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Beyond the Niche Assumption in the UAE Modest Fashion Market

Ms. Udita Sajin Nair

Student, Business Studies, GEMS New Millenium School

Abstract

This paper examines the market for modest fashion in the United Arab Emirates (UAE) through a structured review of secondary evidence, including industry reports from DinarStandard, Euromonitor International and Business of Fashion (BoF) Insights, official and government-linked population and tourism data, and peer-reviewed studies of Gulf dress and consumption. The analysis covers market scope and size, demand drivers, consumer preferences, competition, retail channels, opportunities and risks. Global Muslim consumer spending on clothing and footwear is estimated at US$347 billion in 2024, while the UAE accounted for 36.8% of apparel sales in the Gulf Cooperation Council (GCC) in 2024 and is forecast to grow at 5% annually between 2024 and 2030. Dubai passed four million residents in 2025 and received 19.59 million international overnight visitors, which creates a diverse and internationally exposed consumer base. Survey and academic evidence points to demand for contemporary and culturally informed modest styles, alongside strong price sensitivity. Competition is fragmented and includes specialist labels, regional designers, value retailers, luxury houses and online platforms. Published figures usually describe wider apparel or Muslim consumer spending rather than modest fashion alone, and category definitions differ between sources. It is concluded that opportunity is more likely to arise from clear differentiation, culturally informed design, credible value and reliable customer experience than from treating modest fashion as an uncontested niche. A proposed modular modest streetwear concept is discussed as a hypothesis that requires validation.

Keywords: UAE Apparel, Modest Fashion, Dubai, Consumer Behaviour, Retail Competition, Market Opportunity

1. Introduction

Modest fashion is not a single uniform category. It spans traditional garments such as the abaya and kaftan, contemporary ready-to-wear, and everyday outfits styled for greater coverage, and scholarship treats it as a field in which dress, faith, commerce and media intersect [1]. In the United Arab Emirates (UAE), this field operates within an unusually international retail environment shaped by local cultural expectations, global brands, tourism, digital discovery and a wide range of income levels.

At the global level, Muslim consumer spending on clothing and footwear was estimated at US$347 billion in 2024 and is projected to reach US$444 billion by 2029 [2]. The UAE was ranked second overall in the Global Islamic Economy Indicator in the 2025/26 edition of the same report series [3]. In the previous edition, however, the UAE ranked within the top five in every pillar except modest fashion, where it was placed seventh [4]. This contrast suggests that the UAE's strength as a retail and trade hub does not

automatically translate into leadership in modest fashion specifically, and it makes a careful assessment of market structure worthwhile.

The purpose of this paper is to assess the market environment for modest fashion in the UAE, rather than to evaluate one product. The paper examines the scale and direction of the wider apparel market, consumer preferences, competing retail formats, and the strategic conditions facing a new entrant. A proposed modular modest streetwear concept called Sandouq is considered briefly in Section 10 as one possible response to the conditions identified.

1.1 Research Objectives

- To describe the UAE apparel and modest fashion market using published secondary research.
- To identify consumer trends relevant to modest and contemporary clothing.
- To assess the competitive landscape and the role of price, retail channels and differentiation.
- To identify market opportunities and constraints for a new modest fashion entrant.
- To recommend areas requiring further validation before investment or launch.

2. Literature Review

2.1 Modest Fashion as a Cultural and Commercial Field

Academic work describes modest fashion as a space where religious norms, personal style and consumer markets meet [1]. Gökarıksel and McLarney (2010) examine how Muslim women's consumption relates to consumer capitalism and an expanding Islamic culture industry [5]. Al-Qasimi (2010) analyses the abaya as fashion in the Arab Gulf states and shows how stylistic change can accommodate dissent about modesty norms without abandoning the garment [6].

2.2 Dress, Identity and Consumption in the Gulf

Sobh, Belk and Gressel (2012) drew on observations and depth interviews with young Qatari and Emirati women and found that modesty and vanity are reconciled through creative strategies that the authors term reverse assimilation and double resistance [7]. Ramadan and Mrad (2017) used focus groups and in-depth interviews in the UAE and report that Emirati women's needs for change, integration, self-expression and staying up to date have shifted the abaya from a utilitarian garment toward a style statement, while local designers still regard its traditional look as a symbol of respect [8].

2.3 Fashion Consciousness and Modest Clothing Consumption

Hassan and Harun (2016) studied hijab fashion consumers in Malaysia and found that dressing style, fashion motivation, fashion uniqueness and sources of fashion knowledge influence fashion consciousness, which in turn influences hijab fashion consumption indirectly [9]. Because the study was conducted in a different national context, its findings are treated here as a framework for questions to be tested in the UAE rather than as evidence of UAE consumer behaviour.

2.4 Research Gap

Within the sources reviewed for this paper, academic studies concentrate on identity, the abaya and hijab consumption, while commercial reports concentrate on market size. Little published work links the two by describing the competitive structure of contemporary modest ready-to-wear in the UAE. Table 1 summarises the academic studies used in this paper, and the gap noted above is the space that the present secondary analysis attempts to map.

Table 1: Summary of Academic Studies Used in This Paper

Year	Authors	Context	Main Insight
2010	Gökarıksel and McLarney [5]	Muslim women and consumer capitalism	Links Muslim women's consumption to the Islamic culture industry
2010	Al-Qasimi [6]	Abaya as fashion in the Gulf	Fashion change accommodates dissent about modesty
2012	Sobh et al. [7]	Young Qatari and Emirati women	Modesty and vanity are reconciled through adornment practices
2016	Hassan and Harun [9]	Hijab consumers in Malaysia	Fashion consciousness mediates hijab fashion consumption
2017	Ramadan and Mrad [8]	Emirati women and the abaya	Abaya has moved from utility toward a style statement

3. Research Methodology

This study follows a secondary research design. Sources were identified through structured web searches carried out in November 2026 and were grouped into four evidence types: industry and market research reports, official or government-linked statistics, peer-reviewed academic literature, and trade or news reporting used to document current retail activity. Where a figure was available only through a press release or a report summary, it is reported with its source and scope, and it is not combined with figures from differently defined categories.

Three limitations affect the evidence base. First, no primary data were collected, so statements about consumer demand reflect published surveys rather than a new sample. Second, several commercial reports are paywalled, and the figures used are those that their publishers released publicly. Third, forecasts are projections and are revised between report editions. These limitations are returned to in Section 9.

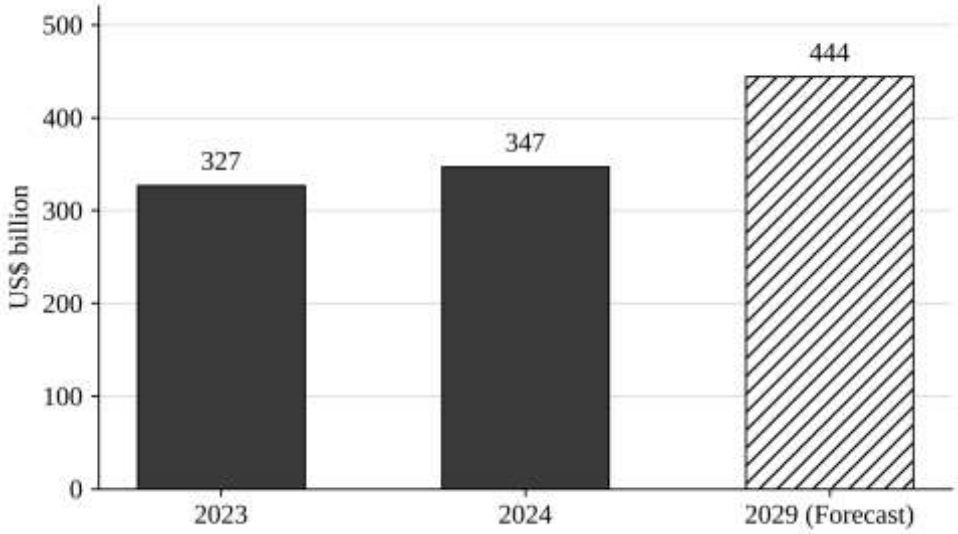
4. Market Scope and Size

Market estimates vary because reports define modest fashion differently. Some measure all apparel purchased by Muslim consumers, others count specialist modest fashion products, and others cover selected categories such as abayas and modest ready-to-wear. These figures should not be combined as though they describe the same market.

4.1 Global Context

The State of the Global Islamic Economy reports use Muslim consumer spending on clothing and footwear as the principal indicator for the modest fashion sector. Spending was estimated at US$327 billion in 2023, a rise of 3% on the previous year [10], and at US$347 billion in 2024, a rise of 6.2%, with a projection of US$444 billion by 2029 at a compound annual growth rate (CAGR) of 5.1% [2, 11]. The previous edition had projected US$433 billion by 2028 [10], which shows that forecasts shift between editions and should be treated as indicative. The indicator also covers all clothing and footwear bought by Muslim consumers and does not isolate garments that are modest by design. Figure 1 presents the series.

Figure 1: Muslim Consumer Spending on Clothing and Footwear in US$ Billion [10, 2]



4.2 The UAE Apparel Market

The d3 and BoF Insights report, citing Euromonitor International data, states that the UAE represented 36.8% of GCC apparel sales in 2024 and forecasts 5% annual compound growth for the UAE apparel market from 2024 to 2030, compared with 4.8% for Saudi Arabia and 3.7% for the global apparel industry [12]. This supports the view that the UAE is an important regional market, but it does not quantify the modest fashion segment alone. The report was developed by BoF as part of a paid partnership with Dubai Design District (d3) [13], so its framing of Dubai's opportunity is best read alongside independent data.

Euromonitor International's February 2026 summary of UAE womenswear describes a fragmented market in 2025, identifies large retail groups as influential, and notes opportunities in affordable and premium fashion, sustainability and localisation. It reports that Landmark Group and Azadea Group held value shares of 15% and 5% respectively in 2025 [14]. These are group-level shares within the report's stated scope and are not shares of modest fashion.

4.3 Third-Party Halal Fashion Estimates

A commercial estimate from Ken Research places the UAE halal fashion market at USD 284 million in 2025 and forecasts USD 451 million by 2032 [15]. The publicly available page does not give enough detail to verify the methodology or to reconcile its category definition with the other sources, so these figures are treated as a third-party estimate and not as a definitive market total. Table 2 lists the main published indicators together with their scope.

Table 2: Selected Published Market Indicators

Indicator	Value	Scope and Caution
Muslim consumer spending on clothing and footwear, 2024	US$347 billion	Global; all clothing and footwear bought by Muslim consumers [2]
Projected spending, 2029	US$444 billion	Global forecast at 5.1% CAGR [2, 11]
UAE share of GCC apparel sales, 2024	36.8%	Wider apparel market; not modest fashion alone [12]

Indicator	Value	Scope and Caution
UAE apparel forecast CAGR, 2024 to 2030	5.0%	Forecast; global comparator is 3.7% [12]
Landmark Group value share in UAE womenswear, 2025	15%	Group level; not modest fashion [14]
UAE halal fashion estimate, 2025	USD 284 million	Commercial estimate; methodology requires caution [15]

5. Consumer Demand and Fashion Preferences

5.1 Population and Visitor Base

Dubai's population passed four million in 2025 according to the Dubai Statistics Centre's population clock [16]. Emirati citizens numbered nearly 300,000 in 2024 [17], which means that most residents are expatriates from many national and cultural backgrounds. In 2025, Dubai also received 19.59 million international overnight visitors, an increase of 5% on 2024, with GCC and wider Middle East and North Africa markets contributing 15% and 11% of arrivals respectively [18]. These figures describe a customer base that is large, mobile and culturally diverse, in which preferences for modest dress are likely to vary by nationality, religion, age and occasion.

5.2 Consumer Preferences

The d3 and BoF Insights study, based on a survey of more than 1,000 Dubai residents conducted in June 2024, reports demand for a wider choice of modest options across age groups [12]. The demand includes traditional garments such as abayas and kaftans as well as non-traditional options such as long-sleeved, non-form-fitting clothing. Younger regional consumers aged 18 to 24 showed particular interest in a wider selection of traditional styles. The research also describes interest in contemporary Arab styles that combine local and Western design references, and suggests that modesty is often achieved through styling and garment choices across broader collections rather than through dedicated modest capsules.

This pattern is consistent with the academic evidence that Emirati women's clothing choices are shaped by fashion motivations such as self-expression and keeping up to date, alongside modesty norms [8], and with the finding in a Malaysian context that fashion consciousness mediates modest clothing consumption [9]. It implies that modest fashion consumers are not necessarily looking for a separate fashion universe. They may value coverage, fit, styling flexibility and cultural relevance within mainstream assortments.

Consumer demand is not uniform. The UAE's resident population includes different nationalities, cultural backgrounds, incomes and levels of interest in traditional or contemporary clothing, and a successful strategy should avoid treating all consumers who prefer modest dress as one homogeneous segment.

5.3 Price Sensitivity and Value

The d3 and BoF Insights report identifies price sensitivity as a meaningful feature of the Dubai market. Consumers compare prices internationally and may shop elsewhere when local prices seem unfair, and residents are described as globally informed shoppers who benchmark products, prices and retail experiences against international alternatives [12]. For a new entrant, value therefore needs to be demonstrated through quality, fit, fabric, versatility, service and transparent pricing, and not only through a low price. A premium price may be viable for a distinctive offer, but the benefit must be visible and credible.

5.4 Cultural Calendar and Occasions

Ramadan and Eid create recurring peaks of discovery and purchase. In 2018, the value retailer Max launched its first abaya line and the online retailer Namshi curated a Ramadan edit of dresses, abayas and kaftans [19]. By 2026, Max Fashion, part of Landmark Group, and the luxury house Prada were both releasing Ramadan and Eid collections [20]. Seasonal modest wear therefore attracts mainstream attention across price tiers, which intensifies competition. Work, family gatherings and everyday wear create different product needs, and heavy reliance on short demand peaks raises the risk of overstocking.

6. Competitive Landscape

The UAE modest fashion market is better understood as a set of overlapping competitive groups than as a single category dominated by one type of retailer. Consumers can choose specialist modest labels, local designers, traditional boutiques, department and mall retailers, international fashion chains, premium brands or online sellers. These alternatives compete on different combinations of design, price, convenience, quality, cultural relevance and brand status.

Several recent developments illustrate the breadth of competition. Regional designers present collections at dedicated events such as Abu Dhabi Modest Fashion Week, which returned in 2025 [21]. Mainstream and luxury names, including H&M and Dolce and Gabbana, have introduced modest lines [22], and the German luxury label MCM launched its first Ramadan collection in 2024 with a hijabi influencer as co-designer [23]. Niche entrants are also appearing in adjacent categories, such as modest affordable activewear [24]. Table 3 groups the main competitors.

Table 3: Competitive Groups in UAE Modest Fashion

Competitive Group	Typical Strengths	Pressure or Gap to Investigate
Specialist modest labels and boutiques	Focused assortment, category knowledge, culturally relevant styling	May have narrower reach or assortment; varies by brand
Local and regional designers	Distinctive design, local relevance, small-batch flexibility	Scale, availability, price consistency and distribution vary
International fast fashion and value retailers	Broad assortment, frequent newness, accessible price tiers	Modesty, fit and climate suitability vary by product
Premium and luxury brands	Materials, brand status, design, retail experience	Higher prices; value expectations are high
Online marketplaces and cross-border sellers	Convenience, broad selection, price comparison	Fit uncertainty, delivery and returns, product consistency

Euromonitor International describes the UAE womenswear market as fragmented and notes that multinational brands often operate through major regional retail groups [14]. Competition therefore includes established distribution and retail infrastructure, and not only product design. The d3 and BoF

Insights report adds that consumers benchmark both local and international offers, which makes differentiation and customer experience important [12].

6.1 Competitive Implications

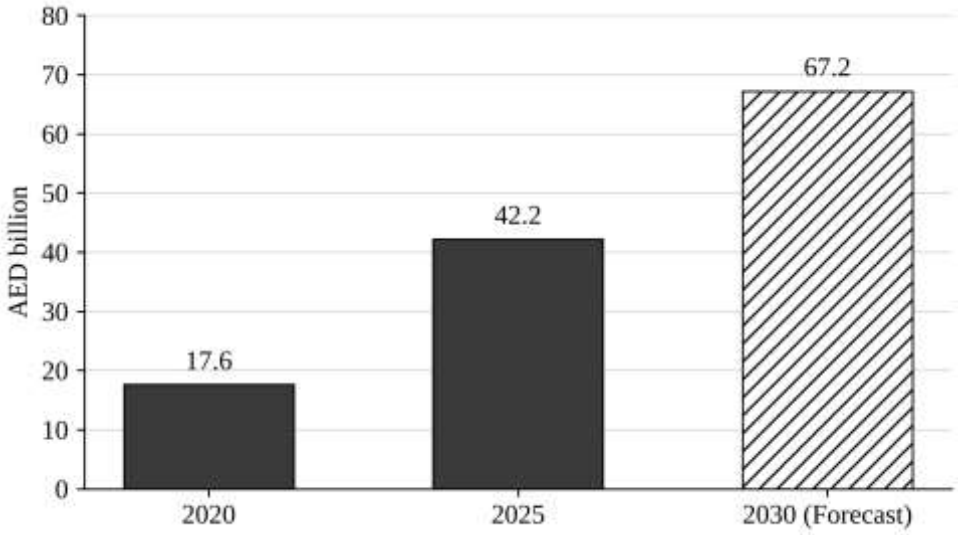
A new brand should not assume that a product feature alone creates a defensible advantage. Modular construction, modest silhouettes or local branding can be copied or substituted. The stronger strategic question is whether the business can combine a relevant design proposition with reliable quality, accessible discovery, appropriate sizing, convenient fulfilment and a price that consumers consider fair.

7. Retail Channels and Market Access

7.1 Omnichannel Retail

The UAE e-commerce market reached AED 42.2 billion (US$11.5 billion) in 2025, up from AED 17.6 billion in 2020, a compound annual growth rate of 19%. E-commerce accounted for about 15.7% of UAE retail sales in 2025 and is expected to exceed 20% by 2030, and apparel and footwear was the largest online vertical at AED 11.4 billion [25]. The market is forecast to grow by 9.9% annually between 2026 and 2030 to about AED 67.2 billion [25], as shown in Figure 2.

Figure 2: UAE E-Commerce Market Size in AED Billion [25]



Euromonitor International's 2026 womenswear summary states that offline retail remains dominant while e-commerce continues to gain traction, with convenience and competitive pricing supporting online growth [14]. In online apparel, the commercial database ECDB ranks Namshi as the largest UAE store by 2024 net sales, at US$124.9 million [26]; this is a database estimate and is used here only to indicate relative scale. Taken together, the evidence points toward an omnichannel environment rather than a simple replacement of physical retail by online shopping.

For modest fashion, physical touchpoints can help customers assess fabric, drape, opacity, fit and construction. Digital channels can support discovery, styling demonstrations, product information and repeat purchases. A brand's channel choice should reflect the complexity of its product and the amount of reassurance customers need before buying.

7.2 Creator-Led Discovery

The d3 and BoF Insights research reports that local creators and influencers are a major source of fashion inspiration for Dubai residents, with international creators also influential [12]. This supports the relevance of creator-led discovery, but it does not mean that influencer promotion automatically converts to sales. Partnerships should be assessed through audience fit, content credibility, measurable engagement and purchase outcomes.

8. Market Opportunities

8.1 Contemporary Modest Ready-to-Wear

Published consumer research points to demand for modest options that extend beyond traditional occasion wear. This creates a potential opening for contemporary everyday pieces that combine coverage with current styling. The opportunity is to address a specific consumer use case, and not to assume that all modest fashion shoppers want streetwear.

8.2 Regionally Informed Design

The d3 and BoF Insights report highlights interest in contemporary Arab styles and local creative collaboration. Regional design cues, suitable silhouettes, thoughtful fabric selection and culturally informed product development may help brands connect with consumers while maintaining broader appeal.

8.3 Versatility and Wardrobe Utility

A garment that can be styled in several ways may appeal to consumers who seek versatility or fewer single-purpose purchases. This is a plausible product hypothesis and not a proven market fact. It should be tested against consumer priorities such as comfort, durability, ease of care, modest coverage and whether convertible features are genuinely useful.

8.4 Digital Discovery with Physical Reassurance

A combined approach, in which digital storytelling and ordering are supported by pop-ups, fittings or selected retail partners, may reduce uncertainty for unfamiliar products. Physical demonstrations are especially relevant when the value of a product depends on how it fits, drapes or changes configuration.

8.5 Visitor and Seasonal Demand

Because the visitor base includes substantial arrivals from the GCC and wider region, and because Ramadan and Eid concentrate purchasing, a brand may be able to design capsule drops that serve both residents and visitors. The commercial value of this approach has not been established in the sources reviewed and would need to be tested through pilot sales.

9. Risks, Constraints and Limitations

- Crowded competition: consumers have many substitutes across price tiers and retail formats.
- Price comparison: international shopping and online discovery make perceived value highly visible.
- Product execution: fabric, fit, opacity, sizing, comfort and durability can determine repeat purchase.
- Inventory risk: seasonal peaks and fast-moving trends can lead to excess stock or missed demand.
- Differentiation risk: design features can be imitated, and novelty may not translate into lasting preference.
- Evidence gap: published market reports describe broad trends and do not establish demand for a specific new brand or product.

The evidence used in this paper also has limitations. Category definitions differ between reports, so figures cannot be added together. Some sources are commercial estimates or summaries of paywalled reports. One of the main consumer sources was produced under a paid partnership, and its survey was limited to Dubai residents. Forecasts are projections and are revised between editions. Finally, no primary research was conducted, and the findings should therefore be read as a structured synthesis of existing evidence.

10. Strategic Implications for a Potential New Entrant

A new modest fashion business should begin with a sharply defined customer need and a small, testable assortment. The market evidence supports exploring contemporary modest options and culturally relevant design, but it does not identify a guaranteed winning product, price or channel. The following steps are recommended.

- Define a specific use case and customer segment instead of targeting all modest fashion consumers.
- Benchmark named competitors and actual products on price, fit, fabric, styling, sizing, availability and returns.
- Test prototypes with users from different relevant backgrounds and collect feedback on practical wear, and not only visual appeal.
- Use transparent pricing and explain the value behind any premium.
- Pilot limited quantities and track sell-through, returns, repeat purchase and customer acquisition cost before scaling.
- Combine digital product education with opportunities to experience fit and fabric where practical.

Table 4 sets out the metrics that would show whether a pilot has validated the concept.

Table 4: Suggested Validation Metrics for a Pilot Launch

Metric	Question It Answers
Sell-through rate	Do customers buy the assortment at the intended price without heavy discounting?
Return rate and reasons	Are fit, opacity, fabric or sizing problems driving returns?
Repeat purchase rate	Does the product earn a second purchase, which signals real preference?
Customer acquisition cost	Can the brand attract customers at a cost that its margins support?
Feature usage feedback	Do customers actually use any modular or convertible features?

Sandouq, a proposed modular modest streetwear concept, could be examined as one response to the opportunity for versatile contemporary modest clothing. Its commercial potential would depend on whether customers find the modular features useful enough to justify the price and whether the business can deliver quality, fit, durability and service consistently. The available market research does not establish those points.

11. Directions for Future Research

Three lines of work would strengthen the findings. A primary survey of UAE residents, stratified by nationality, age and income, would test the preferences that published reports describe only in general

terms. A product-level price and assortment audit of named competitors would convert the qualitative competitive map in Table 3 into measurable benchmarks. A small pilot or pre-order test would measure actual purchase behaviour, which is a stronger form of evidence than stated interest.

12. Conclusion

The UAE offers a substantial and growing apparel environment, and Dubai serves as an influential fashion and retail hub with a large, diverse resident and visitor base. Published research indicates that consumers seek a wider range of modest options, including contemporary and culturally informed styles, while remaining sensitive to price and accustomed to comparing global offers. The competitive landscape is fragmented and includes established retail groups, international and luxury brands, specialist labels, local designers and fast-growing online sellers.

The most credible opportunity is not simply to launch another modest fashion label. It is to identify a specific unmet need and to meet it with relevant design, reliable execution, clear value and an appropriate route to market. Versatility and modular clothing may be worth testing, but they should be treated as hypotheses until they are supported by prototype feedback and actual purchase behaviour.

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