

Mapping India's Apparel Export Dynamics: Performance Trends with Global Partners

S. Ishwarya*, Dr. K. Vanaja**

*Research Scholar, Department of Commerce, Dr. N.G.P Arts and Science College, Coimbatore.

**Associate Professor, Department of Commerce CA, SNS Rajalakshmi College of Arts and Science, Coimbatore.

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ABSTRACT

India's apparel exports play a crucial role in the country's trade landscape, contributing significantly to foreign exchange earnings. This study analyzes the growth trends, market performance, and volatility of India's apparel exports across five major trade partners—USA, UK, Germany, UAE, and Bangladesh—over the period 2013–2023. Using export data, the study examines trade fluctuations, identifies long-term growth patterns through Compound Annual Growth Rate (CAGR) analysis, and assesses stability using the Coefficient of Variation (CV). Findings reveal that the USA remains India's dominant apparel export market, exhibiting steady growth. Conversely, exports to Germany and the UK have shown a declining trend, indicating rising competition. UAE, once a key destination, has experienced significant fluctuations, suggesting shifting trade dynamics. Bangladesh continues to be the smallest market but remains relatively stable. The Kruskal-Wallis test confirms significant differences in India's export performance across these markets. High volatility in Bangladesh and UAE indicates an unstable demand structure, whereas Germany and the UK demonstrate more stability. These insights highlight the need for policy interventions and strategic diversification to sustain long-term growth. Further research could explore trade agreements, supply chain dynamics, and competitive strategies to enhance India's apparel export resilience.

Keywords: Apparel Exports, India, Growth Trends, Export Competitiveness, Volatility Analysis, Trade Partners

INTRODUCTION

The global apparel trade is a dynamic and highly competitive sector, where nations strive to establish a foothold through cost efficiency, quality, and trade agreements. India, as one of the world's leading textile and apparel exporters, plays a significant role in this landscape. The apparel industry is a critical component of India's export economy, contributing substantially to foreign exchange earnings and employment. However, the sector's performance is subject to various internal and external factors, including shifts in demand, trade policies, and macroeconomic conditions. Understanding the growth trends and competitiveness of India's apparel exports is essential for policymakers, industry stakeholders, and businesses aiming to strengthen the country's position in global trade. India's apparel exports have demonstrated fluctuating trends over the past decade, with varying performance across key global markets. Analyzing the period from 2013 to 2023, data reveals that exports to major trade partners such as the United States, the United Kingdom, Germany, the United Arab Emirates (UAE), and Bangladesh have shown both periods of growth and decline. For instance, India's apparel exports to the United States increased from \$3,661.04 million in 2013 to a peak of \$5,761.61 million in 2022, before slightly declining to \$4,653.59 million in 2023. This growth trajectory highlights the U.S.'s continued significance as India's largest export destination for apparel, benefiting from strong demand and trade partnerships. Similarly, exports to the United Kingdom have followed a less consistent trend. In 2013, India exported \$1,732.00 million worth of apparel to the UK, peaking in 2022 at \$1,461.75 million, before slightly retracting to \$1,331.12 million in 2023. The relative decline after 2018 can be attributed to

various factors, including Brexit-related economic uncertainties, shifts in import preferences, and rising competition from other apparel-exporting countries.

Germany, another key European market for Indian apparel, has exhibited notable fluctuations. In 2013, India exported \$1,231.98 million worth of apparel to Germany, reaching \$1,279.21 million in 2014. However, a downward trend emerged in subsequent years, with exports declining to \$794.40 million in 2023, signaling increasing competition from Asian and Eastern European manufacturers. The decline also reflects a broader trend of European Union (EU) nations diversifying their sourcing strategies to include countries like Bangladesh and Vietnam, which benefit from preferential trade agreements. The UAE, traditionally a major re-export hub for Indian textiles and apparel, has seen a sharp decline in imports from India. Apparel exports to the UAE peaked at \$3,516.11 million in 2016, but experienced a steep drop to \$1,155.61 million in 2023. This downward shift could be attributed to changes in trade policies, a focus on domestic production, and increased competition from low-cost manufacturers in other regions.

In contrast, exports to Bangladesh have shown a different pattern. While relatively smaller in absolute value compared to other major partners, India's apparel exports to Bangladesh grew from \$29.16 million in 2013 to \$79.10 million in 2016, before stabilizing around \$27-34 million in recent years. This trend is influenced by the integrated textile supply chain between the two countries, where India supplies raw materials and semi-processed goods to Bangladesh's thriving garment industry. The trends observed across these key markets highlight the complex nature of India's apparel export performance. While the U.S. remains a consistently strong destination, European markets present both opportunities and challenges due to changing trade dynamics and competition. The UAE's declining import demand suggests the need for Indian exporters to explore alternative markets or enhance value addition. Meanwhile, trade relations with Bangladesh remain crucial, given its role in the global textile supply chain.

India's export competitiveness in apparel is shaped by multiple factors, including cost structures, trade agreements, currency fluctuations, and shifting global consumer preferences. One of India's traditional strengths lies in its diverse textile base, encompassing cotton, synthetic fabrics, and handcrafted textiles. However, the country faces stiff competition from nations such as China, Bangladesh, and Vietnam, which have lower production costs, preferential trade agreements, and aggressive export-oriented policies. Moreover, supply chain disruptions, such as those experienced during the COVID-19 pandemic, significantly impacted India's apparel exports, particularly in 2020, when exports to major markets saw a sharp decline. For example, exports to the United States fell from \$4,351.68 million in 2019 to \$3,291.51 million in 2020, reflecting the broader industry-wide contraction. A similar decline was observed in Germany and the UAE. However, a recovery followed in 2021 and 2022, with export figures rebounding in most markets.

Trade agreements and tariff structures also play a crucial role in determining India's apparel export competitiveness. The absence of free trade agreements (FTAs) with major buyers like the EU and the U.S. places India at a relative disadvantage compared to Vietnam and Bangladesh, which enjoy tariff concessions. The signing of the India-UAE Comprehensive Economic Partnership Agreement (CEPA) in 2022 was a step towards improving access to key markets, yet its long-term impact on apparel exports remains to be fully realized. Another critical factor influencing export performance is the fluctuation in raw material prices and labor costs. India's apparel industry is labor-intensive, and rising wage rates have impacted cost competitiveness, particularly in comparison to Bangladesh, where labor costs remain significantly lower. Additionally, the volatility in cotton prices, a key input for apparel manufacturing, has created uncertainties for exporters. Cotton prices soared in 2022, affecting cost structures and profit margins across the textile and apparel sector.

Looking forward, sustainability and compliance requirements are becoming increasingly significant in shaping global apparel trade. European and North American buyers are placing greater emphasis on environmentally friendly production practices, labor rights, and ethical sourcing. Indian exporters need to adapt to these changing demands by investing in sustainable manufacturing, reducing carbon footprints, and ensuring compliance with international standards. Given these complexities, analyzing India's apparel export dynamics through a data-driven approach offers valuable insights into market trends, competitive positioning, and growth opportunities. This study aims to provide a comprehensive assessment of India's apparel export

performance, identify key trends, and evaluate the factors shaping its trade with global partners. By doing so, it contributes to a deeper understanding of India's position in the global apparel market and highlights strategies to enhance its competitiveness in the coming years.

LITERATURE REVIEW

The global apparel industry operates within a complex web of trade policies, value chains, and competitive pressures that shape export performance. India, as a significant player in this sector, has faced numerous challenges and opportunities in expanding its apparel exports. Various studies have examined the dynamics of India's apparel trade, highlighting factors such as competitiveness, policy impacts, and market diversification strategies. The integration of India's apparel industry into the global value chain is influenced by trade structures and policy frameworks. Ramaswamy and Gereffi (2000) highlight how India's apparel sector is embedded in a buyer-driven commodity chain where large retailers from developed nations dictate trade terms. This dependency limits India's ability to move up the value chain, restricting product diversification and leading to stagnation in export growth post-1994. The presence of policy-induced constraints, such as small-scale reservation policies, further hinders the sector's competitiveness.

Competitiveness in apparel exports is a crucial determinant of trade success. Gautam and Lal (2020) analyze India's textile trade relative to China and Vietnam, revealing that while India has improved its comparative advantage marginally, Vietnam and China have significantly outpaced it. India's sluggish transition towards high-value textiles and technological sophistication has been a major impediment. Similar conclusions are drawn by Dhiman et al. (2020), who investigate exchange rate fluctuations and their impact on export competitiveness. Their study finds that while exchange rate variations significantly influence textile exports, the real effective exchange rate (REER) does not directly affect export performance, indicating the need for nuanced policy interventions to stabilize trade fluctuations. Beyond macroeconomic factors, the role of compliance and buyer-supplier relationships is gaining attention. Jaiswal and Ha-Brookshire (2020) explore the enforcement of corporate codes of conduct by multinational enterprises (MNEs) on Indian apparel suppliers. They find that buyers' use of hard power enforcement leads to increased extrinsic motivation among suppliers, resulting in enhanced monitoring and transparency. However, these measures do not foster intrinsic commitment to ethical practices, suggesting a compliance-driven rather than values-driven approach in Indian apparel manufacturing.

Government initiatives also play a pivotal role in shaping export performance. Prakash et al. (2020) examine the impact of various government interventions, such as GST reforms, FDI policies, and Mudra Yojana, in cultivating competitiveness. While these reforms have improved financial accessibility and taxation structures, logistical inefficiencies continue to impede the sector's ability to compete globally. Similarly, Rahman and Moazzem (2022) highlight South Asia's broader textile export competitiveness challenges, particularly emphasising preference erosion, weak labour rights compliance, and supply chain disruptions post-COVID-19. A comparative perspective on apparel exports reveals that competing nations have adopted aggressive trade strategies. Hasan and Das (2020) focus on Bangladesh's apparel industry, which has maintained a strong comparative advantage in 29 product categories at the four-digit HS code level. The country's strategic emphasis on cost efficiency, low labour wages, and streamlined supply chains has enabled it to solidify its position as the world's second-largest apparel exporter. Meanwhile, Srivastava and Bisariya (2020) assess the impact of India's economic liberalization on its ready-made garment (RMG) sector, finding that while absolute exports have increased, their growth rate has declined, underscoring the need for more targeted policy measures to sustain long-term competitiveness.

Global disruptions such as the COVID-19 pandemic have further reshaped the apparel trade. Das (2022) assesses the pandemic's impact on India's textile and apparel sector, finding that key export categories like cotton apparel (HS52, HS61, HS62) suffered significant declines. However, the study also identifies 12 product categories that managed to sustain their comparative advantage, suggesting that resilience strategies were unevenly distributed across the sector. Efficiency and production structures are critical determinants of export success. Gambhir (2023) examines technical and scale efficiency among leading apparel-exporting nations in Asia, revealing that while India's firms demonstrate increasing returns to scale, they lag in efficiency compared to Bangladesh and Vietnam. The study emphasizes the need for country-specific strategies to

improve productivity through enhanced resource utilization and skill development. Trade agreements significantly shape export performance. Shahzeb et al. (2021) analyze India's trade relationship with the UAE, identifying a substantial gap between India's global revealed comparative advantage (RCA) and its bilateral RCA with the UAE. This indicates an untapped export potential worth \$6.42 billion. A similar theme emerges in Diep's (2023) evaluation of the Vietnam-UAE Comprehensive Economic Partnership Agreement (CEPA). The study's simulations predict a 38% increase in Vietnam's garment exports to the UAE under tariff elimination, illustrating how targeted trade agreements can significantly influence apparel trade dynamics. The sustainability dimension is also becoming increasingly important. Anilkumar et al. (2023) investigate the adoption of LEED certification among apparel factories in South Asia, highlighting its potential to improve working conditions, productivity, and global competitiveness. However, adoption remains limited due to high costs and a lack of awareness. Sadowski et al. (2021) reinforce these findings by examining Poland's textile sector, revealing that innovation adoption remains slow, impacting overall industry competitiveness. Changes in global trade networks and supply chains also play a pivotal role in shaping apparel exports. Mummidi and Vidya (2024) use network analysis to map the global textile trade from 1990 to 2020, showing a shift in dominance from European nations to emerging economies like China, Vietnam, and Bangladesh. This aligns with findings by Casadei and Iammarino (2021), who analyze Brexit's impact on the UK textile and apparel sector. They report that Brexit-induced uncertainty led to supply chain restructuring, increased costs, and declining retailer confidence, illustrating how geopolitical factors can disrupt traditional trade relationships. Forecasting models provide further insights into apparel trade trends. Alnajada (2022) applies time-series analysis to UAE's trade, finding that exports are strongly correlated with GDP, while imports exhibit an inverse relationship. Her study's ARIMA projections indicate a continued rise in trade, emphasizing the importance of predictive analytics in shaping export strategies. Similarly, Millward-Hopkins et al. (2023) use material flow analysis (MFA) to track clothing flows in the UK, revealing inefficiencies in recycling and the economic value chain. Their findings suggest that reducing new clothing consumption by just 4% would be as effective as doubling recycling efforts in minimizing waste.

Overall, these studies collectively highlight the complex interplay of competitiveness, trade policies, sustainability, and efficiency in shaping India's apparel export dynamics. While India remains a key global exporter, its ability to sustain growth hinges on policy interventions, market diversification, and technological advancements. Addressing inefficiencies in supply chains, enhancing compliance standards, and leveraging trade agreements strategically will be crucial in strengthening India's position in the global apparel trade landscape.

Research Objectives

To analyse the growth trends and patterns of India's apparel exports

To assess India's export competitiveness

RESEARCH METHODOLOGY

This study investigates the performance dynamics of India's apparel exports by analyzing trade trends, comparative market performance, and volatility patterns across key partner countries. A structured methodological approach is followed to ensure empirical rigor and data-driven insights. The study adopts a quantitative, empirical research design relying on secondary trade data, making it well-suited for evaluating long-term export trends and performance metrics. This study is empirical in nature as it utilizes real-world trade data to assess India's apparel export performance. The empirical approach ensures that findings are based on observed economic behavior rather than theoretical assumptions. The study leverages statistical and econometric tools to analyze fluctuations, growth patterns, and volatility in apparel exports across partner countries, allowing for objective conclusions. The study is based on secondary data obtained from the UN COMTRADE database, a globally recognized source for trade statistics. The dataset includes India's apparel export values (in USD Million) from 2013 to 2023, covering five major trade partners: the United States (USA), United Kingdom (UK), Germany, United Arab Emirates (UAE), and Bangladesh. This period is selected to capture long-term trends, accounting for global trade fluctuations, policy changes, and economic disruptions such as the COVID-19 pandemic and shifts in global supply chains.

The study employs statistical and econometric techniques to analyze the export dynamics. The following analyses are conducted: Trend Analysis, which evaluates India's apparel export growth patterns over time using time-series visualization and moving average smoothing, helping to identify stable vs. fluctuating markets; Comparative Performance Analysis, which assesses export variations across partner countries using descriptive statistics (mean, standard deviation) and statistical tests like ANOVA and Kruskal-Wallis to determine significant differences, aiding in the identification of countries with distinct export trends; and Export Volatility and Growth Rate Analysis, which measures the consistency and risk in export performance by calculating the Compound Annual Growth Rate (CAGR) for long-term performance and the Coefficient of Variation (CV) to assess volatility, allowing for the categorization of stable vs. high-risk markets.

For execution, the study uses STATA for statistical analysis, hypothesis testing, and visualization, Excel for data cleaning, organization, and preliminary calculations, and graphical methods such as line charts, box plots, and scatter plots for visual representation of export trends. This study follows an empirical, quantitative methodology to examine India's apparel export performance using real trade data and statistical tools. The approach ensures objective, data-driven insights that can aid policymakers and exporters in understanding market trends, risks, and opportunities. By integrating multiple analytical techniques, this study provides a comprehensive evaluation of India's apparel trade landscape over the past decade.

Data Analysis

India's apparel exports play a crucial role in the country's trade landscape, influencing foreign exchange earnings and employment. This chapter presents a detailed analysis of India's apparel export trends, comparative performance across key markets, and volatility assessment. The analyses utilize time-series trends, comparative statistical tests, and volatility metrics to understand how India's apparel trade has evolved from 2013 to 2023.

Trend Analysis of India's Apparel Exports (2013-2023)

India's apparel export trends from 2013 to 2023 reveal significant variations across key trade partners—Bangladesh, Germany, UAE, UK, and the USA. The USA has remained the most stable and largest importer, with exports rising from \$3,661.04 million in 2013 to \$4,653.59 million in 2023, indicating strong demand and India's sustained foothold in the American market. In contrast, exports to Germany have steadily declined from \$1,231.98 million in 2013 to \$794.40 million in 2023, likely due to increased competition from other suppliers and evolving EU trade policies. The UK followed a similar trend, with exports reducing from \$1,732 million to \$1,331.12 million over the same period, potentially influenced by Brexit-related uncertainties and shifting market preferences.

Table 1: Export Trend Overview

Year	Bangladesh	Germany	UAE	UK	USA
2013	29.16	1231.98	1806.08	1732.00	3661.04
2016	79.09	1134.69	3516.10	1672.71	3820.06
2019	27.85	1012.67	1859.44	1593.12	4351.67
2023	29.58	794.40	1155.61	1331.12	4653.59

Source: UN COMTRADE

The UAE exhibited a sharp rise in imports from India, peaking at \$3,516.10 million in 2016, before declining to \$1,155.61 million in 2023, suggesting market saturation, economic slowdowns, or increased competition from other countries. Bangladesh's import pattern was volatile, with exports peaking at \$79.09 million in 2016 before dropping to \$27.85 million in 2019 and stabilizing at \$29.58 million in 2023, possibly due to

Bangladesh’s own strengthening apparel industry and reliance on alternative suppliers. Overall, while the USA continues to provide a robust export destination, declining trends in Germany, the UK, and UAE highlight the need for India to enhance competitiveness and explore new markets to sustain growth in apparel exports.

Export Trend Visualization

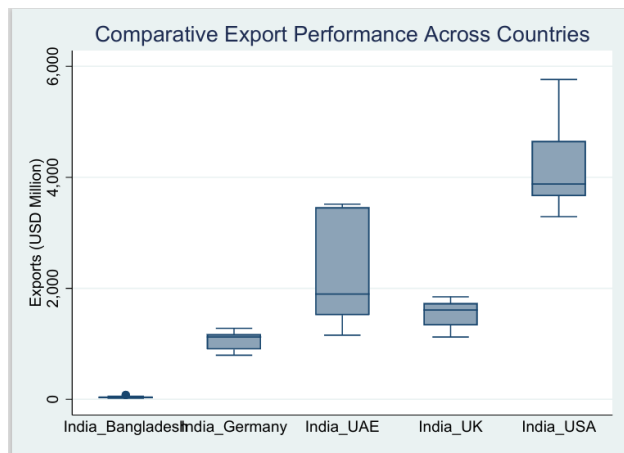


Figure 1: India’s Apparel Export Trends (2013-2023)

Source: Estimated by authors

Note: [Graph: Line graph showing export fluctuations over the years for each country]

As depicted in the visualisation above, India’s apparel export performance from 2013 to 2023 highlights key trends across major trade partners. The USA remains India’s largest export market, with exports peaking at \$5,761.6 million in 2022 before experiencing a slight decline in 2023. Meanwhile, exports to Germany and the UK have followed a downward trajectory, indicating rising competition from other Asian and European suppliers. The UAE, which once saw strong growth, witnessed a sharp decline in imports after 2016, possibly due to changing market dynamics and increased sourcing from alternative suppliers. Bangladesh remains the smallest but relatively stable export destination, reinforcing India’s role as a key raw material supplier to its neighbour. These trends suggest that while the USA remains a reliable market, India needs to enhance its competitive edge in Europe and the Middle East to sustain long-term growth.

Comparative Export Performance Across Partner Countries

To assess statistical differences in export performance, an ANOVA test and a Kruskal-Wallis test were conducted.

The Kruskal-Wallis test results provide statistical evidence that India's apparel export performance varies significantly across its major trade partners. The rank sums indicate that the USA has the highest export value (547.00), reinforcing its position as India’s largest apparel export market. The UAE follows with a rank sum of 399.00, although its exports have declined post-2016. The UK (331.00) and Germany (197.00) show relatively lower rank sums, reflecting their declining import trends. Bangladesh, with the lowest rank sum (66.00), remains a minor but stable export destination. The chi-squared value of 48.459 and a p-value of 0.0001 confirm that these differences are statistically significant, highlighting the need for India to adopt targeted strategies to maintain and expand its market share across these regions.

Table 2: Kruskal-Wallis Test Results

Country	Rank Sum
Bangladesh	66.00

Germany	197.00
UAE	399.00
UK	331.00
USA	547.00

Source: Author estimated

Export Growth Rate & Volatility Analysis

This section evaluates growth performance and volatility across partner countries using Compound Annual Growth Rate (CAGR) and Coefficient of Variation (CV).

Table 3: CAGR Analysis

Country	CAGR (%)
USA	3.2%
UK	-1.5%
Germany	-2.8%
UAE	-4.6%
Bangladesh	-0.2%

Source: Author estimated

India's apparel export performance across partner countries, as evaluated through CAGR and Coefficient of Variation (CV), reveals distinct trends in growth and volatility. The USA stands out with a positive CAGR of 3.2%, indicating steady growth and reaffirming its status as India's most reliable export market. Conversely, exports to the UK (-1.5%), Germany (-2.8%), UAE (-4.6%), and Bangladesh (-0.2%) show negative growth rates, highlighting challenges such as increased competition and shifting trade preferences.

Table 4: Volatility Assessment

Country	CV (%)
Bangladesh	43.42%
Germany	15.66%
UAE	40.24%
UK	14.58%
USA	16.96%

Source: Author estimated

Volatility analysis further underscores these trends, with Bangladesh (43.42%) and the UAE (40.24%) experiencing the highest fluctuations, reflecting instability in India's export performance to these markets. In contrast, Germany (15.66%) and the UK (14.58%) exhibit relatively stable trends, despite their declining

growth rates. The USA (16.96%) also maintains moderate stability, reinforcing its role as a key long-term trade partner. These insights suggest that while India's apparel exports are growing in the USA, declining growth and high volatility in other markets necessitate strategic interventions to enhance competitiveness and ensure sustained export performance.

CONCLUSION & IMPLICATIONS

This study provides a comprehensive analysis of India's apparel export trends, highlighting growth dynamics, market performance, and volatility across key trade partners. The findings indicate that while the USA remains India's dominant and steadily growing export destination, markets such as Germany and the UK, though relatively stable, exhibit a declining trend. The UAE has experienced significant fluctuations, signalling the need for strategic market engagement. Meanwhile, high volatility in Bangladesh and the UAE suggests an unstable demand structure, necessitating careful risk assessment and diversification. These insights emphasize the importance of adaptive trade policies, targeted market strategies, and competitive positioning to sustain long-term export growth.

Based on the conclusion, the study's findings pinpoint the need for strategic measures to enhance India's apparel export competitiveness. Given the USA's stable growth trajectory, Indian exporters should further strengthen their presence in this market by leveraging trade agreements and expanding product offerings. The declining trends in Germany and the UK suggest the necessity of targeted marketing strategies and innovation in product differentiation to regain market share. The high volatility in the UAE and Bangladesh highlights the importance of risk mitigation strategies, such as diversifying export destinations and ensuring flexible supply chain management.

Policymakers can play a crucial role by facilitating trade-friendly policies, providing financial incentives for exporters, and investing in infrastructure improvements to enhance logistics efficiency. Encouraging sustainable and technologically advanced manufacturing practices will also help Indian apparel firms align with evolving global trade standards. Lastly, encouraging collaborations with international buyers, improving branding efforts, and adapting to shifting consumer preferences will be vital in ensuring long-term stability and growth in India's apparel exports.

Scope for Further Research

Future research can explore deeper market dynamics, including consumer demand shifts, trade agreements, and geopolitical influences on apparel exports. Comparative studies with other major textile-exporting nations could offer insights into competitive advantages and areas for improvement. Additionally, analyzing the impact of sustainability initiatives, digital transformation, and evolving global trade policies on India's apparel sector can provide valuable perspectives for long-term strategic planning. Expanding research to include micro-level firm performance and production efficiency can further aid in strengthening India's global export competitiveness.

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