



The Contribution of the Textile and Apparel Cluster to the South Carolina Economy

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What is the Textile and Apparel Cluster?

- **PART 1.** Traditional industries:
 1. **NAICS 313 Textile Mills**
 2. **NAICS 314 Textile Mill Products**
 3. **NAICS 315 Apparel**

Five-digit NAICS Subsectors in the Textile and Apparel Industries

NAICS Code	Industry	2005 SC Establishments	2005 SC Employment
31321	Broadwoven fabric mills	120	16,591
31331	Textile and fabric finishing mills	93	6,740
31311	Fiber, yarn, and thread mills	40	4,841
31412	Curtain and linen mills	80	3,778
31323	Nonwoven fabric mills	18	1,784
31411	Carpet and rug mills	13	1,691
31499	All other textile product mills	57	1,278
31322	Narrow fabric mills and schiffli embroidery	25	1,264
31511	Hosiery and sock mills	8	1,143
31324	Knit fabric mills	18	715
31521	Cut and sew apparel contractors	36	596
31332	Fabric coating mills	11	559
31491	Textile bag and canvas mills	33	535
31529	Other cut and sew apparel manufacturing	6	496
31522	Men's cut and sew apparel manufacturing	13	431
31523	Women's cut and sew apparel manufacturing	8	364
31519	Other apparel knitting mills	12	342
31599	Accessories and other apparel manufacturing	8	109

Source: Census of Employment and Wages (ES202), 1990-2005. MIG, Inc. 2005

What is the Textile and Apparel Cluster?

- **PART 2** Supply Chain:

4. NAICS 111920 Cotton Farms

5. NAICS 115111 Cotton Gins

6. NAICS 325222 Noncellulosic Organic Fiber Manufacturing

7. NAICS 325221 Cellulosic Organic Fiber Manufacturing

8. NAICS 325131 Inorganic Dye and Pigment Manufacturing

9. NAICS 325132 Synthetic Organic Dye and Pigment Manufacturing

10. NAICS 333292 Textile Machinery

TABLE 2. SOUTH CAROLINA SALES: TEXTILES APPAREL INDUSTRIAL CLUSTER		
	TOTAL	
	SALES IN 2006	
PART 2. SUPPLY CHAIN:	millions of dollars	
Key Raw Material Suppliers and Equipment:		
4. NAICS 111920 Cotton Farms	\$97.650	
5. NAICS 115111 Cotton Gins	\$218.596	
6. NAICS 325222 Noncellulosic Organic Fiber Manufacturing	\$3,575.349	
7. NAICS 325221 Cellulosic Organic Fiber Manufacturing	\$251.977	
8. NAICS 325131 Inorganic Dye and Pigment Manufacturing	\$993.925	
9. NAICS 325132 Synthetic Organic Dye and Pigment Manufacturing	\$703.462	
10. NAICS 333292 Textile Machinery	\$165.906	
Key Raw Material Suppliers and Equipment SUBTOTAL:	\$6,006.866	
SOURCES: IMPLAN 2006, HARRIS 2007		

What is the Textile and Apparel Cluster?

- **Part 3.** Distribution and Selected Products

Wholesaling:

- 11. NAICS 424310 Piece Goods, Notions, Dry Goods Merchant Wholesalers
- 12. NAICS 423220 Home Furnishings Merchant Wholesalers
- 13. NAICS 424320 Men's/Boys' Clothing and Furnishings Wholesalers
- 14. NAICS 424330 Women's, Children's, and Infants' Clothing, Accessories

Selected Emerging Textile/Fiber Products

- 15. NAICS 339113 Surgical Appliances and Supplies Manufacturing
- 16. NAICS 336360 Motor Vehicle Seating and Interior Manufacturing

TABLE 2. SOUTH CAROLINA SALES: TEXTILES APPAREL INDUSTRIAL CLUSTER (TAC) continued		
	TOTAL	
	SALES IN 2006	
	millions of dollars	
PART 3. WHOLESALING AND EMERGING INDUSTRIES		
Wholesaling (margin activities only):		
11. NAICS 424310 Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers		
12. NAICS 423220 Home Furnishings Merchant Wholesalers		
13. NAICS 424320 Men's and Boys' Clothing and Furnishings Merchant Wholesalers		
14. NAICS 424330 Women's, Children's, and Infants' Clothing and Accessories		
Merchant Wholesalers SUBTOTAL:	\$385.073	
Selected Emerging Producers of Textile/Fiber Products		
15. NAICS 339113 Surgical Appliances and Supplies Manufacturing	\$208.496	
16. NAICS 336360 Motor Vehicle Seating and Interior Manufacturing	\$81.177	
Selected Emerging Producers of Textile/Fiber Products SUBTOTAL:	\$289.673	
TOTAL:	\$674.746	
SOURCES: IMPLAN 2006, HARRIS 2007		

THE CONTRIBUTION OF THE TEXILE AND APPAREL CLUSTER TO THE SC ECONOMY

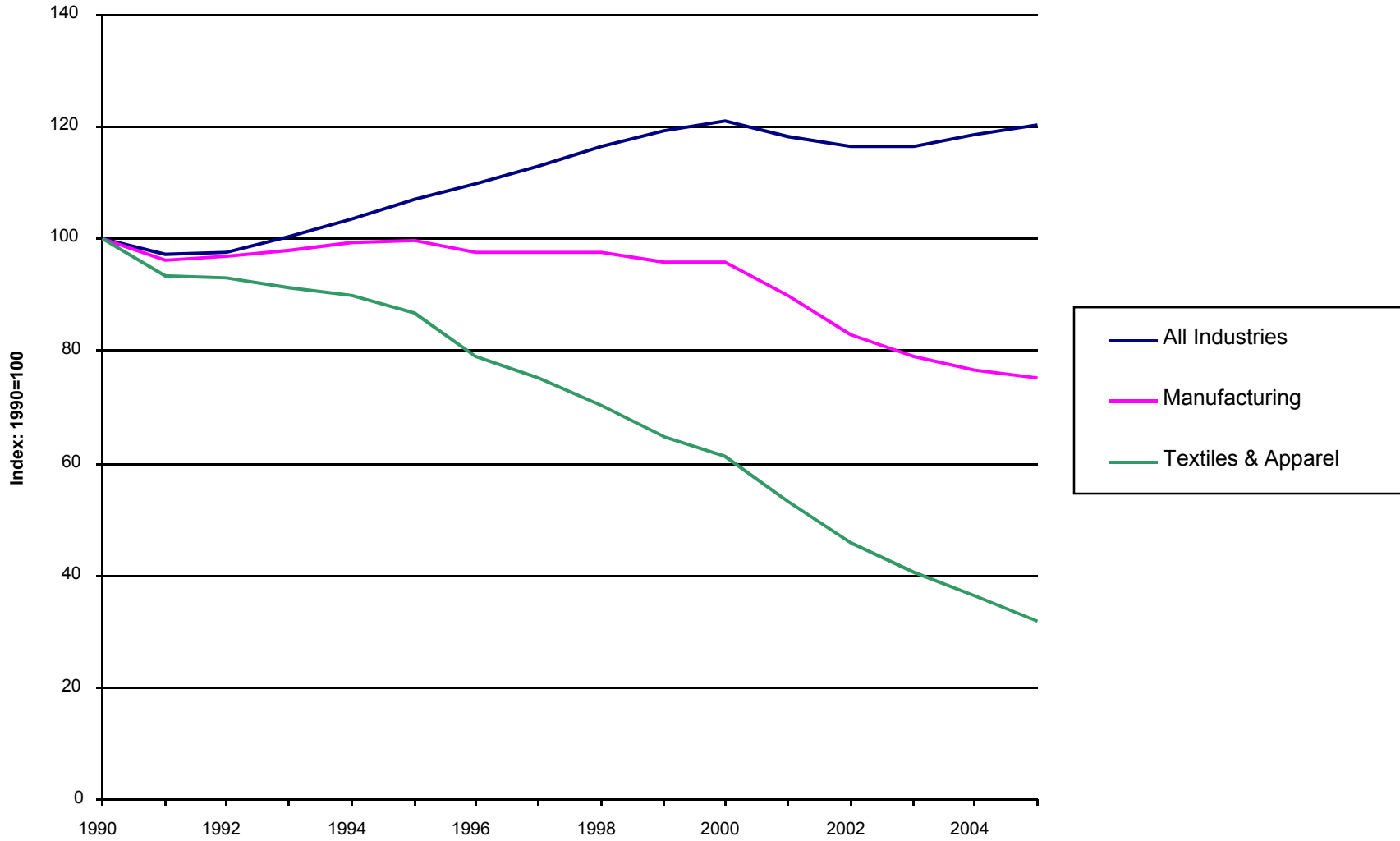
South Carolina Sales: Apparel, Textiles, and Fiber Targeted Changes in Final Demand Sales						
				FINAL DEMAND SALES IN 2006^	FINAL DEMAND SALES IN 2016^	Growth Levels
				millions of dollars	millions of dollars	
Traditional Textiles and Apparel Industries						
1. NAICS 313 Textile Mills (EXC 313230, 313320)				\$4,996.372	\$6,245.465	25%
2. NAICS 314 Textile Mill Products (EXC 31491,31499)				\$1,345.770	\$1,682.213	25%
3. NAICS 315 Apparel				\$271.648	\$135.824	-50%
4. NAICS 313230, 313320, 31491, 31499				\$971.580	\$1,380.864	42%
SUB TOTAL: Traditional Textiles and Apparel Industries:				\$7,585.370	\$9,444.366	25%
Key Raw Material and Suppliers and Equipment:				\$5,055.311	\$6,220.975	23%
Wholesaling (Margin Activities Only):				\$385.073	\$481.341	25%
Selected Emerging Producers of Textile/Fiber Products:				\$289.673	\$434.509	50%
TOTALS:				\$13,315.43	\$16,581.19	25%

Contributions of the Textile and Apparel Industrial Cluster (TAC) to the South Carolina Economy, Estimated 2006 and Targets, 2016				
		2006		2016
	TAC Related Total	TAC Related Shares of SC Total	TAC Targets Total	TAC Targets Shares of SC Total
Number of Jobs	113,258	4.9%	139,626	4.5%
Output (Sales) (\$ Bil. 2006 dol)	\$21.196	8.4%	\$26.379	7.8%
Value Added (\$ Bil. 2006 dol)	\$7.824	6.1%	\$9.713	5.7%

HOW HAS THE CLUSTER
FARED IN RECENT YEARS?

Change in South Carolina Employment 1990-2005

Source: Census of Employment and Wages (ES202), 1990-2005. MIG, Inc. 2005



**WORLD EXPORT MARKETS:
HOW COMPETITIVE IS SC
COMPARED TO NC AND GA?**

South Carolina's Place in the Domestic Competition for World Export Markets

Exports of 313 TEXTILES & FABRICS to World in thousands \$

		State	2001	2006
2001 Position	2006 Position	U.S. Total	7,365,202	8,780,734
2	1	North Carolina	1,204,686	1,841,198
1	2	Texas	1,364,129	1,250,258
3	3	California	553,743	688,799
6	4	Georgia	406,553	644,586
5	5	South Carolina	507,761	537,530
4	6	Florida	534,902	492,925
11	7	Tennessee	152,578	365,564
10	8	Virginia	157,584	349,499
8	9	Alabama	260,672	259,930
7	10	New York	382,011	241,572

Source: U.S. Office of Textiles and Apparel (OTEXA)

South Carolina's Place in the Domestic Competition for World Export Markets

Exports of 314 TEXTILE MILL PRODUCTS to World in \$ Thousands

2001 Position	2006 Position	State	2001	2006
		U.S. Total	2,082,822	2,783,642
1	1	Georgia	422,267	531,302
2	2	Texas	196,417	307,760
3	3	California	152,873	187,802
4	4	North Carolina	152,338	140,884
5	5	New York	106,245	120,231
13	6	Michigan	43,625	112,438
9	7	Florida	78,108	104,377
8	8	Virginia	86,879	97,769
7	9	Pennsylvania	90,430	80,502
12	10	Ohio	55,188	71,549
6	14	South Carolina	98,659	61,665

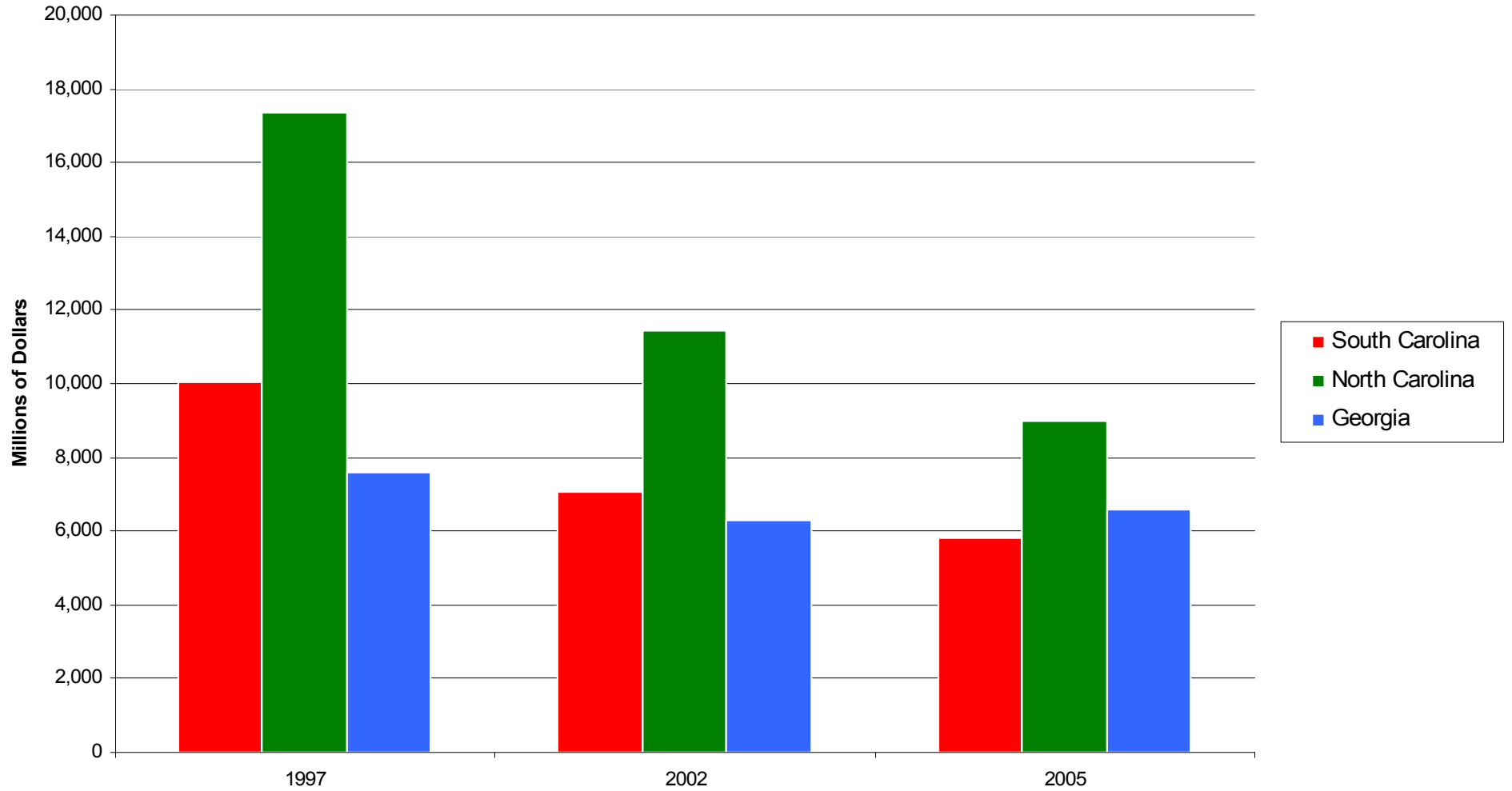
South Carolina's Place in the Domestic Competition for World Export Markets

**Exports of 315 APPAREL & ACCESSORIES to World in
\$ Thousands**

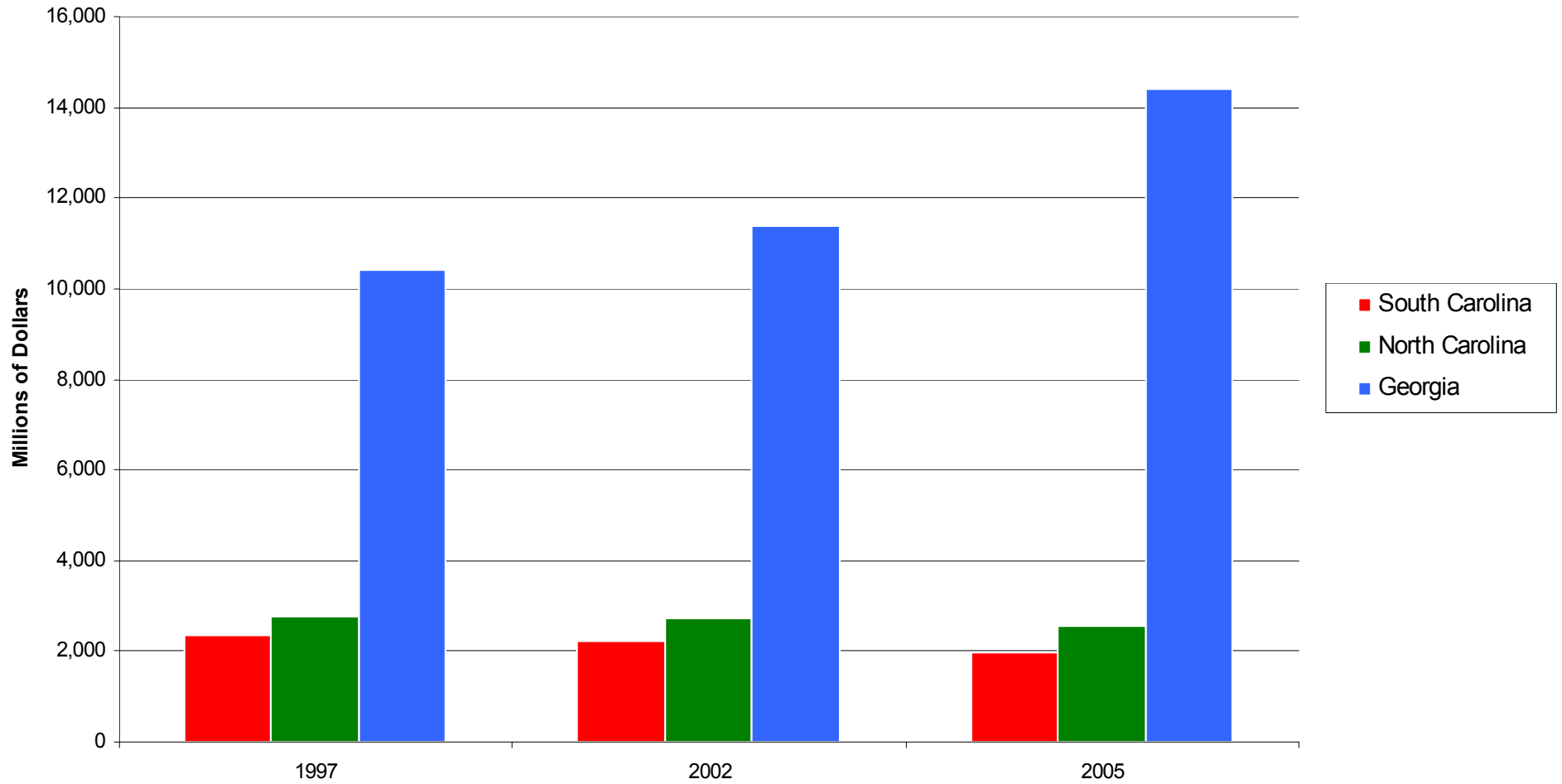
		State	2001	2006
2001 Position	2006 Position	U.S. Total	6,956,292	4,776,411
2	1	California	1,119,929	1,280,841
1	2	North Carolina	1,241,958	757,165
5	3	New York	423,069	452,233
3	4	Texas	771,445	417,894
6	5	Alabama	321,126	252,482
11	6	Puerto Rico	153,231	221,488
4	7	Florida	703,602	178,741
14	8	New Jersey	107,918	141,990
23	9	Massachusetts	30,676	84,987
10	10	Pennsylvania	198,100	79,888
7	14	South Carolina	272,761	53,897

TOTAL SALES IN TRADITIONAL
INDUSTRIES: HOW HAS SC
FARED COMPARED
TO NC AND GA?

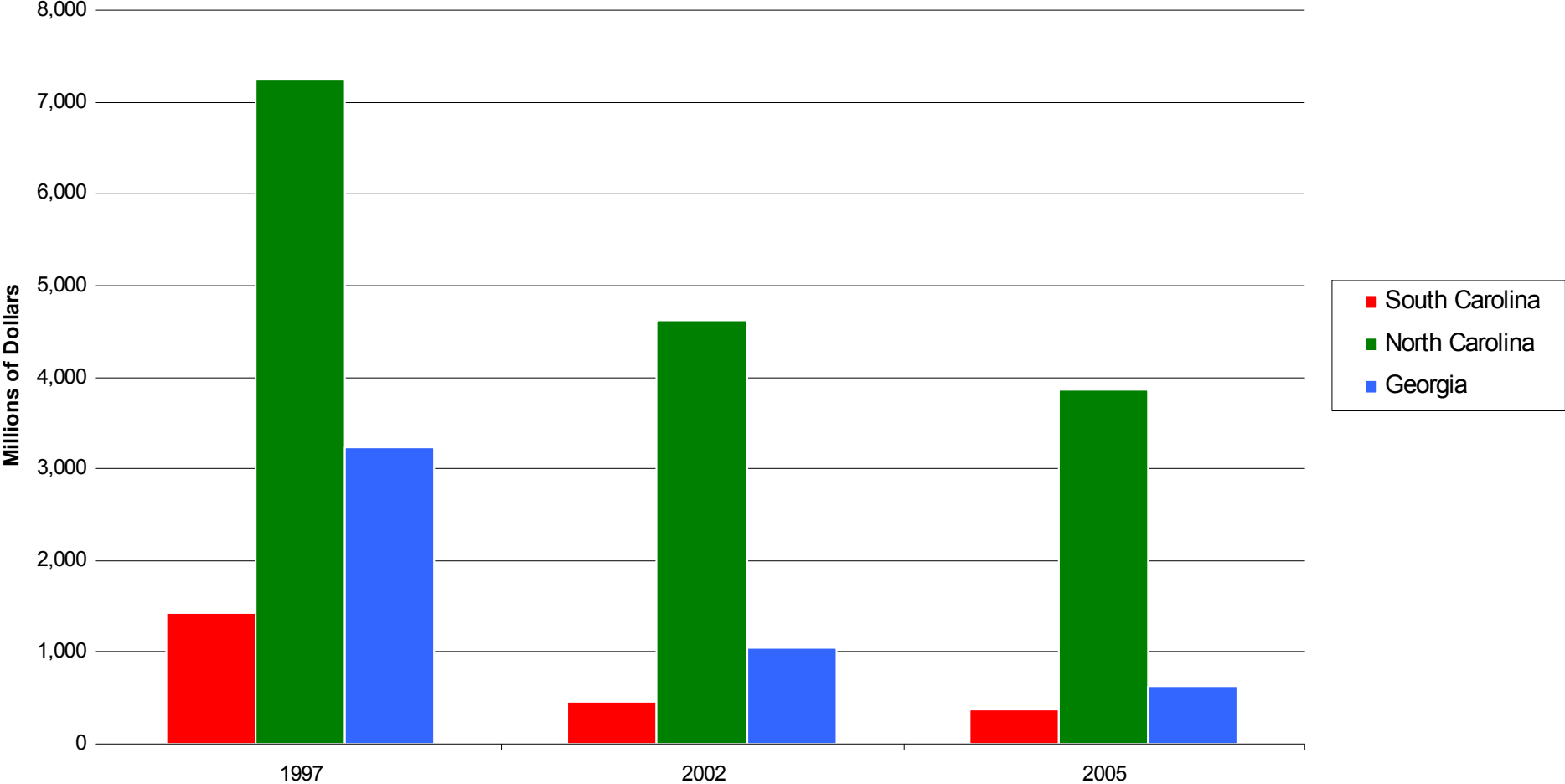
Value of Product Shipments 1997, 2000, and 2005: NAICS 313 Textile Mills



Value of Product Shipments 1997, 2002, and 2005: NAICS 314 Textile Product Mills



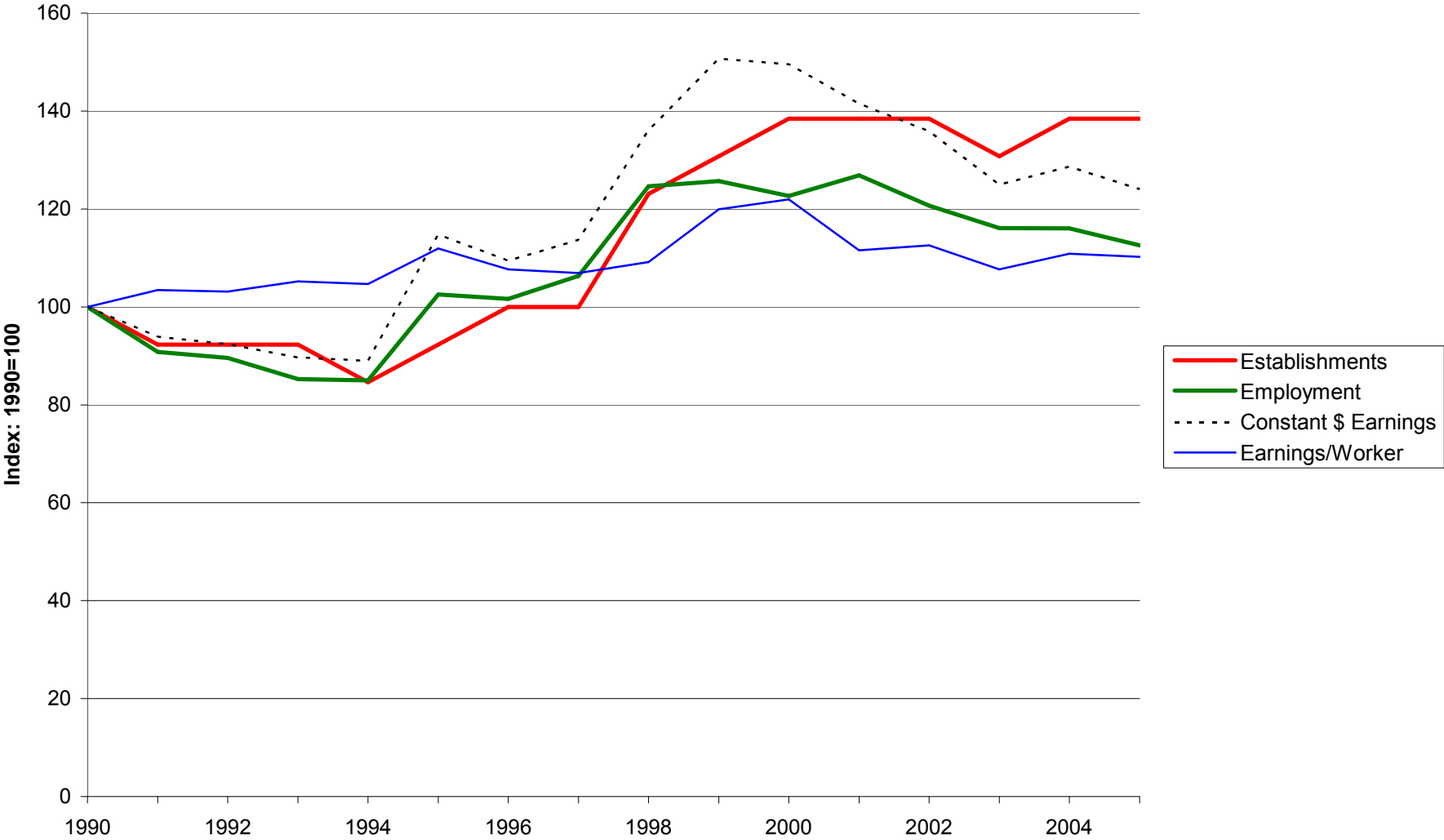
Value of Product Shipments 1997, 2002, and 2005: NAICS 315 Apparel



**TRENDS FOR SELECTED
COMPONENTS OF THE
TRADITIONAL INDUSTRIES IN
THE CLUSTER**

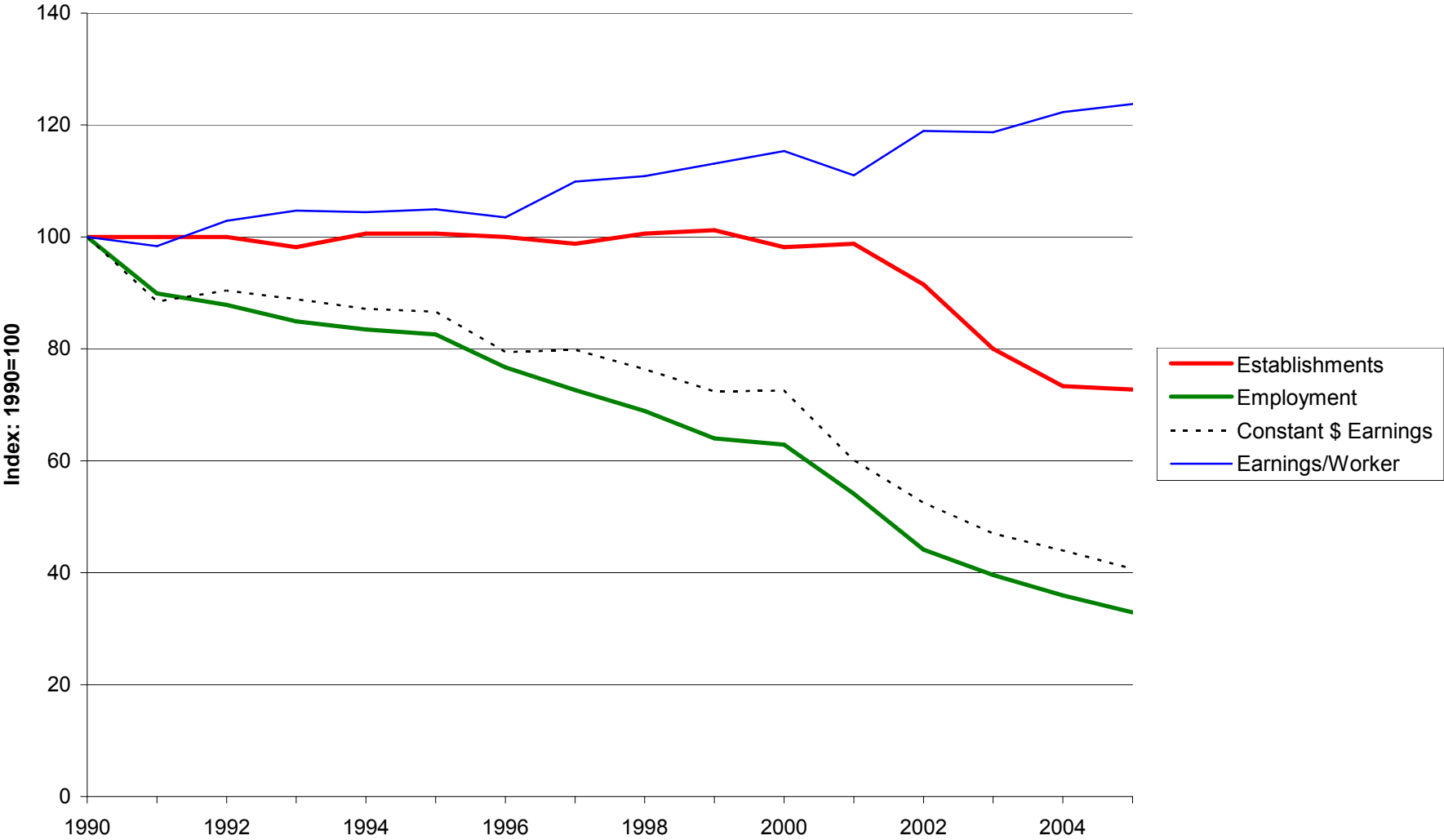
SC Establishment, Employment, and Earnings Trends 1990-2005: NAICS 31323 Nonwoven Fabric Mills

Source: Census of Employment and Wages (ES202), 1990-2005. MIG, Inc. 2005



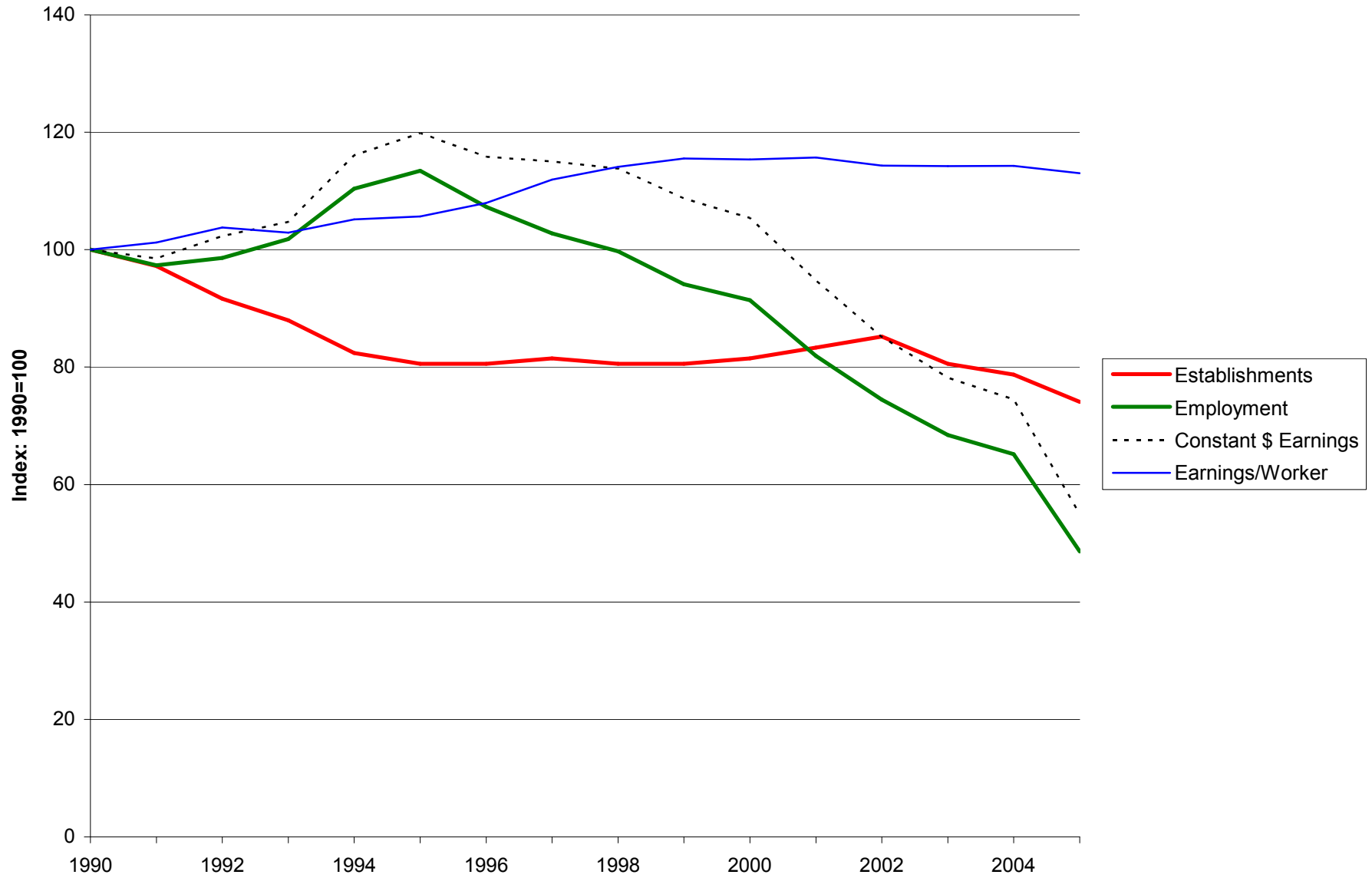
SC Establishment, Employment, and Earnings Trends 1990-2005: NAICS 31321 Broadwoven Fabric Mills

Source: Census of Employment and Wages (ES202), 1990-2005. MIG, Inc. 2005



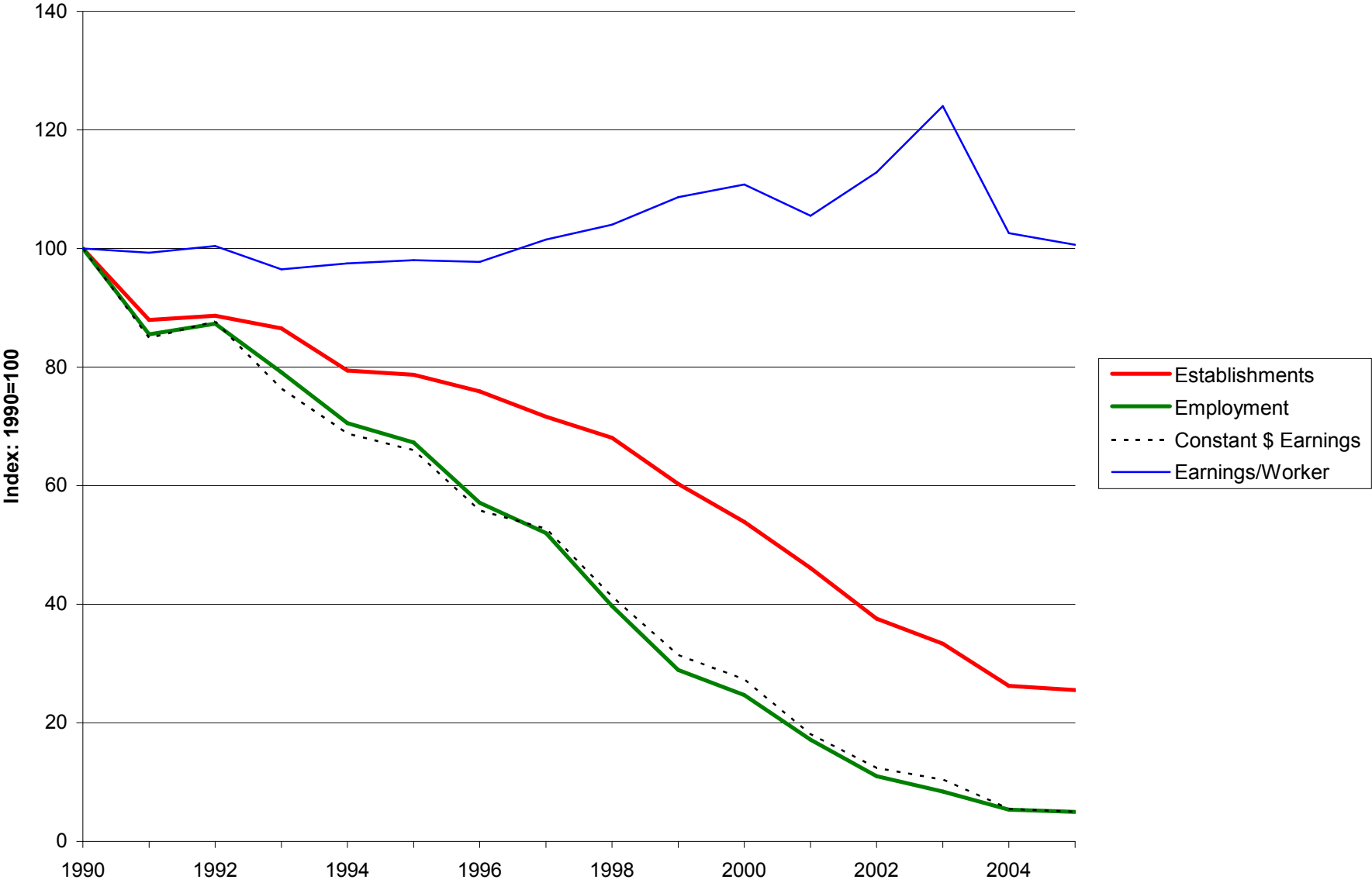
SC Establishment, Employment, and Earnings Trends 1990-2005: NAICS 31412 Curtain and Linen Mills

Source: Census of Employment and Wages (ES202), 1990-2005. MIG, Inc. 2005



SC Establishment, Employment, and Earnings Trends 1990-2005: NAICS 31521 Cut and Sew Apparel Contractors

Source: Census of Employment and Wages (ES202), 1990-2005. MIG, Inc. 2005



TRENDS FOR OTHER SELECTED INDUSTRIES IN THE CLUSTER

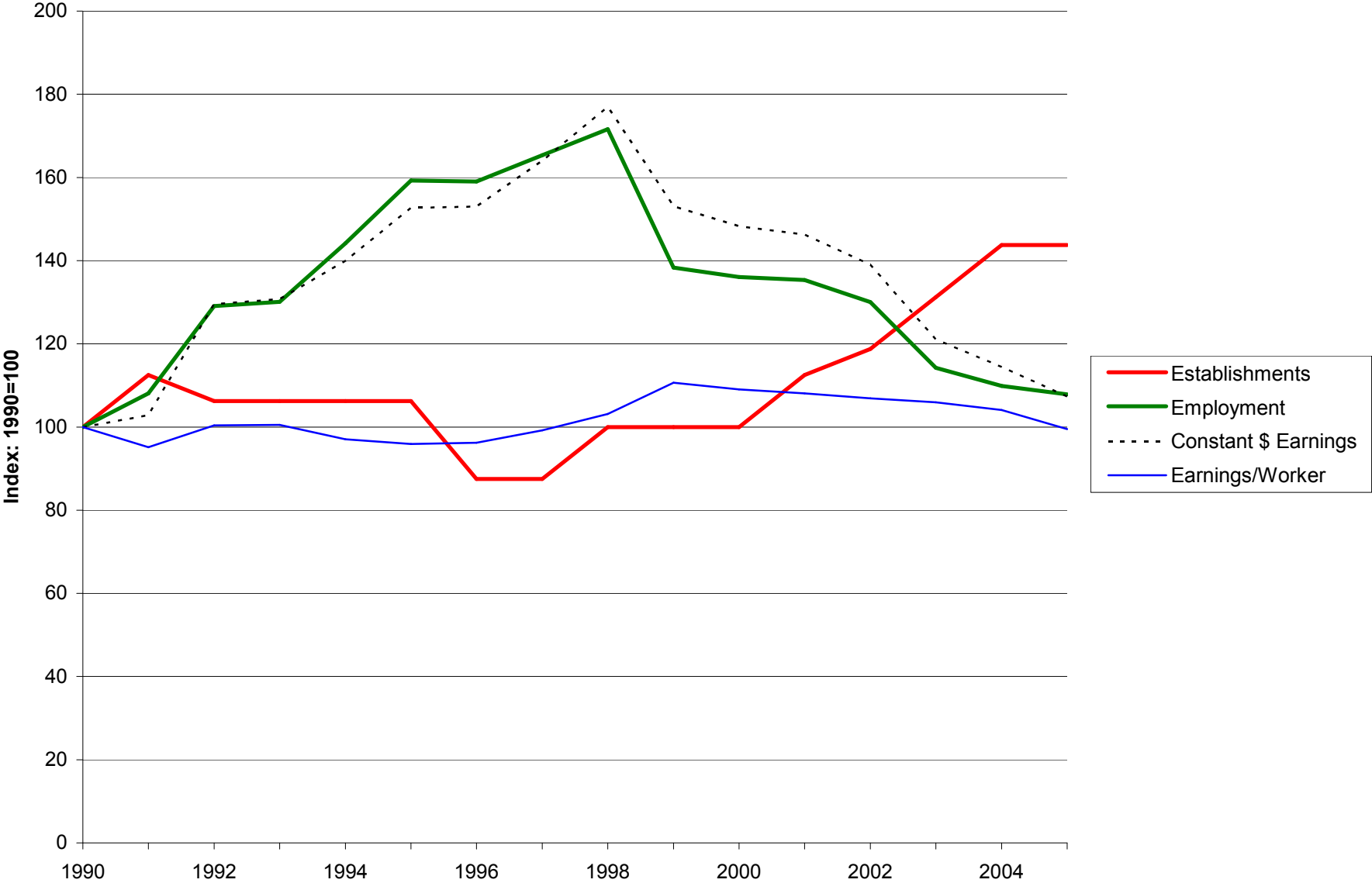
Industries Related to Textile and Apparel Manufacturers Through the Value Chain

NAICS Code	Industry	2005 SC Establishments	2005 SC Employment
32522	Artificial fibers and filaments manufacturing	36	6,828
339113	Surgical appliance and supplies manufacturing	28	1,661
423220	Home Furnishing Merchant Wholesalers	120	1,516
32513	Synthetic dye and pigment manufacturing	23	1,440
333292	Textile machinery manufacturing	52	984
424330	Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesal	41	896
336360	Motor vehicle seating and interior trim mfg.	10	729
424310	Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers	84	437
424320	Men's and Boys' Clothing and Furnishings Merchant Wholesalers	43	295
115111	Cotton Ginning	26	219

Source: Census of Employment and Wages (ES202), 1990-2005. MIG, Inc. 2005

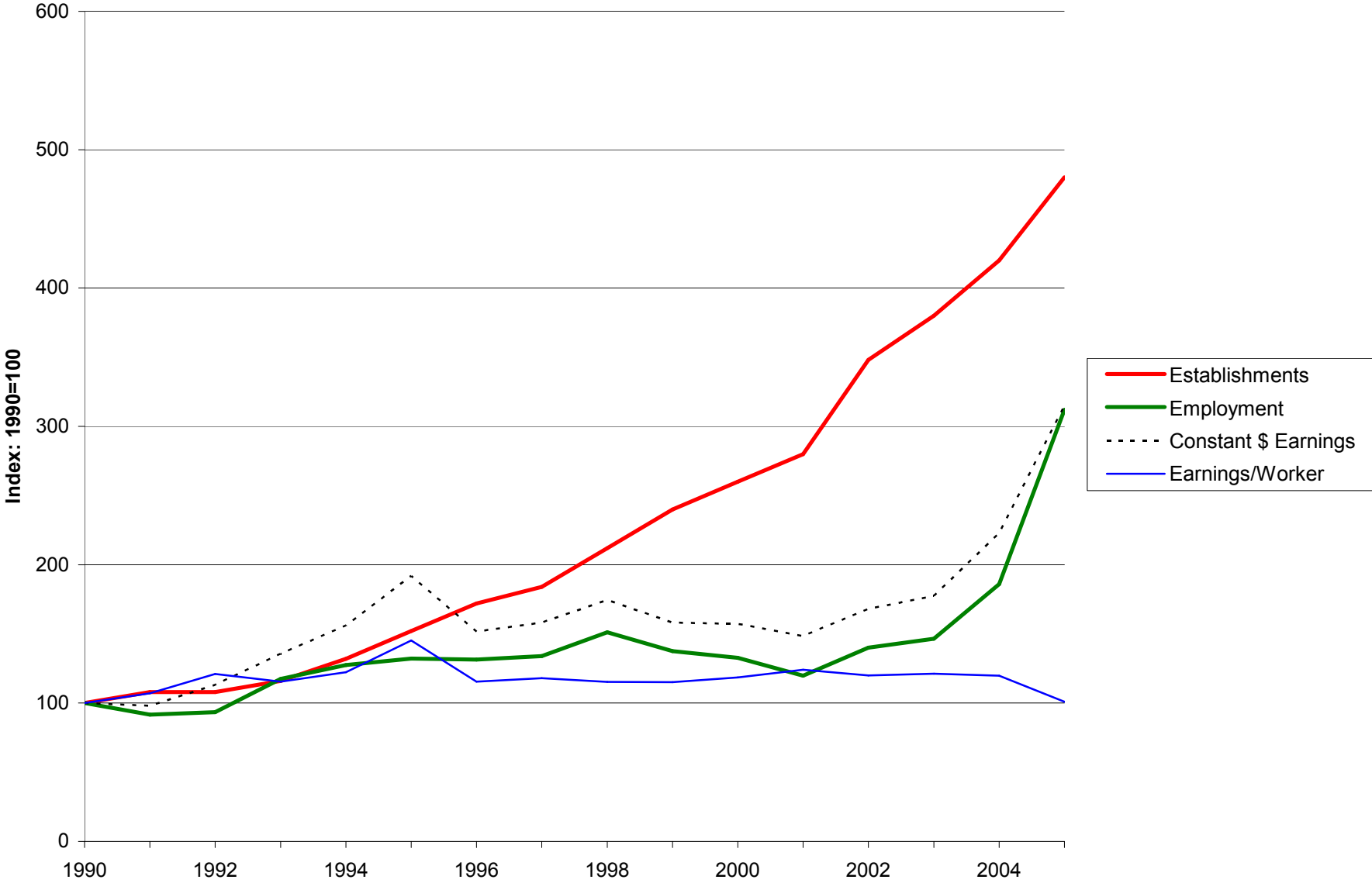
**SC Establishment, Employment, and Earnings Trends 1990-2005:
NAICS 32513 Synthetic Dye and Pigment Manufacturing**

Source: Census of Employment and Wages (ES202), 1990-2005. MIG, Inc. 2005



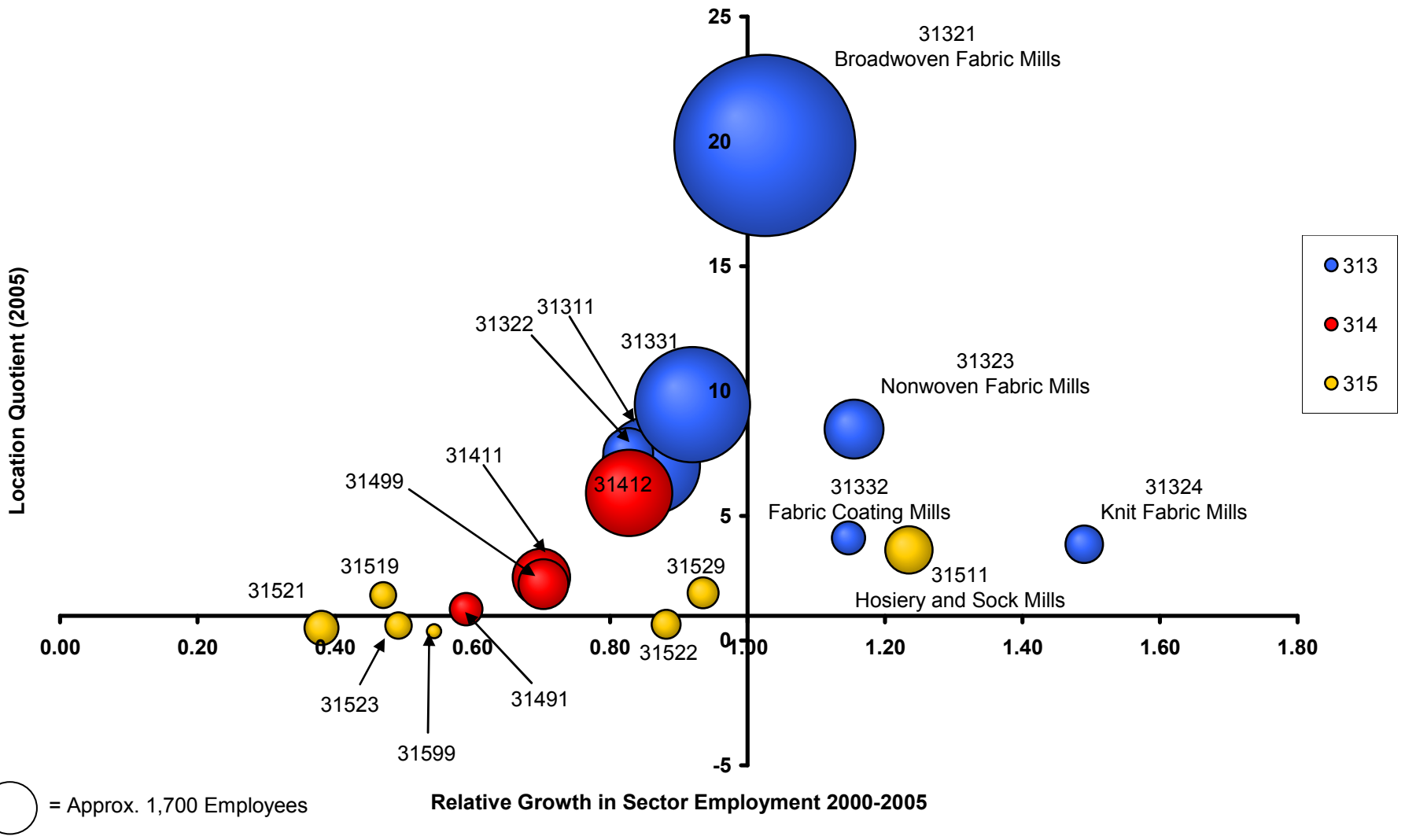
SC Establishment, Employment, and Earnings Trends 1990-2005: NAICS 423220 Home Furnishings Merchant Wholesalers

Source: Census of Employment and Wages (ES202), 1990-2005. MIG, Inc. 2005

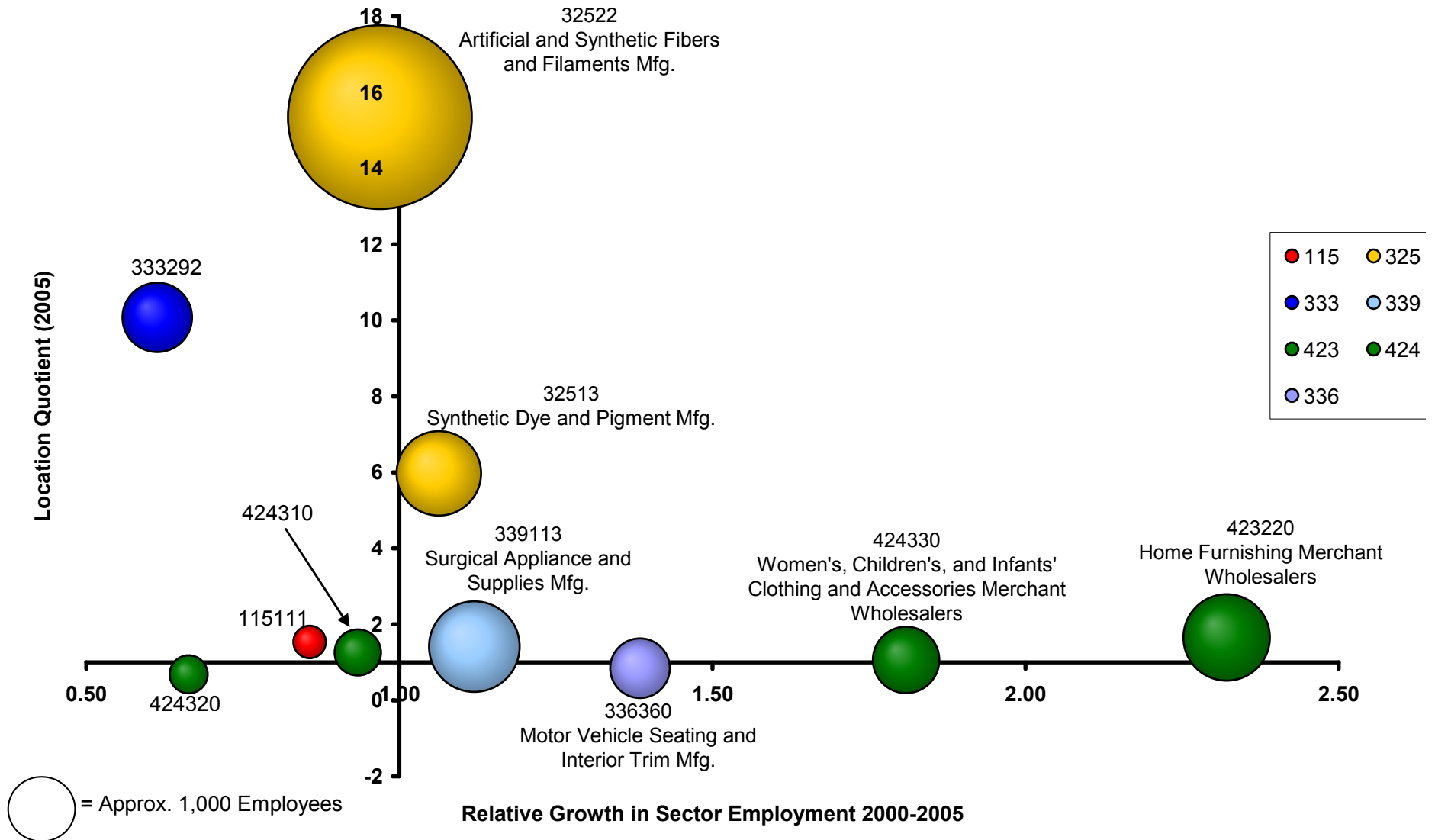


WHERE IS THE
COMPETITIVE ADVANTAGE FOR
SC TEXTILES AND APPAREL?

Location Quotients, Relative Growth Rate, and Employment Size for South Carolina Textile and Apparel Industries



Location Quotients, Relative Growth Rate, and Employment Size for South Carolina Industries Related to Textiles and Apparel



South Carolina's “Competitive Advantage” Subsectors

Textiles and Apparel

- Broadwoven Fabric Mills
(31321)
- Nonwoven Fabric Mills
(31323)
- Knit Fabric Mills
(31324)
- Fabric Coating Mills
(31332)
- Hosiery and Sock Mills
(31511)

Supporting Industries

- Synthetic Dye and Pigment Manufacturing
(32513)
- Motor Vehicle Seating and Interior Manufacturing
(33636)
- Surgical Appliances and Supplies Manufacturing
(339113)
- Home Furnishing Wholesalers
(42322)
- Women's Children's Infants' Clothing Wholesalers
(42433)

A FEW FINISHING ISSUES

1. **AS INCOMES RISE, SPENDING ON MANY TEXTILES AND APPAREL PRODUCTS INCREASES, BUT AT A SLOWER RATE ---**

**SO AS INCOMES FALL,
SPENDING ON TEXTILES AND APPAREL TENDS
TO FALL AT A SLOWER RATE THAN INCOME.**

A FEW FINISHING ISSUES

- 2. RISING TRANSPORT COSTS FOR IMPORTS MAY SHIFT SOME COST ADVANTAGES TOWARD SC PRODUCTION -- BUT THIS SEEMED MUCH MORE LIKELY WHEN OIL WAS HEADED TOWARD \$200.**

A FEW FINISHING ISSUES

- 3. “LEAN RETAILING” FAVORS MANUFACTURING THAT RESPONDS QUICKLY TO CHANGING CONSUMER PREFERENCES – DOMESTIC PRODUCERS THAT ARE FLEXIBLE AND ADAPT TO CHANGES SHOULD DO WELL.**

QUESTIONS OR COMMENTS ARE WELCOME

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