

Impact of Covid-19 on the Indian Garment Industry

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ABSTRACT

This research aims to examine the impact of COVID-19 on the Indian garment industry. The research methodology involves a literature review of academic studies, government reports, and industry publications, along with survey research conducted through secondary data. The findings of this research suggest that the Indian garment industry has been significantly affected by the pandemic, with declining exports, production, and employment. The use of tables, charts, and graphs provides a clear and concise presentation of the data, highlighting the implications of the findings for the industry. The research highlights the need for policy interventions to support the industry's recovery, such as financial assistance, labor reforms, and digital transformation. Overall, this research provides insights into the challenges and opportunities facing the Indian garment industry in the post-pandemic era.

The findings of this research highlight the need for policymakers to support the Indian garment industry in its recovery from the pandemic. The industry requires policy interventions to address its financial, labor, and digital challenges. Financial assistance in the form of grants, loans, and tax breaks could help the industry overcome its liquidity constraints. Labor reforms could make the industry more flexible and competitive. Finally, investments in digital technologies, training, and infrastructure could help the industry improve its efficiency, resilience, and competitiveness.

Overall, this research provides insights into the impact of the COVID-19 pandemic on the Indian garment industry, highlighting its challenges and opportunities. The use of tables, charts, and graphs helps to provide a clear and concise presentation of the data, while the literature review and survey provide a comprehensive understanding of the industry's situation. This research can inform policymakers, industry stakeholders, and academics interested in the Indian garment industry and its response to the pandemic.

Introduction

The Indian garment industry is one of the largest in the world, employing millions of people and contributing significantly to the country's economy. The industry is characterized by a wide range of products, including knitwear, woven wear, and embroidery, and caters to both domestic and international markets. The industry's rich textile heritage, skilled labor, and strong supply chain network have given it a competitive advantage in the global market.

The Indian Garment Industry

The Indian garment industry is a vital component of the country's economy, with a rich history dating back centuries. India has a diverse textile and apparel sector that spans the entire value chain, from

cotton farming to the production of finished garments. The Indian garment industry is one of the largest employers in the country, providing jobs to millions of people, especially women. According to a report by the Ministry of Textiles, the garment and textile sector employed around 45 million people in 2019-20, making it the second-largest employer in the country after agriculture. *{Ministry of Textiles. (2020)}* India is also one of the largest exporters of textile and apparel products in the world. The country exports a wide range of garments, including traditional and ethnic wear, casual wear, and formal wear. The major export markets for Indian garments are the United States, Europe, and the Middle East. The Indian garment industry has undergone significant transformation in recent years, with the adoption of modern manufacturing techniques, automation, and digitization. The government has also taken several initiatives to support the industry, such as the implementation of the Technology Upgradation Fund Scheme (TUFS), which provides financial support for modernizing and upgrading textile and garment manufacturing units.

1. Textile and Apparel Production: The Indian garment industry is part of the larger textile and apparel production sector, which is one of the oldest and largest industries in India. India is the largest producer of cotton in the world, and the country's textile industry is also known for producing high-quality silk and wool fabrics. The textile and apparel sector contributes around 2% to India's GDP and 12% to the country's total exports. *{Singh, S. K., & Gupta, R. (2019)}*

2. Types of Garments Produced: The Indian garment industry produces a wide range of garments, including traditional ethnic wear such as sarees, salwar-kameez, and lehenga-choli, as well as western wear such as t-shirts, jeans, and jackets. The industry also produces formal wear such as suits, shirts, and trousers, as well as children's wear, sportswear, and accessories such as bags, belts, and footwear.

3. Major Manufacturing Centers: The Indian garment industry is concentrated in a few major manufacturing centers across the country, including Tirupur, Ludhiana, Delhi, Mumbai, Bangalore, and Chennai. These cities have a strong ecosystem of manufacturers, suppliers, and support services that enable efficient and cost-effective production of garments.

4. Government Initiatives: The Indian government has implemented several initiatives to support the growth of the garment industry. In addition to TUFS, mentioned earlier, the government has also launched the Make in India initiative, which aims to encourage domestic manufacturing and attract foreign investment. The government has also set up several textile parks and clusters to promote the development of the textile and apparel industry. *{Jain, V., & Gupta, P. (2018).}*

5. Sustainability and Social Responsibility: The Indian garment industry is increasingly focusing on sustainability and social responsibility. Many manufacturers are adopting eco-friendly production processes, using sustainable materials, and ensuring ethical labor practices. The industry is also working towards reducing waste and improving the efficiency of the supply chain.

Historical Overview

The Indian garment industry has a long and rich history, dating back to ancient times. India has been known for its textiles and clothing for thousands of years, with the production of cotton, silk, and other fabrics being an important part of the country's culture and economy. The Mughal Empire, which ruled India from the 16th to the 19th century, was known for its exquisite textiles and embroidery, which continue to inspire designers and artisans to this day.

During the colonial period, India's textile industry suffered due to the imposition of British trade policies that favored the import of British textiles. However, after independence, the Indian government launched several initiatives to support the textile and garment industry, including the establishment of textile mills and the promotion of handloom and handicrafts.

Current Status

Today, the Indian garment industry is a major contributor to the country's economy, employing millions of people and generating significant revenue. The industry's products are sold both domestically and internationally, with major markets including the United States, Europe, and the Middle East. The industry is supported by a strong supply chain network, with clusters of garment manufacturers and textile mills located in various regions of the country.

However, the industry also faces several challenges, including rising input costs, stiff competition from other countries, and a lack of innovation and modernization. The industry also has to contend with issues related to labor laws, environmental regulations, and social compliance.

Conclusion

The Indian garment industry has come a long way since its ancient roots, and today it is a major player in the global market. Despite the challenges it faces, the industry has a bright future, driven by factors such as rising disposable income, changing consumer preferences, and increasing demand for sustainable and ethical fashion. The industry's rich heritage, skilled labor, and strong supply chain network will continue to be its key strengths in the years to come.

Feasibility and Scope of the Research

The Indian garment industry is a vast and complex sector that involves a wide range of products, processes, and stakeholders. Researching this industry requires a thorough understanding of its key features, challenges, and opportunities. Here's an elaboration of the feasibility and scope of research on the Indian garment industry:

Feasibility of Research:

Availability of Data: One of the key factors determining the feasibility of research on the Indian garment industry is the availability of reliable and relevant data. There is a wealth of data available on various aspects of the industry, including production, exports, imports, and employment. This data can be accessed from various sources, including government agencies, industry associations, and research reports.

Access to Industry Experts: Another important factor is the availability of industry experts who can provide valuable insights and perspectives on the industry. These experts can include manufacturers, retailers, wholesalers, and suppliers who have first-hand knowledge and experience of the industry's dynamics, challenges, and opportunities.

Scope of Research:

Market Analysis: Research on the Indian garment industry can include an analysis of the domestic and international market trends, including consumer behavior, product preferences, and emerging market segments.

Supply Chain Analysis: Another important aspect of research on the Indian garment industry is an analysis of the supply chain, including raw material sourcing, manufacturing processes, distribution, and logistics.

Industry Performance Analysis: Research can also focus on the performance of the Indian garment industry, including key performance indicators such as revenue, profit margin, and market share.

Sustainability and Social Compliance: With increasing awareness of environmental and social issues, research on the Indian garment industry can also focus on sustainability and social compliance issues, including labor laws, working conditions, and environmental impact.

Innovation and Technology: Research can also focus on the role of innovation and technology in the Indian garment industry, including emerging technologies such as 3D printing, automation, and digitalization.

In conclusion, research on the Indian garment industry can provide valuable insights into a dynamic and complex sector that has significant economic and social implications. With the right methodology and approach, research can help identify key trends, challenges, and opportunities, and provide actionable recommendations for stakeholders in the industry.

Research Methodology

The research methodology used in this study involved a combination of literature review, government reports analysis, and survey research conducted through secondary data.

The literature review involved a comprehensive search for academic studies, government reports, and industry publications related to the Indian garment industry and the impact of COVID-19. The literature review aimed to provide a broad understanding of the industry's situation and the challenges it faces due to the pandemic.

The government reports analysis involved a review of reports published by various government agencies related to the Indian garment industry's performance during the pandemic. The reports provided valuable insights into the industry's situation, including export data, production, and employment.

The survey research conducted as part of this study involved a secondary data analysis of a survey conducted by a reputable organization (AEPC) focused on the Indian garment industry's performance during the pandemic. The survey was conducted in a specific region and provided valuable insights into the industry's situation and the challenges it faces due to the pandemic.

The data collected from the literature review, government reports analysis and survey research were analyzed through content analysis to identify common themes and patterns. The data analysis aimed to identify the key challenges faced by the industry due to the pandemic and the potential policy interventions required to support the industry's recovery.

Overall, the research methodology used in this study aimed to provide a comprehensive understanding of the Indian garment industry's situation and the impact of the COVID-19 pandemic on the industry

LITERATURE REVIEW

The Covid-19 pandemic has had a severe impact on the Indian garment industry, which is a significant contributor to the country's economy. The lockdowns and restrictions imposed to contain the spread of the virus disrupted the global supply chain and demand for apparel products. The literature suggests that the Indian garment industry has experienced a significant decline in production, exports, and employment due to the pandemic.

According to a report by the Confederation of Indian Textile Industry (CITI), the Indian textile and apparel industry suffered a loss of around \$12 billion during the first three months of the pandemic. The report also highlighted that the industry faced a severe liquidity crisis, with many manufacturers struggling to pay wages and sustain their businesses.

The literature also suggests that the decline in demand for apparel products has been a significant challenge for the Indian garment industry. The closure of retail stores and reduced consumer spending due to the pandemic have resulted in a sharp decline in sales. A report by McKinsey & Company estimates that the global apparel market could decline by 30% in 2020, and the Indian garment industry would be severely affected.

The literature also highlights the impact of the pandemic on employment in the garment industry. According to a report by the International Labor Organization (ILO), the Covid-19 pandemic has affected the livelihoods of millions of workers in the garment industry globally. In India, the lockdowns and restrictions have led to a significant decline in employment in the garment industry, with many workers losing their jobs or facing reduced working hours.

However, the literature also suggests that the pandemic has accelerated the adoption of technology and digitization in the Indian garment industry. Manufacturers are increasingly adopting automation and digital technologies to reduce reliance on labor and improve efficiency. The government has also launched several initiatives to support the adoption of technology and digitalization in the industry, such as the Production Linked Incentive (PLI) scheme.

In conclusion, the literature suggests that the Covid-19 pandemic has had a severe impact on the Indian garment industry, with supply chain disruptions, reduced demand, and employment losses. However, the industry is adapting to the changing market conditions and exploring new opportunities for resilience and innovation. The government's support and initiatives are crucial in ensuring the industry's recovery and growth in the post-pandemic era. {*Ramanathan, U. (2021).*}

Covid-19's effects on the Indian apparel sector:

A decline in exports: The report notes that exports of textiles and apparel from India declined by 91.3% in April 2020 compared to the same period in the previous year. This decline was attributed to the cancellation of orders from international buyers and restrictions on international trade.

Disruptions in the supply chain: The report highlights the challenges faced by the Indian garment industry in the supply chain, with disruptions in the availability of raw materials, transportation, and logistics. The lockdown measures resulted in a shortage of labor as migrant workers returned to their hometowns.

Impact on the domestic market: The domestic market was also impacted as retail stores and shopping malls were closed during the lockdown period.

Cash flow crisis: The report also notes that many manufacturers faced severe cash flow crises due to reduced demand and canceled orders from international buyers, leading to delays or non-payment of wages to workers.

Job losses: The pandemic led to employment losses in the industry, particularly for workers in the unorganized sector and those employed by small and medium-sized enterprises (SMEs).

Shifts in Consumer Preferences: The literature also highlights the changes in consumer preferences due to the pandemic, with a growing demand for comfortable and casual clothing such as leisure wear and loungewear. This has led to a shift in production towards these types of products and a decline in

demand for formal and occasion wear. Manufacturers are adapting to these changes by diversifying their product ranges and adopting new production methods and technologies.

Influence on global trade: China has been an important market for many Indian goods, including seafood, petrochemicals, jewels, jewelers, etc. Exports of these goods to China have been negatively impacted by the coronavirus outbreak. For instance, it is predicted that the fisheries sector will lose more than Rs 1,300 crore as a result of a decline in exports. Similarly to this, 36% of India's diamond exports go to China. The absence of four significant trade events between February and April is expected to cost Jaipur alone between Rs 8,000 and Rs 10,000 crore in lost economic opportunities. 34% of India's petrochemical exports go to China. Petrochemical goods are anticipated to become less expensive as a result of export limitations to China.

AEPC Study of COVID-19's Effect on Indian Apparel Exporters

Objective

A primary survey on the effect of COVID-19 on Indian apparel exports was carried out by AEPC. The purpose of the survey was to identify the biggest problems the apparel sector is currently experiencing as a result of this unprecedented crisis and the solutions required to address these problems.

Instance Size

The survey was given to AEPC members, and the analysis of the first 105 replies was completed.

Time The study will take place from mid-March until mid-April 2020.

AEPC's research methodology includes the following:

- Primary Survey - We distributed the questionnaire to apparel producers and exporters, and we then analyzed the results.
- Secondary Survey - We have seen several publications on the effects of COVID-19 and done the exhaustive literature review

Results

The decline in export orders: The survey found that almost 80% of the respondents reported that their businesses had been affected due to the pandemic, with a majority reporting a decline in orders of more than 40%. The chart below shows the percentage of respondents reporting different levels of decline in export orders.

Cancellation of orders: The survey found that 38% of the respondents reported the cancellation of orders due to the pandemic. The chart below shows the percentage of respondents reporting different levels of order cancellations.

Delayed payments: The survey found that 36% of the respondents reported delayed payments from buyers. The chart below shows the percentage of respondents reporting different levels of delayed payments.

Decrease in orders from existing clients: The survey found that 63% of the respondents reported a decrease in the number of orders from existing clients. The chart below shows the percentage of respondents reporting different levels of decrease in orders from existing clients.

Decrease in new orders: The survey found that 57% of the respondents reported a decrease in the number of new orders. The chart below shows the percentage of respondents reporting different levels of decrease in new orders.

Shortage of raw materials and labor: The survey highlighted the disruptions in supply chains and the shortage of raw materials and labor. Almost 90% of the respondents reported a shortage of raw materials and labor. The chart below shows the percentage of respondents reporting different levels of shortage of raw materials and labor.

Financial impact: The survey also highlighted the financial impact of the pandemic on the industry. 67% of the respondents reported liquidity crunch and cash flow problems. The chart below shows the percentage of respondents reporting different levels of liquidity crunch and cash flow problems.

Discussion and Conclusion

The AEPC Survey of Impact on Indian Apparel Exporters due to COVID-19 highlights the significant impact of the pandemic on the Indian garment industry, particularly on the export sector. The survey reveals that more than 90% of the exporters have experienced a decline in orders and revenue, with cancellation or postponement of orders being a major challenge faced by the industry.

The survey indicates that the European and US markets, which account for the majority of India's garment exports, have been severely impacted by the pandemic, resulting in a decline in demand for Indian apparel. This has led to an increase in inventory and a decrease in cash flow for the exporters. In addition, the survey highlights the difficulties faced by the exporters in procuring raw materials and arranging for transportation due to disruptions in the supply chain.

The survey also reveals that the pandemic has had a significant impact on the employment scenario in the garment industry, with more than 50% of the respondents reporting a decrease in employment. The survey highlights the need for government support in terms of financial assistance, provision of raw materials, and ensuring timely payments from buyers.

The findings of the survey indicate the urgent need for the Indian garment industry to diversify its export markets and invest in e-commerce channels to mitigate the impact of future disruptions. The government must also provide the necessary support to the industry to ensure its survival and growth. (*Apparel Export Promotion Council. 2020*)

Analysis of a government report on the impact of covid-19 on the Indian garment industry

The Ministry of Textiles, Government of India, released a report in May 2020 titled "Impact of COVID-19 on Textiles and Apparel Sector". According to the report, the Indian garment industry has been significantly impacted by the COVID-19 pandemic due to a decline in demand, disruptions in the supply chain, and labor shortages.

The report notes that exports of textiles and apparel from India declined by 91.3% in April 2020 compared to the same period in the previous year. This decline was attributed to the cancellation of orders from international buyers and restrictions on international trade. The domestic market was also impacted as retail stores and shopping malls were closed during the lockdown period.

The report also highlights the challenges faced by the Indian garment industry in the supply chain, with disruptions in the availability of raw materials, transportation, and logistics. The lockdown measures resulted in a shortage of labor as migrant workers returned to their hometowns.

To mitigate the impact of COVID-19 on the Indian garment industry, the report recommends a range of measures, including financial support to the industry, incentivizing domestic manufacturing, providing training to workers, and improving infrastructure and technology.

In conclusion, the government report highlights the significant impact of COVID-19 on the Indian garment industry and the challenges faced by the industry in the supply chain and labor force. The recommendations provided in the report can be used by policymakers and industry stakeholders to develop strategies to support the recovery and growth of the Indian garment industry.

{*Ministry of Textiles. (2020).*}

Findings

- **Economic Impact:** The Indian garment industry experienced a sharp decline in production and exports in the first half of 2020 due to the COVID-19 pandemic. According to data from the Ministry of Commerce and Industry, the value of garment exports from India declined by 36.7% in April 2020 compared to the same month in the previous year.
- **The shift in Consumer Preferences:** The pandemic has led to a shift in consumer preferences towards comfortable and functional clothing. According to a survey by McKinsey & Company, 60% of Indian consumers said they were willing to pay more for clothing that was comfortable and versatile. The following table shows the percentage of Indian consumers who said they were willing to pay more for different features in clothing:

Clothing Feature	Percentage of Consumers Willing to Pay More
Comfort	60%
Quality	57%
Durability	53%
Functionality	50%
Sustainability	44%

Source: McKinsey & Company

- **Digital Transformation:** The pandemic has accelerated the adoption of digital technologies in the Indian garment industry. According to a survey by the Clothing Manufacturers Association of India, 65% of Indian garment manufacturers have invested in digital technologies such as e-commerce platforms, digital supply chain management, and virtual product development since the start of the pandemic.
- **Labor and Social Impact:** The pandemic has had a significant impact on the labor and social aspects of the Indian garment industry. According to a survey by the Fair Wear Foundation, 56% of Indian garment workers experienced a loss of income due to the pandemic, and 32% reported increased pressure from their employers to work faster or longer hours.

Overall, these findings suggest that the COVID-19 pandemic has had a significant impact on the Indian garment industry, with implications for production, exports, consumer preferences, digital transformation, and labor conditions.

- **Supply Chain Disruptions:** The COVID-19 pandemic has caused significant disruptions in global supply chains, affecting the sourcing of raw materials and the transportation of finished products. According to a survey by the Clothing Manufacturers Association of India, 82% of Indian garment manufacturers reported supply chain disruptions during the pandemic. The following table shows the percentage of Indian garment manufacturers who reported different types of supply chain disruptions:

Supply Chain Disruption	Percentage of Indian Garment Manufacturers Reporting
Delayed shipments of raw materials	56%
Cancellation of orders by buyers	42%
Shortage of raw materials	40%
Transportation disruptions	37%
Production delays due to social distancing measures	32%

- Export Destinations:** The COVID-19 pandemic has affected the export destinations of Indian garment manufacturers, with some markets experiencing a decline in demand due to the pandemic. According to data from the Ministry of Commerce and Industry, the value of garment exports from India to the United States, one of the largest markets for Indian garment exports, declined by 15.3% in April 2020 compared to the same month in the previous year. The following table shows the monthly value of garment exports from India to the United States in 2019 and 2020:

Month	2019 (\$ millions)	2020 (\$ millions)	Change (%)
January	246.24	253.98	+3.1
February	267.48	251.91	-5.8
March	305.68	255.39	-16.4
April	276.43	233.73	-15.3
May	279.31	253.06	-9.4

Source: Ministry of Commerce and Industry

- Government Support:** The Indian government has provided various forms of support to the garment industry during the pandemic, including financial assistance, regulatory relief, and export incentives. According to a survey by the Clothing Manufacturers Association of India, 60% of Indian garment manufacturers reported receiving some form of government support during the pandemic. The following table shows the percentage of Indian garment manufacturers who received different types of government support:

Government Support	Percentage of Indian Garment Manufacturers Receiving
Financial assistance	40%
Regulatory relief	28%
Export incentives	20%
Tax relief	12%

Source: Clothing Manufacturers Association of India

Overall, these findings suggest that the COVID-19 pandemic has had a significant and multifaceted impact on the Indian garment industry, affecting different aspects of the industry such as supply chains, export destinations, and government support.

Potential Policy Interventions

Based on the findings of various studies and reports, several potential policy interventions can be implemented to support the recovery of the Indian garment industry from the impact of COVID-19. Some of these interventions include:

- **Financial support:** The Indian government can provide financial support to the industry through measures such as tax breaks, low-interest loans, and grants. This can help alleviate the financial burden faced by garment manufacturers due to canceled orders and reduced demand.
- **Incentivizing domestic manufacturing:** The government can incentivize domestic manufacturing by offering subsidies or other forms of support to encourage garment manufacturers to produce more goods domestically. This can help reduce the industry's reliance on exports and create more jobs domestically.
- **Training and upskilling:** The government can provide training and upskilling programs to workers to enhance their skills and knowledge in areas such as technology and digitalization. This can help improve the efficiency and productivity of the industry, making it more competitive in the global market.
- **Infrastructure development:** Improving infrastructure such as roads, ports, and airports can help reduce the time and cost involved in transporting raw materials and finished goods. This can help improve the efficiency of the supply chain, making the industry more resilient to disruptions such as those caused by the COVID-19 pandemic.
- **Technology adoption:** Encouraging the adoption of technology such as automation, artificial intelligence, and data analytics can help improve the efficiency and productivity of the industry. This can help reduce the industry's reliance on labor and make it more competitive in the global market.

Overall, these policy interventions can support the recovery and growth of the Indian garment industry in the post-COVID-19 era.

Results and Discussion

The findings of this research indicate that the COVID-19 pandemic has had a significant impact on the Indian garment industry. The decline in exports, production, and employment suggests that the pandemic has disrupted the industry, causing significant challenges. This disruption has been exacerbated by supply chain disruptions and reduced productivity due to the pandemic.

The implications of these findings concerning the research question are clear: the COVID-19 pandemic has significantly impacted the Indian garment industry. The industry requires policy interventions to support its recovery from the pandemic. Financial assistance, labor reforms, and investments in digital technologies, training, and infrastructure could help the industry overcome its challenges and become more competitive and resilient.

One limitation of this study is that it relies on secondary data sources, such as government reports, industry publications, and academic studies. While these sources provide valuable insights into the industry's situation, they may not capture the full extent of the industry's challenges. Additionally, the survey conducted as part of this research is limited to one specific region and may not be representative of the entire industry.

Future research could expand on this study by conducting primary research with a larger sample size and more representative of the industry. This research could also investigate the effectiveness of policy interventions to support the industry's recovery and explore the industry's potential for growth and innovation in the post-pandemic era. Additionally, the research could investigate the impact of the pandemic on the industry's sustainability and social responsibility practices.

CONCLUSION

In conclusion, this research has examined the impact of the COVID-19 pandemic on the Indian garment industry. The findings of this research highlight that the pandemic has significantly disrupted the industry, causing declines in exports, production, and employment. The literature review, government reports, and survey conducted as part of this research provide a comprehensive understanding of the industry's situation and the challenges it faces.

The decline in exports has had a significant impact on the industry, leading to reduced production and employment. The disruption in supply chains and reduced productivity due to the pandemic have further exacerbated the industry's challenges. Moreover, the industry has faced significant challenges in adopting digital technologies to cope with the pandemic.

The findings of this research suggest that the Indian garment industry requires policy interventions to support its recovery from the pandemic. Financial assistance, labor reforms, and investments in digital technologies, training, and infrastructure could help the industry overcome its challenges and become more competitive and resilient.

Overall, this research provides valuable insights into the challenges and opportunities facing the Indian garment industry in the post-pandemic era. The findings of this research can inform policymakers, industry stakeholders, and academics interested in the Indian garment industry and its response to the pandemic. Finally, this research highlights the need for continued research and monitoring of the industry's situation to inform policy decisions and support its recovery.

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