

**CITY UNIVERSITY OF HONG KONG**  
**香港城市大學**

**“Shift Disruptions” Transforming the  
Apparel Global Sourcing Landscape**  
**轉移變動：改變服裝全球採購前景**

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## Abstract

The landscape of apparel global sourcing is experiencing seismic activity through “shift disruption.” While the apparel sourcing caravan has historically roamed from developing country to the next to find lower production costs, forces are disrupting these traditional patterns in global sourcing, creating alert signals being sent by emerging trends. Not only have production countries been replaced over the years, global sourcing organizational-level transformations from the linear economy to the digital economy are disrupting business models. The evolution from traditional risks to emerging risks impacts the time to respond (TTR) and the mitigation reaction that impact different countries and regions in the apparel landscape. In addition, technology innovation is transforming traditional industries as well as trade policy. Furthermore, there has been a reposition in the supply chain cornerstone—trending from the fulfillment supply chain to the development supply chain, as the global sourcing function occurs at the front end and back end of the supply chain. The early recognition of these shifts is unexplored in global sourcing studies. The purpose of this study was to identify the “shifts” that are driving disruptions affecting the apparel global sourcing landscape, from traditional versus emerging shifts, creating an enhanced sourcing shift risk management framework which includes risk foresight, identification, assessment, mitigation, and monitoring (FIAMM). The findings reflect sourcing shifts by linking apparel import secondary data from the U.S. Dept of Commerce with a cluster analysis in comparison to primary group survey data from sourcing practitioners to analyze the perception of shift in apparel producing countries over time. Past studies’ researchers report a lack of analysis of secondary trade data as well as lack of empirical research that identifies patterns in global sourcing shift. In addition, results of this study’s survey capture emerging global sourcing levels, ranking of key impact forces revolutionizing the global sourcing landscape, changes in TTR, tiering the mitigation level of these forces and

observing innovation adoption in apparel technology shifts. Finally, a framework was constructed for global sourcing practitioners that incorporates not only the traditional risk management steps of identification, assessment, and mitigation, but furthermore deploys updated risk management direction in global sourcing studies through foresight future methodologies to best manage emerging trends and shifts for the apparel global sourcing landscape.

*Keywords:* apparel global sourcing, textile and apparel trade, global sourcing evolution, tariff and non-tariff barriers, global sourcing supply chain, risk management, technology innovation, innovation adoption, foresight studies