



Women Workers in a Continuum of Risks

Impacts of Tariff Shocks in the Garment Sector in Bangladesh and India

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Abstract

This paper¹ examines the gendered impacts of the unilateral tariffs imposed by the Trump regime on the feminised, export-oriented garment sectors in India and Bangladesh. Injecting further volatility into a systemically unequal and fragile multilateral trade system, they disproportionately impact women workers. As costs and production pressures are pushed down the global garment supply chain, women workers in both countries face loss of jobs, uncertainty, lower social security benefits, and weaker bargaining power. Seeking to address and reverse these gendered impacts, the paper proposes a multi-pronged gender-transformative approach, including fair trade agreements, greater brand accountability, and stronger regional and global workers' alliances.

1. Introduction

The tariffs imposed unilaterally by the Trump regime since 2025 have wreaked havoc and increased volatility in an already systemically unequal, fragile multilateral trade system. They have exacerbated the vulnerability of many women working in precarious conditions in export-oriented markets in the Global South, who already face the differentiated impacts of unequal trade regimes. While emerging evidence has pointed to the tariffs' significant impacts in this context, including in export-oriented, labour-intensive sectors such as the ready-made garment (RMG) sector (Raman, 2025; Preetha, 2025; News Desk, 2025; Belrhiti et al., 2026), these impacts have not been probed further in South Asia. This paper seeks to remedy this by contextualising and examining the tariffs' gendered impacts on the garment sector in India and Bangladesh. The sector was chosen as it is a significant export-oriented sector that has faced high tariffs since 2025, as well as being highly feminised, employing high proportions of marginalised women in low-skilled, low-paying jobs.

Drawing on both secondary research as well as seven Key Informant Interviews (KIIs) with researchers and leaders of

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collectives and unions in the sector who work alongside women workers in the two countries, the paper centres women's experiences at work to understand how the risks, pressures, and costs of trade uncertainty are gendered and unevenly distributed.² It examines how women workers face further precarity during crises, such as the recent imposition of tariffs, when cost and production pressures are pushed down the garment supply chain in a global trading system that relies on extractive, exploitative monopolistic relationships between brands (buyers) and contract manufacturers (suppliers), and between manufacturers and a feminised workforce (Nathan *et al.*, 2025; Mezzadri and Srivastava, 2015). Through this analysis, the paper contributes to existing research on unfair impacts of trade regimes and how weaponisation of tariffs impacts the lives and livelihoods of women workers in export-oriented sectors in the Global South.

2. Gendered Work in the Garment Sector in Bangladesh and India

2.1 The Garment Sector in Bangladesh and India: An Overview

The ready-made garment sector forms the backbone of Bangladesh's economy, employing about four million workers in nearly 4,000 factories (Akbar, 2025). Its importance for Bangladesh's economy has grown over the last few decades, exponentially increasing its contribution to the country's total export earnings from about four per cent in 1984–85 to approximately 81.5 per cent in 2024–2025 (BGMEA, 2026). In 2024–25, Bangladesh was the world's second largest garment exporter (News Desk, 2025), earning 39.35 billion US dollars from RMG exports which constituted approximately 8.5 per cent of the country's nominal GDP (Nasrin, Hossain, and Ahmed, 2025). These RMG exports are primarily geared towards the European Union (EU) (approximately 50 per cent), with the US and UK also constituting significant proportions of the trade at 20 per cent and eleven per cent respectively (BGMEA, 2026). Garment imports from Bangladesh constitute over 10.5 per cent of total US apparel imports (Mirdha, 2026).

In India, although the textile and garment industry accounts for a smaller share of exports than in Bangladesh, the sector

nevertheless plays a significant role for the national economy, accounting for roughly 2.3 per cent of India's GDP and 13 per cent of industrial production (Press Information Bureau, 2025b). In 2024–25, India's textile and apparel exports were approximately 37.8 billion US dollars, about 8.6 per cent of India's total exports (Fair Wear Foundation, n.d.). An estimated 45 million people are directly employed in the sector and a further 60 million are indirectly employed across the supply chain, with 80 per cent of the sector's capacity in thousands of micro, small, and medium enterprise (MSME) clusters across the country (Press Information Bureau, 2025b). The sector in India is characterised by regionally specialised production clusters engaged in diverse production and labour practices and differentiated product specialisation (Mezzadri, 2014; Fair Wear Foundation, 2016).³ In 2024, the US was the largest market for Indian textiles and garment exports, with a share of about 28.51 per cent, followed by the EU (19.57 per cent) (CITI, n.d.). In value terms, India's dependence on US markets is high with 10.47 billion US dollars' worth of textiles and garments exported to the US in 2024 (Ibid). Imports of Indian apparel constitute approximately 6.6 per cent of total US apparel imports.

The garment industry in India and Bangladesh is shaped by a buyer-driven value chain; clothing brands, mostly multinational companies (MNCs), drive the entire system, and largely determine production, employment, and export outcomes.

2.2 Gendered Dimensions of the Garment Sector

Growth in Bangladesh's garment sector over the last few decades has generated substantial employment opportunities for women, significantly contributing to higher overall female labour force participation.⁴ In recent years, however, the proportion of women workers in the sector has steadily declined.⁵ Women exit the sector largely due to the difficulty of balancing their paid work and unpaid care work responsibilities, as well as the poor conditions in their workplaces, including harassment, long working hours, and low salaries (Rahman *et al.*, 2023; Matsuura and Teng, 2020).⁶ Discriminatory and hostile conditions for women at work include a lack of basic facilities, such as safe accessible toilets, access to clean drinking water, and menstrual hygiene facilities (Akbar, 2025). Although notoriously underreported, gender-

² See appended list of interviews. Given the time constraints for the research, the study draws on the experiences of people who work with garment workers in the two countries to provide a bird's eye view of conditions for women rather than direct interviews with the women workers. While the paper draws primarily on the interviews to understand the tariff regime's impacts, it also triangulates this information through both secondary data and analyses (where available), including a survey of workers by Asian Floor Wage Alliance (Najib 2026), as well as through corroboration between interviews.

³ In the north in Delhi National Capital Region (NCR), the cluster comprises a mix of formal and informal, factory-based and workshop or home-based units, whereas in clusters in the south such as in Bangalore, work is mostly in factories employing on average 2,000 workers, with a workforce of 500 to 1,000 in smaller factories (Mezzadri, 2014; Fair Wear Foundation, 2016). This has begun to change in Bangalore, with more piece-rate workers in factories (KII with Deepika Rao, Executive Director, CIVIDEP, 14 April 2026, hereinafter KII 2).

⁴ In 2025, the labour force participation rate (LFPR) for women stood at 39 per cent after having peaked at 44 per cent in 2022 from a low of 24 per cent in 1990 (World Bank, 2026).

⁵ A recent estimate shows a decline from 80 per cent in the 1980s and 1990s to 53.65 per cent in 2021 (Rahman *et al.*, 2023).

⁶ Additionally, although automation in the sector is still low to medium in Bangladesh and varies across tasks and apparel types, it has disproportionate impacts on women, unskilled, and older workers who face heightened vulnerability to worker displacement (Rahman *et al.* 2025; also KII with Nazma Akter, Executive Director, Awaj Foundation, 11 April 2026, hereinafter KII 1).

based violence is a significant issue in the sector (Staff Reporter, 2023; Akbar, 2025). Women workers also contend with deep-seated systemic issues including unequal care burdens and insufficient daycare in factories, with reports that women had to leave two to three-month-old babies at home while working (KII 1).⁷ Additionally, many women lack financial literacy skills, or a complete primary education, which leaves them vulnerable to economic shifts (Akbar, 2025).

The sector is also characterised by gendered occupational segregation with women working mainly in sewing, winding, and finishing; 85 per cent of women work in low-paid roles with far fewer women in managerial and staff positions (ILO, 2017; Matsuura and Teng, 2020). Studies estimate that the wage disparity between women and men is between eleven and 30 per cent (ILO, 2017; Akbar, 2025). Notwithstanding its vital contribution to the economy, the sector continues to be besieged by exploitative working conditions: unlawful firing, wage theft, excessive work hours along with denial of leave and rest, poor occupational health and safety, as well as restricted rights to freedom of association (FOA) and collective bargaining in supplier factories (Islam, 2022). Although legal and administrative reforms were undertaken after the Tazreen Group factory fire in 2012 and the Rana Plaza tragedy in 2013, enforcement of regulations is hindered by legal ambiguities and insufficient administrative resources (Sarwar, 2025).

In India, significant numbers of women work in the garment sector, with differing proportions in the various garment clusters around the country. In northern India, the sector employs more male workers, whereas in the south, about 80–90 per cent of workers are women (Fair Wear Foundation, 2016; Mezzadri, 2014). Even in the northern clusters, however, there are significant numbers of women workers, mainly in home-based production, as family helpers, or as individual homeworkers for specialised tasks such as embroidery, and thus obscured by statistics. In factories, women mainly take on semi-skilled roles, such as checking, thread cutting or packing, with very few employed as tailors (Mezzadri, 2016). In this sense, the garment sector in India displays both »the feminisation of factory production (in the south), and the feminisation of processes of value addition (in the north)« (Mezzadri 2016, 8).⁸

As in Bangladesh, in India intense competition for export markets, companies' profit-driven targets, purchasing practices as well as gender norms result in exploitative working

conditions in the sector (Nathan *et al.*, 2025). This is manifested in low wages and minimum wage violations, long working hours, inadequate breaks, non-payment, underpayment, or delayed payment of wages, unpaid forced overtime, occupational health and safety hazards, poor care facilities at work, and high levels of verbal abuse and threats (Ceresna-Chaturvedi and Kumar, 2015; Sisters for Change, 2016; Nathan *et al.*, 2025).⁹ Physical violence and sexual harassment of women is widespread (Sisters for Change, 2016; Saha, 2014). Women workers also face high levels of surveillance, including through the use of Artificial Intelligence (KII with A, Executive Director, Social Organisation for Garment Workers, 17 April 2026 and KII with Raju, General Secretary, Karnataka State Garment and Textile Workers' Union, 27 April 2026).¹⁰ Exploitative wage structures are also rampant in the industry, with differential wages in the sector, not just in terms of differentials between men and women, but also between one industrial cluster and another (Ganguly, 2013).

3. Impacts of US Tariffs

From March 2025, US President Donald Trump announced plans for broad-based tariffs on most US trading partners, triggering a major shock to global trade that persists to date.

3.1 The US Tariff Regime

Table 1 below shows the changing US tariff rates for Bangladesh and India between 2 April 2025 and March 2026.

Both Bangladesh and India faced significant uncertainty due to the imposition of high »reciprocal« tariffs between April 2025 and February 2026, although these were not fully implemented initially and were later reduced for Bangladesh. At first India was in a relatively favourable position compared to competitors such as Bangladesh, Indonesia, Sri Lanka, and Vietnam. However, this advantage quickly disappeared when India was subjected to an additional 25 per cent tariff in August 2025 after progress on the proposed bilateral deal slowed,¹¹ and as a punitive response to India's purchase of Russian oil.

These additional tariffs remained in force until they were struck down by the US Supreme Court on 24 February 2026. The US administration subsequently introduced a ten per cent tariff on an MFN basis under Section 122 of the 1974 Trade Act, effective until 24 July 2026, resulting in

⁷ A recent time-use survey highlighted the extent of the unequal care burdens faced by women. It found that women in Bangladesh spend 7.3 times as long on unpaid care and domestic work as men per day (Bangladesh Bureau of Statistics, 2023).

⁸ The number of migrant women in garment work has also grown significantly, particularly in the clusters in Bangalore; in garment factories young women migrants from rural parts of Jharkhand, Bihar, Odisha, West Bengal, Uttar Pradesh face both poor working and living conditions, with surveillance and severe restrictions on mobility (Fair Wear Foundation, 2016; Ray and Peepercamp, 2017).

⁹ Similar to Bangladesh, the latest time-use survey in India has found that the burden of care falls disproportionately on women, who spend an average of 7.1 hours per day on unpaid care and domestic work, compared to 2.7 hours for men (Press Information Bureau Delhi, 2025).

¹⁰ Hereinafter KII 4 and KII 7 respectively.

¹¹ One of the key reasons was India's sensitivity in agreeing to tariff cuts demanded by the US for its agriculture and dairy sectors which impact millions of small-scale producers and workers.

A Chronology of US Tariffs Imposed on Bangladesh and India (April 2025 to March 2026)

Country	Date	US tariff rate announced	Description	Effective period
Bangladesh, India		0–32% (avg. 15%) Most Favoured Nation (MFN) rate in garments sector		Prior to 5 April 2025
Bangladesh	2 April 2025	MFN + 10% baseline tariff + 37% ›reciprocal‹ tariff (Executive Order (EO) 14257)	›Reciprocal‹ tariff was announced but on hold till 7 August 2025	5 April to 7 August 2025
	31 July 2025	MFN + 20% ›reciprocal‹ tariff (EO 14326)	Applied; reduction based on the start of talks on a bilateral trade deal	7 August 2025 to 24 February 2026
	9 February 2026	MFN + 20% ›reciprocal‹ tariff (19% tariff rate announced under trade deal but not implemented)	Announced: further reduction under a bilateral trade deal	
India	2 April 2025	MFN + 10% baseline tariff + 26% ›reciprocal‹ tariff (EO 14257)	›Reciprocal‹ tariff was announced but on hold till 7 August 2025	5 April to 7 August 2025
	31 July 2025	MFN + 25% ›reciprocal‹ tariff (EO 14326)	Adjusted ›reciprocal‹ tariff rates	7 August to 27 August 2025
	6 August 2025	MFN + 25% ›reciprocal‹ tariff + 25% additional ›reciprocal‹ tariff (EO 14329)	Additional 25% tariff imposed on account of India's purchase of Russian oil and as India did not agree to the bilateral trade deal terms set by the US	27 August 2025 to 7 February 2026
	2 February 2026	MFN + 25% ›reciprocal‹ tariff (18% announced under trade deal but not implemented)	Announced reduction of tariff rate based on announcement of a bilateral trade deal and India's promise not to buy Russian oil	7 February to 24 February 2026
Bangladesh, India	20 February 2026	MFN + additional 10% MFN rate (to be applied till 24 July 2026)	Supreme Court struck down the ›reciprocal‹ tariffs on 20 February, effective 24 February 2026 and President Trump imposed additional MFN tariff under Section 122 of the 1974 Trade Act, effective 24 February to 24 July 2026 (trade deals not yet implemented)	24 February to end of May 2026
Bangladesh, India	11 and 12 March 2026		Announcement of investigations under Section 301 of the US Trade Act based on excess capacity and forced labour	

a total average tariff burden of around 25 per cent (15 plus 10) for both Bangladeshi and Indian garment exports.¹²

India experienced a longer period of very high US tariffs, especially between August 2025 and February 2026, and had substantial dependence on the US market, with a 29–30 per cent share in total Indian textile and garment exports. Bangladesh's exposure to the threat of a 37 per cent tariff was comparatively shorter and later its 20 per cent tariff remained relatively competitive. However, Bangladesh was vulnerable given the garment sector's extremely high share in its total exports.

Overall, the US tariffs severely exacerbated tensions and competition among garment and textile exporting countries in Asia, which account for 60.72 per cent of global exports, including Bangladesh, India, Vietnam, China, Cambodia, Pakistan, Sri Lanka, and Indonesia. This shifted countries further away from collaborative approaches and pushed them towards securing trade deals with the US (see Section 3.3 below) at any cost.

3.2 Impacts on the Garment Sector in Bangladesh and India: Volatility, Uncertainty, Production, and Employment

According to data from the US Office of Textiles and Apparel (OTEXA), Bangladesh garments exports to the US fell by around 11.6 per cent (647.7 mil US dollars) year on year in October 2025 (TBS Report, 2026b), and by 14.5 per cent (USD 526.5 mil US dollars) year on year in November 2025 (Munni, 2026), due to the tariffs. There is no clear secondary data but there seemed to be a moderate decline in production leading to a slowdown. The main impact on production and exports stemmed from cancelled orders and in some instances, demands for discounts from the brands. Already finalized shipments were in some cases cancelled with stocks left lying at the ports (KII with Wiranta Ginting, Abhiramy S, and Haris Najib, Asia Floor Wage Alliance, 14 April 2026).¹³ As orders have a lead time, production continued between April and early August 2025, but order cancellations due to the uncertainty created by the threat of a 37 per cent tariff affected most supplying companies, with resultant threats of job losses (Paul and Johora, 2025). There were some reports of closures or reduced production in smaller companies that were already struggling, leading to a significant drop in their workforce (KII with Babul Akhter, General Secretary of Bangladesh Garments and Industrial Workers Federation, 21 April 2026 and KII with Syed Sultan Uddin Ahmmed, Executive Director, Bangladesh Institute of Labour Studies, 25 April 2026).¹⁴

This came at a difficult time as Bangladesh is set to graduate¹⁵ from its Least Developed Country (LDC) status in 2026 and faces significant challenges in retaining preferential access to major garments markets, including the EU, UK, Canada, Japan, and the US. In addition, although the country is trying to conclude a significant number of bilateral trade agreements, the sector must also comply with stricter rules of origin and labour and environment standards in order to retain its traditional markets which will trigger higher costs and technology requirements that may be prohibitive, especially for SMEs (Islam, 2026).¹⁶ All these factors severely exacerbate the challenges to the sector and to Bangladesh's overall economy, with women workers likely to bear a disproportionate share of adjustment costs (see Section 2.2 above).

In India, given the protracted period of extremely high tariffs, the impact was clearly visible. In October 2025 OTEXA reported a 29 per cent drop in textile and garments exports. A December 2025 survey by the Confederation of Indian Textile Industry (CITI, 2026) found that nearly one-quarter of respondents reported a turnover decline of over 50 per cent in October–December 2025 compared with the preceding quarter and a further 50 per cent decline was expected in January–March 2026. Around 60 per cent of respondents reported that export orders were shifted to other garment producers such as Bangladesh and Vietnam. 82.6 per cent of respondents experienced sharp increases in order reductions, 73.9 per cent noted discount demands, and 48 per cent reported cancellations or postponements, underscoring the severity of the demand shock. The burden fell disproportionately on MSMEs, which accounted for 59 per cent of survey respondents.

A survey of 145 workers across 46 factories in September 2025 by Asia Floor Wage Alliance (AFWA) (Najib, 2026) showed that the three main hubs in Karnataka, Delhi NCR, and Tamil Nadu (Tirupur) faced major disruptions. In the Delhi hub, which has the highest US exposure, more than 50 per cent of factories faced reduced shifts, fewer workers on the line, partial stoppages, and idle production lines. In Karnataka, a similar situation impacted 50 per cent of factories while one third of factories faced disruptions in Tamil Nadu. AFWA also found massive cancellations of orders by brands and demands for discounts (often up to 20 per cent), thus passing on costs to supplying companies, which in turn passed these on to their workers (Kumar, 2025; Chua, 2025).

3.3 Uncertain Future: Prospects for the Agreements on Reciprocal Tariffs (ART)

At the time of writing, the status and exact contents of the US-Bangladesh Agreement on Reciprocal Tariffs (BART),

¹² This study does not cover the period after announcement of the Section 301 investigations.

¹³ Hereinafter KII 3, which also included information based on primary research done by AFWA across Bangladesh, India, Sri Lanka, Vietnam, Indonesia, and other countries.

¹⁴ Hereinafter KII 5 and KII 6 respectively.

¹⁵ The new government in Bangladesh has officially applied to the UN for a three-year extension of its graduation but the final decision is awaited at the UN General Assembly.

¹⁶ Reports forecast a decline of 14.3 per cent and a rise in overall tariffs of 8.9 per cent on Bangladesh's total exports (World Trade Organization, 2020) of which 84 per cent is garments, as well as a decline of 11.6 per cent in garment exports (Rahman et al., 2022) as a result of graduation, which again will impact workers, especially women.

signed on 9 February (White House, 2026a), and the US-India ART, announced on 6 February 2026 (White House, 2026b), are not fully clear, as the US Supreme Court struck down the US reciprocal tariffs. As of February 2026 news, the agreements are supposed to bring down US tariffs to 19 and 18 per cent for Bangladesh and India respectively, with these rates to be imposed on top of the pre-April 2025 MFN US tariff rate for each product line.

Through these Agreements, Bangladesh and India are expected to make massive concessions to the US in several areas covering both tariff and non-tariff issues,¹⁷ whereas the tariff gains are meagre, if any, given the current dynamics. Even at a reduced level, the US tariffs will still represent at least a doubling compared to MFN rates before April 2025. Rates may be subject to erratic changes at any point in the future, leading to an era of uncertainty regarding trading positions and competitiveness.

Moreover, the ARTs include challenging provisions for the garment sector in both countries by including zero-tariff access to US markets but only if US cotton is used as inputs (see White House, 2026a), even when it is more expensive compared to domestic or alternative sources. Though Bangladesh does not produce cotton, shifting from Indian to US cotton may take time, making it difficult for small enterprises to survive the tariffs in the meantime (KII 5). Being required to import US cotton creates additional challenges for India as it will reduce demand for domestic cotton. As recognised by workers' organisations (KIIs 4 and 7), this may intensify competition not only among countries but also among workers across countries and among sectors within the same country, including between garment workers, cotton farmers, and industrial cotton workers.

Since currently the Section 122 tariffs of 10 per cent are applied to all countries on an MFN basis and are temporary, Bangladesh and India receive no special advantage from the US deals and may even face disadvantages if competing countries do not sign such agreements. In March the US initiated Section 301 investigations for sixteen countries based on »structural excess capacity and production in manufacturing sectors« (Press Office, 2026), and later for another sixty countries concerning »forced labour« (Office of the United States Trade Representative, 2026), a further pressure tactic to secure adherence to the highly unbalanced ARTs.

It remains to be seen whether Bangladesh and India will ultimately conclude and implement the US ARTs and on what terms. In either case, the future appears extremely uncertain, with the garment sector in both countries facing an escalation of existing crises, further aggravated by the

Covid-19 pandemic and the Russia-Ukraine war. For Bangladesh, the risks are even greater due to graduation-related challenges, the political turmoil of 2025, and marked dependence on garment exports. The sector's future in both countries will depend not only on trade relations with the US and diversification of export markets, but also on how competing countries act. Additionally, the US–Israel–Iran war poses a serious threat to fuel supplies, affecting production, input costs, and incomes.

4. The Impact on Women Workers

The impacts of the US tariffs affected garment-sector workers in Bangladesh and India in multiple ways and thus had consequences for many women, given the significant proportion of women in the sector in both countries. In addition, there were several gender-specific impacts due to the way women engage with the sector or their gender-based vulnerability. As quality secondary data is scant, this study has used primary accounts from workers' unions, civil society organisation, and thinktanks (KIIs) for the analysis.

Bangladesh

First, closure or downsizing of small factories directly affected women's jobs (KII 5). Secondly, if regular monthly employment continued, cuts in overtime significantly affected incomes; workers are very dependent on this supplementary income even to meet basic household expenses (KIIs 1 and 5). In particular, this had cascading impacts on women workers' ability to pay for food and their children's education. Thirdly, one very interesting feature in Bangladesh was suppliers' use of uncertainty and volatility to create fear and anxiety in order to exert greater psychological control over workers, curtailing their bargaining capacity. In some cases (KIIs 5 and 6), workers were told not to take leave, to do unpaid overtime work, and forego benefits. There were instances of companies requesting the government to allow exemptions to labour law provisions, such as contract-based job guarantees and payment of wages (KII 6).

Garment supplier companies' political influence made it easier for them to pass on the brands' and suppliers' tariff-related costs to workers, with jobs targeted primarily in lower-skilled segments. In addition, as female unionization rates are relatively low (Islam, n.d.), it comes as no surprise that women workers disproportionately faced the brunt of cutbacks. Workers, especially women workers, already threatened by the introduction of automation as a replacement tool (Rahman *et al.*, 2025), find that continued crises in the sector have taken away the bargaining power they need to ensure their jobs and incomes or secure a voice in policy decisions related to the sector.

¹⁷ The BART text and the US-India Joint Statement indicate provisions such as zero-duty access for US exports on a range of products and services including in vulnerable sectors like agriculture and dairy; guaranteed quantities of exports from the US and investments in the US; concessions on a number of areas such as fisheries subsidies, intellectual property rights, e-commerce moratorium and domestic taxation of US digital corporations, as well as on standards and technical barriers; liberalisation of government procurement; and even restrictions on partner countries' trade agreements with third countries, with significant implications for their policy sovereignty.

India

In India, women workers were likewise disproportionately impacted, as they constitute 60–80 per cent of the workforce in the sector. The silent and often invisible retrenchment of workers in India (KII 3) was manifested through various strategies.

First, closures of some factories led directly to job losses. Secondly, migrant workers were laid off by being told not to report back after going home on leave (KIIs 2, 3, 4, and 7). Their housing and benefits were curtailed. Migrant workers are almost entirely women, are less organised, and have more limited bargaining power than local workers (Mohan, 2017). Thirdly, the most recent hires and disabled workers were dismissed first and their social security benefits were cut. Fourthly, employer-provided transport services were withdrawn, forcing local workers in remote locations to take involuntary leave (KIIs 2, 3, and 4). Fifth, sectors where women make up much of the workforce, such as production and sewing work, were targeted first for job cuts; there was also a 50 per cent reduction in overtime, especially by women (Najib, 2026).

Sixth, piece-rate work, which involves around 10 per cent of workers and is undertaken almost completely by women, was stopped. In addition, subcontracting and outsourcing activities like stitching and washing were also halted (KIIs 2, 4, and 7). These are already some of the most informal employment segments, within which workers, again mostly women, operate without wage guarantees, social security benefits, labour inspections, or legal protection.

As in Bangladesh, the atmosphere of fear and misgivings generated by tariff uncertainty was transmitted to workers through increased productivity targets and production pressures. Workers were required to work longer hours for the same wage, denied leave or asked to undertake compensatory work, while new recruitment and overtime benefits were restricted (KIIs 2 and 4).

Beyond the direct effects, additional impacts were specifically gendered in both India and Bangladesh. This was more visible in India due to the prolonged high tariffs. Existing adverse workplace conditions, (gender-based harassment, abuse, sexual harassment, and violence) worsened considerably (KIIs 2, 4, and 7). Roles such as junior tailors and assistants, where women proliferate, were targeted first, while relatively skilled positions generally held by men, such as supervisors and master tailors, were retained.

High accommodation and transport costs along with loss of paid overtime forced more women to leave employment as they could not afford to live near factories or travel to their jobs, while in addition childcare facilities remained

inadequate (KII 4 and 7). This increased women's care burdens. Interviews also revealed growing household debt and reduced expenditure on health and children's education, often dependent on women's earnings (KII 4). Women also faced lower mobility in searching for alternative work opportunities (Najib, 2026). Most importantly, women who had gained recognition and standing within households through paid work lost that foothold, which was a major erosion of their socio-economic identity within and outside the household (KIIs 4 and 5).

5. Responses to the Tariff Changes

5.1 Government Responses

Government responses in both countries, as mentioned above, focused primarily on trade diversification and attempting to secure a trade deal with the US. In India, diversification included securing additional FTAs, most notably with the EU, drawing up a comprehensive forty-country market diversification strategy, as well as engaging in efforts to propel domestic consumption (Press Information Bureau, 2025a). Additionally, the government provided a range of incentives to the industry to encourage investment and enhance the ease of doing business. The government extended the Export Obligation (EO) period in the textile sector from six to eighteen months, revised the Product Linked Incentive (PLI) scheme by reducing entry barriers and financial thresholds for setting up new businesses, introduced an import duty exemption for cotton, rationalised the Goods and Services Taxes (GST) rate across the textile value chain, and approved the Credit Guarantee Scheme for Exporters (CGSE), which provides 100 per cent credit guarantee coverage to lending institutions that extend additional credit facilities to eligible exporters (Press Information Bureau, 2025a).¹⁸ There seems to have been no effort to offer direct relief to workers impacted by the tariffs or to directly address the concerns raised by workers' collectives and unions.

In Bangladesh too, the government focused on securing a trade deal with the US. Additionally, in response to requests by the Bangladesh Garment Manufacturers and Exporters Association (BGMEA) the government provided some relief to the sector for the cumulative crises by expediting release of pending cash incentives to improve factory cash flow and providing soft loans or low-interest loans equivalent to six months of wages to ensure timely payment of salaries and bonuses to workers (TBS Report, 2026a). Before the Eid break in 2026, it provided soft loans to garment-manufacturing companies (KII 5 and KII 6; also see Mowla, 2026); however, we have no data on whether it reached the workers.

¹⁸ Export obligation rules under the Advance Authorisation scheme require companies manufacturing products, including textiles, to meet export obligations within 180 days of import clearance. This requirement was eased for the textile and garment sector.

5.2 Responses by Brands / Buyer Companies

Very soon after the Trump administration's imposition of the tariff regime, US brands reported declining sales as a consequence of the tariff hikes. 70 per cent of US fashion brands surveyed in a study by Delaware University had delayed or cancelled some sourcing orders (Lu, 2025). Other studies too found that buyers rapidly reassessed sourcing strategies and production costs, pushing for orders to be paused or cancelled and requesting price reductions (or discounts), or to a significant extent passing on the increased tariffs to suppliers in Bangladesh and India (Business and Human Rights, 2026; Uddin, 2025; Hussain, 2025). Transfer of risks and costs to suppliers and subsequently workers was noted in our interviews in both Bangladesh and India. We found no evidence of the brands offering to cover any of the losses borne by suppliers or workers.

5.3 Responses by Supplier Companies

In response to the tariffs, companies and company representatives, such as the Bangladesh Garment Manufacturers and Exporters Association (BGMEA) in Bangladesh and the Apparel Export Promotion Council (AEPC) in India, sought relief from the government for moratoriums on repayment of existing loans or provision of soft loans, also calling for removal of import barriers (Khetarpal and Shah, 2025; TBS Report, 2026a). As we have seen above, companies in both countries shifted a significant proportion of the risks and costs due to sourcing pressures from brands onto their workers. We have not come across any reports of companies providing direct relief to workers.

5.4 Responses by Workers' Collectives and Unions

Workers' collectives and groups responded to the tariffs by rallying workers, reaching out to brands and suppliers to resist shifting risks and costs to workers and seeking instead to ensure their rights were protected. In some instances, they were successful in ensuring workers did not lose their jobs (KII 4 and 7). However, workers' collectives and union leaders also highlighted the limited scope for negotiations or protests, pointing to systemic thwarting of their right to FOA in both countries. There were some isolated examples of strategic collaboration between women workers and supplier companies in Bangladesh, which actively encouraged women workers to send letters to the US government and political groups articulating the threats to their livelihoods (KII 1), along with some instances of workers' unions and collectives writing to their national governments. However, overall, union and collective representatives highlighted the limited nature of organizing efforts in both countries. Our interviewees underlined that cross-country collaborations between workers' unions and collectives were few and far between, with most union activity targeted at local levels. Many interviewees did however underline efforts by groups such as AFWA to collaborate with member organisations across garment-producing countries to articulate a regional position against the tariff

regime (AFWA, 2025) and recognised the need for such collaborations (KII 2, 3, 4, 5, 6, 7). They also noted the challenges of creating a nuanced understanding of shared concerns given the rhetoric of inter-country competition (KII 3).

6. Recommendations

Aggressive, weaponised use of tariffs and bilateral trade agreements by the US has caused shocks to the garment sector in Bangladesh and India. Against the backdrop of a feminized workforce already facing precarious working conditions shaped by gender norms, high production targets and export goals, the tariffs imposed by the Trump regime form part of a continuum of crises for the garment sector. In injecting further volatility and uncertainty, the tariffs disproportionately impact women workers, exacerbating their precarity. In both countries, women workers faced a mix of fear and uncertainty, along with psychological pressure, reductions in paid overtime and social security benefits, closure of smaller factories with vulnerable workers laid off, cuts in transport and hostel facilities, and curtailed bargaining power.

In the face of these gendered impacts of tariffs and unfair trade regimes in global supply chains, the following section draws on the authors' analysis and suggestions from workers' organisations and policy experts to provide some (partially overlapping) recommendations for governments, companies, global institutions, and trade unions to advance towards a gender-transformative future for women workers.

6.1 Actions by Governments

6.1.1 Trade Policy for Cooperation and Diversification Instead of Competition and Concentration

National trade policymaking must be based on cooperation rather than competition, especially among developing countries and LDCs, encouraging coalition-building among them. It should ensure deliberate, well-planned diversification of export and import markets rather than dependence on a few developed countries with differing goals. Trade policy tools, including preferential tariffs, must be used proportionately to avoid intensifying competition and division among countries and their workers (AFWA, 2025).

6.1.2 Process and Substance of Trade Agreements

Trade agreements signed by national governments must first ensure fair, transparent, and inclusive negotiation processes that enable participation of diverse constituencies in both design and implementation, while rejecting coercive measures (such as tariffs or the US Section 301 investigations). Secondly, the substance must deliver on and in particular not detract from national sustainable development objectives. For example, tariffs should serve as tools for development rather than as weapons and must be proportionate and fair (KII 3, 5, and 7). Social and environmental provisions should not become trade barriers for developing countries and LDCs (Anuradha and Dutta, 2019).

that can backfire on workers and are difficult to enforce. Facilitating export market access and technology transfer for sustainable production while ensuring national policy space to promote domestic production, decent jobs, public healthcare, and education services for workers should be necessary components of trade agreements which can serve the objectives of advancing women's rights, labour rights, and sustainability.

6.1.3 National Labour Laws and Implementation

National governments have a responsibility to enact progressive labour laws ensuring protections such as FOA, living wages, and social protection measures including subsidised public childcare (Rahman *et al.*, 2025). Effective implementation of these laws is equally important, for otherwise they become meaningless, as seen in Bangladesh (KII 1); simply including labour related provisions in trade agreements cannot adequately protect women workers' rights.

6.2 Actions by the Private Sector

6.2.1 Role of Brands/Buyer Companies

Brand MNCs must be regulated and made accountable for their impact on suppliers and workers (AFWA, 2025) through national policies, regional cooperation, and global initiatives. Specific measures include quadripartite negotiation mechanisms bringing in buyer brands under an ILO framework (Nathan, 2023), responsible and fair purchasing practices with sufficient lead times, sustainable costing and review mechanisms, effective gender-responsive human rights due diligence, continuous assessment of working conditions and social protection measures for women workers, and setting up disaster funds for workers during crisis situations (KII 2, 3, 4, 5, and 7). The Business and Human Rights Treaty (BHR Treaty) process is also an important space for a human rights-centric regulatory approach to MNC activities.

6.2.2 Role of Manufacturers or Supplier Companies

Supplier companies must ensure effective implementation of labour codes and standards under national labour laws, promote collective bargaining and FOA, protect labour costs in negotiations with buyers and brands, and work collaboratively to prevent wage competition and the downward slide of wages.

6.3 Role of Global Institutions and Fora

A fair, balanced, and development-oriented global framework on trade and work is critical to advance trade interests while protecting workers' rights. As the World Trade Organization (WTO) is primarily driven by commercial interests, the International Labour Organization (ILO), UN human rights mechanisms (including the BHR Treaty), and the Committee on the Elimination of All Forms of Discrimination against Women (CEDAW) can serve as effective spaces. Democratization of global supply chains, inclusion of unions in decision-making, and tax justice policies whereby corporate taxes support workers' welfare (KII 4) must be key priorities in these initiatives.

6.4 Workers' Alliance for Human Rights

Trade unions must organise beyond national borders, strengthen regional and global alliances, and provide worker-led solutions with global trade unions, think tanks, and civil society organisations (KII 5, 6, and 7). Forming regional alliances of women workers, expanding women's participation in unions and representative structures, and increasing awareness of their rights (Rahman *et al.*, 2023) will be important to secure the rights of women workers across borders.

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List of Interviews

1 Nazma Akter, Executive Director, Awaj Foundation | Bangladesh | 11 April 2026.

2 Deepika Rao, Executive Director, CIVIDEP | India | 14 April 2026.

3 Wiranta Ginting, Deputy International Coordinator; Abhiramy S, Regional Coordinator South Asia; and Haris Najib, National Program Coordinator, India, Asia Floor Wage Alliance | Asia-wide | 14 April 2026.

4 A., Executive Director, Social Organisation for Garment Workers (details kept anonymous on request) | India | 17 April 2026.

5 Babul Akter, General Secretary, Bangladesh Garments and Industrial Workers Federation and Founder of Bangladesh Centre for Workers' Solidarity | Bangladesh | 21 April 2026.

6 Syed Sultan Uddin Ahmmmed, Executive Director, Bangladesh Institute of Labour Studies | Bangladesh | 25 April 2026.

7 Raju B Chikkanarasaiya, General Secretary, Karnataka State Garment and Textile Workers' Union | India | 27 April 2026.

Access to full study



Gendered Impacts – Blind Responses

The 2025 Tariff Crisis and the Case
for Gender Transformative Reforms

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