

## How Fast-Fashion Brands Changed Garment Industry Landscape: Study Case On Relationship of Garment Factories And Sewing Thread Suppliers

Ryzky Pamungkas<sup>1</sup>, Tengku Ezni Balqiah<sup>2</sup>

<sup>1,2</sup>Universitas Indonesia, Indonesia

Correspondent : [Ryzky.pamungkas@ui.ac.id](mailto:Ryzky.pamungkas@ui.ac.id)<sup>1</sup>

Received : November 14, 2024

Accepted : December 31, 2024

Published : April 30, 2025

Citation: Pamungkas, R., & Balqiah, T.E (2025). How Fast-Fashion Brands Changed Garment Industry Landscape: Study Case On Relationship of Garment Factories And Sewing Thread Suppliers. *Ijomata International Journal of Management*. 6 (2). 666 – 680. <https://doi.org/10.61194/ijjm.v6i2.1474>

**ABSTRACT:** The garment industry is facing considerable challenges in meeting the demands of overseas buyers. The fast fashion trend has shortened garment production cycles and forced garment factories to work with reliable suppliers, especially sewing thread suppliers, to quickly fulfil the production needs of garment factories. This research emphasises the importance of building strategic partnerships between garment factories and sewing thread suppliers within the framework of B2B marketing relationships to ensure an effective and sustainable supply chain. Previous research states that there is a positive influence between commitment, trust, and relative dependence on customer satisfaction and customer loyalty in distributor and seller relationships. This study builds a model to analyse further the influence of Affective Commitment, Instrumental Commitment, Capability-based Trust, Benevolence-based Trust, and Relative Dependence factors to achieve customer satisfaction and customer loyalty in the relationship between garment factories and sewing thread suppliers. The research method used is quantitative, collecting data through surveys sent to garment factories in Banten, West Java, and DKI Jakarta Provinces. Data analysis was conducted using SmartPLS to determine the relationship between the research variables. The findings of this study state that Affective Commitment, Instrumental Commitment, Capability-based Trust, and Benevolence-based Trust can increase customer satisfaction and customer loyalty, but relative dependence was found to have no significant effect on customer satisfaction and customer loyalty. These findings provide new insights for companies in developing their business strategies.

Keywords: Affective Commitment, Instrumental Commitment, Trust, customer satisfaction, customer loyalty



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## INTRODUCTION

Clothing is typically related to function, covering for protection and adornment for expressiveness and attraction (Thornquist, 2018). Boosted by social media, consumers now find it easy to discover and purchase new fashions to fulfil their need for expressiveness. This trend has led to the rapid consumption of fashion as the life cycle of fashion trends is decreasing from 3-4 times a year to

just a couple of months (Cooper, 2023). Some brands even have new styles in stores every 1 -2 months. Brands such as Uniqlo, H&M, Esprit, and many major brands have successfully utilized this trend by providing consumers with updated fashion styles at affordable prices (Hayes, 2024).

Strong foreign and domestic demand drives positive growth in the textile industry such as apparel and footwear. In the first quarter of 2024, foreign demand for these products experienced an increase in volume, namely by 7.34 per cent (yoy) for textile products, 3.08 per cent (yoy) for apparel, and 12.56 per cent (yoy) for footwear (Indonesia.go.id, 2024). Moreover, the garment industry is essential in Indonesia as it contributed to the national export value of US\$9,58 billion. The industry continues to evolve to meet the consumer's high demands. The trend of fast fashion, which started in the early 2000s, has significantly affected how it operates and gained competitive value against its competition, not only among garment factories in the country but also in the region. (Statista, 2023) Despite the major contribution of the garment industry in Indonesia, the industry faces challenges in maintaining brand orders. Brands like H&M and Gap can easily transfer their orders to other garment factories or countries once they feel their garment partner is unsatisfied. Consequently, the cherished relationship between a garment factory and its supplier in the B2B context is significant for the garment factory to entertain brand orders.

Supply chain sustainability is a prevalent topic in the garment industry. Sustainability is a massive issue, as adverse effects such as water pollution, air pollution, forced labour, and large amounts of global textile consumption continue negatively impacting the garment industry supply chain. This means close working relationships between garment factories and suppliers have become vital in the business-to-business environment in achieving commercial success (Chong, Man, and Kim, 2018). The increase in satisfaction and loyalty among B2B partners in garment factories and their thread suppliers is the main issue of this research in relational marketing. Satisfaction in a B2B setting is viewed beyond positive dispositions but towards trust building, collaboration, and word-of-mouth recommendation (Mungra and Yadav, 2019). Satisfaction in a B2B context can be achieved when both partners are mutually beneficial and satisfied in their business dealings (Sharma, 2022). Loyalty in a B2B setting is the behavior of making repeat purchases and the tendency to reduce changing suppliers ((Padgett, Hopkins, and Williams 2020). The growth of buyer-seller satisfaction and loyalty in the B2B setting is associated with several benefits, such as an increase in business volume, ongoing cost reduction, and uninterrupted supply (Arthur et al. 2024).

Findings from previous research in B2B settings in the context of manufacturers and distributors found a relationship between commitment, trust, and relative dependence which formed loyalty and satisfaction (Arthur et al. 2024). If firms improve their relationship quality, it is viewed as a long-term strategy to make partners recognize the need to remain in a relationship over a long period (Kofi Amoako, Baadu Adams, and DOE 2020). However previous studies leave gaps. This study aims to explore the different aspects of commitment and trust, which are defined as affective commitment and instrumental commitment, capability-based trust and benevolence-based trust, and the influence of relative dependence on customer loyalty in the B2B setting of buyer-seller relationships which were not explored in previous studies in the context of labour-intensive industry, garment industry in Indonesia.

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The constructs used in the research are affective commitment, instrumental commitment, capacity-based trust, benevolence-based trust, relative dependence, customer satisfaction, and customer loyalty. Firm size and years of B2B plot as a control variable. The model aims to measure the influence of affective commitment, instrumental commitment, capacity-based trust, benevolence-based trust, and relative dependence can directly improve customer satisfaction and customer loyalty based on the models described above and previous research recommendations from Arthur et al (2024) and (Kofi Amoako et al. 2020) As in Figure 1.

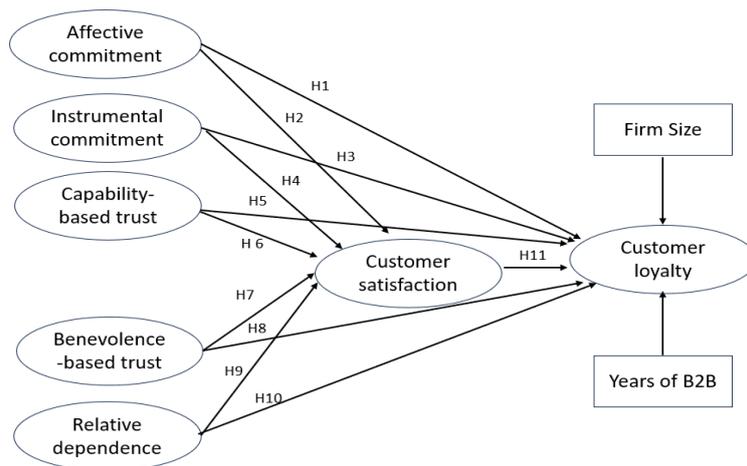


Figure 1 Research Framework

## METHOD

This research used a conclusive design to test hypotheses. Primary data was collected by a cross-sectional survey using a 1 – 7 point Likert scale questionnaire, which was divided into two sections, A and B. Sociodemographic questions related to gender, age, education, position, and years of relationship with the leading supplier were covered in section A. Section B was to examine the indicator dimensions of commitment, trust, relative dependence, customer satisfaction and customer loyalty. All indicators used in the survey were adopted from previous studies as in Table 1.

Table 1. Research Questions

Variable	Code	Indicator	Source
Affective commitment	AC 1	Our company wants to maintain relationships with these suppliers because they match their values.	(Padgett et al., 2020)
	AC 2	Our company wants to maintain relationships with these suppliers because we enjoy working with them	(Padgett et al., 2020)

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	AC 3	Our company wants to maintain relationships with these suppliers because we think positively/have a reasonable opinion about them	(Padgett et al., 2020)
	AC 4	We want to maintain relationships with these suppliers because we are loyal to them	(Padgett et al., 2020)
Instrumental commitment	IC 1	Our suppliers will allocate their resources and capabilities to meet our needs.	(Akman and Yörür 2012)
	IC 2	We are willing to establish long-term, profitable cooperation with these suppliers.	(Padgett et al., 2020)
	IC 3	We receive benefits that outweigh our costs in cooperative relationships with these suppliers.	(Padgett et al., 2020)
	IC 4	Our suppliers are willing to make long-term investments that are beneficial to us	(Akman & Yörür, 2012)
Capability-based trust	CT 1	Our suppliers will send products with consistent quality.	(Arthur et al., 2023)
	CT 2	Our suppliers provide consistent service to us.	(Arthur et al., 2023)
	CT 3	Our suppliers fulfil their promises to our company	(Arthur et al., 2023)
	CT 4	Our suppliers are very knowledgeable / experts in the field of sewing thread	(Malina, Arimbawa, and Wulandari 2020)
Benevolence-based trust	BT 1	Our suppliers can be trusted	(Wu, Chen, and Chen 2015)
	BT 2	Our suppliers care about our interests.	(Akman & Yörür, 2012)
	BT 3	Our suppliers have high business ethics.	(Chang et al. 2012)
	BT 4	Our suppliers consider the interests of both parties when making important decisions,	(Akman & Yörür, 2012)
Relative Dependence	RD 1	Our suppliers are critical to the future performance of our company	(Chang et al. 2012)
	RD 2	Our company depends on this supplier	(Chang et al. 2012)
	RD 3	It is difficult to change our leading supplier	(Chang et al. 2012)
	RD 4	Our company does not have a better alternative supplier to replace this supplier	(Chang et al. 2012)
Customer satisfaction	CS 1	We are delighted with the service and products from this supplier.	(Arthur et al., 2023)
	CS 2	We have had a good experience in conducting business relationships with this supplier.	(Arthur et al., 2023)
	CS 3	Overall, we are satisfied with the service from this supplier.	(Arthur et al., 2023)

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	CS 4	We love what our suppliers do for us	(Akman & Yörür, 2012)
Customer loyalty	CL 1	If necessary, our company will buy more from that supplier than other suppliers.	(Arthur et al., 2023)
	CL 2	We prefer this leading supplier compared to other sewing thread suppliers.	(Arthur et al., 2023)
	CL 3	Our leading suppliers are the best business partners	(Wu et al. 2015)
	CL 4	we will recommend our leading suppliers to other companies or garment factories	(Wu et al. 2015)

Source: (Padgett et al., 2020), (Akman & Yörür, 2012), (Arthur et al., 2023), (Wu et al. 2015), Chang et al., 2012).

The target population in this research is export-oriented garment factories located in Jakarta, Banten, and West Java areas. The respondents in this research were staff to higher officials in marketing, procurement, or industrial engineering departments who have authority or influence in purchase decision-making for sewing thread.

The research found that respondents had collaborated with the leading supplier for quite a long time; 35 respondents (44%) had collaborated for more than 9 years, and 21 respondents (26%) had collaborated for more than 4 years. This shows loyalty between the game factory and the sewing thread supplier.

Smart PLS 4 was used for data processing, including determining the validity and suitability of the model using confirmatory factor analysis, testing discriminant validity using the Fornell-Larcker criteria, and testing model suitability using Standardized Root Mean Square Residual (SRMR). The data analysis then continued with path coefficient analysis, using the relationship between t-values and p-values to determine the hypothesis's significance.

## RESULT AND DISCUSSION

The questionnaire was emailed to the 120 target respondents and received responses from 61 garment factories with 84 responses. Four respondents were filtered due to inappropriate criteria, making up 70% of the response rate.

Table 2 shows that most respondents are female 59 (74%). In terms of education, most of the respondents are Bachelor 41 (51%) and Diploma 33 (41%). Respondents who participated in the survey mostly came from the marketing/merchandise department 48 (60%) and procurement 29 (36%), with the title of supervisor or assistant manager 38 (48%).

Table 2 Respondent's Profile

Variable	Frequency	Per cent
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<b>Gender</b>		
Male	21	26%
Female	59	74%
<b>Domicile</b>		
DKI Jakarta	19	24%
West Java	56	70%
Banten	5	6%
<b>Education</b>		
Sr. High	5	6%
Diploma (D3)	33	41%
Bachelor	41	51%
Master	1	1%
<b>Department</b>		
Marketing (Merchandiser)	48	60%
Procurement	29	36%
Industrial Engineering	3	4%
<b>Title</b>		
Staff	21	26%
Supervisor	38	48%
Manager	19	24%
Director/Owner	2	3%

Table 3 depicts data processing results using SmartPLS 4.0 with 80 respondents with an outer loading value of more than 0.7 and an AVE of more than 0.5 so that all items are declared valid.

Table 3. Validity Test

<b>Variable</b>	<b>Indicator code</b>	<b>Outer Loading</b>	<b>AVE</b>	<b>Result</b>
Affective Commitment	AC1	0,903	0,802	Valid
	AC2	0,925		Valid
	AC3	0,919		Valid
	AC4	0,833		Valid
Instrumental Commitment	IC1	0,796	0,699	Valid
	IC2	0,848		Valid
	IC3	0,842		Valid
	IC4	0,856		Valid
Capability-based Trust	CT1	0,908	0,755	Valid
	CT2	0,852		Valid
	CT3	0,892		Valid
	CT4	0,821		Valid

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Benevolence-based Trust	BT1	0,767	0,600	Valid
	BT2	0,708		Valid
	BT3	0,747		Valid
	BT4	0,868		Valid
Relative Dependence	RD1	0,755	0,570	Valid
	RD2	0,764		Valid
	RD3	0,742		Valid
	RD4	0,760		Valid
Customer Satisfaction	CS1	0,838	0,768	Valid
	CS2	0,850		Valid
	CS3	0,882		Valid
	CS4	0,916		Valid
Customer Loyalty	CL1	0,886	0,766	Valid
	CL2	0,868		Valid
	CL3	0,886		Valid
	CL4	0,861		Valid
Years B2B		1,000	1,000	Valid
Firm Size		1,000	1,000	Valid

Source: Data Processing Result (2024)

Based on the SmartPLS output results in Table 4, all constructs show composite reliability and Cronbach's alpha values above 0.70, which shows that they are reliable.

Table 4. Reliability Test

Variable	Cronbach's Alpha	Composite Reliability (rho.c)	Keterangan
Affective Commitment	0,917	0,942	Reliable
Benevolence based trust	0,776	0,856	Reliable
Capability based trust	0,891	0,925	Reliable
Customer Satisfaction	0,899	0,930	Reliable
Customer loyalty	0,898	0,929	Reliable
Instrumental Commitment	0,856	0,903	Reliable
Relative dependence	0,774	0,842	Reliable
Years of B2B	1,000	1,000	Reliable
Firm Size	1,000	1,000	Reliable

Source: Data Processing Result (2024)

The results of the outer model test showed that all indicators have surpassed validity and reliability testing of 0,7 Cronbach's alpha for all indicators. A value between 0,6 and 0,7 is considerably acceptable. (Hair et al. 2019)The validity testing for outer loading is also more than 0.7, so no indicators are deleted in the next test. Discriminant validity testing using a matrix Fornel-Lacker Criterion indicates discriminant validity in the research model.

Structural model testing tests hypotheses regarding the causal relationship between latent variables proposed in the research. The R square test results are in Table 5.

Table 5 R<sup>2</sup> Test Results

Variable	R Square	R Square Adjusted
Customer Satisfaction	0,840	0,829
Customer loyalty	0,968	0,964

Source: Output SmartPLS (2024)

Hypothesis testing uses the T-value and P-value values to see the statistical significance of the path coefficient between variables in the partial least squares path modelling. Testing with a significance level ( $\alpha$ ) of 5% and two-tailed test (two-tailed test) with results as shown in Table 6:

Table 6 Hyphotesis Results

No	Hypothesis	Path Coefficient	T-Value	P-Value	Results
1	Affective commitment has a positive effect on Customer loyalty	0.060	1.795	0.073	Not Supported
2	Affective commitment has a positive effect on Customer satisfaction	0.105	3.588	0.000	Supported
3	Instrumental commitment has a positive effect on Customer loyalty	0.043	0.019	0.985	Not Supported
4	Instrumental commitment has a positive effect on Customer satisfaction	0.074	2.744	0.006	Supported
5	Capability-based trust has a positive effect on Customer loyalty.	0.030	0.696	0.486	Not Supported
6	Capability-based trust has a positive effect on Customer satisfaction.	0.070	2.167	0.030	Supported

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7	Benevolence-based trust has a positive effect on Customer satisfaction	0.096	2.628	0.009	Supported
8	Benevolence-based trust has a positive effect on Customer loyalty.	0.030	0.546	0.585	Not Supported
9	Relative dependence has a positive effect on Customer satisfaction.	0.058	1.129	0.259	Not Supported
10	Relative dependence has a positive effect on Customer loyalty.	0.058	1.129	0.259	Not Supported
11	Customer satisfaction has a positive effect on Customer loyalty.	0.055	15.556	0.000	Supported
12	Customer satisfaction mediates the relationship between affective-commitment and customer loyalty	0,092	3,51	0,007	Supported
13	Customer satisfaction mediates the relationship between instrumental commitment and customer loyalty	0,065	2,698	0,007	Supported
14	Customer satisfaction mediates the relationship between capability-based trust and customer loyalty.	0,06	2,15	0,032	Supported
15	Customer satisfaction mediates the relationship between Benevolence-based trust and Customer loyalty.	0,084	2,606	0,009	Supported
16	Customer satisfaction mediates the relationship between Customer loyalty and relative dependence	0,05	1,124	0,261	Not Supported

Source: Data Processing Results (2024)

The first and third hypotheses were meant to predict the direct effect of affective commitment and instrumental commitment on loyalty among B2B partners. The result showed that affective and instrumental commitment have a less significant effect on loyalty. The author found that even though garment factories have worked with the leading thread supplier for a long time, 44% of respondents said they have worked with the leading supplier for more than 9 years, but it is caused by other factors instead of commitment. Not of affective commitment. Instrumental commitment was also found to have a less significant effect on loyalty. The instrumental commitment related

to monetary aspects, product, and quality may not necessarily increase loyalty in B2B relationships because monetary, quality, and service benefits can be imitated by competitors, making it easy for buyers to change suppliers (Padgett et al., 2020). This is in line with the findings in this research that influence instrumental commitment, which is not significant to customer loyalty in a B2B relationship between garment factories and sewing thread suppliers.

The second and fourth hypotheses were to predict affective commitment and instrumental commitment on satisfaction. The analysis results show that both dimensions have a significant effect on loyalty. This supports previous research by Amoako et al. (2020) and Arthur et al. (2023). Commitment has a positive effect on the b2B relationship. This is also in line with Chang et al.'s (2021) findings that *affective commitment* can increase customer satisfaction in B2B relationships.

The fifth and eighth hypotheses were to predict the effect of capability-based trust and benevolence-based trust on loyalty. The results show that trust dimensions have a less significant effect on loyalty, which is supported by findings from Amoako et al. (2020) that trust is not significant to the intention to continue B2B cooperative relationships unless combined with other dimensions.

The results of analysis for the sixth and seventh hypotheses to predict capability-based trust and benevolence-based trust on satisfaction were found to significantly affect satisfaction. This was also supported by the finding from Arthur et al. (2023) that the supplier's ability to fulfil commitments and provide good service consistently will create satisfaction from buyers in the B2B relationship. The benevolence-based trust that suppliers have in buyer-seller relationships in B2B marketing shows that sellers/suppliers not only care about their interests but also care about their customers (Morgan, 1994). This concern can increase the trust and security of the customer to cooperate. When a garment factory has the perception that its supplier is well-intentioned and cares about its interests, this can foster trust and security from the garment factory to cooperate with the supplier with the expectation that the supplier cares about the garment factory's interest in quality and delivery according to the agreed schedule. As a customer, the garment factory will feel satisfied with the supplier because the supplier can fulfil its interests.

The ninth and tenth hypotheses were to predict the relative effect of relative dependence on satisfaction and loyalty among B2B partners, which both have a less significant effect on satisfaction and loyalty. Findings from Padgett et al. (2020) and Arthur et al. (2023) show that relative dependence significantly affects satisfaction and loyalty. The findings from the research have different results in the relationship among garment factories. Customers are satisfied with the supplier's performance by delivering on time with good quality, but it does not make them dependent on the supplier. This is because companies implement policies to use more than one supplier to avoid dependence on certain suppliers (Hutt, 2013). So that companies are not dependent on specific suppliers. The lack of dependence on suppliers makes buyers feel the relative dependence variable may not necessarily affect buyer satisfaction with the supplier's performance. In the research conducted, it was found that only 1% of respondents used one supplier, 93% used 2 - 4 suppliers, 5% used 5-8 suppliers, and 1% used more than 9 suppliers. Relative dependence was also found to be less significant in customer loyalty. Garment factories try not to depend on certain suppliers and continue building cooperation with several suppliers, even with fewer purchases. This can happen because the switching cost factor for sewing thread

is low and the strength of suppliers in Porter's five forces framework is also low. This can be seen from only 1% of respondents working with 1 supplier, 74 respondents (93%) working with 2-4 sewing thread suppliers, and 6% with more than 5 suppliers.

The eleventh hypothesis to predict the relative effect of satisfaction on loyalty was found to have a significant effect on customer loyalty in B2B relationships, and the more satisfied buyers in B2B relationships, the more likely they will increase their loyalty to the supplier. Research showed that 44% of respondents have relationships for 9-14 years, 26% for 4-8 years, and 15% for 15-20 years. The results of this study also support previous research conducted by (Amoako et al., 2020) and (Arthur et al., 2023).

The results of this study provide information for suppliers to develop strategies that can increase customer satisfaction. For example, suppliers can ensure timely delivery by the initial commitment so that the supply chain process at the customer is not interrupted, is of good quality, and is consistent. A smooth supply chain process will make the production process run smoothly. This will increase customer satisfaction and encourage customers to continue to work with these suppliers by making repeat purchases.

The twelfth, thirteenth, fourteenth, and fifteenth hypotheses supported the research, as customer satisfaction was found to mediate between affective commitment, instrumental commitment, capability-based trust, benevolence-based trust, and customer loyalty. The result confirmed previous studies of Arthur et al. (2023) and Padgett et al. (2020) that dimensions of commitment and trust would influence loyalty in the B2B setting, and the level of loyalty would be increased through customer satisfaction. However, in the sixteenth hypothesis, customer satisfaction was less significant in mediating relative dependence and customer loyalty. In the research conducted, it was found that the loyalty of garment factories shown by repeat purchases and long-time cooperation is not directly related to the level of dependence on certain sewing thread suppliers. The existence of alternative sewing thread suppliers or a policy of not depending on one supplier (Hutt, 2013) resulting relative dependence among garment factories, and sewing thread suppliers are less necessary.

## CONCLUSION

The study evaluated the connection between dimensions of commitment, trust, relative dependence, and customer satisfaction as loyalty determinants in the relationship between garment factories and sewing thread suppliers. The results and the statistics show how commitment and trust influence satisfaction and loyalty, while relative dependence has less influence. Therefore, the suppliers need to develop dimensions of commitment and trust with their partners so they will perceive more benefits in cooperating with their suppliers and be loyal to the supplier.

Based on the results and discussion described, dimensions of commitment – affective and instrumental- are confirmed to significantly affect customer satisfaction, supported by previous studies. Dimensions of trust – capability-based and benevolence-based trust also significantly affected customer satisfaction. However, the study revealed the dimensions of commitment and trust had no significant effect on customer loyalty. Customer satisfaction as a mediating variable

of commitment and trust has significantly affected loyalty in this research. Relative dependence does not significantly affect customer satisfaction and loyalty among garment factories and sewing thread suppliers. The presence of alternative suppliers and policy to not depend on particular supplier possibilities effecting customers considered relative dependence is less necessary

Affective commitment and capability-based trust have proven to significantly increase customer satisfaction. Sewing thread suppliers should develop closer relationships with their customers, innovate, and improve their capabilities to fulfill customer requests. Finding that customer satisfaction influences loyalty is expected to help develop services, product innovations, or other marketing strategies from suppliers that can increase customer satisfaction.

This research has several limitations that were encountered during the research process. First, there is a potential for bias in this research because respondents may have different understandings in interpreting the statements or questions asked. Second, most of the respondents in this study were employees at assistant managers or supervisors levels. Even though this questionnaire has been completed with supervision and approval from the manager or head of the relevant department, it is possible that it still reflects the personal opinion of the respondent and does not fully reflect the views of the manager or head of the department with higher authority. Third, this research is still concentrated in Jakarta, Banten and West Java, while the location of garment factories is increasingly spreading to Central Java and West Java. Time limitations mean this research has not yet reached garment factory respondents in other areas, especially Central Java and East Java Provinces to obtain more in-depth information and insight.

The future research advised expanding the geographic scope of research to other regions in Indonesia and having more respondents from other areas, such as Central and East Java, where several bonded zone areas are developed to service the textile industry, particularly garment factories, to obtain more in-depth information and insight. Test the research model in the context of other manufacturing industries. The dimensions of commitment in B2B relationships consist of affective, instrumental, and normative commitment. Normative commitment is a company's commitment to continue working with partners or suppliers because it has a moral obligation to remain bound in cooperation with these partners or suppliers. Companies with high normative commitment will continue to work with these suppliers because they feel they must collaborate (Padgett et al., 2020). Future research is recommended to add the dimension of normative commitment to find out how it affects customer satisfaction and loyalty in B2B marketing. Apart from updating existing models, it will also enrich the literature in B2B marketing studies in Indonesia and explore other factors that may influence the relationship between garment factories and suppliers, such as communication, flexibility, or information sharing.

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