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Made in USA Great Again? Potential implications of President Trump's trade war and tariffs on the global garment industry[1]

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Abstract
Donald Trump, newly re-elected president of the United States of America, has announced historically high tariffs on imports in April 2025. While the president aims to provide cheaper products to Americans and wants to boost local manufacturing, the USA is heavily reliant on garment and shoe imports, mostly from China and the European Union. The article explores the potential consequences of Donald Trump's trade war on the global garment industry. While the topic has a critically time-sensitive nature due to the turbulent changes in economic policy directions with daily announcements, the conclusion of the study is that the tariffs will neither lead to more jobs nor make accessible local products for consumers in the USA. The proposed tariffs will likely make imports more expensive, hurting poorer consumers and developing countries that strongly rely on garment exports.
Keywords: USA, European Union (EU), tariffs, global garment industry, global value chains

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Made in USA Great Again? Potencjalne konsekwencje wojny handlowej prezydenta Trumpa dla globalnego przemysłu odzieżowego

Streszczenie

Donald Trump, nowo wybrany prezydent Stanów Zjednoczonych Ameryki, ogłosił historycznie wysokie cła na import w kwietniu 2025 roku. Chociaż prezydent dąży do zapewnienia Amerykanom tańszych produktów i wspierania lokalnej produkcji, Stany Zjednoczone są w dużym stopniu uzależnione od importu odzieży i obuwia, głównie z Chin oraz Unii Europejskiej. Autorka analizuje potencjalne konsekwencje „wojny handlowej" Donalda Trumpa dla globalnego przemysłu odzieżowego. Chociaż temat ma jest ważny ze względu na gwałtowne zmiany w kierunkach polityki gospodarczej, które są codziennie ogłaszane, wniosek z przeprowadzonego badania jest taki, że cła nie doprowadzą do powstania nowych miejsc pracy ani nie zapewnią dostępu do lokalnych produktów dla amerykańskich konsumentów. Proponowane cła prawdopodobnie podniosą koszty importu, uderzając w uboższych konsumentów i kraje rozwijające się, które są silnie uzależnione od eksportu odzieży.

Słowa kluczowe: USA, Unia Europejska (UE), globalny przemysł odzieżowy, globalne łańcuchy wartości

The United States of America almost entirely relies on imported clothing[2] and shoes, because local industry has been significantly deteriorated due to outsourced manufacturing since the 1990s. Although Donald Trump, newly re-elected U.S. President, has envisaged cheaper products for Americans in the wake of the trade war, the proposed tariffs will likely negatively influence those who are already vulnerable. Therefore, poorer Americans, and those developing countries with significant clothing production, will be affected, and a high proportion of U.S. imports.

On 2 April 2025, Donald Trump announced that tariffs would be imposed on products imported into the U.S. market as a way to offset the U.S. trade deficit. He believes that America is being exploited by other countries – especially China, but also Japan and the European Union – through unfair trade practices, and that the U.S. trade deficit demonstrates that these countries are not reciprocating market opening, distorting trade relations and gaining unfounded competitive advantage. The tariffs are said to have been proposed by Peter Navarro, a senior counselor on trade and manufacturing for Trump. As the president has claimed, "The textiles, you know I'm not looking to make T-shirts, to be honest. I'm not looking to make socks. We can do that very well in other locations" (Rappeport 2025), pointing out to the unwillingness of support from the domestic industry segments, since it would be uncompetitive, compared to imported products.

The USA envisages that tariffs will provide income for the budget and counterbalance the influx of cheap imports (Matura 2025). As things stand, the basic tariffs came into force on 5 April 2025, followed by additional tariffs on 9 April. However, on the 9th, he also announced the suspension of the tariffs for 90 days against countries whose representatives had been approached and had not taken countermeasures. Analysts and econo-

[2] The terms garment, clothing and apparel are treated as synonims.

mists, such as Nobel laureate Paul Krugman, Nouriel Roubini or Jerome Powell, chair of the Federal Reserve, have widely disputed the positive impact of the planned tariffs on the U.S. economy and have sounded the alarm that overall, the planned tariffs will penalise U.S. buyers (and consumers) with higher priced products, pushing the country into recession (Pringle 2025; Suhanic 2025).

However, this research’s findings do not exclusively apply to Americanists, because the European Union also heavily outsources textile and garment manufacturing, and it imports a significant amount of products, leading to deindustrialisation in both developed markets, such as the USA and the EU, mainly its Western and Northern parts. This way, the results and the later ‘lessons learned’ can be considerable for European residents, manufacturers, and policymakers as well. **The aim of this study** was to explore the potential consequences of Donald Trump’s trade war on the global garment industry. For this purpose, the analysis of statistical data, as well as media discourse analysis were used as research methods.

Global garment value chains: one of the most fragmented

According to the WTO, textiles and clothing account for 2% and 4% of total international exports of finished goods: $339 billion and $576 billion, respectively (World Trade Organization 2019). In terms of clothing exports, China is the largest exporter (31% in world export share), followed by the EU (27.1%), Bangladesh (7.9%), Vietnam (6.1%), Turkey (3.5%), India (3.1%), Indonesia (1.7%), Cambodia (1.6%) and Pakistan (1.5%), and the United States is the largest importer (World Trade Organization 2019: p. 120).

Based on data from the Observatory of Economic Complexity, the USA imported $242 billion worth of apparel products in 2023, while it imported $118 billion worth of textile product in 2024 (Observatory of Economic Complexity 2025). These include knitted and non-knitted sweaters, women’s, men’s and children’s clothing, along with all other textile apparel products. The USA mostly imports from Asia, especially China, Japan, South Korea and Vietnam. Canada and Mexico also export raw materials and textiles to the USA. However, the governments of the countries with the highest tariffs, such as Vietnam, Indonesia, India and Cambodia, have already indicated that they will try to negotiate with Trump and are ready to waive the tariffs previously imposed on U.S. imports. But China, the largest importer, seems to be challenging the announcement and is also taking up arms in the tariff war. Later, the European Commission also announced countermeasures towards the USA (see: European Commission 2025), and the European Union announced its willingness “to accept a trade arrangement with the USA that includes a 10% universal tariff on many of its exports, but wants the USA to commit to lower rates on key” sectors on 30 June 2025 (Valero, Nardelli 2025).

The problem with Trump’s original statement and promise, however, is that the USA imports 98% of the clothing and 99% of the shoes they use (Bain, Kennedy 2025). So, there will be almost no clothing products on the U.S. market that are not affected by the announced tariffs. And the proposed tariffs will affect dozens of countries, with which the

USA has a trade deficit – many of them are developing countries, whose clothing exports (and employment) account for a significant percentage of their total exports.

Table 1: Trump's announcement on 2 April on how much tariffs could hit some countries' clothing exports.

Country	Planned tariff (%)	Export trade value (million $) in 2023	Apparel export (SITC 84) in million $	Percentage of apparels in total export (%)	Apparel export to USA (in million $)	Percentage of apparel export to USA
European Union	20	2 760 013	43 815	1,58	5 297	12
China	125	3 379 747	164 742	4,80	34 717	21
Cambodia	49	23 775	7 964	33,50	2 616	32,8
Vietnam	46	n.d.	n.d.	n.d.	n.d.	n.d.
Bangladesh	37	n.d.	n.d.	n.d.	n.d.	n.d.
Thailand	36	285 074	3 486	1,20	1 312	37,6
Taiwan	32	n.d.	n.d.	n.d.	n.d.	n.d.
Indonesia	32	258 774	8 333	3,20	4507	45
Switzerland	31	419 922	3 202	1,70	94	2,9
South-Africa	30	110 607	427	0,38	7	1,7
India	26	431 411	15 366	3,56	4867	31,6
South-Korea	25	631 804	2 105	0,33	279	13,2
Malaysia	24	312 605	3 973	1,27	1,19	29,9
Israel	17	59 915	162	0,27	74	45,9

Source of planned tariffs on selected countries: CNN Business (2025), Export data: UN Comtrade (2025), SITC 84 – Category of clothing for 2023.

However, President Trump has admitted that "there will be transaction costs and problems" with the proposed 125% tariffs on Chinese import, and the tariffs are so high that many economists think these could decimate US–China trade (Bloomberg 2025). Although the UN Comtrade database does not have data on clothing exports from all the countries for 2023 (such as Bangladesh, Vietnam that are significant garment exporters, and Taiwan), it can be said that the European Union is still practically the less affected with 20% tariffs, as *Table 1* demonstrates. However, while the EU can trade in a good number of other goods and services, Bangladesh's export portfolio is less colourful: garments are by far the country's largest export (worth $48.9 billion in 2023), with almost half of this being imported by the U.S. market (UN Comtrade WWW). Based on previous export data, Bangladeshi garment manufacturing accounts for about 84% of the country's total export activity (Siddiqi 2025).

The example of Cambodia demonstrates the vulnerability: the country's total exports in 2023 were $23.7 billion, of which $7.9 billion were garment exports. So, garments account for more than 30% of the country's exports, and of these, $2.6 billion, more than 30%, went to the U.S. market. However, the U.S. market is not negligible for China either: of the $164.7 billion in clothing products, $34.7 billion, or 21%, is directed to the U.S. market (UN Comtrade WWW). However, China's role in garment manufacturing has declined over the past 15 years, while countries such as Bangladesh and Vietnam have gained in importance.

Garment exports to the EU from several less developed countries, for example, were boosted by the *Everything But Arms* agreement, which allowed them to export duty-free to the EU market without quantitative quotas.[3] Since the *Multi-Fiber Arrangement* was abolished in 2005, there are no quantitative quotas on clothing trade – many developing countries have entered the global (clothing) value chains accordingly. The WTO's general rules now govern international trade in clothing. Therefore, it is thanks to these that most of the clothing exports from Southeast Asian countries to the U.S. market have increased. Although the USA has (bilateral) free trade agreements with 20 countries, in case of the USA, the *Dominican Republic – Central America Free Trade Agreement* (CAFTA-DR) provides for duty-free treatment for textiles and clothing products in both directions. Thanks to this, and the former NAFTA, U.S. apparel companies predominantly trade in the Western Hemisphere, when it comes to textiles and apparel products. In 2020, only a little over 12% of apparel products imported into the U.S. market came under the FTA's ring-fenced tariffs and were subject to relatively high tariffs, compared to other product categories.

Representatives of several Asian manufacturing countries said that they had no plans to retaliate against the U.S. tariffs (Bain 2025). While it is far from a fair playing field with equal power in international trade, when many developing and least developed countries are dominated by low value-added assembly activities in their economies, and a significant proportion of those employed in the industry make their living from the relatively cheap, easy and quick to 'upscale' garment industry. And the decades of cheap

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[3] The European Commission has decided to partially withdraw part of the tariff preferences granted to Cambodia under the European Union's Everything But Arms' (EBA) trade scheme in 2020, due to the systematic violations of the human rights principles (European Commission 2020).

supplies to the huge U.S. market are incomparable to the size and purchasing power of local, regional markets (with exception of China, of course).

Made in America – at what price?

The announcement did not help the shares of U.S. clothing brands, which have recently become increasingly conglomerated: *Nike, Puma, Ralph Lauren, PVH* (including Tommy Hilfiger and Calvin Klein), *Capri* (Michael Kors, Versace, Jimmy Choo) and *Tapestry* (Coach New York, Kate Spade, Stuart Weitzmann) all saw their share prices plummet. The heated phase of the tariff war could not have come at a worse time for one of the biggest luxury acquisitions in recent times: the Italian *Prada group* was due to decide during the first week of April to buy *Versace*, an Italian brand owned by *US Capri*. Based on some sources, the deal could fall through completely (Thomas, Dummet 2025), while others reported a price cut of €200 million (Klasa et al. 2025). Later, *Prada* agreed to buy *Versace* for $1.375 billion, including debt (Anzolin et al. 2025).

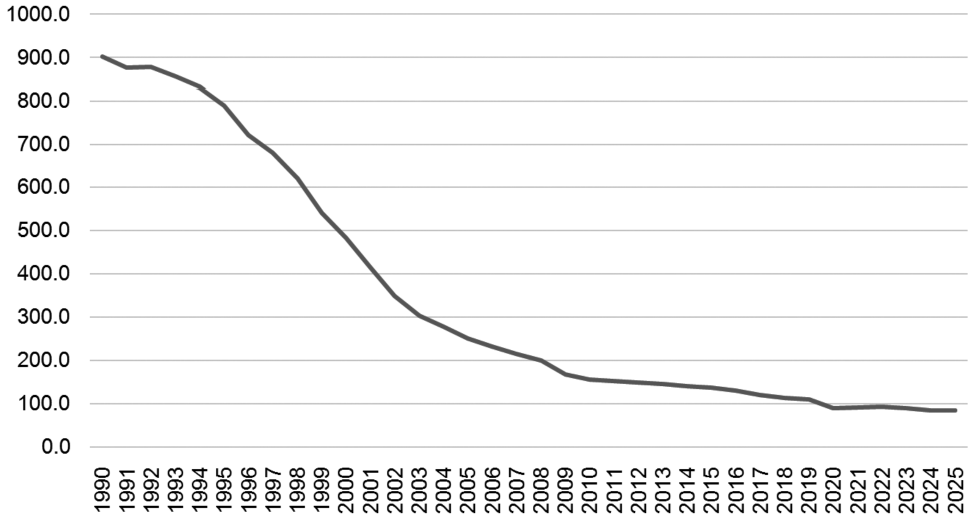
At the same time, the U.S. textile and apparel industry outsourced production abroad very early, and at the same time the local industry almost entirely declined. Trump's advisors also see the outsourcing of production capacity and the relocation of industrial capacity abroad as the reasons behind the decline of U.S. industry and, thus, the trade deficit (Sass 2025). And these leading U.S. fashion brands almost completely outsourced production from the country, mostly already in the 1990s (Lowe 2004).

If companies want to cut costs through their foreign suppliers (most probably they will want to cut production costs and/or raise prices, which customers will pay), this will lead to a further deterioration of working conditions, which are often exploitative and violate human and labour rights, and which are already very low-margin for suppliers. While human and labour rights concerns were part of the trade/tariff war back in the time of President Biden, regarding Uyghur forced labour between the USA and China that lead firms have to cope with (Lu 2022), this aspect will not concern Trump or his advisors.

And the few U.S. garment companies that are still in business will not be able to meet the extra demand due to high labour costs, forced payment of duties on raw materials, and lack of capacity if U.S. brands now want to produce locally. Many experts do not see the textile industry coming back to the USA (Medina 2025). As Nancy Hodges has highlighted, "the effects of unemployment, and specifically the negative effects experienced by small towns in the United States when the industry is no longer there to support a labor market and provide a solid economic foundation" (Hodges 2022: p. 125) faces a lack of scientific interest, compared to impacts on developing countries.

As *Figure 1* demonstrates, the number of people working in the garment industry in the USA will fall by 90% between 1990 and 2025, from more than 938,000 people working in this sector in 1990 to just over 84,000 now. This fact indicates deindustrialisation through a strong decline in domestic employment within the sector that makes the restoration of domestic production challenging.

Figure 1: Number of employed in U.S. garment manufacturing (1990–2025) in thousand people.



Source: U.S. Bureau of Labor Statistics (2025), Apparel manufacturing employees between 1990 and 2025, based on yearly averages, calculated from monthly data.

For comparison, Hungary, which is significantly smaller than the USA, has reduced the size of its garment industry, which employs around 17,000 people, according to the Hungarian Central Statistical Office as of 2023. The garment industry provides a livelihood for about 4,4 million people in Bangladesh and over 855 thousands in Cambodia, according to previous calculations and research by the NGO Clean Clothes Campaign (Clean Clothes Campaign 2021).

At the same time, U.S. garment workers are not being given a free ride: exploitative sweatshop conditions are wrongly associated with only developing countries. As early as in 2000, Edna Bonacich and Richard Appelbaum published a book that made a profound point about the undignified working conditions in Los Angeles garment workshops (Bonacich, Appelbaum 2000). The FABRIC (Fashioning Accountability and Building Real Institutional Change) bill, which aims to regulate working conditions in the U.S. garment industry, was introduced in the Senate in 2022 (see: IndustriALL 2022). It contains a proposal that includes 30% reshoring tax credit for garment manufacturers, who move manufacturing operations to the USA, and according to the proposal, this credit will be applicable to costs associated with reshoring production (Manson 2022). And if industry pressures increase (and an uncertain situation puts pressure on the already competitive, highly price-sensitive apparel sourcing), it will be the garment workers who will suffer, because their working conditions will deteriorate.

Although U.S. Bureau of Economic Analysis’ data for 2022 demonstrates that U.S. apparel production hit a record high of $28 billion, this is still small compared to the country's apparel imports. According to data from the Office of Textiles and Apparel (OTEXA) under the U.S. Department of Commerce, $24.8 billion of were exported anyway, so little of them were sold domestically. Moreover, any U.S. fashion brand, regardless of size, will be adversely affected by the proposed tariffs, because even if they manufacture their products in the USA, the raw material is already guaranteed to be imported, in the almost total absence of US textile production.

Unaffected luxury industry?

However, the largest luxury conglomerate, French *LVMH (Moët Hennessy Louis Vuitton)*, derives a quarter of its revenue from the U.S. market. The CEO of the luxury group, Bernard Arnault, also considered one of the wealthiest men in the world, has had a very good relationship with Donald Trump since his first presidential term (Garnier 2025). Historically, European luxury brands have relied on American consumers. Moreover, the U.S. market is particularly important for European luxury brands in the recovery from the coronavirus pandemic, especially since they can no longer rely on the Asian luxury appetite as they used to. While the Asian luxury consumer class has increasingly started to appreciate local designers and spend more prudently, luxury consumers in the USA – unlike Europeans, who prefer to save during an impending crisis – are more willing to spread their money around, even in uncertain economic times. So far, a tariff of around 15% has been imposed on European luxury goods, which could be offset by 1–4% increase in the price of finished goods for luxury brands that traditionally operate on higher margins (Kennedy, Stern Carbone 2025). This will be more readily accepted by luxury consumers, who, as a result, also tend to have higher incomes. The *LVMH group* has already been ahead of the curve and ahead of the tariff war during Trump's first term, opening three factories in Texas and California, which produce half of Louis Vuitton's products sold in the U.S. market in volume, and a third in value. Otherwise, the Texas LV factory is reportedly underperforming and struggles seriously with training labour (Hummel, Cunningham 2025), highlighting the challenges of U.S. manufacturing.

Potential consequences of Trump's tariffs on the global garment industry

While some analysts and sustainability professionals have envisaged the end of fast fashion and curbing overconsumption, others have warned about a potential pullback regarding sustainability efforts (Pucker 2025). Historical evidence has also shown that economic hardships can fuel the use of cheap, synthetic fibres and low-cost fashion, instead of mindful consumption.

The previous U.S. tariffs legislation has also contributed significantly to Chinese ultra-fast fashion players *Shein* and *Temu* enriching themselves in the U.S. market. Previously, thanks to the *de minimis* "loophole", Chinese companies could send packages directly to U.S. customers duty-free for less than $800. Trump has now gone away with this, so it is likely that these very low-priced products will become more expensive, even though the market for ultra-fast fashion products is growing worldwide.

The problem is that Trump’s tariffs will hit hardest those consumers and exporters who are already the most vulnerable: the lower social groups in the USA and the developing countries that account for a large part of the clothing production in the country, as export-oriented industrialisation has led to the dominance of clothing production in many Southeast Asian countries. This way, Trump’s garment tariffs will cause more wealth inequality in the USA. Although apparel manufacturing is ‘easy to move’ and can be restructured relatively cheaply and quickly, it is also possible that if the tariffs planned by Trump and his advisors remain, it will simply redraw the apparel sourcing map and increase U.S. apparel exports from countries that are less affected.

This viewpoint is also supported by the analysis of *Apparel Insider* that suggests: President Trump’s tariff hikes on key garment hubs could translate to retail price increases of between 10 to 25%, so running shoes by *Nike* can cost 125$ (originally 100$), produced in Vietnam. Brands also have a choice of absorbing some costs or passing price increases on to suppliers by asking for discounts, however, many suppliers are already working on very low margins, and fashion brands have always been extremely loathe to increase prices for clothing, where deflation (in real terms) has been a trend in recent decades, leaving them with no choice (Apparel Insider 2025).

Even if Trump’s goal is to remove the United States from the global value chains in the name of economic nationalism, the tariffs imposed will not lead to the recovery and reconstruction of the once American textile and clothing industry. As for example, labour costs in Vietnam are $3.10 per hour, it is in a sharp contrast with the U.S. manufacturing wages $28.64 (U.S. Bureau of Labor Statistics 2025). No capacity, no new jobs, let alone high value-added jobs, will suddenly appear, and they will not supply the lower classes in America with affordable products. Therefore, it is almost certain that Trump, who has announced that local manufacturing will also bring lower prices for Americans, will not be right.

Conclusion

For a European outlook, President Trump’s trade war also serves as a thought-provoking consideration. While the COVID-19 pandemic has shed light on the strategic importance of the textile industry, as personal protective equipment and many healthcare products are provided by this sector, most nations are falsely hesitant to invest in the reindustrialisation of this segment. Based on a draft proposal of the European Commission, being similar in nature to closing the de minimis loophole in the USA, the EU is implementing a new €2 tax on low-value imported parcels, primarily impacting goods from online marketplaces like *Temu* and *Shein* – these are the leading Chinese ultra-fast fashion retailers, whose unsustainable practices and roles in boosting overconsumption have been echoed many times. While the *EU Strategy for Sustainable and Circular Textiles* offers numerous new initiatives towards a more sustainable, ethical, and transparent supply chain, there is still considerable room for improvement.

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