

## Market Size

### Total Addressable Market (TAM):

Customers/Users: 2.1M - 3.2M

Revenue: 421.6M - 1.3B AED

### Serviceable Addressable Market (SAM):

Customers/Users: 472K - 944K

Revenue: 94.4M - 377.8M AED

## Executive Summary

The total addressable market (TAM) for sewing and alteration services in the UAE is estimated to be between 421.6 million to 1.3 billion AED annually, representing 2.1 to 3.2 million potential customers. The serviceable addressable market (SAM), focused on the middle to high income population segments, is projected to be 94.4 million to 377.8 million AED in annual revenue with 472,000 to 944,000 target customers. This analysis is based on the UAE's population of 10.54 million, estimated 20-30% usage rates for alteration services, and assumed annual spend of 200-400 AED per customer.

The competitive landscape consists of around 208 clothing alteration providers, including local tailors like My Tailor & Little Things and Parmar Tailors as well as international brands leveraging technology like 3D body scanning. Key success factors are quality craftsmanship, quick turnaround times, competitive pricing, effective marketing, and building customer trust. However, challenges include high operational costs, intense competition, changing consumer trends, and regulatory compliance. Leveraging digital marketing, community engagement, and exploring technological innovations in fabrics and wearables will be crucial for new entrants to differentiate themselves in this growing but crowded market.

## Key Data Points

- UAE population in 2023: 10.54 million [1]
- Apparel market size in UAE (2028 projection): \$11.66 billion [4]
- Global tailoring and alteration services market size (2032 projection): \$14.14 billion [2][3]
- Number of clothing alteration services in UAE: 208 [46]
- Income distribution in UAE:
  - Low income (under \$5K): 10.4%
  - Middle income (\$5K-\$20K): 44.4%
  - Upper-middle income (\$20K-\$50K): 26.4%
  - High income (over \$50K): 18.8% [23]

## Market Size Calculations

### Total Addressable Market (TAM) Calculations:

UAE population (2023): 10,540,000 [1]

Assumed usage rate of sewing/alteration services: 20-30%

Average annual spend per customer: 200-400 AED

$10,540,000 \times 20\% \times 200 \text{ AED} = 421,600,000 \text{ AED}$

$10,540,000 \times 30\% \times 400 \text{ AED} = 1,264,800,000 \text{ AED}$

TAM range: 421,600,000 - 1,264,800,000 AED

TAM customer range: 2,108,000 - 3,162,000

### Serviceable Addressable Market (SAM) Calculations:

Serviceable population (middle to high income): 89.6% [23]

$10,540,000 \times 89.6\% = 9,443,840$

Assumed market share capture: 5-10%

Average annual spend per customer: 200-400 AED

$9,443,840 \times 5\% \times 200 \text{ AED} = 94,438,400 \text{ AED}$

$9,443,840 \times 10\% \times 400 \text{ AED} = 377,753,600 \text{ AED}$

SAM range: 94,438,400 - 377,753,600 AED

SAM customer range: 472,192 - 944,384

## Assumptions

Key assumptions made in TAM/SAM calculations:

Sewing/alteration usage rate: Assumed 20-30% of UAE population uses professional sewing/alteration services in a given year. This is based on the income distribution data showing ~90% are middle to high income [23], making them more likely to spend on these services. As a sense check, this usage range seems reasonable compared to the overall apparel market size of \$11.66B [4], as alterations would be a small subset of that spend.

Average annual spend per customer: Estimated spend of 200-400 AED per year based on researching typical prices for common alterations like hemming, resizing, etc. For example, basic alterations can cost 25-40 AED [12] while more complex services like restyling can cost 80-320 AED [14][15]. The 200-400 AED range assumes a customer does 2-4 basic alterations or 1-2 complex alterations per year on average.

Serviceable market: Focused SAM analysis on the middle, upper-middle and high income groups which together represent 89.6% of the UAE population [23]. These segments have more disposable income making them a better target for discretionary services like alterations. Did not include low income segment in SAM.

Market share capture: Assumed a 5-10% market share is achievable for a new business. The low end of the range acknowledges it is a fairly fragmented market with 208 existing competitors [46]. The high end reflects the growing demand for alteration services based on the projected 4.3% CAGR of the global market [2][3].

In terms of proxy data used, looked at the overall apparel market (\$11.66B) [4], luxury fashion market (\$635.7M) [29], and personal care market (\$522M) [42] to validate there is significant spend in adjacent categories. While not direct proxies for alterations, the large sizes and growth rates of these markets suggest consumers are willing to spend on clothing and individualized services, supporting the demand for sewing/alteration specialists. However, relied more on the direct population and income data for the core TAM/SAM calculations.

## Methodology

To calculate the Total Addressable Market (TAM) and Serviceable Addressable Market (SAM) for a sewing and alteration specialist service in the UAE, we followed a structured approach by identifying the required data points, extracting relevant information, making reasonable assumptions, and performing calculations.

For the TAM, we needed to estimate the total population of the UAE, the percentage of the population that uses sewing or alteration services, and the average annual spend per customer on these services. Based on the data provided, the UAE population in 2023 is 10.54 million [1]. We assumed that 20-30% of the population uses professional sewing or alteration services, considering the income levels and fashion interests of the population. For the average annual spend per customer, we estimated a range of 200-400 AED based on typical alteration prices.

To calculate the TAM, we multiplied the total population by the assumed usage rate and the average annual spend per customer. The resulting TAM range is 421.6 million AED to 1.26 billion AED, representing a customer range of 2.1 million to 3.2 million.

For the SAM, we focused on the middle to high-income segments, which account for 89.6% of the UAE population [23]. We assumed that our business could capture a market share of 5-10%, considering the competitive landscape and the projected growth in the global tailoring and alteration services market [2][3].

To calculate the SAM, we first determined the serviceable population by multiplying the total population by the percentage of middle to high-income groups (89.6%). We then multiplied the serviceable population by the assumed market share capture and the average annual spend per customer. The resulting SAM range is 94.4 million AED to 377.8 million AED, representing a customer range of 472,192 to 944,384.

It's important to note that these calculations relied on several assumptions due to the lack of specific data on sewing and alteration service usage rates and spend amounts in the UAE. To refine these estimates, we would need to gather more direct data on these factors or conduct market research.

Additionally, we considered proxy data from related markets, such as the apparel market, fashion and luxury fashion markets, and personal care market, to validate the overall consumer spending in adjacent categories. However, we primarily relied on the population and income distribution data for the core TAM and SAM calculations.

In summary, we followed a structured approach to estimate the TAM and SAM for a sewing and alteration specialist service in the UAE, making reasonable assumptions based on the available data and considering relevant proxy information. The resulting ranges provide a rough estimate of the market potential, but further refinement may be necessary as more specific data becomes available.

## Competitor Research Summary

1. The Smart Tailor:
  - Known for its mobile tailoring service
  - Offers a wide range of specialized tailoring services, including clothes alteration and making
  - Focuses on quality and affordability
  - Uses high-quality fabrics and materials [52]
2. My Tailor & Little Things:
  - Has three prime locations in Dubai
  - Offers bespoke and custom tailoring services
  - Handles simple alterations to major modifications
  - Known for ensuring a perfect fit [50]
  - Provides high-quality bespoke and alteration services [53]
3. Sartor:
  - Inspired by Italian tailoring culture
  - Offers bespoke suits for special occasions
  - Focuses on quality fabrics and attention to detail [49]
4. 8th Lining:
  - Utilizes state-of-the-art 3D body-scanning technology
  - Creates consistently perfect suits from a wide range of fabrics
  - Offers a high-quality bespoke experience [49]
5. Parmar Tailors:
  - Established in 1956
  - Family-owned tailor shop
  - Uses high-quality British and Italian fabrics
  - Offers bespoke suits and alterations
  - Focuses on quality and elegance [49]
6. Collars and Cuffs:
  - Known for modern, pop culture-inspired bespoke wear
  - Offers a wide range of fabrics
  - Provides a personalized concierge service [49]
7. Crescent Tailors:
  - Based in Abu Dhabi

- Specializes in uniform tailoring and gents tailoring
- Offers customized dress stitching and high-quality uniforms [51]

#### Market Trends:

- The UAE sewing machine market is expected to add more than USD 1 million from 2023 to 2028 [47]
- The global tailoring and alteration services market is expected to reach USD 14,137.72 million by 2032, growing at a CAGR of 4.3% [48]
- There are a total of 208 clothing alteration services in the United Arab Emirates as of July 12, 2024 [46]

#### Key Success Factors:

1. Experience and expertise in various stitching patterns and techniques [54][55]
2. Positive customer reviews and recommendations [54][55]
3. Wide range of services offered (hemming, resizing, restyling) [55]
4. Quick turnaround times without compromising quality [55]
5. Competitive pricing [54][55]
6. Effective communication with clients [55][56]
7. Regular fittings and adjustments [55][56]
8. Trust in the tailor's expertise [56]

#### Marketing Strategies:

1. Digital marketing using social media platforms (Facebook, Instagram, YouTube) [57][60]
2. Influencer marketing [58]
3. User-friendly websites showcasing services and testimonials [57][60]
4. Targeted advertising on platforms like Google and Facebook [59]
5. Community engagement through workshops or free alteration days [60]
6. Email marketing for regular updates and promotions [60]
7. Encouraging word-of-mouth referrals [60]
8. Partnerships with local businesses for cross-promotion [60]
9. Consistent visual branding using tools like Desygner [60]

#### Challenges:

1. High operational costs (rent, labor, logistics) [62][63]
2. Intense competition in the UAE retail market [62][63]
3. Seasonal fluctuations in demand [62]
4. Changing consumer preferences and fashion trends [62]
5. Pressure from e-commerce and online shopping trends [62]
6. Complex regulatory compliance and tax variations [62]
7. Dependence on imported raw materials [63]
8. Stiff competition from international low-cost manufacturing centers [61][63]

#### Technological Advancements:

1. Non-iron suits with enhanced fabric strength [64]
2. Stretching technologies using materials like elastane [64]
3. Temperature control features in clothing [64]
4. Integration of microchips for wearable payment and access [64]
5. Color-changing fabrics using tiny crystals [64]
6. Exploration of self-healing fabric using bacteria [64]

## Summary of Collected Data

### Financial Data

Total population of the UAE in 2023: Approximately 10.54 million [1].

The Apparel market in the UAE is projected to grow by 2.53% from 2024 to 2028, reaching a market volume of US\$11.66 billion in 2028 [4].

The global tailoring and alteration services market is expected to grow at a CAGR of 4.3% from 2023 to 2032, with a market size projected to reach USD 14,137.72 million by 2032 [2][3].

The UAE's population currently stands at 9.89 million people and is projected to continue growing until 2033, reaching 10.71 million people [21].

The fertility rate in the UAE is relatively low at 1.42 births per woman [21].

Income distribution in the UAE for 2023:

- Low-income population (below \$5,000 per year): 10.4%
- Middle-income population (\$5,000 - \$20,000 per year): 44.4%
- Upper-middle-income population (\$20,000 - \$50,000 per year): 26.4%
- High-income population (above \$50,000 per year): 18.8% [23]

The Luxury Fashion market in the UAE is projected to grow by 3.87% from 2024 to 2028, reaching a market volume of US\$635.70 million in 2028 [29].

The Fashion market in the UAE is projected to reach a revenue of US\$2.37 billion in 2024, with an annual growth rate (CAGR) of 8.11% from 2024 to 2029 [31].

The eCommerce Fashion market in the UAE is expected to grow annually by 8.11% (CAGR 2024-2029) [27].

The UAE's sustainable fashion revenue is estimated to be \$5 billion [28].

The Personal Care market in the UAE is projected to grow by -1.22% from 2024 to 2028, resulting in a market volume of US\$522.00 million in 2028 [42].

The Beauty & Personal Care market in the UAE is projected to grow by 7.65% from 2024 to 2029, resulting in a market volume of US\$665.20 million in 2029 [43].

Market share of various personal care services in the UAE:

- Personal Care: \$518.8 million
- Skin Care: \$292.5 million
- Cosmetics: \$174.5 million
- Fragrances: \$142.7 million [38]

The UAE skin care market is expected to reach USD 589.92 million by 2030, growing at a CAGR of 6.18% from 2023 to 2030 [39].

### Behavioral Data

Consumer Preferences:

- UAE consumers prioritize quality, craftsmanship, and personalized service in alteration services [6].
- There is a growing interest in sustainable clothing options and eco-friendly practices [7].

- Consumers value convenience and timeliness in alteration services [6].
- There is an increasing adoption of digital technology, such as 3D body scanning, in the alteration process [8].

#### Market Trends:

- The global tailoring and alteration services market is expected to grow at a CAGR of 4.3% from 2023 to 2032 [2][3].
- The apparel market in the UAE is projected to grow by 2.53% from 2024 to 2028 [4].
- The UAE has emerged as a leader in sustainable fashion, with 47% of its apparel market revenue coming from slow fashion [26].

#### Consumer Behavior:

- UAE consumers are becoming more price-conscious due to economic uncertainty and job insecurity [10][11].
- There is a significant shift towards online shopping, with the UAE retail mobile-commerce market projected to grow at 19% CAGR between 2020 and 2025 [10].
- Consumers are increasingly concerned about health, sustainability, and social responsibility, influencing their buying decisions [10][11].

#### Demographics:

- The UAE population is approximately 10.54 million as of 2023 [1].
- Children up to 14 years old make up about 15.8% of the population, people aged 15-64 years account for roughly 82.3%, and the remaining percentage is 65 and over [20].
- The median age in the UAE is 32.6 years as of 2020 [21].

#### Income Distribution:

- Low-income population (income below \$5,000 per year): 10.4% [23]
- Middle-income population (income between \$5,000 and \$20,000 per year): 44.4% [23]
- Upper-middle-income population (income between \$20,000 and \$50,000 per year): 26.4% [23]
- High-income population (income above \$50,000 per year): 18.8% [23]

#### Fashion Industry Trends:

- The Luxury Fashion market in the UAE is projected to grow by 3.87% from 2024 to 2028 [29].
- The eCommerce Fashion market is expected to grow annually by 8.11% (CAGR 2024-2029) [27].
- Fast fashion accounts for 22.46% of the UAE's apparel market, while slow fashion accounts for 47.393% [28].

#### Consumer Attitudes:

- 52% of consumers would rather pay for a good experience than material possessions [9].
- Consumers in the UAE are not hesitant to switch brands if they encounter any inconvenience [9].
- 34% of UAE consumers are loyal to their favorite brands, and 69% are attracted to exclusive rewards and benefits [44].

#### Personal Care Services:

- The Personal Care market in the UAE is projected to grow by -1.22% from 2024 to 2028 [42].
- The Beauty & Personal Care market is projected to grow by 7.65% from 2024 to 2029 [43].

These behavioral data points provide insights into consumer preferences, market trends, and demographic factors that influence the sewing and alteration services industry in the UAE.

## Competitor Data

The competitive landscape for sewing and alteration services in the UAE is characterized by a mix of local and international players. Here are some key points about the competitors in this market:

#### 1. Market Size and Growth:

- The global tailoring and alteration services market is expected to grow at a CAGR of 4.3% from 2023 to 2032, with a market size projected to reach USD 14,137.72 million by 2032 [2][3].
- The apparel market in the UAE is projected to grow by 2.53% from 2024 to 2028, resulting in a market volume of US\$11.66 billion in 2028 [4].

#### 2. Number of Competitors:

- There are 208 clothing alteration services in the United Arab Emirates as of July 12, 2024 [5].
- The distribution of these services across different emirates is as follows:
  - Dubai: 146 services
  - Sharjah Emirate: 26 services
  - Abu Dhabi Emirate: 21 services
  - Ajman Emirate: 12 services
  - Ras al-Khaimah: 3 services

#### 3. Key Players:

- International brands such as Alfred Dunhill, Alteration Express, Cad & The Dandy, and Uniqlo have a significant presence in the region [18].
- Local tailoring businesses also have a strong presence, offering bespoke tailoring services [16][17][19].

#### 4. Competitive Positioning:

- Quality and Craftsmanship: UAE consumers prioritize the quality and craftsmanship of alteration services [6].
- Personalized Service: Consumers value personalized service and attention to detail [6].
- Fabric Selection: The choice of fabric is crucial for UAE consumers [6].
- Digital Technology: The use of digital technology, such as 3D body scanning, is gaining popularity [8].
- Convenience and Timeliness: UAE consumers expect timely delivery and convenient services [6].
- Sustainability: There is a growing interest in sustainable clothing options [7].
- Online Presence: A strong online presence and positive customer testimonials are essential for attracting customers [6].

#### 5. Pricing Strategies:

- Basic Alterations: AED 25-40 for basic alterations, with the option to haggle [12].
- Home Tailoring Services: AED 150 for home service plus the price of the alteration at some providers [13].
- Specific Garment Alterations: Prices range from AED 80-320 depending on the type of alteration and garment [14][15].

#### 6. Market Trends:

- The UAE has emerged as a leader in sustainable fashion, with 47% of its apparel market revenue coming from slow fashion, translating to \$5 billion in sustainable fashion revenue [26].
- The eCommerce Fashion market in the UAE is expected to grow annually by 8.11% (CAGR 2024-2029) [27].
- In 2022, fashion and accessories saw the biggest growth in the fashion sector in the UAE, at 32 percent [25].

#### 7. Consumer Preferences:

- UAE consumers expect personalized service and attention to detail [37].
- They prefer bespoke tailors who can provide customized garments tailored to their individual style and preferences [37].
- Consumers value attention to detail and expect tailors to have a deep understanding of various fabric types and garment styles [37].
- They rely heavily on online reviews and testimonials from previous customers to gauge a tailor's reputation and service quality [37].

#### 8. Marketing Strategies:

- Competitors leverage social media platforms like Facebook, Instagram, and YouTube to showcase their work [32].
- They organize workshops or events to engage with the local community [32].
- Many competitors have user-friendly websites showcasing their services, portfolio, and customer testimonials [33].
- Partnerships with local businesses for cross-promotion opportunities are common [32].

This competitive landscape highlights the diverse nature of the sewing and alteration services market in the UAE, with a focus on quality, personalization, and digital innovation.

## Demographic Data

### Population:

- Total population of the UAE in 2023: 10.54 million [1]
- Population growth rate: 0.6% in 2024 [40]

### Age Distribution:

- Children up to 14 years old: 15.8% of the population
- People aged 15-64 years: 82.3% of the population
- People aged 65 and over: The remaining percentage (approximately 1.9%) [20]
- Median age: 32.6 years (as of 2020) [21]

### Income Distribution:

- Low-income population (below \$5,000 per year): 10.4%
- Middle-income population (\$5,000 - \$20,000 per year): 44.4%
- Upper-middle-income population (\$20,000 - \$50,000 per year): 26.4%
- High-income population (above \$50,000 per year): 18.8% [23]

### Workforce:

- Technical and skilled workers: Approximately 1.8 million (as of 2020) [34]

### Digital Adoption:

- Internet users: 9.9 million [36]
- Social media users: 10.00 million (105% of the total population) [41]

### Consumer Behavior:

- 34% of UAE consumers are loyal to their favorite brands
- 69% are attracted to exclusive rewards and benefits [44]
- 59% of respondents use fashion to express their personality [22]
- 33% focus on functionality in fashion choices [22]
- 28% want to express their emotions through fashion [22]

### Market Trends:

- The Apparel market is projected to reach US\$11.66 billion by 2028 [30]
- The Luxury Fashion market is expected to reach US\$635.70 million by 2028 [29]
- The eCommerce Fashion market is projected to reach US\$3.50 billion by 2029 [24]
- The Personal Care market is expected to reach US\$407.50 million by 2029 [35]

### Sustainability:

- 47% of UAE's apparel market revenue comes from slow fashion, translating to \$5 billion in sustainable fashion revenue [26]

These demographic data points provide insights into the population structure, income distribution, consumer behavior, and market trends in the UAE, which can be valuable for understanding the potential market for sewing and alteration services.

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## User Inputs

**Please enter the name of your business, product, or service**

Sewing

**Please describe your business, product or service in as much detail as possible. This can include elements such as the main benefits you offer, costs, industry, etc. and helps make the TAM & SAM calculations more accurate.**

Sewing and Alteration Specialist statistics should be in UAE currency