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Introduction

This working paper—the third in a series of four papers providing analysis on U.S. merchandise trade in 2022—covers chemicals and related products, footwear, and textiles, providing discussion and analysis on U.S. exports, imports, and trade balance by sector (e.g., chemicals), digest (e.g., medicinal chemicals), and leading U.S. trade partners. The fourth paper will cover electronic products, machinery, and transportation equipment. These working papers are intended to be read with the interactive data tables and figures that can be found on the USITC website at: https://www.usitc.gov/research_and_analysis/tradeshifts/2022/index.

Box 1.1 Background on the trade data used in this working paper

For the purposes of this paper, trade is divided into ten broad industry sectors (e.g., agriculture). The industry sectors are further divided into digests (e.g., poultry or oilseeds). Each USITC sector digest encompasses various 8-digit subheadings in the *Harmonized Tariff Schedule of the United States* (HTS). The USITC maintains and publishes the HTS which sets out the tariff rates and statistical categories for all merchandise imported into the United States. The U.S. Census Bureau (Census) collects and compiles export statistics of approximately 8,000 commodity classifications (10-digit classification codes) in *Schedule B: Statistical Classification of Domestic and Foreign Commodities Exported from the United States*. Schedule B classification codes are concorded to HTS 10-digit statistical reporting numbers based on USITC estimates; therefore, the classification codes for exports are presented using HTS 8-digit subheadings for imports.[a]

The trade data presented in this working paper principally rely on three broad categories of trade: "total exports," "domestic exports," and "general imports." Unless otherwise noted, the export data used in tables are for domestic exports; some tables also include data on re-exports.[b] The import data used in the tables are for general imports.

Definitions of the five broad categories of trade data gathered by the U.S. Census:

General imports are total physical arrivals of merchandise from foreign countries into the United States, whether such merchandise enters consumption channels immediately or is entered into bonded warehouses or Foreign Trade Zones (FTZs) under Customs custody.

Imports for consumption (sometimes called "special imports") are merchandise that have physically cleared through Customs, either entering consumption channels immediately or entering for consumption after withdrawal from bonded warehouses or FTZs under Customs custody.

Domestic exports are (1) exported goods that were grown, produced, or manufactured in the United States, and (2) exported commodities of foreign origin that have been changed in the United States (including changes made in a U.S. FTZ) from the form in which they were imported, or that have been enhanced in value or improved in condition by further processing or manufacturing in the United States.

Re-exports (sometimes called foreign exports) are calculated as total exports minus domestic exports of goods of foreign origin that (1) have previously entered the U.S. customs territory, a Customs bonded warehouse, or a U.S. FTZ, and (2) at the time of exportation, have not undergone any substantial change in form or condition or any enhancement in value by further manufacturing in the U.S. customs territory or U.S. FTZs.

Total exports are U.S. domestic exports plus re-exports. This includes all exports of physical merchandise from the United States.[c]

[a] For a complete list of HTS subheadings classified in a particular sector or digest, see https://www.usitc.gov/system/files/research_and_analysis/tradeshifts/files/sectors_digest_table_2022.html.
[b] For more information on trade terminology, please refer to USITC, "Special Topic: Trade Metrics https://www.usitc.gov/research_and_analysis/trade_shifts_2014/trade_metrics.htm, Shifts in U.S. Merchandise Trade, 2014.
[c] USDOC, Census webpage, "Trade Definitions," https://www.census.gov/foreign-trade/reference/definitions/ USITC, "A Note on U.S. Trade Statistics," August 22, 2014, http://www.usitc.gov/publications/research/tradestatsnote.pdf. Census also notes the following definition for foreign exports: "Exports of foreign merchandise (re-exports) consist of commodities of foreign origin which have entered the United States for consumption, or into Customs bonded warehouses or U.S. Foreign Trade Zones, and which, at the time of exportation, are in substantially the same condition as when imported." USDOC, Census webpage, "Guide to Foreign Trade Statistics," http://www.census.gov/foreign-trade/guide/sec2.html (accessed September 15, 2018).

Chemicals and Related Products

Changes in 2022 from 2021:

- **U.S. total exports of chemicals and related products increased by $36.6 billion (12.6 percent) to $326.2 billion**
  - **U.S. domestic exports of chemicals and related products increased by $29.4 billion (11.1 percent) to $293.6 billion**
  - **U.S. re-exports of chemicals and related products increased by $7.2 billion (28.6 percent) to $32.6 billion**
- **U.S. general imports of chemicals and related products increased by $58.5 billion (15.2 percent) to $442.1 billion**

The value of U.S. domestic exports of chemicals and related products[1] rose by $29.4 billion (11.1 percent) to $293.6 billion in 2022, after increasing by 25.4 percent in 2021 (table CH.1).[2] Exports rose the most in miscellaneous inorganic chemicals (up $5.5 billion), fertilizers (up $3.9 billion), polyethylene resins (up $3.4 billion), miscellaneous plastic products ($2.7 billion higher), and medicinal chemicals (up $1.9 billion). U.S. domestic exports to Mexico increased by the largest value in 2022 (up $5.2 billion, or 13.5 percent), followed by Canada (up $3.7 billion, or 8.6 percent) and China (up $2.9 billion, or 15.2 percent) (appendix table B.2).

The value of U.S. general imports of chemicals and related products grew by $58.5 billion (15.2 percent) in 2022, slowing down from the 16.6 percent growth in 2021 (table CH.2). Medicinal chemicals led the growth in imports in 2022 (up $21.8 billion), followed by miscellaneous inorganic chemicals (up $6.1 billion), miscellaneous plastic products (up $5.9 billion), fertilizers (up $4.3 billion), and tires and tubes (up $3.7 billion). U.S. general imports increased the most from China (up $15.3 billion, or 35.3 percent), Ireland (up $11.3 billion, or 22.7 percent), and Canada (up $5.0 billion, or 13.0 percent) (appendix table C.2).

The growth in chemicals trade was largely driven by continuing effects of and recovery from the COVID-19 pandemic in various industries. Not only did trade in products related to COVID-19 continue to increase, but also the general global economic recovery led to growth across the board in many sectors. Since most sectors use chemicals, their recovery necessarily spurred increased demand for their chemicals-based inputs as well as for the plastics required to package them for transport and sale.

U.S. Domestic Exports

Miscellaneous inorganic chemicals recorded the largest increase ($5.5 billion or 36.0 percent) in domestic exports in 2022 (table CH.1).[3] This digest includes a broad aggregation of product groups, with no single group accounting for more than 10 percent of the increase in U.S. exports. The largest increase in this digest was experienced by high-purity silicon (containing by weight not less than 99.99 percent of

[1] The Chemicals and Related Products sector consists of 36 product digests. Each USITC sector digest encompasses various 8-digit subheadings in the Harmonized Tariff Schedule of the United States (HTS).
[2] Unless otherwise noted, the export data used in this section are for domestic exports. For more information on trade terminology, please refer to Lundquist, "Special Topic: Trade Metrics," June 2015.
[3] "USITC DataWeb/Census," digest CH007, accessed February 17, 2023.

silicon), which increased by $486 million (43.0 percent). High-purity silicon is an essential material in the production of semiconductors, the demand for which continued to grow through 2022 for electronics and automotive applications.[4] The increased exports of high-purity silicon were driven by unit values, which rose by 61.4 percent in 2022. Lithium oxide and hydroxide exports increased by $229 million (240.5 percent), with the largest increase going to Poland ($100 million). After plant openings in 2022, Poland has the world's second-largest lithium-ion battery production capacity.[5] Lithium oxide and hydroxide are processed forms of lithium that are key inputs for the lithium-ion batteries used in electric vehicles. The three largest U.S. export markets—China, $774 million (41.4 percent); Canada, $652 million (50.5 percent); and Mexico, $507 million (15.3 percent)—also accounted for the biggest export increases.

Table CH.1 Leading changes in U.S. domestic exports, 2018–22
In millions of dollars and percentages

Product group (digest)	2018 (million $)	2019 (million $)	2020 (million $)	2021 (million $)	2022 (million $)	Absolute change, 2021–22 (million $)	Percentage change 2021–22 (%)
Medicinal chemicals	53,883	58,703	58,102	79,274	81,156	1,882	2.4
Miscellaneous plastic products	27,111	26,071	24,227	28,679	31,344	2,666	9.3
Certain organic chemicals	19,600	18,237	17,021	22,161	22,748	587	2.6
Miscellaneous inorganic chemicals	13,310	13,482	12,722	15,196	20,659	5,463	36.0
Other plastics in primary forms	16,274	15,455	13,596	16,622	18,339	1,717	10.3
Polyethylene resins in primary forms	9,998	10,849	10,616	13,322	16,754	3,432	25.8
Organic specialty chemicals	7,861	7,680	7,145	8,186	9,665	1,479	18.1
Miscellaneous chemicals and specialties	7,203	7,134	6,809	8,136	9,497	1,361	16.7
Perfumes, cosmetics, and toiletries	9,299	9,385	8,184	8,926	9,435	509	5.7
Paints, inks, and related items, and certain components thereof	7,195	6,584	5,843	7,013	7,714	701	10.0
All other product groups	54,536	51,544	46,529	56,725	66,282	9,557	16.8
Total	226,271	225,122	210,794	264,242	293,595	29,353	11.1

Source: USITC DataWeb/Census, accessed February 16, 2023.
Notes: Export values are based on free along ship value, U.S. port of export. Calculations are based on unrounded data.

U.S. domestic exports of fertilizer increased by $3.9 billion (103.4 percent) to $7.6 billion in 2022.[6] The primary factor behind the increase in the value of U.S. fertilizer exports was supply chain disruptions in important fertilizer producing regions, particularly China and Russia.[7] In response, U.S. suppliers significantly increased fertilizer exports, with the largest increases going to Canada (up $882 million, or 64.0 percent), Brazil (up $647 million, or 62.0 percent), and Mexico (up $370 million, or 104.5 percent).

The fertilizer supply disruptions were driven by two different factors: COVID-19-induced food security concerns and the Russian invasion of Ukraine. Because of concerns over shortages stemming from the pandemic, some countries limited exports of certain goods, including fertilizers, that had the potential

[4] SIA, "2022 State of the U.S. Semiconductor Industry," November 2022, 14–15.
[5] Ptak, "Poland Overtakes US to Have World's Second Largest," April 6, 2023.
[6] "USITC DataWeb/Census," digest CH010, accessed February 17, 2023.
[7] IFI, "Five Fertilizer Market Dynamics That Tell the Story of 2022," December 21, 2022; Chow and Patton, "China Issues Phosphate Quotas," July 15, 2022.

to impact domestic food security.[8] For example, China instituted a new requirement in November 2021 for inspection certificates to ship fertilizers (a de facto restriction on exports) and then imposed export quotas on phosphates in July 2022.[9] China is the world's top exporter of phosphates, accounting for approximately 30 percent of global exports in 2021, and the quotas reduced the country's exports by 45 percent from 2021 levels, thereby affecting global phosphate-based fertilizer supplies and prices.[10]

The Russian invasion of Ukraine and the sanctions that followed also disrupted the global fertilizer market because Russia is a significant producer of both fertilizers and fertilizer ingredients.[11] Russia is an important producer and exporter of natural gas, an ingredient used to produce nitrogen-based fertilizers. A series of trade-restrictive actions against Russia starting in March 2022 resulted in Russia reducing its supply of natural gas to European Union (EU) countries. This, in turn, impaired the ability of producers in those countries to manufacture fertilizers and drove up global prices.[12] In response, U.S. suppliers of nitrogen-based fertilizers—which have a readily available supply of natural gas—stepped up exports to meet global demand.[13] The four fertilizer products that recorded the greatest increases in exports in 2022—all of which were nitrogen-based fertilizers—experienced unit value increases of at least 20 percent.[14] Although export volumes increased significantly, higher unit prices also contributed to the increased U.S. export values.

U.S. exports of polyethylene (PE) resins grew by $3.4 billion (25.8 percent) to $16.8 billion in 2022.[15] PE resin is the most commonly used plastic in the world and is employed in a wide variety of applications, including food packaging, shopping bags, detergent bottles, cable insulation, and automobile fuel tanks.[16] U.S. exports of PE resins increased substantially to China (up $583 million) and Latin America—particularly Brazil (up $489 million) and Colombia (up $170 million)—as well as to Belgium (up $382 million). Growing demand from the automotive and consumer goods markets in Brazil and China drove

[8] International Fertilizer Association, "Five Fertilizer Market Dynamics That Tell the Story of 2022," December 21, 2022.
[9] Chow and Patton, "China Issues Phosphate Quotas," July 15, 2022.
[10] Chow and Patton, "China Issues Phosphate Quotas," July 15, 2022.
[11] International Fertilizer Association, "Five Fertilizer Market Dynamics That Tell the Story of 2022," December 21, 2022. Russia is the second-largest producer of fertilizer inputs such as ammonia, urea, and potash. Mathers, "Statement on Russia-Ukraine Conflict," March 3, 2022. "Potash" is the general term for a variety of potassium-containing salts and minerals, many of which are used in agricultural fertilizers. Potassium chloride is the variety most commonly used in fertilizers. Mosaic Crop Nutrition, "Potassium Chloride," accessed February 3, 2023; Natural Resources Canada, "Potash Facts," October 31, 2022.
[12] European Council, "Timeline - EU Restrictive Measures Against Russia," April 13, 2023; European Council, "EU Sanctions Against Russia Explained," April 14, 2023; Soldatkin, "Russian Pipeline Gas Exports to Europe Collapse," December 28, 2022. Statista, "Natural Gas Commodity Prices in Europe and the United States," accessed May 2, 2023; EIA, "Average Cost of Wholesale U.S. Natural Gas in 2022," January 9, 2023; Sabadus, "War in Ukraine, Gas Crisis," February 10, 2023.
[13] Elkin and Skerritt, "Nutrien Will Boost Fertilizer Production Capacity," June 9, 2022.
[14] The four fertilizer products that had the greatest export growth in 2022 were urea (up $694 million, or 481.0 percent), monoammonium phosphate mixtures with diammonium phosphate (up $661 million, or 65.8 percent), mixtures of urea and ammonium nitrate (up $556 million, or 496.0 percent), and anhydrous ammonia (up $450 million, or 399.5 percent).
[15] "USITC DataWeb/Census," digest CH025, accessed February 17, 2023.
[16] Research Nester, "Polyethylene Market Analysis," February 13, 2023; Reliance Foundry, "You Use It Daily. But What IS Polyethylene Plastic?," January 25, 2019; Rapid Direct, "Types of Plastics Used in the Automotive Industry," September 23, 2022.

the increased U.S. exports to those destinations.[17] Motor vehicle production was up by 5 percent in Brazil and 3 percent in China in 2022.[18]

U.S. exports of miscellaneous plastic products grew by $2.7 billion (9.3 percent) to $31.3 billion in 2022.[19] This digest covers a broad range of plastic products and no single item was responsible for driving the overall increase in exports. Many of these products, however, are used as packaging materials, the demand for which benefitted from the broad increases in COVID-19-induced consumer demand as well as the continued move toward greater e-commerce.[20] The largest increases in U.S. exports were to Mexico (up $1.0 billion) and Canada (up $788 million). Overall, these two countries accounted for more than half the increase in U.S. exports of miscellaneous plastic products.

U.S. exports of medicinal chemicals grew by $1.9 billion (2.4 percent) to $81.2 billion in 2022.[21] A significant factor behind increased U.S. exports of medicinal chemicals is China's growing demand for advanced pharmaceuticals, medications, and other medicinal products. In an effort to "tackle life-threatening diseases" for which it has few domestic treatments,[22] the government of China has modified its regulatory process in recent years, a development that has accelerated the approval of U.S. pharmaceuticals and medicines for use in China. In response, the U.S. pharmaceutical industry has increased its exports to China of high-value, high-demand drugs and vaccines.[23] For example, reportedly "China broke the annual record for U.S. exports of immunological medicines, plasma and other blood 'fractions' by one country in just the first eight months of 2022."[24] U.S. exports of medicinal chemicals to China increased by $1.6 billion (35.8 percent) in 2022. The Netherlands, however, recorded the biggest increase in U.S. exports of medicinal chemicals (up $2.0 billion, or 33.6 percent) and was the largest recipient of U.S. exports of medicinal chemicals ($7.8 billion). The Netherlands has several large container ports (e.g., Rotterdam) and acts as an entry point and distribution hub for many European imports.[25] U.S. exports also increased significantly to the following European countries: the United Kingdom (up $1.1 billion), Germany (up $1.1 billion), and Switzerland (up $776 million). Some of these increases were likely a redistribution of European points of entry; Belgium (also a significant trading hub) recorded the biggest decline in these U.S. exports in 2022.[26]

U.S. General Imports

U.S. general imports of medicinal chemicals increased by $21.8 billion (12.4 percent) to $197.7 billion in 2022 (table CH.2).[27] The primary factor driving the rise in imports has been strong demand in the U.S. medical industry for products, including diagnostic reagents and vaccines, used to prevent, diagnose, or

[17] Grand View Research, "Alpha Olefin Market Size & Share," accessed February 3, 2023.
[18] OICA, "2022 Production Statistics," accessed May 4, 2023.
[19] "USITC DataWeb/Census," digest CH033, accessed February 17, 2023.
[20] Mordor Intelligence, "E-Commerce Plastic Packaging Market Size & Share Analysis," accessed June 22, 2023.
[21] "USITC DataWeb/Census," digest CH019, accessed February 17, 2023.
[22] Hutchinson and Slawson, *US Export Report 2022*, April 4, 2022, 7.
[23] Hutchinson and Slawson, *US Export Report 2022*, April 4, 2022, 7.
[24] Roberts, "In 2022, China Dominates U.S. Exports of Immunological Drugs," October 26, 2022.
[25] Gandolfi, "Rotterdam," September 14, 2022; Marine Digital, "The World's Biggest Shipping Hubs," accessed June 22, 2023.
[26] "USITC DataWeb/Census," digest CH019, accessed February 17, 2023.
[27] "USITC DataWeb/Census," digest CH019, accessed February 17, 2023.

treat COVID-19 infections.[28] Continuing a trend established during the COVID-19 pandemic, the increase in the value of such pharmaceutical imports during 2022 also resulted from higher drug prices and the continued offshoring of drug manufacturing.[29] Additionally, although China accounts for a small share of final pharmaceutical products, it has made efforts to move upstream in the industry and now accounts for a large share of active pharmaceutical inputs production globally.[30] Imports from China increased the most in 2022 (up $9.6 billion, or 182.5 percent), followed by Ireland (up $8.0 billion, or 19.0 percent) and Belgium (up $2.8 billion, or 34.6 percent).

Table CH.2 Leading changes in U.S. general imports, 2018–22
In millions of dollars.

Import source	2018	2019	2020	2021	2022	Absolute change, 2021–22 (million $)	Percentage change 2021–22 (%)
Medicinal chemicals	135,368	151,615	166,859	175,855	197,654	21,799	12.4
Miscellaneous plastic products	40,073	41,013	42,299	51,563	57,465	5,902	11.4
Organic specialty chemicals	16,546	15,884	16,264	19,891	23,254	3,363	16.9
Tires and tubes	15,148	15,261	13,715	16,290	20,010	3,720	22.8
Miscellaneous inorganic chemicals	11,756	11,511	9,945	13,167	19,238	6,071	46.1
Fertilizers	8,212	7,727	6,400	11,553	15,831	4,278	37.0
Perfumes, cosmetics, and toiletries	10,353	10,047	9,071	11,512	13,362	1,851	16.1
Certain organic chemicals	11,696	9,629	10,074	13,565	12,525	-1,040	-7.7
Other plastics in primary forms	7,562	6,948	6,229	9,164	11,346	2,182	23.8
Miscellaneous chemicals and specialties	6,890	6,933	7,197	9,131	11,226	2,095	22.9
All other sources	46,220	43,227	40,561	51,929	60,185	8,256	15.9
Total	309,826	319,796	328,613	383,620	442,097	58,477	15.2

Source: USITC DataWeb/Census, accessed February 16, 2023.
Notes: Import values are based on U.S. customs value. Calculations are based on unrounded data.

Miscellaneous inorganic chemicals also enjoyed strong U.S. import growth in 2022, increasing $6.1 billion (46.1 percent) to $19.2 billion.[31] The imported quantity of this broad basket category, however, increased by only 3.0 percent in 2022, indicating that higher unit values accounted for nearly all of the rise in import value. Mixtures of two or more inorganic compounds not elsewhere specified or included

[28] USITC, *COVID-19 Related Goods*, December 2020, 19–20.
[29] Heritage, "Skyrocketing Pharmaceutical Imports to the U.S.," January 9, 2023; Muoio, "Nationwide Drug Spending Grew 7.7%," April 12, 2022; Beasley, "U.S. New Drug Price Exceeds $200,000," January 5, 2023.
[30] Heritage, "Skyrocketing Pharmaceutical Imports to the U.S.," January 9, 2023.
[31] "USITC DataWeb/Census," digest CH007, accessed February 17, 2023.

(n.e.s.o.i.) experienced the greatest increase, $1.8 billion (110.2 percent) to $3.4 billion. The bulk of the increased imports came from East Asian trading partners—South Korea, China, and Japan—with U.S. imports from each increasing by more than $1.0 billion.

Imports of miscellaneous plastic products increased by $5.9 billion (11.4 percent) to $57.5 billion in 2022.[32] This increase was driven, in part, by tableware and kitchenware articles n.e.s.o.i. and by plastics whose imports increased by $564 million (16.0 percent). These imports reflect the increased use of plastic utensils in the food service industry, activities that picked up speed during the COVID-19 pandemic when many restaurants shifted a growing share of their food service to takeout or delivery options.[33] U.S. consumers are also reportedly eating in restaurants more frequently, compared to 2021.[34] Other components of this digest that recorded strong growth in 2022 are other articles of plastic n.e.s.o.i. and vinyl tile floor coverings. The increased imports of vinyl tile floor coverings benefitted from the sustained increase in home renovation projects since the inception of the COVID-19 pandemic as well as a recovery in commercial construction.[35] U.S. imports of miscellaneous plastic products increased the most from Mexico (up $1.1 billion, or 19.3 percent), China (up $904 million, or 4.7 percent), and Canada (up $813 million, or 10.6 percent).

U.S. imports of fertilizers grew by $4.3 billion (37.0 percent) to $442.1 billion in 2022.[36] The primary factor driving this increase in imports were significantly higher import unit values stemming from the supply shocks arising from the Russian invasion of Ukraine.[37] To illustrate, although the volume of potassium chloride fertilizers imported by the United States fell by 20.1 percent in 2022, higher unit values resulted in overall import values increasing by $2.1 billion (57.9 percent). Similarly, import values of anhydrous ammonia rose 80.5 percent even though the quantity imported declined 7.1 percent. Unsurprisingly, the major sources of U.S. fertilizer imports in 2022 were countries with petroleum and natural gas resources—namely Canada (up $2.8 billion, or 62.9 percent), Russia (up $575 million, or 48.4 percent), and Trinidad and Tobago (up $500 million, or 51.9 percent).[38]

U.S. imports of tires and tubes increased by $3.7 billion (22.8 percent) to $20.0 billion in 2022.[39] The primary factor driving growth in this digest was imports of tires for trucks, buses, and passenger vehicles, which grew by $3.0 billion or 23.1 percent.[40] The American Trucking Association reported that shipping tonnage grew at the fastest rate since 2018, up 3.4 percent from 2021.[41] Because domestic production of truck and bus tires was relatively flat (up 0.2 percent), this increased level of trucking resulted in strong demand for imported tires.[42] Imports of tires for passenger vehicles also reached a

[32] "USITC DataWeb/Census," digest CH033, accessed February 17, 2023.
[33] PIA, "Delivery or Takeout?, accessed July 27, 2023; Parsi, *Waste Not, Want Not*, February 21, 2020.
[34] Popmenu, "58% of U.S. Consumers Are Dining Out More Often," October 20, 2022.
[35] Mariotti, "Home Remodeling Statistics," June 23, 2022; Deane, *State of Remodeling in the U.S.*, August 6, 2022; Statista, "Value of U.S. Commercial Construction 2022," February 13, 2023.
[36] "USITC DataWeb/Census," digest CH010, accessed February 17, 2023.
[37] Sabadus, "War in Ukraine, Gas Crisis," February 10, 2023.
[38] Enerdata, "Global Natural Gas Production," accessed June 23, 2023; MEEI, "Oil and Gas Industry," accessed June 23, 2023; EIA, "What Countries Are the Top Producers," accessed June 23, 2023.
[39] "USITC DataWeb/Census," digest CH032, accessed February 17, 2023.
[40] Davis, "Truck Sector Leads U.S. Tire Market," February 3, 2023.
[41] Davis, "Truck Sector Leads U.S. Tire Market," February 3, 2023.
[42] Davis, "Truck Sector Leads U.S. Tire Market," February 3, 2023.

record level, increasing 4.6 percent in 2022.[43] Increased domestic production of passenger vehicles (up 12 percent in 2022) contributed to the increased tire imports, as did the demand for replacement tires because people retained their vehicles longer in 2022.[44] Another factor that increased the value of U.S. passenger vehicle tire imports was tire price inflation (up 9–15 percent for most radial tires).[45] The increased imports of tires and tubes came primarily from Japan (up $556 million), Thailand (up $531 million), and Vietnam (up $369 million).

[43] Davis, "Truck Sector Leads U.S. Tire Market," February 3, 2023.
[44] OICA, "2022 Production Statistics," accessed May 4, 2023; Grabell, "Overinflated: The Journey of a Humble Tire," May 3, 2023.
[45] "USITC DataWeb/Census," digest CH032, accessed February 17, 2023.

Footwear

Changes in 2022 from 2021:

- **U.S. total exports increased by $193 million (16.8 percent) to $1.3 billion**
  - **U.S. domestic exports increased by $76 million (9.3 percent) to $894 million**
  - **U.S. re-exports increased by $117 million (35.3 percent) to $450 million**
- **U.S. general imports increased by $9.0 billion (33.4 percent) to $35.9 billion**

The value of U.S. domestic exports of footwear products[46] increased by $76 million (9.3 percent) to $894 million in 2022 (table FW.1).[47] Domestic exports made up $894 million (66.5 percent) of total exports ($1.3 billion), with re-exports accounting for the remaining $450 million. The two largest U.S. export destinations in 2022 were Vietnam, accounting for 22.3 percent of all U.S. exports, followed by Canada at 20.5 percent. Exports to Vietnam (primarily footwear parts) increased by 12.1 percent to $199 million, and exports to Canada increased by 22.4 percent to $183 million (appendix table B.6). The next-largest destination market for U.S. exports in 2022 was Mexico (up 24.5 percent), followed by Indonesia (down 3.1 percent) and China (down 48.7 percent).

U.S. general imports of footwear products increased by $9.0 billion (33.4 percent) to $35.9 billion in 2022 (table FW.2). The largest suppliers of footwear to the United States were China ($13.8 billion), Vietnam ($10.9 billion), and Indonesia ($3.1 billion) (appendix table C.6). Although imports from China grew in 2022 compared to 2021, China's share of total U.S. imports fell to its lowest point since 1992—38.4 percent in 2022. By contrast, Vietnam's share of U.S. imports of footwear products continued to increase, growing from 28.4 percent ($7.7 billion) in 2021 to 30.1 percent ($10.7 billion) in 2022. Imports from Indonesia and Cambodia experienced significant year-over-year increases in 2022. Imports from Italy also increased $316 million (15.0 percent).

Rising global consumer demand in 2022 following the COVID-19 pandemic lockdowns led to both increases in U.S. exports and imports.[48] Imports of footwear also came from a more diverse group of countries, corresponding with increased pressure for companies to move away from sourcing from China. Although the industry is rebounding, footwear imports and exports were still below 2019 pre-pandemic numbers.[49]

U.S. Domestic Exports

U.S. domestic exports of footwear products grew by $76 million (9.3 percent) to $894 million in 2022 (table FW.1).[50] The increase in U.S. footwear exports in 2022 resulted principally from the continued

[46] The Footwear sector consists of one product digest, which encompasses various 8-digit subheadings in the *Harmonized Tariff Schedule of the United States* (HTS). For a complete list of HTS subheadings classified in a particular sector or digest, see data table.
[47] Except when otherwise noted, export data used in this section are for domestic exports. For more information on trade terminology, please refer to USITC, "Special Topic: Trade Metrics," *Shifts in U.S. Merchandise Trade, 2014*, June 2015.
[48] Clark, "Shoe & Footwear Manufacturing in the US," July 2022.
[49] USITC DataWeb/Census, digest FW001, accessed January 3, 2023.
[50] USITC DataWeb/Census, digest FW001, accessed January 3, 2023.

rebound in global consumer demand as life normalized after the height of the COVID-19 pandemic and reshoring due to supply chain disruptions.[51] The largest exported footwear product was footwear parts, exports of which were up $20 million to $367 million. Footwear parts accounted for 41.0 percent of all U.S. footwear exports. Remaining exports consisted of finished shoes, which were up $56 million to $527 million.[52] Footwear exported from the United States—from brands such as New Balance and Danner—is viewed as high quality in foreign markets.[53] Nevertheless, exports remained below pre-COVID-19 pandemic levels as U.S. domestic producers suffered from appreciation of the U.S. dollar in 2022, causing U.S.-made footwear to become more expensive abroad.[54] In addition, supply chain disruptions, including the cost of container freight, continued in the first half of 2022, and U.S. producers struggled to access inputs and export their products.[55]

Table FW.1: Leading changes in U.S. domestic exports, 2018–22
In millions of dollars and percentages.

Product group (digest)	2018 (million $)	2019 (million $)	2020 (million $)	2021 (million $)	2022 (million $)	Absolute change 2021–22 (million $)	Percentage change 2021–22 (%)
Footwear	985	1,133	798	818	894	76	9.3
Total	985	1,133	798	818	894	76	9.3

Source: USITC DataWeb/Census, accessed February 16, 2023.
Notes: Export values are based on free along ship value, U.S. port of export. Calculations are based on unrounded data.

Growth in U.S. footwear exports to Vietnam and Canada helped drive the overall increase of 9.3 percent in U.S. exports in this sector. By value, Vietnam was the top destination for U.S. exports of footwear and footwear parts, with exports increasing by $21 million (12.1 percent) to $199 million. Exports to Canada experienced the largest change, growing by $34 million (22.4 percent) to $183 million. U.S. exports also increased to Mexico (up $14 million or 24.5 percent), Hong Kong (up $13 million or 56.7 percent), and the Netherlands (up $20 million or 175.0 percent). The types of footwear exported to these destinations varied. Hong Kong and Vietnam largely imported footwear parts and accessories from the United States; Canada, the Netherlands, and Mexico primarily imported finished footwear.[56] These increases were due to the continued rebound in global consumer demand as well as reshoring in response to supply chain disruptions. For example, in March 2022, New Balance expanded its shoe production in the United States, opening a new manufacturing facility in Massachusetts.[57] A representative from New Balance, a

[51] Clark, "Shoe & Footwear Manufacturing in the US," July 2022.
[52] Footwear parts are exported under HS heading 6406.
[53] Clark, "Shoe & Footwear Manufacturing in the US," July 2022.
[54] Clark, "Shoe & Footwear Manufacturing in the US," July 2022, 11; Matschke and Sattiraju, "Price Pressures for U.S. Exporters," August 31, 2022.
[55] These disruptions were not insignificant given that exports represented about 25 percent of total industry revenue in 2022. Clark, "Shoe & Footwear Manufacturing in the US," July 2022, 20.
[56] The largest footwear group exported to Canada and the Netherlands was certain leather upper footwear under HS heading 6403; the largest footwear group exported to Mexico was certain other footwear under HS heading 6405.
[57] Thomas, "New Balance Bulks up Manufacturing," March 28, 2022.

U.S. importer and exporter of footwear, cited the opening as a response to increased costs in shipping containers constraining its ability to import its shoes from abroad.[58]

Some of the largest markets for U.S. footwear either remained flat or experienced a decline in exports in 2022. Exports to China fell by $57 million (48.7 percent) to $60.3 million. China dropped from the third-largest destination market to the fifth in 2022. By comparison, exports to Indonesia, the fourth-largest destination market, remained stable at approximately $70 million. China's Zero-COVID policy led to lower footwear demand because the country's continued lockdowns resulted in store closings and factories often shutting down.[59] Supply chain disruptions, including growing shipping container rates and port congestion, also made it more difficult for U.S. manufacturers to export goods in 2022.[60]

Re-exports accounted for about 33.5 percent ($450 million) of total U.S. exports of footwear in 2022, an increase of 35.3 percent ($117 million) from 2021. Re-exports' share of total exports grew slightly compared to 2020 and 2021 shares of 29.8 percent and 28.9 percent, respectively. Canada and Mexico were the largest destination markets for re-exports, totaling $241 million (53.7 percent) and $53 million (11.7 percent), respectively. The majority of reexported footwear is finished footwear, because the United States often serves as a distribution hub for shipments to North America.[61]

U.S. General Imports

The U.S. market for footwear is almost entirely supplied by imports, which accounted for 95.4 percent of U.S. consumption in 2022.[62] U.S. imports of footwear grew by $9.0 billion (33.4 percent) to $35.9 billion in 2022 (table FW.2). The increase in U.S. footwear imports was driven primarily by an increase in consumer spending as life normalized after the height of the COVID-19 pandemic and consumers purchased shoes for activities such as entertainment and office work.[63] U.S. consumer spending on footwear increased 4.3 percent in the fourth quarter of 2022 compared to the fourth quarter of 2021.[64] At the same time, companies reportedly built up large inventories of shoes because of overbuying in response to supply chain issues in early 2022.[65] Elevated domestic inventories may dampen U.S. imports of shoes in 2023 and beyond.

[58] A representative from New Balance indicated its per-container shipping costs increased from $1,700 to $22,000 from Asia to the West Coast of the United States during the first half of 2022. Phillips, "How New Balance Overhauled Sourcing to Tackle Supply Disruption," April 22, 2022.
[59] Fox, "As Chinese Lockdowns Continue," October 14, 2022; Ciment, "China's Relaxed Covid Measures," December 27, 2022.
[60] Dobrosielski, "Nike, Puma, Under Armour 'Too Optimistic' About Vietnam Comeback?," November 23, 2021; American Apparel & Footwear Association, AAFA Urges Biden, September 20, 2021.
[61] Jones et al., "The Rising Role of Re-Exporting Hubs in Global Value Chains," April 2020, 9.
[62] Clark, "Shoe & Footwear Manufacturing in the US," July 2022, 11.
[63] Clark, "Shoe & Footwear Manufacturing in the US," July 2022, 18.
[64] BEA, "Table 2.4.5U. Personal Consumption Expenditures by Type of Product," accessed March 6, 2023.
[65] Friedman, "Footwear Imports Falloff Reflects Inventory Crunch," October 18, 2022.

Table FW.2: Leading changes in U.S. general imports, 2018–22
In millions of dollars and percentages.

Product group (digest)	2018 (million $)	2019 (million $)	2020 (million $)	2021 (million $)	2022 (million $)	Absolute change 2021–22 (million $)	Percentage change 2021–22 (%)
Footwear	26,518	26,865	20,195	26,925	35,924	8,999	33.4
Total	26,518	26,865	20,195	26,925	35,924	8,999	33.4

Source: USITC DataWeb/Census, accessed February 16, 2023.
Notes: Import values are based on U.S. customs value. Calculations are based on unrounded data.

The two largest sources for U.S. imports of footwear in 2022 were China and Vietnam, together accounting for 68.8 percent of all U.S. imports. The United States imported a variety of footwear products from China in 2022, with U.S. imports from the country totaling more than $13.8 billion, an increase of $2.6 billion (22.8 percent). Although China is still the largest supplier of U.S. footwear, its total import share (38.4 percent) continued to decline in 2022 to the lowest point since 1992. In addition to the Zero-COVID policies that resulted in factory shutdowns, the rising middle class in China is leading to worker shortages in footwear factories as fewer people desire jobs in footwear manufacturing compared to higher paying jobs.[66] In 2022, U.S. retailers stepped up efforts to diversify their sources of shoes away from China for a variety of reasons, including supply chain disruptions and U.S. trade actions against China. China is subject to additional duties under section 301 of the Trade Act of 1974 as well as the Uyghur Forced Labor Prevention Act, which went into effect on June 21, 2022, and prohibits the import of any goods manufactured wholly or in part from the Xinjiang Uyghur Autonomous Region of China.[67] Nonetheless, China still dominates global production of footwear as a result of its large production capacity, unparalleled access to inputs, and highly developed road and port infrastructure.[68]

U.S. imports from Vietnam rose by $3.4 billion (45.3 percent) to $10.9 billion in 2022. Vietnam is a large player in global footwear production, particularly for athletic shoes. Nike, Adidas, Puma, and Reebok have all established manufacturing facilities in country, mainly to take advantage of low labor costs relative to China.[69] Vietnam has also benefited from foreign footwear manufacturers seeking to diversify their sources of imported footwear away from China, although Vietnam's relatively small labor force and reliance on foreign inputs reportedly limit its ability to replace China as the largest producer of footwear.[70]

[66] Nishimura, "China Dominance Wanes as Sourcing Sands Shift," December 29, 2022.
[67] Chua, "Customs Blacklisting, New Data Show Ongoing Fight Against Forced Labor," December 29, 2022; Friedman, "Shoe Imports Trudging Into Peak Season," November 16, 2022; CBP, "Uyghur Forced Labor Prevention Act," October 25, 2022.
[68] Strong, "Nike Shifts Footwear Production," January 5, 2022; Sourcing Journal, *Footwear Report 2020*, August 5, 2020, 19; Brocker, "Global Footwear Manufacturing," June 2022.
[69] World Footwear, "Vietnam: Leather and Footwear Exports on the Rise," September 14, 2022; Fox, "As Chinese Lockdowns Continue," October 14, 2022.
[70] Vietnam imports 70–80 percent of its textiles from China. It is also the largest importer of footwear parts in the world, importing $1.22 billion in footwear parts in 2021. Its reliance on foreign inputs can make a company's supply chain more vulnerable and raise the price per unit. The Observatory of Economic Complexity (OEC), "Footwear Parts in Vietnam," accessed May 3, 2023. Veritas Sourcing, "Manufacturing in Vietnam - 5 Key Factors," February 27, 2022; Guarascio and Vu, "World's Apparel, Sneakers Hub Vietnam," May 3, 2023.

Indonesia was the third-largest supplier of U.S. footwear imports in 2022, with imports increasing by $1.1 billion (56.2 percent) to $3.1 billion. Indonesia's relatively low labor costs and vast natural resources, such as rubber, have increased its appeal in recent years to footwear companies attempting to diversify production locations away from China.[71] Imports from Italy, the fourth-largest U.S. supplier of footwear by value, grew by $316 million (15.0 percent) to $2.4 billion.[72] Italy historically supplies premium, high-end footwear to the United States; however, in recent years, Italian firms have evolved to include more comfort and athleisure shoes in their product lines, which are becoming more fashionable.[73] Italian manufacturers also benefited from the rebound in shoe demand following the height of the COVID-19 pandemic.[74] U.S. imports of footwear also increased significantly from Cambodia (up by $357 million; 50.1 percent) and Mexico (up by $238 million; 41.6 percent). Cambodia received a $50 million loan from the Asian Development Bank to help diversify its economy and encourage investment. Footwear imports from Cambodia grew in the first 10 months of 2022, before declining because of rising footwear prices following the Russian invasion of Ukraine and a slowdown of purchases after overbuying in early 2022.[75] Additionally, imports from Mexico benefited from reshoring activities by U.S. shoe manufacturers following supply chain disruptions in 2020–21 because such firms attempted to locate manufacturing and assembling facilities closer to the North American market.[76]

[71] Crnkovich, "Footwear Manufacturing in Indonesia," November 30, 2016; Goodman, Reynolds, and Fittipaldi, "Economic Security in Emerging Markets," May 17, 2022.
[72] By quantity, Italy was the sixth-largest supplier of U.S. footwear after China, Vietnam, Indonesia, Cambodia, and India, respectively. The average unit value for footwear imports from Italy was more than $80 per pair; the average unit values for China and Vietnam were $9 and $16, respectively. The average unit values were calculated using imports for consumption. OTEXA, USDOC, "U.S. FOOTWEAR, LEATHER & TRAVEL GOODS IMPORTS BY COUNTRY," accessed May 4, 2023.
[73] The average unit value of footwear from Italy fell by just over 5 percent from 2020 to 2021. OTEXA, USDOC, "U.S. FOOTWEAR, LEATHER & TRAVEL GOODS IMPORTS BY COUNTRY," accessed May 4, 2023; Velasquez, "Lyst: Italian Brands and Comfort Shoes Are Piping Hot," October 27, 2022.
[74] World Footwear, "Double-Digit Increase in Turnover for Italian Footwear Manufacturers," January 11, 2023.
[75] Asian Development Bank, "Cambodia's Economy to Accelerate in 2022 and 2023," April 6, 2022; Fibre2Fashion, "Cambodia's Economy to Grow by 5.3% in 2022; 6.5% in 2023," April 6, 2022; Abdulla, "Cambodia Footwear, Garment Exports to Slide in 2023," January 9, 2023; Friedman, "Footwear Imports Falloff Reflects Inventory Crunch," October 18, 2022.
[76] Goodman, "'OK, Mexico, Save Me,'" January 1, 2023.

Textiles and Apparel

Changes in 2022 from 2021:

- **U.S. total exports increased by $2.1 billion (9.5 percent) to $24.5 billion**
  - **U.S. domestic exports increased by $1.5 billion (8.6 percent) to $19.0 billion**
  - **U.S. re-exports increased by $614 million (12.6 percent) to $5.5 billion**
- **U.S. general imports increased by $8.8 billion (6.1 percent) to $153.2 billion**

The value of U.S. domestic exports of textile and apparel products[77] increased by $1.5 billion (8.6 percent) to $19.0 billion during 2022.[78] Exports of fibers and yarns, apparel, fabrics, miscellaneous textile products, and carpets and rugs all rose in 2022, with growth ranging from $9 million to $593 million (table TX.1).[79] By contrast, exports of home furnishings decreased by $15 million (down 2.5 percent) in 2022 as high interest rates in many countries tempered new housing construction and spending on home improvement projects, which are the two main drivers of demand for these products.[80] Exports to the United States' largest destination markets—Mexico ($4.5 billion), Canada ($4.1 billion), and Honduras ($1.7 billion)—led growth in the sector, with exports to Honduras increasing the most, by $306 million (21.6 percent), followed by Canada, up $298 million (7.8 percent), and Mexico, up $217 million (5.1 percent) (appendix table X).[81]

U.S. general imports of textiles and apparel increased by $8.8 billion (6.1 percent) to $153.2 billion in 2022 (table TX.2), although growth slowed compared to 2021 (13.4 percent).[82] The deceleration in growth was due in part to rising inflation in the United States, which dampened consumer demand for finished goods in 2022, but also the exceptional economic performance of 2021 (as the U.S. economy bounced back from the lows of the COVID-19 pandemic era).[83] Apparel, which accounted for 72.4 percent of total textile and apparel imports in 2022, saw the greatest increase in imports by value, up $9.5 billion (9.3 percent) to $110.9 billion. The second-largest shift was in imports of home furnishings, which fell by $1.5 billion (down 9.6 percent) to $13.9 billion. The fibers and yarns digest and the fabrics

[77] The Textiles and Apparel sector consists of six product digests. Each USITC sector digest includes various 8-digit subheadings in the *Harmonized Tariff Schedule of the United States* (HTS).
[78] Except when otherwise noted, export data used in this section are for domestic exports. For more information on trade terminology, please refer to Lundquist, "Special Topic: Trade Metrics," June 2015; USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.
[79] USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.
[80] In particular, interest rates in Canada, the primary market (62.4 percent share) for U.S. exports of home furnishings, rose in 2022. Lang, *Textile Mills in the US*, January 2023; Altstedter, "Canada Home Prices See Record Drop," January 16, 2023; Hertzberg and Thanthong-Knight, "Canada's Economy Starts to Sputter," November 29, 2022; Pereira, "Toronto Offers Glimpse of Housing Pain," July 19, 2022; Smith, "Charting the Global Economy," August 27, 2022. USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.
[81] USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.
[82] USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.
[83] USDOC, BEA, "Table 2.3.5U. Personal Consumption Expenditures by Major Type of Product and by Major Function," accessed January 15, 2023; Abdulla, "US Apparel Imports Slide in October," December 9, 2022; Kleinhenz, *Monthly Economic Review*, January 2023; Casselman, "U.S. Economy Showed Momentum at Year's End," January 26, 2023.

digest had the third- and fourth-largest changes in import levels, increasing by $737 million (19.3 percent) and by $444 million (5.5 percent), respectively (table 11.1).[84]

Certain economic factors affected shifts in U.S. trade across the textiles and apparel sector in 2022. Growth in U.S. exports was primarily due to increased global consumer demand for apparel as economies continued to rebound from the pandemic, which generated demand for production inputs, such as U.S. yarns and fabrics, from regional trading partners.[85] During 2022, however, the growth in exports was more moderate than during 2021 (18.9 percent), in part due to the relative strength of the U.S. dollar, which raised the cost of U.S. goods in foreign markets, as well as to limitations on U.S. production caused by labor constraints.[86] Similarly, increasing U.S. consumer demand for apparel spurred growth in sector imports, with U.S. consumer spending on clothing and footwear up 6.5 percent as a result of the U.S. economy's high employment and growing wages.[87]

U.S. textile and apparel companies moved to build international supply chain resiliency through sourcing diversification, which was the primary factor impacting shifts in imports from major suppliers in 2022.[88] COVID-19-related factory lockdowns, particularly in China, impacted the textiles and apparel supply chain, leading to input shortages, delayed delivery of orders, and shipping disruptions.[89] Although China was the leading supplier to the United States in all sector categories except for carpets and rugs,[90] overall U.S. imports from China declined by $3.8 billion (8.4 percent) to $41.5 billion in 2022 (appendix table X).[91] In addition to the COVID-19-related disruptions mentioned above, the drop in U.S. imports of textiles and apparel from China can also be attributed to section 301 duties on certain Chinese goods as

[84] USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.
[85] Lang, *Textile Mills in the US*, January 2023; UNCTAD, *Global Trade Update*, December 13, 2022; Magana, "Honduras Strengthens Position as US Nearsourcing Partner," October 24, 2022.
[86] Sandler, Travis & Rosenberg, P.A., "Trade Deficit Tumbles as Exports, Imports Both See Declines," accessed January 14, 2023; Spiegel, "Textile Companies Slammed by Shortages and Missing Labor," June 15, 2022. USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.
[87] Smith, "Federal Reserve Keeps Faith in a US 'Soft Landing,'" January 18, 2023; Husband, "Key Trends to Watch," February 10, 2023; USDOC, BEA, "Table 2.3.5U. Personal Consumption Expenditures by Major Type of Product and by Major Function," accessed March 7, 2023.
[88] Lu, *2022 Fashion Industry Benchmarking Study*, July 2022.
[89] Chua, "China's Zero-Covid Policy Triggers Raw-Material Scramble in Vietnam," May 16, 2022; Russell, "Global Fashion Industry Heading for Slowdown in 2023," November 30, 2022.
[90] India was the top supplier of carpets and rugs to the United States in 2022; China ranked third. USITC DataWeb/Census, digest TX003, accessed February 9, 2023.
[91] USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.

well as a ban on products manufactured in Xinjiang.[92] As a result, some U.S. companies diversified the sourcing of textiles and apparel, including purchases from a growing number of non-Chinese suppliers.[93] Despite emerging interest in nearshoring,[94] textile and apparel imports from Vietnam (up $4.0 billion), Bangladesh (up $2.6 billion), Indonesia (up $1.5 billion), and India (up $1.3 billion) showed the four largest increases by value in 2022.[95] Nevertheless, Chinese producers of textiles and apparel remain competitive in the U.S. market as a result of the vertically integrated nature of the industry, which allows quick access to high volumes of a wide selection of manufacturing inputs, a skilled workforce (capable of producing a wide variety of high-quality goods), and low-cost production (due to economies of scale and use of advanced technology).[96] Moreover, the textile and apparel manufacturing industries of other countries exhibit limited capacity with which to displace the enormous volume of imports that the United States currently sources from China.[97]

U.S. Domestic Exports

U.S. exports of fibers and yarns increased by $593 million (up 14.8 percent) to $4.6 billion in 2022 (table (table TX.1).[98] Certain cotton yarns[99] and certain cotton-polyester blended yarns[100] led overall export growth, rising by $211 million (37.4 percent) and $85 million (22.8 percent), respectively.[101] In 2022, exports of these two product groups increased by the largest absolute amount to countries that are signatories to the Dominican Republic-Central America-United States Free Trade Agreement (CAFTA-DR), namely Honduras (up $247 million or 43.3 percent), the Dominican Republic (up $46 million or 25.8 percent), and Guatemala (up $20 million or 76.2 percent).[102] The large increase in yarn exports to these

[92] In 2018, the U.S. Trade Representative found that China's practices concerning forced transfers of technology and intellectual property constituted discriminatory trade practices in violation of section 301 of the Trade Act of 1974, and section 301 duties were subsequently levied on imports from China in several tranches. USTR, *Findings of the Investigation into China's Acts, Policies, and Practices Related to Technology Transfer, Intellectual Property, and Innovation Under Section 301 of the Trade Act of 1974*, March 22, 2018. In 2021, the Uyghur Forced Labor Prevention Act created a rebuttable presumption that imports from the Xinjiang Uyghur Autonomous Region in China were made with forced labor and prohibited importation into the United States under section 307 of the Tariff Act of 1930. Uyghur Forced Labor Prevention Act of 2021, Pub. L. No. 117-78, 135 Stat. 1525. Hale and Waluszewski, "Chinese Exports Suffer Sharpest Fall in 3 Years as Covid Pain Spreads," January 13, 2023; Chua, "Customs Blacklisting, New Data Show Ongoing Fight Against Forced Labor," December 29, 2022; Glas, "China Tariffs Are Working in Nearshoring Manufacturing," September 27, 2022; Husband, "Is China a Business Opportunity or Liability?," January 4, 2023. USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.

[93] Lu, *2022 Fashion Industry Benchmarking Study*, July 2022.

[94] Nearshoring is the relocation of business activities to a nearby country from one that is farther away.

[95] U.S. imports of textiles and apparel from Malaysia had the second-largest decrease by value, only slightly smaller than China, falling by $3.8 billion (down 63.9 percent) to $2.1 billion because of a sharp decline in U.S. imports of gloves. USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023. Glas, "China Tariffs Are Working in Nearshoring Manufacturing," September 27, 2022.

[96] Wright, "China Market Share of US Apparel Imports Rises," March 4, 2022; Abdulla, "Index of World's Most Vulnerable Apparel Supply Chains," February 10, 2022.

[97] Yoon, "Companies Will Find It Hard to Diversify Away from China Covid Shock," November 30, 2022.

[98] USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.

[99] Schedule B number 5205.12.0000.

[100] Schedule B number 5509.53.0000.

[101] USITC DataWeb/Census, digest TX001, accessed February 9, 2023.

[102] USITC DataWeb/Census, HTS subheadings 5205.12, 5509.53, accessed March 6, 2023. OTEXA, "Summary of the U.S. - CAFTA - DR Free Trade Agreement," accessed January 20, 2023.

countries likely stems from the U.S. apparel industry's interest in nearshoring, because the CAFTA-DR's "yarn-forward" rules of origin require that apparel and other finished textiles imported into the United States under the agreement must be produced in signatory countries using U.S. or partner-country inputs.[103] Overall, U.S. fiber and yarn exports grew by the largest amount in 2022 to Honduras, up $322 million (32.3 percent), followed by the Dominican Republic, up $71 million (24.0 percent).[104] Other factors that likely contributed to U.S. exports of fibers and yarns to the CAFTA-DR region include expanded U.S. investment in textile and apparel manufacturing facilities in the region, which further developed the coproduction chain, as well as a workforce development partnership established by the governments of the United States and Honduras to train employees for skilled and academic opportunities in textiles.[105]

Table TX.1: Leading changes in U.S. domestic exports, 2018–22
In millions of dollars and percentages.

Product group (digest)	2018 (million $)	2019 (million $)	2020 (million $)	2021 (million $)	2022 (million $)	Absolute change 2021–22 (million $)	Percentage change 2021–22 (%)
Fabrics	6,136	5,844	4,918	5,452	5,692	240	4.4
Fibers and yarns, except raw cotton and raw wool	4,515	4,356	3,242	4,009	4,602	593	14.8
Apparel	3,242	3,236	2,502	3,313	3,774	462	13.9
Miscellaneous textile products	2,976	2,965	2,916	3,485	3,702	218	6.2
Carpets and rugs	904	836	670	663	672	9	1.4
Home furnishings	537	520	468	581	567	-15	-2.5
Total	18,311	17,757	14,715	17,503	19,009	1,506	8.6

Source: USITC DataWeb/Census, accessed February 16, 2023.
Notes: Export values are based on free along ship value, U.S. port of export. Calculations are based on unrounded data.

U.S. exports of apparel increased by $462 million (13.9 percent) to $3.8 billion in 2022. The markets that witnessed the largest increases in U.S. exports were Canada (up by $142 million or 13.5 percent), Poland (up by $69 million or 2,403.8 percent), and Mexico (up by $38 million or 5.5 percent).[106] Exports of apparel to Poland grew rapidly in part as a result of U.S. donations of diapers and other sanitary products in support of the war effort in Ukraine.[107] Increased consumer spending on apparel in Canada

[103] OTEXA, "Summary of the U.S. - CAFTA - DR Free Trade Agreement," accessed January 20, 2023.
[104] Magana, "Honduras Strengthens Position as US Nearsourcing Partner," October 24, 2022. USITC DataWeb/Census, digest TX001, accessed February 9, 2023.
[105] U.S. investment in textile manufacturing in the region meets objectives of nearshoring for supply chain security and job creation to stabilize the region. Wright, "US Investments in Honduras," August 8, 2022; Magana, "Honduras Strengthens Position as US Nearsourcing Partner," October 24, 2022; Abdulla, "New US-Honduras Partnership," August 23, 2022.
[106] USITC DataWeb/Census, digest TX005, accessed February 9, 2023.
[107] The World Health Organization (WHO) identified diapers, sanitary pads, and tampons as urgent needs in Ukraine and the neighboring countries, including Poland, that were hosting war refugees. Diapers, diaper liners, sanitary napkins, and tampons are classified in Schedule B number 9619.00.8000, which is included in the apparel digest. U.S. exports of these products to Poland increased from about $6,000 to $54 million in 2022. WHO, "Medical Supply Donations for Ukraine," March 8, 2023; WPTV, "Church Sends Thousands of Diapers," March 21, 2022; Hurley, "Ukrainian Relief Drive Has Enough Diapers," March 3, 2022. USITC DataWeb/Census, digest TX005, accessed February 9, 2023, and March 1, 2023.

and Mexico drove U.S. export growth to these markets, where qualifying U.S. products enjoy duty-free access under the United States-Mexico-Canada Agreement (USMCA).[108] Shirts and blouses led export growth in the apparel digest, rising by $354 million (53.1 percent) to $1.0 billion in 2022.[109]

Fabrics, which represented the largest share (29.9 percent) of U.S. exports of textiles and apparel in 2022, experienced the third-largest shift by value, increasing by $240 million (4.4 percent) to $5.7 billion. U.S. exports of coated fabrics grew by the largest amount ($121 million or 10.8 percent), followed by broadwoven fabrics ($104 million or 9.3 percent).[110] Because both coated and broadwoven fabrics are primarily used in apparel production, the increase in U.S. exports is likely due to global growth in demand for clothing.[111] Nonwoven fabrics, which are used in a variety of applications, including wipes, filters, and automobile upholstery, accounted for the largest share of U.S. fabric exports (32.7 percent), totaling $1.9 billion in 2022. However, exports of nonwoven fabrics experienced the largest decrease by value, falling by $77 million (4.0 percent), largely because of slowing demand for personal protective equipment (PPE) in the wake of the COVID-19 pandemic.[112] U.S. exports of fabrics to Mexico and Canada, its USMCA trading partners, were up by $74 million (3.3 percent) and $47 million (5.4 percent), respectively, and represented the two largest markets in terms of the absolute increase in exports in 2022.[113]

Exports of miscellaneous textile products increased by $218 million (6.2 percent) to $3.7 billion in 2022.[114] The largest shift was in exports of used clothing and other worn articles,[115] which grew by $115 million (up 14.1 percent) to $929 million in 2022.[116] U.S. exports of used clothing to Guatemala, the top U.S. market for such goods, led growth in absolute terms with an increase of $34 million (24.8 percent). The second- and third-largest markets, measured by the absolute increase in exports of used clothing, were Mexico and Chile, which grew by $16 million (39.8 percent) and $12 million (14.5 percent), respectively.[117] U.S. consumers purchased a growing amount of new clothing in 2022 and, in turn, disposed of used garments. U.S. exports of used clothing, particularly to countries in the Western

[108] USITC DataWeb/Census, digest TX005, accessed February 9, 2023. OTEXA, "Summary of the U.S.-Mexico-Canada Agreement," accessed January 20, 2023; Statistics Canada, "Household Actual Final Consumption, Canada, Provincial and Territorial, Annual," March 28, 2023 (accessed May 3, 2023); Mexico News Daily, "Consumer Spending Rose 6.5% in Mexico in 2022," March 6, 2023.
[109] USITC DataWeb/Census, digest TX005, accessed February 9, 2023.
[110] USITC DataWeb/Census, digests TX001–006, accessed February 9, 2023.
[111] Lang, *Textile Mills in the US*, January 2023; UNCTAD, *Global Trade Update*, December 13, 2022.
[112] McIntyre, "2022–The Year That Was," November 29, 2022. USITC DataWeb/Census, digest TX002, accessed February 9, 2023.
[113] Under the USMCA, certain qualifying U.S. textile and apparel products have duty-free access to Mexico and Canada. OTEXA, "Summary of the U.S.-Mexico-Canada Agreement," accessed January 20, 2023. USITC DataWeb/Census, digest TX002, accessed February 9, 2023.
[114] USITC DataWeb/Census, digest TX006, accessed February 9, 2023.
[115] HS heading 6309.
[116] Miscellaneous textile products were aggregated by four-digit headings for this comparison. Only Schedule B statistical reporting numbers in the digest were included in the totals. USITC DataWeb/Census, digest TX006, accessed February 9, 2023.
[117] USITC DataWeb/Census, HTS heading 6309, accessed March 8, 2023.

Hemisphere, grew in response.[118] Overall, the United States is the largest global exporter of used clothing.[119]

Reexports made up 22.3 percent ($5.5 billion) of total U.S. textile and apparel exports in 2022.[120] Reexports of apparel increased by the largest amount, rising by $589 million (20.4 percent) to $3.5 billion, followed by fabrics, which grew by $41 million (5.9 percent).[121] Many U.S. apparel brands and retailers use foreign-trade zones (FTZs) in the United States as distribution hubs for their products, particularly to Canadian and Mexican markets, which results in reexports making up a large share (48 percent in 2022) of total U.S. apparel exports.[122] Growing consumer demand for apparel in these two key North American markets has likely driven the increases in reexports of apparel as well as the fabrics used in apparel production.[123]

U.S. General Imports

In 2022, imports of apparel increased by $9.5 billion (9.3 percent) to $110.9 billion (table TX.2).[124] Overall, U.S. consumer spending on apparel grew by 6.5 percent in 2022,[125] with the rise in demand largely met by imports, which generally offer a cost advantage over apparel produced in the United States.[126] The shirts and blouses product category drove the increase in apparel imports, rising by $7.3 billion (27.6 percent).[127] Imports of knit tops led growth for shirts and blouses, likely in response to increased demand for comfortable, less structured clothing as the work-from-home trend continued in 2022.[128] Apparel imports from China (the largest U.S. supplier) fell by $2.4 billion (down 8.6 percent) to $25.7 billion in 2022, reportedly as a result of section 301 duties, the Xinjiang cotton product ban, and

[118] Siqueira and Lu, "What Affects the Patterns of Used Clothing Exports?," September 15, 2022, 2; USDOC, BEA, "Table 2.3.5U. Personal Consumption Expenditures by Major Type of Product and by Major Function," accessed January 15, 2023. USITC DataWeb/Census, HTS subheading 6309, accessed March 8, 2023.
[119] S&P Global, IHS Markit, Global Trade Atlas, HS 6309.00, accessed January 16, 2023.
[120] USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.
[121] USITC DataWeb/Census, digests TX001-006, accessed February 9, 2023.
[122] For additional information on FTZs, see Lundquist, "Special Topic: Trade Metrics," June 2015.
[123] Statistics Canada, Household Actual Final Consumption, Canada, Provincial and Territorial, Annual, accessed May 3, 2023; Mexico News Daily, "Consumer Spending Rose 6.5% in Mexico in 2022," March 6, 2023; Guyot, "Mexico," accessed May 3, 2023.
[124] USITC DataWeb/Census, digest TX005, accessed February 9, 2023.
[125] This estimate is for clothing and footwear. U.S. Bureau of Economic Analysis, "Table 2.3.5U. Personal Consumption Expenditures by Major Type of Product and by Major Function," accessed March 7, 2023.
[126] Apparel production is labor intensive, so manufacturers in countries with low labor costs have a significant competitive advantage over those with high labor costs, such as the United States. DellaCamera, *Global Apparel Manufacturing*, August 2021.
[127] USITC DataWeb/Census, digest TX005, accessed February 9, 2023.
[128] Engelhardt, "2022 Dampened by Economic Challenges," 2022, 55.

lingering COVID-19-related supply chain issues.[129] China's loss in share was mostly absorbed by other leading apparel-producing Asian countries, particularly Vietnam and Bangladesh.[130]

Table TX.2: Leading changes in U.S. general imports, 2018–22
In millions of dollars and percentages.

Product group (digest)	2018 (million $)	2019 (million $)	2020 (million $)	2021 (million $)	2022 (million $)	Absolute change 2021–22 (million $)	Percentage change 2021–22 (%)
Apparel	91,964	92,573	79,671	101,461	110,936	9,475	9.3
Home furnishings	11,742	12,188	11,517	15,357	13,881	-1,476	-9.6
Miscellaneous textile products	8,739	9,013	23,412	11,802	11,724	-78	-0.7
Fabrics	7,479	7,041	6,854	8,079	8,523	444	5.5
Fibers and yarns, except raw cotton and raw wool	3,976	3,539	3,020	3,815	4,551	737	19.3
Carpets and rugs	3,093	2,883	2,925	3,909	3,586	-323	-8.3
Total	126,992	127,238	127,400	144,423	153,203	8,779	6.1

Source: USITC DataWeb/Census, accessed February 16, 2023.
Notes: Import values are based on U.S. customs value. Calculations are based on unrounded data.

U.S. imports of home furnishings fell by $1.5 billion (down 9.6 percent) to $13.9 billion in 2022.[131] Demand for home furnishings decreased as a result of rising interest rates in the United States, which, in turn, led to a slowdown in new home construction and home improvement projects, the primary drivers of consumer spending on home furnishings.[132] The decline in imports of home furnishings also likely stems from the cancellation of orders by retailers, as they tried to avoid an inventory glut in the face of the cooling consumer demand.[133] By country, the largest absolute decline in imports was from China, the leading supplier of home furnishings to the U.S. market, which fell by $932 million (11.4 percent), followed by India, which declined by $469 million (13.8 percent).[134] By product category, bedspreads and other furnishing articles experienced the largest drop in imports, decreasing by $1.7 billion (66

[129] Hale and Waluszewski, "Chinese Exports Suffer Sharpest Fall in 3 Years as Covid Pain Spreads," January 13, 2023; Chua, "Customs Blacklisting, New Data Show Ongoing Fight Against Forced Labor," December 29, 2022; Glas, "China Tariffs Are Working in Nearshoring Manufacturing," September 27, 2022; Husband, "Is China a Business Opportunity or Liability?," January 4, 2023. Uyghur Forced Labor Prevention Act of 2021, Pub. L. No. 117-78, 135 Stat. 1525. USITC DataWeb/Census, digest TX005, accessed February 9, 2023.
[130] Apparel is a key export product for many U.S. suppliers. Of sector imports from Vietnam, 93.6 percent were apparel in 2022, for Bangladesh, 96.5 percent, and for China, 62 percent. Vietnam's share of U.S. apparel imports increased to 16.9 percent in 2022, up from 13.6 percent in 2018; Bangladesh accounted for 8.8 percent of apparel imports in 2022, up from 5.9 percent in 2018. USITC DataWeb/Census, digest TX005, accessed February 9, 2023.
[131] USITC DataWeb/Census, digest TX004, accessed February 9, 2023.
[132] Lang, *Textile Mills in the US*, January 2023. Marks, "Whee! That Was One Bumpy Ride," December 9, 2022. USITC DataWeb/Census, digest TX004, accessed February 9, 2023.
[133] Marks, "What Are You Going to Do Now?," June 2, 2022; Marks, "Whee! That Was One Bumpy Ride," December 9, 2022.
[134] USITC DataWeb/Census, digest TX004, accessed February 9, 2023.

percent) to $895 million.[135] The downward shift was likely due in part to the higher shipping costs associated with transporting products that are large in volume.[136]

U.S. imports of fibers and yarns increased by $737 million (19.3 percent) to $4.6 billion in 2022. Imports of glass fiber rovings[137] and certain glass fibers[138] were the leading drivers of growth in this digest, increasing by $114 million (42.1 percent) and $94 million (115.7 percent), respectively.[139] These fibers are often used as inputs to manufacture heat-resistant industrial fabrics, which have growing domestic markets in industries such as shipbuilding.[140] Imports from the United States' top supplier of fibers and yarns—China—grew by $123 million (24.2 percent) in 2022, the largest increase in imports in absolute terms.[141] Such growth was driven by glass[142] and synthetic products that are not subject to the Xinjiang cotton product ban.[143]

Imports of fabrics rose by $444 million (5.5 percent) to $8.5 billion in 2022.[144] Increasing global demand for apparel drove import growth in the digest, with broadwoven fabrics—a key apparel manufacturing input—experiencing the largest absolute change (up $200 million or 9.2 percent).[145] Because U.S. apparel production did not increase significantly in 2022, it is likely that some broadwoven fabric imports passed through FTZs to Mexico's growing apparel industry.[146] Nonwoven fabrics, which include upstream inputs for facemasks, wipes, and medical supplies, experienced the second-largest absolute change in imports, declining by $146 million (7.1 percent) because of decreased demand for PPE as COVID restrictions relaxed in the United States.[147] Overall, nonwoven fabrics was the only fabric product group to decline in 2022.[148] U.S. imports of fabrics from China, the top U.S. supplier, fell by $148 million (9.0 percent) because of a variety of factors, including section 301 duties, the Xinjiang cotton product ban, and lingering supply chain issues related to the pandemic.[149]

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[135] Marks, "What Are You Going to Do Now?," June 2, 2022.USITC DataWeb/Census, digest TX004, accessed February 9, 2023.
[136] Marks, "How the Fashion Bedding Business Is Adjusting to the High-Cost Environment," June 10, 2022.
[137] HTS subheading 7019.12.00.
[138] HTS subheading 7019.11.00.
[139] USITC DataWeb/Census, digest TX001, accessed February 9, 2023.
[140] Lang, *Textile Mills in the US*, January 2023; MarketWatch, "The Silica Fabric Market Is Analyzed on the Basis of Geography," accessed March 10, 2023; Haun, "2023 US Shipbuilding Report," April 17, 2023; USITC, *Certain Amorphous Silica Fabric from China*, March 2017.
[141] USITC DataWeb/Census, digest TX001, accessed February 9, 2023.
[142] China is the top global manufacturer of glass fibers. Gardiner, "The Making of Glass Fiber," June 30, 2020.
[143] Uyghur Forced Labor Prevention Act of 2021, Pub. L. No. 117-78, 135 Stat. 1525. USITC DataWeb/Census, digest TX001, accessed February 9, 2023.
[144] USITC DataWeb/Census, digest TX002, accessed February 9, 2023.
[145] USITC DataWeb/Census, digest TX002, accessed February 9, 2023.
[146] General imports may include goods that are reexported. For additional information on FTZs, see Lundquiest, "Special Topic: Trade Metrics," June 2015. Russell, "Ten Apparel Sourcing Countries to Watch," January 6, 2023.
[147] McIntyre, "2022—Not the Year of Nonwovens," November 29, 2022. USITC DataWeb/Census, digest TX002, accessed February 9, 2023.
[148] USITC DataWeb/Census, digest TX002, accessed February 9, 2023.
[149] Hale and Waluszewski, "Chinese Exports Suffer Sharpest Fall in 3 Years as Covid Pain Spreads," January 13, 2023; Chua, "Customs Blacklisting, New Data Show Ongoing Fight Against Forced Labor," December 29, 2022; Glas, "China Tariffs Are Working in Nearshoring Manufacturing," September 27, 2022; Husband, "Is China a Business Opportunity or Liability?," January 4, 2023. Uyghur Forced Labor Prevention Act of 2021, Pub. L. No. 117-78, 135 Stat. 1525. USITC DataWeb/Census, digest TX002, accessed February 9, 2023.

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