



A Study on the Factors Influencing the Development of the Local Apparel Industry: Insights from Guangzhou in the 20th Century and the New Era

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Abstract

This study focuses on the evolutionary trajectory of Guangzhou's apparel industry during the National Products Movement (1920s–1940s) and the past three years of the New Era (2022–present). Through a comparative analysis, it reveals the strategic transformation logic from national self-strengthening to brand innovation and internationalization. Grounded in the context of globalization and digitalization, the research integrates multiple perspectives, including policy-driven development, cultural identity, and supply chain restructuring, to examine the synergistic effects of national policies, industry organizations, brand innovation, and cultural identity on industrial growth. The study employs a comparative historical analysis, examining policy frameworks, industry organization roles, brand strategies, and cultural identity factors across different periods. The findings indicate that national policies have consistently played a guiding role across both historical periods, while industry organizations have served as a crucial bridge between the government and the market. Moreover, brand innovation and cultural identity have emerged as core drivers of industrial upgrading. The study further proposes that cultural identity and technological innovation are key factors in fostering differentiated competition within Guangzhou's apparel industry. This study underscores the significance of learning from history, offering theoretical and practical insights for contemporary policy-making, brand internationalization strategies, and regional collaborative development in Guangzhou's apparel sector.

Keywords: *Guangzhou Apparel Industry; Domestic Product Movement; Brand Innovation; Cultural Identity*

1. Introduction

Amid the waves of globalization and digitalization, the apparel industry, as a crucial component of China's economy, is undergoing unprecedented transformations. Guangzhou, historically a gateway for China's external trade and currently a core city of the Guangdong-Hong Kong-Macao Greater Bay Area, holds a pivotal position in both the national and global fashion landscape. However, existing research has

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paid relatively limited attention to Guangzhou's apparel industry, particularly lacking a systematic exploration of its industrial evolution and strategic transformation from the National Products Movement era (1920s–1940s) to the new era (2022–present).

This study selects the National Products Movement period and the New Era as the temporal scope of analysis, based on the following considerations. First, the National Products Movement period marked the awakening of China's national industry (Karl, R. E., 2002). Under the backdrop of economic aggression by foreign powers, Guangzhou's apparel industry initially achieved national industrial self-strengthening through policy support and the symbolic construction of cultural identity. Second, the New Era signifies the deep integration of globalization and digitalization. Particularly in the aftermath of the COVID-19 pandemic, global supply chains, consumption patterns, and trade policies have undergone significant transformations, presenting Guangzhou's apparel industry with both new opportunities and challenges. Third, both periods place a strong emphasis on the role of cultural identity. During the National Products Movement, consumer patriotism was mobilized to promote domestic products and industrial development. In contrast, the New Era fosters cultural identity through the rise of Guochao (Chinese fashion style), local designer brands, and the fusion of traditional culture with contemporary design, driving brand internationalization. This continuity and innovation in cultural identity serve as a crucial foundation for Guangzhou's apparel industry to establish differentiated competitiveness. Finally, both periods faced significant external shocks and economic aggression by foreign powers in the early 20th century and intensified global competition in the contemporary era. In response, industrial transformation and upgrading have been achieved through policy guidance and innovation.

Currently, research on the National Products Movement and the apparel industry primarily focuses on cities such as Shanghai, Tianjin, and Nanjing. For instance, studies such as *A Comparative Study on the National Products Suit Industry in Modern Shanghai and Tianjin* by Ding, Q. K., et al (2021), and *Research on the National Products Activities of Trade Associations in the Modern Shanghai Apparel Industry* by Chen Huili, & Jingqiong, Z. (2020) provide valuable insights into the development of China's modern apparel industry. However, these studies fail to fully capture the regional distinctiveness of Guangzhou. As a major commercial center and a key hub for apparel production and distribution in modern China, Guangzhou's national products apparel industry holds significant research value in terms of scale, influence, and cultural identity practices.

Additionally, theoretical studies on the relationship between cultural identity and brand internationalization by both domestic and international scholars provide important references for this research. For example, Hofstede, G. (1984) emphasizes how cultural dimension theory reveals the impact of cultural differences on consumer behavior, while Schooler, R. D. (1965) highlights the role of the country-of-origin effect in shaping consumer perceptions of a brand's cultural background and influencing purchasing decisions. These theories suggest that cultural identity is not only a core driving force behind brand internationalization but also a key factor in establishing differentiated competitiveness. However, existing research rarely integrates cultural identity theory with regional industrial history. In particular, there is a lack of systematic exploration of how cultural identity practices have evolved in Guangzhou's apparel industry from the National Products Movement to the New Era.

In the context of the New Era, Guangzhou's apparel industry is demonstrating new competitive advantages through the digital transformation of supply chains, exploration of brand internationalization, and deepening of cultural identity. However, challenges such as trade barriers in the globalization process, technological transformations, and supply chain restructuring in the post-pandemic era also pose significant obstacles to industrial development. This study primarily adopts a literature research methodology,

systematically reviewing historical newspapers, magazines, and archival documents related to Guangzhou's modern apparel industry and the National Products Movement from institutions such as the Sun Yat-sen Library of Guangdong Province and the Guangzhou Municipal Archives. Additionally, it incorporates industry reports and policy documents from the past three years (2022–2024) to provide a comprehensive analysis of the historical evolution and contemporary transformation of Guangzhou's apparel industry.

The core research question of this study is: How has Guangzhou's apparel industry transitioned from the national self-strengthening of the National Products Movement period to the brand innovation and internationalization of the New Era? In this process, what roles have national policies, industry organizations, brand innovation, and cultural identity played? By conducting a comparative analysis of the industrial environment, policy measures, and developmental outcomes across these two periods, this study aims to uncover the underlying logic of Guangzhou's apparel industry development and provide theoretical and practical insights for contemporary industrial policy formulation and brand internationalization strategies.

The significance of this research lies in its historical perspective—learning from history to inform the present. By summarizing historical experiences, this study seeks to offer valuable references for the high-quality development of Guangzhou's apparel industry within the framework of globalization and digitalization, particularly in addressing international trade barriers, fostering brand innovation, and strengthening cultural identity.

2. The National Products Movement and Modern Guangzhou's Apparel Industry: The Historical Logic of National Self-Strengthening

2.1 The Historical Background and External Challenges of the National Products Movement

China's modern National Products Movement was a socio-economic movement that emerged in the early 20th century, aimed at revitalizing the national economy. It arose in response to the colonial economic impact imposed by Western powers through unequal treaties and capital export. As one of China's earliest open port cities, Guangzhou was at the forefront of foreign goods dumping, facing immense pressure from imported products.

Following the Jinan Incident in 1928, Yuehua Daily published an article by Anonymous (1928) detailing the Guangdong Provincial Government's implementation of the Nationalist Government's National Products Promotion Plan. As shown in Table 1, the plan targeted four major groups—schools, the Ministry of Industry and Commerce, the Ministry of Finance, and the general public—proposing five specific measures to encourage domestic product consumption through policy guidance. This initiative catalyzed the rapid development of the National Products Movement in Guangzhou, making it a crucial component of the nationwide movement.

However, the impact of global economic colonization was not mitigated by the emergence of the National Products Movement. As a crucial hub for foreign trade, Guangzhou remained at the forefront of economic competition between China and foreign powers. The infiltration of foreign capital, the loss of tariff sovereignty, and the unequal competition in international markets posed significant challenges to Guangzhou's apparel industry during the early stages of the National Products Movement. Nevertheless, through policy guidance, industry collaboration, and public support, the movement created critical opportunities for the transformation and upgrading of Guangzhou's apparel industry, laying the foundation for subsequent brand innovation and cultural identity development.

2.2 Policy-Driven Development and Industry Response

The collaboration among the government, industry organizations, and enterprises was a defining characteristic of the National Products Movement in Guangzhou. As shown in Table 2, policy instruments

covered four key areas: market development, technological upgrading, cultural mobilization, and policy enforcement, forming a policy technology market closed-loop system.

Table 1. Implementation of The National Products Movement

Group	Measures for The Implementation
School	1. The Ministry of Education shall oversee the compilation and review of primary and secondary school textbooks, with a particular emphasis on promoting domestic products. 2. All governmental offices, including central and local administrative bodies and educational institutions, shall procure domestic products exclusively, except for books, machinery, and other essential items that are unavailable in China.
Ministry of Industry and Commerce	The Ministry of Industry and Commerce shall promptly formulate a plan for the revitalization of domestic industries and strictly prohibit merchants from misrepresenting foreign goods as domestic products.
Ministry of Finance	The Ministry of Finance shall implement policies to protect and support domestic products.
The masses	Provincial and municipal governments shall issue public proclamations advocating the nationwide promotion and consumption of domestic products.

In terms of market development, the government facilitated infrastructure construction, such as establishing national products markets (Anonymous, 1930) and exhibition halls (Anonymous, 1931), and implemented policy enforcement measures, such as the Civil Servants' Clothing and Fabric Regulations, which mandated the prioritization of domestic products in government procurement.

Technological upgrading relied on industry coordination and enterprise-led innovation. Industry organizations, such as chambers of commerce and trade associations, played a critical role in technology coordination and public advocacy. For instance, Anonymous (1930) announced in the Guangzhou Republic Daily the establishment of the Committee for Research on Substitutes for Imported Goods, aimed at advancing local textile technology.

At the enterprise level, product upgrading was achieved through brand innovation. Apparel companies, exemplified by Ligonmin Weaving Factory, introduced foreign textile machinery and registered proprietary trademarks (e.g., the Golden Deer brand), transitioning from imitation to independent innovation. This progression underscores the pivotal role of technology acquisition in industrial upgrading.

Moreover, since the late 19th century, the loss of China's tariff autonomy has led to an influx of foreign goods, severely constraining the development of domestic industries. In 1928, the Nanjing Nationalist Government declared the restoration of tariff autonomy and gradually increased import tariffs, creating a protective barrier for national industries. As a key hub for foreign trade, Guangzhou actively responded to this policy by raising import tariffs on apparel products, thereby restricting the dumping of foreign goods and securing market space for domestic apparel enterprises.

By implementing a strategy of government policy protection & industry technological collaboration & enterprise cultural innovation, Guangzhou demonstrated its regional distinctiveness and established a localized breakthrough model distinct from those of Shanghai and Tianjin (Table 3). However, in the later stages, due to external instability, the high-end market continued to struggle to compete with foreign products.

2.3 Cultural Identity and Brand Practices

Cultural identity served as a key driving force behind Guangzhou's National Products Movement in the apparel industry. To promote domestically produced clothing, the government and civil organizations leveraged exhibitions, newspaper columns, such as the National Products Column in Yuehua Daily, and fashion performances to embed nationalist symbols like patriotism and self-strengthening into consumer behavior.

Under the influence of the National Products Movement, Guangzhou witnessed the emergence of several representative domestic apparel brands. For instance, Li Gongmin Weaving Factory introduced the Golden Deer 120-thread-count yarn, which, due to its high quality and strong national identity, successfully replaced France's Deer Head brand, gaining popularity across Guangdong and Guangxi provinces and expanding into Southeast Asian markets. Similarly, Zhou Yixing Factory developed the Bicycle 100-thread-count yarn, positioning itself as a competitor to Germany's Iron Tower brand. Through its refined craftsmanship and localized design aesthetics, the brand earned widespread consumer recognition.

Table 2. Core Policies and Achievements of the National Products Movement in Guangzhou

Policy Domain	Major Measure	Effect
Market Construction	Establishment of National Products Markets and Exhibitions: National Products Market By 1930, National Products Exhibition Hall By 1931, and National Products Trade and Sales Center By 1933.	Establishment of National Products Exhibition and Sales Platforms: Enhanced the visibility of local brands.
Technology Upgrading	Technological Advancement and Industry Coordination: Establishment of the Committee for Research on Substitutes for Imported Goods By 1930; introduction of foreign textile machinery and production technologies.	Improvement in Production Efficiency and Quality: By 1930, 221 types of domestically produced clothing items (accounting for 68%) could replace imported goods, covering 18 trademarked brands. Additionally, 84 types of domestic products (26%) had no equivalent foreign substitutes, while only 20 types of foreign products (6%) lacked corresponding domestic alternatives.
Cultural Mobilization	Cultural Mobilization and Public Awareness Campaigns: Organization of National Products Exhibitions and Apparel Standards Exhibitions; publication of special issues dedicated to the National Products Movement, including The Advocacy of National Products and the Frugality Movement Series, National Products Movement Special Issue, Women's Special Issue on the Advocacy of National Products, Guangdong Women's Association for National Products Advocacy Bulletin, and Guangzhou National Products Bulletin; organization of public lectures on national products; establishment of dedicated columns on national products in newspapers; hosting of apparel competitions and exhibitions; organization of national products fashion shows.	Strengthening Consumer Identification with Local Culture: Fostered national product consumption by reinforcing cultural identity.
Policy Coercion	Policy Enforcement and Regulatory Measures: Mandatory adoption of domestic products as an initial measure for economic recovery. Various regulations, such as the Regulations on the Uniform System of the Republic of China, Guidelines for the National Products Movement, Public Security Bureau's Advocacy of National Products, Police Uniform Regulations, Mandatory Use of National Products in the Ministry of Construction and Education, Draft Standards for Apparel, and Civil Servants' Clothing and Fabric Regulations, explicitly promoted the purchase and use of domestic products, with some even specifying the exact types of domestic fabrics to be used.	Industry Growth and Market Expansion by 1934: The Western-style Clothing Guild had 82 stores, with a total asset value of 48,150 yuan. The Machine-Knitted Sweaters and Hosiery Guild had 21 stores, with a total asset value of 38,700 yuan. The Second-Hand Clothing Guild had 81 stores, with a total asset value of 123,120 yuan. The Footwear Guild had 81 stores, with a total asset value of 82,600 yuan.

Table 3. Regional Distinctiveness of Guangzhou

Dimension	Guangzhou	Shanghai	Tianjin
Cultural Strategy	Cantonese characteristics & National Products Exhibitions	Haipai design & Concession culture integration	Northern folk traditions & Government-led enterprises
Industrial Foundation	Complete industrial chain & Foreign trade tradition	High-end brands & Internationalized design	Textile raw materials & Northern market hub
Policy Focus	Tariff autonomy Industry collaboration	Special policies in concessions	Support from the Viceroy of Zhili

2.4 Achievements and Limitations

Driven by the National Products Movement, Guangzhou's apparel industry underwent a transformation from low-quality to high-quality production, evolving from imitation to independent manufacturing, continuous product innovation, and eventual superiority over foreign goods. A 1930 survey indicated that domestically produced clothing could replace 68% of imported apparel, covering 18 registered trademarks (Guangdong Provincial Department of Construction, 1930). Additionally, Guangzhou's garment enterprises, through the adoption of advanced equipment and technology, established independent production sectors, including Western-style suits, fashion apparel, and knitwear. The industry further expanded into specialized fields such as tailored Western-style clothing, uniforms, machine-sewn garments, and bespoke tailoring.

According to statistics from the Guangdong Provincial Bureau of Investigation (1935), between 1929 and 1934, the total number of newly established businesses in Guangzhou reached 17,281, with an average net increase of 1,157 per year (Guangzhou Chamber of Commerce, 1934). Furthermore, between 1930 and 1932, 13 industry-related associations, including the Western-Style Clothing Guild, Secondhand Clothing Guild, and Machine Sewing Guild, were either newly established or restructured to support the development of the apparel industry. By 1934, trade associations related to Western-style clothing and machine-knit apparel had significantly expanded their asset scale (Table 2).

Despite these notable achievements, Guangzhou's apparel industry continued to face multiple challenges in the later stages of the National Products Movement. External instabilities, such as warfare and the global economic crisis, disrupted industrial development, limiting its long-term sustainability. The high-end market remained unable to compete effectively with imported goods. Additionally, some enterprises lacked long-term brand development strategies, remained dependent on imported technologies, and demonstrated insufficient originality in design, exposing vulnerabilities within the industrial supply chain.

3. Strategic Transformation of Guangzhou's Apparel Industry in the New Era : A Dual-Driven Approach of Globalization and Digitalization

3.1 Restructuring of the International Environment and Strategic Response

The strategic transformation of Guangzhou's apparel industry in the new era has been shaped by the dual forces of globalization and digitalization. During this period, the global economy and industrial landscape have undergone profound changes, particularly under the impact of the COVID-19 pandemic, which has led to significant adjustments in global supply chains, consumption patterns, and trade policies. As a key hub of China's apparel industry, Guangzhou's development trajectory has been influenced not only by domestic policy directives but also by the restructuring of the international economic environment.

3.1.1 Regionalization of Global Supply Chains: From Made in China to Regional Collaboration

In the post-pandemic era, the global supply chain has undergone accelerated regional restructuring, exerting pressure on Guangzhou's apparel industry to transition from the traditional Made in China model to a regional collaboration framework. In 2023, Guangzhou's apparel exports accounted for 14.6% of the

national total, reflecting a 3.4 percentage point decline from 18.0% in 2019. Concurrently, Southeast Asia's share of global apparel production capacity surged to 25% (Guangdong Provincial Department of Commerce, 2023), compelling enterprises to reconfigure their supply chains. According to the 2024 Aimer Co., Ltd. Vietnam Production Base Construction Report, leveraging RCEP tariff benefits has enabled a 20% reduction in production costs, exemplifying the trend toward regionalized collaboration (Aimer Co., Ltd., 2024).

In this transformation process, national policies, industry organizations, and corporate strategies have collectively driven the regionalization of supply chains:

National Policies: The RCEP agreement offers tariff reductions and regional market access, lowering the barriers for enterprises entering the Southeast Asian market (Guangdong Provincial Department of Commerce, 2024).

Industry Organizations: Trade associations have organized investment delegations to Southeast Asia and published risk assessment reports, helping enterprises mitigate investment risks (Guangzhou Business Bureau, 2023).

Corporate Strategies: Guangzhou's apparel enterprises have established localized production facilities and cross-border collaborations, developing a regionalized supply chain network to enhance global competitiveness.

3.1.2 Digital Technology-Driven Transformation of the Industrial Ecosystem

Digital technology is reshaping the ecosystem of Guangzhou's apparel industry. In 2023, Guangzhou-based apparel enterprises achieved a 32% year-on-year increase in cross-border e-commerce exports through platforms such as Shein and Temu (iiMedia Research Group, 2023). According to the Guangzhou Industrial and Information Technology Bureau. (2024) in the Guangzhou Apparel Industry Digital Transformation Report, the digital transformation rate surged from 35% in 2021 to 65% in 2024 (Figure 1), highlighting substantial progress in the adoption of digital technologies by Guangzhou's apparel enterprises. This trend has been facilitated by the Guangdong Provincial Government's Digital Economy Promotion Regulations, as well as active industry association initiatives promoting technological adoption.

For example, URBAN REVIVO, a leading Guangzhou-based fashion brand, leveraged digitalized factories to achieve a seven-day turnaround from design to market, improving inventory turnover by 40%—a landmark case of digital transformation (URBAN REVIVO, 2023).

The key drivers of digital transformation in Guangzhou's apparel industry include:

Policy Support: The Guangdong Provincial Digital Economy Promotion Regulations provide up to 10% financial subsidies for intelligent manufacturing upgrades.

Technology Sharing: Industry associations have organized digital factory tours to promote the adoption of AI design tools.

Corporate Initiatives: Guangzhou apparel enterprises have actively integrated AI-driven design tools and big data analytics, optimizing production processes and reducing R&D costs.

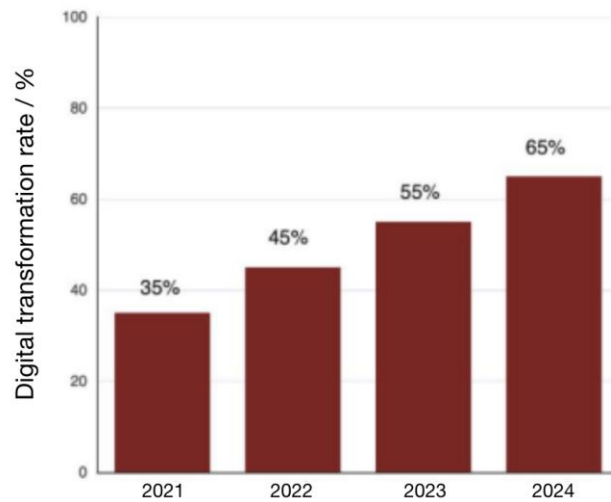


Figure 1. Digital Transformation Rate of Guangzhou's Apparel Industry (2021–2024). Source: Guangzhou Bureau of Industry and Information Technology, Guangzhou Apparel Industry Digital Transformation Report (2024).

3.1.3 Cultural Consumption Upgrade and Brand Value Recognition

The upgrading of cultural consumption has facilitated the internationalization of domestic brands. Research published by iiMedia Consulting indicates that the Guochao apparel market continues to expand, demonstrating strong consumer potential. According to the China Fashion Association (2024) in the China Apparel Brand Internationalization Index Report, Guangzhou's brand internationalization index reached 22% in 2024, surpassing the national average of 15%. This advantage is attributed to Guangzhou's apparel enterprises actively exploring cultural identity and brand development. For instance, the local brand MO&Co., characterized by the fusion of Lingnan's Intangible Cultural Heritage & Minimalist Design, has showcased the innovative potential of Chinese fashion brands. By integrating elements of Lingnan's intangible cultural heritage with contemporary minimalist aesthetics, MO&Co. has gained recognition in the global apparel industry.

The key pathways for constructing cultural identity include:

Policy Support: National cultural authorities provide cultural resources and policy incentives through initiatives such as the Textile Intangible Cultural Heritage Inheritance and Development Action Plan by 2020, fostering the integration of heritage into brand development.

Industry Initiatives: Industry associations promote innovation and standardization of cultural symbols by organizing events such as the Guochao Design Competition.

Corporate Strategies: Guangzhou apparel enterprises enhance brand cultural identity through advertising campaigns, exhibition activities, and international marketing strategies.

3.2 Policy and Market Synergy: Institutional Dividends and Resource Integration

3.2.1 RCEP Policy Dividends: Tariff Reduction and Regional Market Expansion

In the new era, national policies and regional cooperative development have provided Guangzhou's apparel industry with crucial institutional dividends and a platform for resource integration. The implementation of the Regional Comprehensive Economic Partnership (RCEP) has brought significant tariff reductions and market expansion opportunities for the sector. According to data from the General Administration of Customs of China (GACC), China's textile and apparel exports reached \$298.47 billion in

2023, marking a 3.2% year-on-year growth (General Administration of Customs, 2024). While Guangzhou's apparel export data has not been separately disclosed, as a key apparel manufacturing hub, local enterprises have significantly benefited from RCEP's tariff reduction policies. For instance, by September 2024, the cumulative value of Certificates of Origin issued under RCEP reached \$21.963 billion, reflecting a 10.35% year-on-year increase (China Customs, 2024), demonstrating the sustained release of policy dividends.

3.2.2 Resource Integration in the Guangdong-Hong Kong-Macao Greater Bay Area (GBA)

The coordinated development of the Guangdong-Hong Kong-Macao Greater Bay Area (GBA) has provided Guangzhou's apparel industry with essential technological, design, and financial support. For example, the 2023 co-branded collection launched through the collaboration between Hong Kong designers and Guangzhou supply chains under the EXCEPTION brand achieved a 40% increase in sales revenue (Guangzhou EXCEPTION Fashion Co., Ltd., 2024). Additionally, Shenzhen's digital twin technology has been applied to Guangzhou's flexible production lines, improving production efficiency by 25% (Shenzhen Institute of Digital Economy, 2024). Furthermore, leveraging the logistics hub advantages of the Greater Bay Area, such as Baiyun Airport and Foshan's warehousing facilities, Guangzhou has established a fully integrated industrial network encompassing design, production, and logistics. This cross-regional resource integration and collaborative innovation not only compensates for Guangzhou's shortcomings in high-end design and technological R&D but also significantly enhances the overall competitiveness of the industry.

3.2.3 Sustainable Development Policy as a Driving Force

Sustainable development policies have set the direction for the green transformation of Guangzhou's apparel industry. In 2023, the Guangdong Provincial Government released the Guiding Opinions on Green Transformation in the Textile and Apparel Industry, explicitly stating that carbon emissions in the apparel sector must be reduced by 30% by 2030. In response to this policy directive, Guangzhou's apparel industry has actively promoted green transformation, achieving remarkable progress. Data indicates that in 2023, the carbon emission reduction compliance rate in Guangzhou's apparel industry reached 50%, while the utilization rate of recycled fabrics stood at 15%. By 2024, these two key indicators had further improved to 80% and 30%, respectively, as shown in Table 4. This significant progress not only highlights the effective guidance of policy measures but also demonstrates the proactive investment and rapid advancements of Guangzhou apparel enterprises in technological innovation.

Table 4. Achievements in the Green Transition of Guangzhou's Apparel Industry (2023–2024).

Year	Carbon Emission Reduction Compliance Rate	Recycled Fabric Utilization Rate
2023	50%	15%
2024	80%	30%

Source: Guangdong Provincial Government, Guiding Opinions on Green Transformation in the Textile and Apparel Industry (2024).

3.3 Case Study: From Local Breakthrough to Global Competition

EXCEPTION is a leading representative of high-end Chinese womenswear brands. Since its establishment in 1996, the brand has consistently embraced Eastern Aesthetics as its core design philosophy, striving to integrate traditional Chinese culture with contemporary fashion. Through cultural narratives and design innovation, EXCEPTION has progressively expanded from the domestic market to the international stage, serving as a key example of the premiumization and globalization of Chinese apparel brands.

The internationalization of EXCEPTION began with its in-depth exploration and innovative application of traditional Chinese culture. The brand collaborates with intangible cultural heritage (ICH) artisans, incorporating traditional craftsmanship such as Canton embroidery and Xiangyun silk into modern fashion

designs, creating a distinctive Eastern Aesthetic style. For instance, its 2020 Cloud Brocade collection employed traditional brocade weaving techniques, with individual pieces priced above 10,000 RMB, garnering strong interest from high-end consumers (Guangzhou EXCEPTION Fashion Co., Ltd., 2020). This culture-driven design strategy has not only enhanced the brand's artistic value but also secured widespread recognition in the domestic market. The brand has established flagship stores in first-tier cities such as Beijing, Shanghai, and Guangzhou, targeting high-end consumer groups. According to Luxe.co (2023), EXCEPTION has set up counters in premium shopping malls such as Beijing SKP and Shanghai Plaza 66, with annual sales steadily increasing.

From a policy perspective, EXCEPTION has benefited from national policies supporting ICH preservation and cultural exports. For example, the Action Plan for the Inheritance and Development of Textile Intangible Cultural Heritage proposed by the Ministry of Culture and Tourism of China (2020) provided policy and financial support, enabling the brand to delve deeper into cultural resource exploration. Additionally, EXCEPTION has collaborated with local governments to organize cultural exhibitions, further enhancing its cultural value. In partnership with the Guangzhou Cultural Center (2022), the brand hosted the Intangible Heritage and Modern Design exhibition, showcasing contemporary applications of Canton embroidery and Xiangyun silk, attracting widespread attention from both domestic and international media and consumers. This synergy between policy support and market demand has laid a solid foundation for the brand's internationalization.

Although EXCEPTION's presence on the global stage has yet to be systematically documented, the brand has gradually enhanced its international influence by participating in high-end fashion events both domestically and internationally. It has been a frequent exhibitor at China Fashion Week, showcasing its Eastern Aesthetic design philosophy. In 2021, the brand hosted the EXCEPTION Eastern Aesthetics thematic exhibition in Beijing, attracting significant attention from global media and consumers (China Fashion Week Organizing Committee, 2021).

The case of EXCEPTION demonstrates that high-end Chinese fashion brands can enhance their global influence through cultural empowerment. Its success can be attributed to the integration of traditional cultural elements with modern design, leveraging national ICH protection policies for deeper cultural resource exploration, and focusing on the high-end consumer market to elevate brand value.

3.4 Achievements and Challenges

In the context of the new era, the development of Guangzhou's apparel industry presents both significant achievements and formidable challenges. According to research data from Li, R. Z. & Li, J. et al. (2024), Guangzhou was home to nearly 50,000 enterprises engaged in apparel and related industries, with over 7,000 registered apparel trademarks, accounting for approximately 10% of the national annual sales revenue. Moreover, the industrial ecosystem in Guangzhou encompasses almost all key stages of the supply chain, with the exception of natural fiber extraction. Specifically, Guangzhou serves as a central hub for fabric and accessory supply, apparel design, and pattern making, while also functioning as a critical distribution center, thereby forming a comprehensive and highly efficient supply chain system.

However, the industry simultaneously faces an intricate network of challenges, including extreme fluctuations in market demand, the transition from traditional business models, the rapid expansion of cross-border e-commerce, the deep integration of digital technologies, and the fast-paced evolution of original design. These factors are interwoven, collectively posing significant tests to the industry's adaptability and flexibility while also driving profound structural transformations within the ever-evolving global economic landscape.

The latest economic mid-year report released by Guangzhou provides an overview of economic activity

in the first half of the year. During this period, the city's total retail sales of consumer goods reached 560.155 billion RMB, remaining largely unchanged compared to the same period in the previous year. A closer examination of the retail performance across different product categories reveals key insights, particularly within the 21 major categories of goods sold by enterprises above a designated size. The apparel, footwear, and textile sector demonstrated a noticeable slowdown, with its year-on-year growth rate dropping significantly to 1.3%, a sharp decline from the 15.3% growth recorded in 2023. This stark contrast further underscores the challenges facing Guangzhou's apparel industry, particularly in the context of evolving consumer market dynamics, intensified industry competition, and the complex transformations within the broader macroeconomic environment. The industry's growth momentum and market adaptability are currently undergoing rigorous tests.

4. Historical and Contemporary Comparison: Evolutionary Logic and Differentiated Strategies

This study constructs a three-dimensional comparative framework based on policy instruments, cultural empowerment, and technological transformation (Table 5) to systematically compare the evolutionary logic of Guangzhou's apparel industry during the National Products Movement and the New Era. The findings reveal that although both periods were driven by national policies, the mechanism of influence has shifted from direct government intervention to market-oriented guidance. Additionally, strategies related to cultural identity and technological application have undergone significant transformations in response to globalization, collectively advancing the industry's shift from national self-strengthening to brand internationalization.

4.1 Theoretical Construction of the Comparative Framework

From the perspective of historical institutionalism, the comparative framework is established based on the shared characteristics and divergent logic of these two periods.

Table 5. Theoretical Construction of Comparative Framework and Historical Correspondences.

Comparative Dimension	National Products Movement (1920s–1940s)	New Era (2022–present)	Theoretical Basis
Policy Instruments	Government-led model (administrative orders, mandatory procurement)	Market-driven model (subsidy incentives, institutional innovation)	Hall's Policy Instrument Classification Theory (Hall, P. A., 1993)
Cultural Empowerment	Nationalist symbolism (e.g., the political metaphor of the Zhongshan suit)	Modern reinterpretation of traditional culture	Cultural Capital Theory (Bourdieu P., 1986)
Technological Transformation	Introduction of mechanized production	Construction of a digital ecosystem (blockchain, 3D designs)	Techno-Economic Paradigm Theory (Freeman, c. & Louca, F., 2001)

First, both periods faced structural external shocks. During the National Products Movement, China encountered economic aggression from foreign powers, exemplified by tariff barriers that severely constrained domestic apparel production. For instance, in 1925, the import tariff on cotton textiles was merely 5%, which significantly squeezed the survival space for domestically produced clothing (Guangzhou Local Chronicle Compilation Committee, 1999). In contrast, the New Era must navigate technological barriers and green trade standards, such as the European Union's Circular Economy Action Plan, which mandates traceability and environmental certification for textiles.

Second, policy instruments have remained the core driving force, though their operational modes have evolved. During the National Products Movement, administrative mandates played a dominant role, such as the 1928 National Products Ordinance, which enforced compulsory procurement of domestic cotton fabrics. In contrast, the New Era stimulates market vitality through institutional innovation, exemplified by the 2023 Guangzhou Textile and Apparel Industry High-Quality Development Action Plan, which provides subsidies for digital transformation.

Third, cultural identity has shifted from a singular nationalist symbol to a fusion of globalization and localization, while technological application has progressed from mechanized production to a digitally integrated ecosystem. These transformations collectively constitute the core logic of differentiated competition in the contemporary apparel industry.

4.2 Evolutionary Logic of Industrial Environment and Policy Instruments

The differences in the nature of external shocks have profoundly influenced the choice of policy instruments. During the National Products Movement, the government directly intervened in the market through administrative measures. For instance, the Guangzhou municipal government, in collaboration with local business associations, organized the National Products Exhibition, mandating government agencies and schools to procure domestically produced apparel. While this government-led model temporarily boosted local industries, its long-term reliance on policy protection resulted in insufficient innovation capacity.

In contrast, policy instruments in the new era emphasize the combination of an effective market and an enabling government. For example, under the RCEP framework, tariff reduction policies have lowered regional trade costs, while subsidies for digital transformation have encouraged enterprises to integrate into industrial internet platforms autonomously. According to data from iResearch (2023), the adoption rate of 3D virtual garment technology among Guangzhou apparel enterprises reached 37% in 2023, reflecting a 21-percentage-point increase compared to 2021. This shift from market substitution to market empowerment underscores the deeper logic of China's economic system reform.

It is crucial to highlight that the leading role of national policies has not diminished but has instead been reinforced through a strategic role transformation. In the National Products Movement, policies were primarily defensive, and aimed at resisting external economic aggression. In contrast, contemporary policies focus on proactive innovation, such as the integration of resources within the Guangdong-Hong Kong-Macao Greater Bay Area, fostering global synergy across design, production, and marketing. Although policy remains central in both periods, its mechanism has been optimized alongside increasing marketization.

4.3 Cultural Empowerment Mechanism and Differentiation Strategies

The practice of cultural identity exhibits distinct characteristics across different eras. During the National Products Movement, cultural empowerment was deeply rooted in nationalist narratives. For instance, the design of the Sun Yat-sen suit incorporated symbolic elements, such as four pockets representing propriety, justice, integrity, and honor, while national product advertisements reinforced political identity with slogans like Buying national products is an act of patriotism. These strategies successfully mobilized patriotic consumption.

In contrast, the contemporary Guochao movement achieves cultural empowerment through the modern reinterpretation of traditional elements, enabling brands to break into new markets. A prime example is the incorporation of Xiangyun silk, an intangible cultural heritage craft, into high-end ready-to-wear collections, thereby enhancing cultural value output. This approach not only sustains cultural consciousness but also elevates brand premiums through a luxury positioning strategy.

However, cultural internationalization remains constrained by Western aesthetic hegemony. International fashion media often stereotype Chinese design under the label of Oriental mysticism, thereby limiting the global premiumization of Chinese brands. In response, Guangzhou-based enterprises have adopted cross-cultural narratives to navigate these barriers. For example, when Inman expanded into Belt and Road Initiative (BRI) markets, it strategically employed minimalist design aesthetics to downplay regional stereotypes while emphasizing universal appeal. This approach mitigates cultural discounting while preserving the cultural resilience evident in the National Products Movement.

4.4 Technological Transformation and the Shift in Competitive Paradigm

The application of technology has evolved from instrumental innovation to ecosystemic reconstruction. During the National Products Movement, technological advancements primarily revolved around the introduction of mechanized equipment. In contrast, the new era leverages digital technologies to restructure the industrial ecosystem. Notable innovations include:

Blockchain technology, which enables end-to-end traceability of cross-border orders.

3D virtual design technology, which has reduced prototype sampling costs by 60%.

This technological paradigm shift has driven Guangzhou's apparel industry away from a cost-driven competition model toward a value-driven competition paradigm, reinforcing the industry's global competitiveness.

4.5 Core Logic of Differentiated Competition

Historical experience demonstrates that the strategic transformation of Guangzhou's apparel industry has consistently relied on policy, cultural, and technological synergy. During the National Products Movement, policy protection and technology acquisition facilitated the initial establishment of the industry chain. In contrast, the New Era pursues market-driven strategies, cultural reinterpretation, and digital ecosystem construction to compete for higher positions in the global value chain.

The fundamental difference between the two periods lies in their innovation strategies:

The National Products Movement adopted defensive innovation to counter external economic threats and ensure industrial survival.

The New Era emphasizes proactive innovation to expand international markets and enhance global competitiveness.

This evolutionary logic reinforces the argument presented in the abstract, while national policies have consistently played a guiding role, their implementation pathways dynamically adjust to evolving economic demands. Meanwhile, industry organizations and market mechanisms operate within the policy framework, driving industrial upgrading through synergistic collaboration. Ultimately, brand innovation and cultural identity emerge as the core driving forces behind the industry's continuous advancement.

5. Cultural Identity and Brand Internationalization: Theoretical Framework and Guangzhou's Practice

Cultural identity serves as the core driving force behind the internationalization of Guangzhou's apparel industry, but its mechanisms have evolved significantly from the National Products Movement to the New Era. This chapter, based on cultural capital theory and practical cases in Guangzhou's apparel industry, systematically explores how cultural identity is translated into brand value through symbolic reinterpretation and narrative reconstruction. It also analyzes the barriers and breakthrough strategies in the process of internationalization.

5.1 Theoretical Model of Cultural Identity: From Cultural Capital to Brand Value

The construction of cultural identity is fundamentally a process of transforming cultural capital into

economic capital. According to Bourdieu's (1986) cultural capital theory, cultural symbols (e.g., traditional craftsmanship, regional aesthetics) shape consumer perceptions through symbolic power, thereby influencing market behavior.

During the National Products Movement, Guangzhou's apparel industry politicized cultural identity through nationalist symbols such as the Zhongshan suit, stimulating patriotic consumption.

In the New Era, brands leveraged the Guochao movement to reinterpret Lingnan cultural elements (e.g., Xiangyun silk, Guang embroidery), creating a brand language that is both culturally distinctive and globally appealing.

For instance, Guangzhou-based brand EXCEPTION integrates Xiangyun silk craftsmanship with minimalist design, showcasing a fusion of Chinese tradition and modern fashion. This design philosophy has gained international recognition, demonstrating the effectiveness of the cultural capital-to-brand value transformation mechanism. The rarity of cultural symbols (e.g., intangible heritage craftsmanship). Innovative storytelling (e.g., contemporary design). Together, these elements enhance brand value and global appeal.

5.2 Barriers to Internationalization: Western Aesthetic Hegemony and Cultural Discount

Although cultural identity provides a foundation for brand differentiation, Guangzhou's fashion brands face structural barriers in international markets:

Western aesthetic hegemony: The Western fashion system dominates global aesthetic discourse, often reducing Chinese designs to stereotypical Oriental mysticism. For example, Vogue's 2023 feature on Chinese designers focused 70% on traditional motifs such as dragon patterns and toggle fastenings, largely ignoring technical innovations in Chinese fashion. This restricts the perception of Chinese brands as premium players in the global market.

Cultural discount phenomenon: Consumers' acceptance of non-Western cultural symbols is often limited due to cognitive and aesthetic differences. This affects the market penetration of culturally distinctive designs.

5.3 Breakthrough Strategies: Cross-Cultural Narratives and Localization Integration

To overcome these challenges, Guangzhou's fashion brands should adopt a dual adaptation strategy. Modern reinterpretation to reduce cultural barriers. Regional collaborations to strengthen cultural resonance.

Modern Reinterpretation of Lingnan Culture: Luxury positioning of Xiangyun silk serves as a successful case study. Through material innovation (e.g., blending with silk), streamlined design, and color palette innovation, Xiangyun silk preserves its cultural essence while aligning with international minimalist aesthetics. According to industry research, high-end Xiangyun silk apparel has gained attention in Western markets, indicating that cultural value can be converted into brand loyalty.

Constructing Cross-Cultural Narratives: The Belt and Road Initiative (BRI) provides a strategic context for innovative narratives. For instance, Guangzhou-based brand Inman successfully entered Southeast Asian markets by leveraging the Maritime Silk Road narrative. By combining Lingnan fashion culture with local textile traditions, Inman launched co-branded collections, leading to significant sales growth in Southeast Asia.

By bridging cultural gaps and adapting narratives to diverse markets, Guangzhou's apparel industry can enhance its international competitiveness while maintaining a strong cultural identity.

6. Strategic Insights: Building a New Ecosystem for Guangzhou's Apparel Industry under the Dual Circulation Framework

China's Dual Circulation strategy, proposed in 2020, emphasizes a development model that prioritizes domestic circulation while integrating global engagement (State Council Information Office, 2020). Domestic circulation focuses on expanding domestic demand, optimizing supply chains, and enhancing brand value to activate the local market. International circulation relies on global collaboration and regional trade agreements (e.g., RCEP) to expand foreign markets and integrate global resources. The synergy between these two circulations enables the transition from scale expansion to quality-driven industry upgrading in Guangzhou's apparel sector.

6.1 Policy Recommendations: Strengthening Supply Chain Resilience and Institutional Advantages

To enhance the resilience of supply chains, the government should prioritize digital infrastructure development. Blockchain technology could improve cross-border logistics efficiency, a critical gap identified by iResearch (2023) in Guangzhou's apparel industry. Leveraging RCEP tariff reductions, the Guangdong-Hong Kong-Macao Greater Bay Area (GBA) can further collaborate with ASEAN nations. In 2023, 24% of Guangzhou's apparel exports were transshipped via Vietnam (Guangdong Provincial Department of Commerce, 2023), yet regional supply chain integration still needs refinement. The EU Circular Economy Action Plan mandates a 65% textile recycling rate by 2025, necessitating green subsidies to help Guangzhou enterprises comply with international sustainability standards.

6.2 Business Strategies: Data-Driven Operations and Cultural IP Development

Guangzhou's fashion brands must embrace data-driven transformation. AI-powered consumer behavior analysis on e-commerce platforms can optimize clothing patterns, reducing the sample-making cycle from 15 days to 3 days. Expanding cultural IP collaborations (e.g., co-branded collections with the Forbidden City Museum) can leverage cultural traffic to enhance brand recognition. Alibaba Research Institute (2022) found that cultural IP co-branded products significantly boosted sales and increased average transaction value during promotions.

6.3 Global Collaboration: Regional Integration and Design Resource Optimization

On the international front, Guangzhou should enhance production collaboration with Southeast Asia and integrate European design resources. The Guangdong Textile & Apparel Industry Southeast Asia Investment Guide suggests establishing a design-production-logistics integrated park in Vietnam to leverage low labor costs for manufacturing. Simultaneously, setting up a design center in Milan could attract European fashion talent, forming a front-end retail, and back-end manufacturing model to strengthen Guangzhou's global design influence.

By leveraging digital transformation, cultural branding, and global collaboration, Guangzhou's apparel industry can successfully transition from cost competition to value-driven innovation in the Dual Circulation era.

7. Conclusion and Recommendation

By comparing the evolutionary trajectory of Guangzhou's apparel industry during the National Product Movement and the New Era, this study reveals the strategic transition from national self-strengthening to brand innovation and internationalization. The findings indicate that national policies have consistently served as the primary driving force of industrial development, yet their mechanisms have dynamically adjusted to meet evolving demands: while the National Product Movement relied on government-led administrative interventions to counter external shocks, the contemporary era has emphasized market-driven

approaches and institutional innovations to stimulate enterprise dynamism. The synergistic effects of cultural identity and technological transformation are evident across both periods: cultural identity has shifted from nationalist symbolism to localized global integration, while technological progress has evolved from mechanized production to the construction of a digital ecosystem, collectively enhancing the industry's differentiated competitive advantage.

Amid the dual challenges of globalization and digitalization, the transformation of Guangzhou's apparel industry offers valuable historical insights. Empirical evidence suggests that policy instruments must be deeply integrated with market mechanisms and cultural resources to facilitate the transition from scale expansion to value upgrading. The dual circulation framework in the contemporary era presents new opportunities for Guangzhou:

Domestic circulation requires data-driven strategies and cultural IP operations to stimulate domestic demand.

The international circulation necessitates regional collaboration and design resource integration to overcome trade barriers.

However, Western aesthetic hegemony and cultural discounting remain significant challenges for brand internationalization. Future research could further explore optimization pathways for cross-cultural narrative strategies.

This study has certain limitations, primarily in terms of the scope of contemporary data coverage and the quantitative analysis of cultural identity. Future research is encouraged to incorporate consumer behavior surveys to quantify the impact of cultural capital on brand premium, as well as to track the long-term effects of regional agreements such as RCEP. In summary, the strategic transformation of Guangzhou's apparel industry not only exemplifies the broader upgrading of China's manufacturing sector but also provides a significant paradigm for the innovative development of traditional industries within the context of globalization.

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