-11.2 (-10.4%)	-161.9 (-10.4%)	\$+0.03 (+2.0%)
648	Doz W&G MMF SLACKS/BREECHES/SHORTS	DOZ	\$-88.7 (-5.0%)	-1.7 (-6.3%)	-25.6 (-6.3%)	\$+0.06 (+1.3%)
647	Doz M&B MMF TROUSERS/BREECHES/SHORTS	DOZ	\$-286.2 (-14.7%)	-4.5 (-15.3%)	-67.2 (-15.3%)	\$+0.03 (+0.7%)
Others	Excluding top 4	--	\$-789.0 (-8.8%)	--	-334.7 (-9.6%)	\$+0.02 (+0.9%)
Overall	All categories	--	\$-1,419.0 (-8.2%)	--	-635.1 (-9.6%)	\$+0.04 (+1.5%)

MMF-dominant categories top four duty and border-cost indicators

MFA	Category	Effective calculated-duty rate change pp (%)	Calculated-duty change \$ million (%)	Duty per SME change \$ (%)	Full border cost per SME change \$ (%)
638	Doz M&B MMF KNIT SHIRTS	+5.0 pp (+29.6%)	\$+100.7 (+24.6%)	\$+0.20 (+36.2%)	\$+0.37 (+9.5%)
659	Kg OTHER MMF APPAREL	+3.5 pp (+15.3%)	\$+19.9 (+3.9%)	\$+0.06 (+17.2%)	\$+0.08 (+4.7%)
648	Doz W&G MMF SLACKS/BREECHES/SHORTS	+8.1 pp (+30.6%)	\$+106.3 (+22.5%)	\$+0.36 (+30.9%)	\$+0.37 (+6.5%)
647	Doz M&B MMF TROUSERS/BREECHES/SHORTS	+6.7 pp (+32.9%)	\$+45.0 (+11.0%)	\$+0.30 (+33.0%)	\$+0.31 (+5.6%)
Others	Excluding top 4	+4.8 pp (+19.9%)	\$+161.1 (+7.3%)	\$+0.12 (+19.9%)	\$+0.13 (+3.9%)
Overall	All categories	+5.2 pp (+22.8%)	\$+433.0 (+10.8%)	\$+0.14 (+24.0%)	\$+0.17 (+5.3%)

Note: January-June 2026 compared with January-June 2025. The four individual categories are the largest within each dominant-fiber group by full-year 2025 general-import value. 'Others' aggregates all categories outside the top four, and 'Overall' covers every category in the fiber group. Doz. denotes dozen. Each cell reports the absolute change followed by the percentage change. Raw category quantities are not aggregated because units differ; SME provides the common physical-volume measure.

Note: Import value and import value per SME use Census general imports. Effective calculated-duty rates, calculated duty, duty per SME, and full border cost use imports for consumption. Full border cost equals CIF value plus calculated duty. Calculated duty is not a cash-collections series.

Source: Author's calculations based on data from OTEXA and U.S. Census Bureau International Trade data.

Appendix Table A4 Timeline of Major Tariff Developments Affecting U.S. Apparel Imports, February 2025–June 2026

Effective date	Policy development	Tariff treatment and relevance to apparel imports	Official source
Feb. 4, 2025	China fentanyl-related tariff begins	An additional 10% ad valorem duty applied to most products of China, including Hong Kong, on top of ordinary and other applicable duties. Qualifying in-transit goods were excepted.	[1]
Mar. 4, 2025	China fentanyl-related tariff increases	The additional China duty increased from 10% to 20%.	[2]
Apr. 5, 2025	Broad reciprocal tariff begins	A 10% additional reciprocal tariff applied to most imports from most trading partners, subject to product, country, and in-transit exceptions.	[3]
Apr. 9-10, 2025	Country-specific rates briefly begin; China rate escalates	Country-specific reciprocal rates began April 9. Effective April 10, the higher non-China rates were suspended and replaced by the 10% baseline, while China's reciprocal component increased to 125%. These rates were additional to other applicable duties.	[3], [4]
May 2, 2025	China and Hong Kong de minimis treatment ends	Covered low-value imports from China and Hong Kong no longer qualified for duty-free de minimis entry. Special ad valorem or per-postal-item duties applied, depending on the entry channel.	[5]
May 14, 2025	China reciprocal component is reduced	China's reciprocal component fell from 125% to 10%. For standard entries, the principal IEEPA additions were therefore 20% for the fentanyl measure plus 10% for the reciprocal measure, before ordinary or other duties.	[6]
Aug. 7, 2025	Revised country-specific reciprocal rates take effect	Rates relevant to major apparel suppliers included Bangladesh 20%, Vietnam 20%, Cambodia 19%, Indonesia 19%, Pakistan 19%, India 25%, and Jordan 15%. Unlisted partners generally remained at 10%. In-transit provisions applied.	[7]
Aug. 27, 2025	Additional India tariff begins	An additional 25% duty applied to most imports from India because of India's direct or indirect imports of Russian oil. It stacked with most other applicable duties, subject to stated exceptions.	[8]
Aug. 29, 2025	Worldwide de minimis treatment is suspended	Duty-free de minimis treatment ended for qualifying low-value shipments from all countries. Non-postal shipments became subject to all applicable duties; temporary special rules applied to international postal shipments.	[9]
Nov. 10, 2025	China fentanyl-related tariff is reduced	The fentanyl-related China duty fell from 20% to 10%, while the 10% reciprocal component remained in effect. For standard entries, the two principal IEEPA additions totaled 20%, before ordinary or other duties.	[10]
Feb. 7, 2026	Additional India tariff is removed	The separate 25% tariff associated with India's purchases of Russian oil was eliminated. Other applicable tariff treatment remained in place at that time.	[11]
Feb. 20, 2026	IEEPA tariff authority is rejected and IEEPA duties are ended	The Supreme Court held that IEEPA did not authorize the tariffs at issue. A same-day executive order directed agencies to end the listed IEEPA-based additional ad valorem duties and terminate collection as soon as practicable.	[12], [13]
Feb. 24, 2026	Temporary Section 122 surcharge begins	A separate 10% import surcharge took effect for 150 days under Section 122 of the Trade Act of 1974, subject to listed exceptions and special stacking rules, including treatment of Section 232 duties.	[14]

Note: Rates shown are additional statutory tariff measures, not the report's monthly effective calculated-duty rate, which is calculated from Census calculated duty and imports-for-consumption customs value.

Official sources

- [1] [Executive Order 14195, Imposing Duties to Address the Synthetic Opioid Supply Chain in the People's Republic of China](#)
- [2] [Executive Order 14228, Further Amendment to Duties Addressing the Synthetic Opioid Supply Chain in the People's Republic of China](#)
- [3] [Executive Order 14257, Regulating Imports with a Reciprocal Tariff](#)
- [4] [Executive Order 14266, Modifying Reciprocal Tariff Rates to Reflect Trading Partner Retaliation and Alignment](#)
- [5] [Executive Order 14256, Further Amendment to Duties as Applied to Low-Value Imports from China](#)
- [6] [Executive Order 14298, Modifying Reciprocal Tariff Rates to Reflect Discussions with China](#)
- [7] [Executive Order 14326, Further Modifying the Reciprocal Tariff Rates](#)
- [8] [Executive Order 14329, Addressing Threats to the United States by the Government of the Russian Federation](#)
- [9] [Executive Order 14324, Suspending Duty-Free De Minimis Treatment for All Countries](#)
- [10] [Modifying Duties Addressing the Synthetic Opioid Supply Chain in China](#)
- [11] [Executive Order 14384, Modifying Duties to Address Threats by the Government of the Russian Federation](#)
- [12] [Learning Resources, Inc. v. Trump, U.S. Supreme Court, decided February 20, 2026](#)
- [13] [Executive Order 14389, Ending Certain Tariff Actions](#)
- [14] [Proclamation, Imposing a Temporary Import Surcharge to Address Fundamental International Payments Problems](#)