

# From cotton belt to home of high-tech fibers

The US textile industry has repeatedly reinvented itself—and must now prove this strength once again amid the current tensions between global price pressure, trade controls, and demands for fair, sustainable textile production.

The US is one of the top names in the textile world, with leading positions in specific segments. In 2023, it led global staple fiber exports with 3,056 kilotons (kt), ahead of China (1,807 kt), according to the yearbook „The Fiber Year“ (TFY). They are currently in a neck-and-neck race with Brazil for the world’s largest share of raw cotton exports. According to forecasts by the US Department of Agriculture (USDA), Brazil could finish ahead of the US (28%/12.5 million bales/+9%) in 2025/2026 with 32% (14.3 million bales 218 kg /+10%). With a goods value of USD 28 billion, the country also ranked among the top ten

exporters of textiles and clothing in 2024, according to the National Council of Textile Organizations (NCTO). According to TFY, the United States ranked third in 2023 as a producer of man-made fibers, with 2.4 million tons behind China (68.4 million tons) and India (7.3 million tons), as well as in staple fiber production (4,176 kt/-15.2%), again behind China (24,085 kt/+9.5%) and India (10,765 kt/+6.4%).





In 2024, the key figures for the national textile industry remained stable overall or recorded only slight declines, with the exception of the cotton and wool sectors. With these statements, the NCTO praises the steadfast adaptability of its textile clients, who continue to struggle with a protracted market disruption. Experts expect US economic growth to halve in 2025, after GDP rose by 3% in each of the previous two years. The reasons for this slowdown lie not only in geopolitical uncertainties or higher interest rates to curb inflation, both of which are dampening consumption and investment. The Trump administration's aggressive tariff policy is creating a radically changed environment and a high degree of uncertainty and caution among US companies and consumers. On the other hand, the abolition of the competition-distorting de minimis rule in May and August 2025, which previously allowed foreign shipments of textiles and clothing worth less than USD 800 to enter the US market duty-free, gives cause for hope. This flood of millions of packages flowing into the US every day,

mainly from Asia, once again underscores the fundamental shift in power in the textile world that established Asian dominance decades ago, cost the US textile industry its supremacy, and forced it into painful restructuring. This was a dramatic turning point in US textile history.

### **From golden times to iron resolve**

The textile tradition of the indigenous peoples of North America can be traced back to around 6000 BCE. It is based on plant and animal materials and involves complex techniques such as twining, weaving frames, finger weaving, and quillwork. European colonists brought their textiles and textile technologies with them from the 17th century onwards. After American independence in 1776, Samuel Slater's first water-powered cotton spinning machines soon appeared and industrialization began. Factory towns such as Lowell and Manchester sprang up in the New England states of the Northeast, while cotton production grew in the South, mainly with the

help of slave labor. Cotton became the most important export commodity of the US, accounting for almost 77% of global production before the American Civil War (1861-1865), according to the statistics platform Statista. As a result, the industry expanded over time into southern and southeastern states such as North Carolina, now known for technical textiles, Georgia (carpets and floor coverings), South Carolina (apparel fabrics and automotive textiles), and later California (sustainable fashion and innovative fabric technologies).

The golden age of the US textile industry began around 1900, driven in part by rising demand for textiles during two world wars and the emergence of synthetic fibers, whose production and export were dominated by US companies until the early 1970s. Nylon stockings and denim jeans „made in the USA“ became a symbol of American manufacturing – until globalization, automation, and cheaper mass production from Asia ended their reign. Many factories closed or relocated abroad; according to statistics, the number of employees fell from 2.4 million to 1.5 million between 1973 and 1996 alone. Even after this decline, however, the US textile industry repeatedly managed to successfully reposition itself through structural change, greater specialization, technology, and innovation.

### **Textile industry: Today, „Made in the USA“ means quality instead of quantity**

Today, the most promising markets for the US textile industry are nonwovens, technical textiles, chemical fibers, and carpet manufacturing. Textile research and development is correspondingly strong with a focus on next-generation textile materials. In order to remain competitive in these sectors, US textile companies are constantly investing in new plant and equipment – around USD 3 billion in 2022, according to the NCTO. However, traditional cotton production and processing has declined and continues to shrink due to overwhelming competition from Asia. Clothing manufacturing has also lost importance, with large US fashion companies long since producing mainly abroad, especi-

ally in Asia. For these reasons in particular, the number of people employed in the US textile industry supply chain – from textile fibers to clothing and other sewn products – will continue to fall to around 471,000 in 2024, according to the NCTO. The main market for textile products is the domestic market with its more than 345 million inhabitants. In 2024, US textile and clothing production had a total value of USD 63.9 billion, with exports accounting for around 44% of this figure, meaning that the lion’s share was sold on the domestic market.

A major customer is the US military, which purchases more than 8,000 different textile products. The USD 63.9 billion mentioned above is broken down into the following product categories (in USD billion): 25.0 for yarns and fabrics (NAICS category 313), 23.6 for home textiles, carpets, and other sewn non-apparel products (NAICS 314), 9.8 for apparel (NAICS 315), and 5.5 for artificial and synthetic fibers and filaments (NAICS 32522).

The constant search for sustainable market niches and business models is leading to a renewed concept of textiles „made in the USA.“ Today, this concept encompasses not only high-tech products outside the fashion industry, such as medical textiles, protective clothing, special and industrial fabrics, and nonwovens, but also a return to quality, sustainability, and fairness—not least in light of growing consumer awareness in the US of the negative consequences of fast fashion. This is reflected in the increased focus on recycled fibers, organic cotton, biodegradable fabrics, and climate-friendly production, for example. However, it is also evident in the fight against cheap imports of textile goods manufactured under forced labor in the Xinjiang region of China, which fall under the import ban of the Uyghur Forced Labor Prevention Act (UFLPA) and have so far entered the US unchecked through the de minimis loophole.

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Strong competition from Asia has forced the US clothing industry to rethink its strategy; today, the focus is on manufacturing high-quality clothing.



## Trade fights against de minimis, forced labor, and tariffs

With goods worth USD 28.0 billion in 2024, the US textile industry is one of the world's largest textile exporters. According to NCTO figures, it exports textile products to more than 200 countries. The most important regions are the USMCA (United States-Mexico-Canada Agreement) countries with USD 12.5 billion, the participants in the CAFTA-DR (Dominican Republic-Central America Free Trade Agreement) free trade agree-



ment with USD 3.0 billion, Asia with USD 2.8 billion, and Europe with USD 2.1 billion. Apart from clothing (USD 7.1 billion), the US has a strong export position in fibers, yarns (USD 4.0 billion) and fabrics (USD 8.0 billion), as well as cotton and wool (USD 5.0 billion).

However, huge imports of textiles and (in particular) clothing have long been responsible for high trade deficits – even though imports fell by 20.5% in value to USD 105 billion in 2023, according to TFY figures. In that year, only the 27 EU countries exceeded this figure, with USD 124 billion. The US textile industry is therefore heavily dependent on global supply chains, for example for fabrics, chemicals, and accessories, and is therefore sensitive to geopolitical conflicts and logistical disruptions.

Against this backdrop, the aforementioned UFLPA brings not only support but also challenges – from compliance efforts to restructuring global procurement in order to avoid suspicious goods from the outset. This procure-

ment pressure is further increased by the price-raising effects of the Trump administration's escalating tariffs. In a study conducted at the University of Delaware, major US fashion companies estimated the additional procurement costs resulting from tariffs as they stood in the first quarter of 2025 to be in the tens of millions per year. On the other hand, small US textile companies with fewer options for cost and procurement planning are particularly dependent on imports – and there are many of them. In 2021, for example, over 76% of clothing factories based in the US (NAICS 315) had fewer than 10 employees, while only 0.7% had more than 500 employees.

According to data from the U.S. International Trade Commission (USITC), average tariffs on US clothing imports from China peaked at over 69% in spring 2025. These imports fell dramatically as a result, bringing China's market share in this segment to new monthly lows not seen in decades. Given this situation and the increasing strategic competition between the two countries, many leading US fashion companies are planning to reduce their clothing procurement from China to a single-digit percentage or even withdraw from the country altogether, according to a study by the University of Delaware. Asia, with countries such as Vietnam, India, Bangladesh, and Indonesia, is likely to remain the leading region for imports into the US.

## „White gold“ shines less brightly

According to the USDA crop report, the US will rank fourth in cotton production in 2024/2025 behind China, India, and Brazil, with an estimated 14.2 million bales produced, accounting for just under 12% of the global volume of 119.9 million bales. This would be the second-smallest harvest since 2015/2016. TFY already recorded a 17.4% decline in production in 2023 to a seven-year low, as well as a 29% reduction in acreage due to export losses of 11.4% in 2021/22 and a further 11.8% in 2022/23.

This is evidence not only of increasingly fierce competition, but also of the declining importance of what was once

known as „white gold,“ which is lagging behind the advance of chemical fibers and struggling with declining demand, low prices, increasing climate change, and high yield costs. Under this pressure from all sides, the industry is increasingly focusing on sustainable cultivation practices, diversification of export markets, and industrial and economic development with political support. Cotton exports remain a lifeline, with the US—now behind Brazil—among the market leaders and expected to see global trade growth of 5% in 2025/2026, according to USDA forecasts. However, there are also setbacks here: in view of the retaliatory tariffs imposed by China, cotton trade with this previously largest buyer has collapsed. At least the Trump administration is also providing compensation: the „One Big Beautiful Bill Act“ strengthens national cotton producers through a combination of improved financial security, modernized credit programs, and targeted support for the processing industry.

### **Success predicted for chemical fibers, nonwovens, and technical textiles**

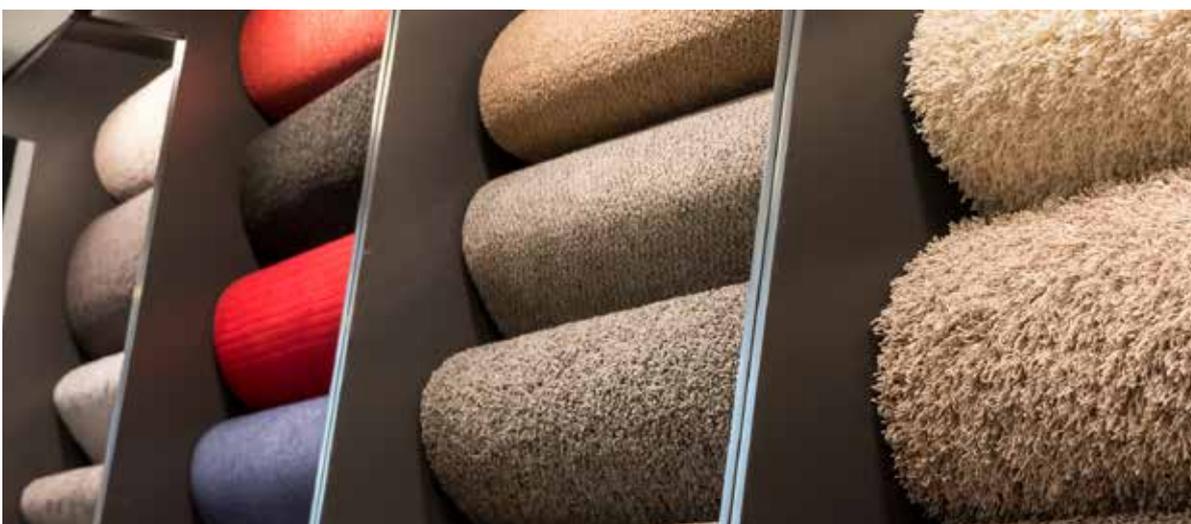
With the birth of nylon and the triumph of fine tights in the 1930s, US chemical giant DuPont achieved a true pioneering feat on the road to mass consumption. Chemical fibers such as polyolefin, polyester, aramid, and acrylic fibers are still strong trump cards in the hands of the US textile industry, which, according

to TFY 2023, ranked third worldwide behind China and India as a man-made fiber producer with 2.4 million tons. In

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that year, however, production of synthetic staple fibers declined by 7.8% to 1.0 million tons, while filament production fell by as much as 12.3% to a century low of 1.4 million tons. The reasons for this are weaker demand in all end-use applications and declining trade flows.

Nevertheless, artificial and synthetic fibers and filaments are considered a growth market. In 2024, the value of these products manufactured in the US (NAICS 32522) was estimated by NCTO at USD 5.5 billion. According to market researchers at Market Research Future, the value of the entire US synthetic fiber market could grow from USD 19.8 billion in 2024 to USD 35 billion by 2035. This is supported by the fact that chemical fiber products for technical textiles and nonwovens are certainly included in this calculation. These markets are also expected to grow. According to Grand View Research, the US nonwoven market generated sales of almost USD 2.2



The USA is the largest manufacturer of BCF carpet yarns alongside Turkey.

Various US sustainability initiatives promote the cultivation and processing of sustainable cotton.



billion in 2024 and is expected to reach over USD 3 billion by 2030. TFY reported in 2023 that there were plans for investments in nonwoven plants and capacity expansions. Important market drivers include innovative, lightweight, and durable chemical fibers and technical textiles for the automotive and aerospace industries, low-cost nonwoven disposable products for the health-care sector, and, above all, sustainable materials and products.

### **On the way to a more holistic sustainable system**

Recent studies indicate increased environmental awareness in the US. However, it is not only in consumer opinion

**The US textile industry is increasingly moving towards a more holistic sustainable system.**

that politics has some catching up to do. It was not until the end of 2024 that the US Government Accountability Office (GAO) published its first federal report on the long-standing growth in textile waste and its consequences, and proposed solutions to the problem. It remains to be seen whether the current US administration will take up the recommendations, especially since it has rolled back the environmental and climate regulations introduced by the previous administration. On a positive note, however, the US textile industry itself is increasingly moving toward a more holistic, sustainable system. Individ-

ual US states are also setting a „green“ example. Here are a few examples:

- **Recycling and circular economy:** The US company Unifi recycles PET bottles into polyester fibers at its plants in North Carolina, reducing CO<sup>2</sup> emissions by around 60% compared to virgin polyester fibers. Since 2007, over 42 billion bottles have been processed and used by brands such as Nike, Patagonia, Levi's, and UGG. In Los Angeles, Ambercycle is investing in its first commercial textile recycling factory, which is scheduled to go into operation in 2025. Inditex will purchase 70% of this production from recycled polyester over the next three years. Braskem evaluates investments in carbon-neutral bio-based polypropylene in the US to produce 1 million tons of biopolymers by 2030 and become carbon neutral by 2050. Eastman achieved initial production on schedule in the fourth quarter of 2024 at its new molecular recycling facility in Kingsport, Tennessee. The company plans to invest in two additional molecular recycling facilities in France and in the US.
- **Legal impetus:** California signed the Responsible Textile Recovery Act, which requires manufacturers to establish recycling, reuse, and repair programs by 2028. In addition, extended producer responsibility (EPR) laws for packaging have been passed in Colorado, Maine, Minnesota, and Oregon, and such laws

are currently being considered in ten other states.

- Sustainability initiatives: The U.S. Cotton Trust Protocol is a sustainability standard specifically for cotton from the United States, developed in 2020 by the National Cotton Council of America. The Sustainable Cotton Challenge, launched by the non-governmental organization (NGO) Textile Exchange, encourages brands and retailers to use only sustainable cotton. The Better Cotton Initiative promotes sustainable cotton farming. The study „Transforming PET Packaging and Textiles in the United States,“ published by Systemiq, Closed Loop Partners, Eunomia, and The Recycling Partnership, outlines a plan to transition the PET packaging and polyester textile industries in the US to circular, low-waste, and low-emission systems by 2040, while promoting US jobs.

However, the challenges are not getting any smaller in view of low virgin fiber prices: despite an increase in the production of recycled polyester fibers in 2023, their share of the total polyester market fell from 13.6% to 12.5%, according to the Materials Market Report 2024 published by the NGO Textile Exchange. Recycled fibers accounted for only 2% of the total market share of polyamide (nylon), the second most common synthetic fiber. In contrast, the share of cotton produced under sustainability programs remained stable, accounting for 28% of total cotton production.

### **Responsibility as a competitive advantage**

All in all, the US textile industry must succeed in the balancing act of remaining globally competitive with quality instead of quantity, greater sustainability, and technological innovations, while at the same time strengthening transparency, fairness, and regulatory control (UFLPA, de minimis, customs monitoring). Then ethical responsibility could also be an economic competitive advantage and further fuel a much-discussed topic: reshoring, i.e., the relocation of textile

production back to the US. This will not bring back the golden age. However, with the help of high automation and AI-supported production, it would be possible to produce more competitive high-value products for niche markets, reduce dependence on foreign suppliers and fragile supply chains, and create new jobs in the domestic textile industry. In conjunction with automation, the low energy prices in the US industry are a long-standing competitive advantage over regions such as Central America and Central Europe.



The US company Unifi recycles PET bottles into polyester fibers at its plants in North Carolina, reducing CO<sub>2</sub> emissions by around 60% compared to new polyester fibers.

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