

## **Readymade Garment Industry in Bangladesh: Growth, Contribution and Challenges**

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**Abstract:** Based on secondary data, the study is intended to draw the scenario of RMG industry in Bangladesh, especially the growth, contribution, and challenges. RMG industry has been functioning in Bangladesh since long as a catalyst for sustainable development and growth of the country. It is the largest exporting industry in Bangladesh that has experienced tremendous growth during the last 25 years. It provided more than five million direct jobs, 16 percent of GDP, and more than 81 percent of foreign exchange earnings in FY2013-2014. The Knitwear industry is adding up to 75% value, which opens up enormous potential for foreign and domestic investors to spend in the areas of spinning, weaving, sewing, packaging, and accessories manufacturing. Despite the stupendous growth of the RMG industry, and its bright prospects, challenges are still there. In order to address the challenges, a number of collaborative and coordinated steps should be initiated. Along with establishing sound infrastructure, skill manpower, improved productivity, enhanced market access, market diversification, access to finance at competitive interest rate, and establishment of secured special industrial zones are crying need for the industry. Moreover, to grab and retain the sweet fruits of RMG a positive branding should be continued.

**Keywords:** Challenges, Contribution, Growth, Knitwear, RMG

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### **I. Introduction**

Shifting from an agro based economy to an industrial economy is an essential part of the process of economic development of a country. Bangladesh, one of the representatives of LDCs that has recently graduated to a lower-middle income country from a low-income country, has also been following the same direction. Agriculture had been the dominant sector of Bangladesh economy and also the main source of income for the people of the country since her independence in 1971. But Bangladesh can now rightfully claim that she has graduated from a predominantly agro based and aid receiving nation to a trading nation [1]. The export-oriented Readymade Garment (RMG) sector has made considerable contribution to this transformation. Nowadays, RMG sector is the largest exporting industry in Bangladesh that experienced tremendous growth during the last 25 years. Within a short span of time, it has attained a high profile in terms of foreign exchange earnings, exports, industrialization, and contribution to GDP. The industry also plays a key role in employment generation, provision of income to the poor, and in the socio-economic development of the country. According to Bangladesh Knitwear Manufacturing and Exporting Association (BKMEA), it provided 4.2 million direct jobs, 16 percent of GDP, and more than 81 percent of foreign exchange earnings in FY2013-2014 [2],[3]. Owing to the emergence of strong backward linkages within the country, the knitwear industry is adding up to 75% value, which opens up enormous potential for foreign and domestic investors to spend in the areas of spinning, weaving, sewing, packaging, and accessories manufacturing [4]. In the last five consecutive fiscal years, knitwear constituted 7.2% of the national GDP on average, demonstrating that RMG continues to serve as a strategic and commercially important sector to the country.

The paper has completely been prepared based on secondary sources of information. Different research articles both in online and printed, websites of different business bodies like BKMEA and BGMEA, reports of Bangladesh Bureau of Statistics (BBS) and Bangladesh Economic Review (BER) are the major sources of information for this paper. The general objective of the study is to draw a brief scenario of RMG industry in Bangladesh. The specific objectives of this study are:

- a. to depict the history and growth picture of RMG sector in Bangladesh;
- b. to show the contribution of RMG sector in the national economy of Bangladesh; and
- c. to explore the opportunities and challenges of RMG sector of Bangladesh.

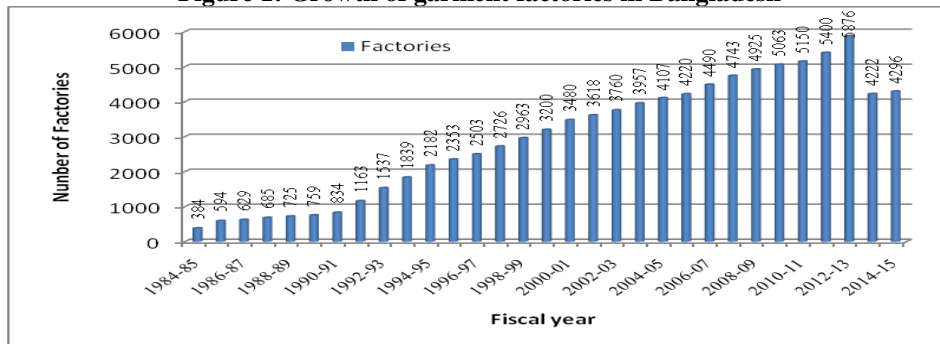
Section II of this paper depicts the history and growth picture of RMG sector in Bangladesh; Section III shows the contribution of RMG sector in the national economy; Section IV describes the prospects and challenges of the sector; and the final Section V provides recommendations and conclusion.

## II. History And Growth Of Garments Industry In Bangladesh

The export-oriented readymade garments (RMG) sector in Bangladesh started its journey in late 1970s as a small non-traditional sector of export. At that time there were only nine exporting garments industries in the country. The three largest industries in that time were Riaz Garments, Jewel Garments, and Paris Garments. Among those, Riaz Garments was the most famous and oldest industry in that time. In the earlier stage, Riaz Garments of Mohammad Reaz Uddin started its business with some tailoring shop in the name of Riaz store. Later on, the name turned into Riaz Garments in 1973, and from 1978 the company started exporting with one million pieces of shirts in the South Korean Company named ‘Olanda’. Desh Garments is another pioneer of Bangladesh RMG sector. In 1979, Desh Garments started a joint project with South Korean company “Daiyuu”. At the same time, several garments factories were established such as Stylecraft Limited, Aristocraft Limitd, Azim Group, and Sunman Group. Following the beginners of RMG sector, some others discreet and hard-working entrepreneurs started their RMG business in the country. Since then, RMG sector of Bangladesh has been developing day by day through various critical stages. Bangladesh exported RMG worth only US\$ 69 thousand when Reaz Garments exported its first consignment in 1978. By FY2002, within a span of about two decades, exports increased to US\$4.5 billion and in next 12 years it became US\$24.49 billion in the year 2013-14. Over the past decade alone, the sector registered a phenomenal growth rate of 15 percent per annum, which is impressive by any standard [5]. All the readymade garments of Bangladesh are classified into two broad categories namely woven products and knitted products. Woven products include shirts, pants, and trousers. On the other hand, knitted product includes T-Shirts, polo shirts, undergarments, socks, stockings, and sweaters. Woven garments still dominate the export earnings of the country. It is evident from BGMEA report that knitted items production is increasing in considerable rate day by day and at present about 40% of the export earnings of Bangladesh has been generating from knitted products.

Quota system that gave enormous benefit was a great blessing for establishing the garments industry in Bangladesh. Thanks to the system, RMG sector of the country has become a matured industry today. The system was governed through the Multi Fibre Arrangement (MFA) of world trade in textiles and garments from 1974 to 2004 that imposed quotas on the amount developing countries could export to developed countries. Between 1990 and 2004, Bangladesh witnessed about eightfold increase of its exports of garments from US\$620 million to US\$5.7 billion [6]. While quota system was approaching to an end in 2004, many people who were directly or indirectly related to the industry got upset about the future of RMG sector of Bangladesh. But the sector was not affected so heavily as the experts concerned. The industry conquered the post quota challenges and made that a successful story [7]. In fact, Bangladesh's exports increased in value by about US\$500 million in 2006 [8]. Critics say that the garment industry grew sharply in Bangladesh after the end of the MFA and exhibited social benefits such as ‘empowering women, their mobility, and their individual choice but that increased opportunities for women have been made at the cost of their health and increased risk of harassment [9].

Figure 1: Growth of garment factories in Bangladesh



Source: BGMEA Web Site (Graph Designed by the Researchers)

At present, according to a private statistics, there are more than 5,000 garment factories in Bangladesh. But, according to BGMEA the number of garment factories in Bangladesh is more than 4000. The number was merely 384 in the year 1984-85, which gradually became the highest ever 6,876 in 2012-13, then decreased to 4,222 in 2013-14. Now, RMG industry is the country’s largest export earner, where exports surged 14 percent to US \$24.49 billion in 2013-14 fiscal year from the previous year. But the total exports were 1 percent below the target of US\$30.5 billion [10]. Though the total export target was not met, garments still played the lead role in exports and maintained a satisfactory growth. Despite the growth loss in the specialized textiles, a figure of 14% increase in RMG export is encouraging news for the sector.

The sector witnessed unparalleled growth in the last 20 years and also became the largest exporting industry in Bangladesh. It has attained a high profile in terms of foreign exchange earnings, exports, industrialization, and contribution to GDP within a short span of time. The major importer of RMG products from Bangladesh are USA and Europe. USA is the largest importer of Bangladeshi RMG products, followed by Germany, UK, France and other E.U countries. But there are some other countries that have a contribution to the total RMG export of Bangladesh.

**Table 1: Bangladesh's RMG Export to World from 2013 to 2015**

Million US\$	Woven			Knit			Total		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
<b>EU Countries</b>	<b>5663.29</b>	<b>6230.26</b>	<b>6910.14</b>	<b>8140.94</b>	<b>8779.99</b>	<b>8992.53</b>	<b>13804.23</b>	<b>15010.25</b>	<b>15902.68</b>
% of World	46.99	50.16	50.05	71.11	72.19	70.27	58.74	61.06	59.78
Growth %	18.80	10.01	10.91	17.83	7.85	2.42	18.23	8.74	5.95
<b>USA</b>	<b>4,088.09</b>	<b>3,803.62</b>	<b>4,233.65</b>	<b>1,209.81</b>	<b>1,204.43</b>	<b>1,425.26</b>	<b>5297.90</b>	<b>5008.04</b>	<b>5658.91</b>
% of World	33.92	30.62	30.67	10.57	9.90	11.14	22.54	20.37	21.27
Growth %	14.94	-6.96	11.31	16.82	-0.45	18.33	15.36	-5.47	13.00
<b>Canada</b>	<b>545.68</b>	<b>525.80</b>	<b>569.91</b>	<b>454.37</b>	<b>403.34</b>	<b>403.88</b>	<b>1000.05</b>	<b>929.15</b>	<b>973.79</b>
% of World	4.53	4.23	4.13	3.97	3.32	3.16	4.26	3.78	3.66
Growth %	9.45	-3.64	8.39	2.87	-11.23	0.13	6.36	-7.09	4.80
<b>Other Countries</b>	<b>1755.24</b>	<b>1861.58</b>	<b>2091.73</b>	<b>1643.56</b>	<b>1774.94</b>	<b>1975.59</b>	<b>3398.80</b>	<b>3636.52</b>	<b>4067.32</b>
% of World	14.56	14.99	15.15	14.36	14.59	15.44	14.46	14.79	15.29
Growth %	35.53	6.06	12.36	27.97	7.99	11.31	31.77	6.99	11.85
<b>Grand Total</b>	<b>12052.30</b>	<b>12421.26</b>	<b>13805.44</b>	<b>11448.68</b>	<b>12162.70</b>	<b>12797.26</b>	<b>23500.98</b>	<b>24583.96</b>	<b>26602.70</b>
<b>Growth %</b>	<b>19.12</b>	<b>3.06</b>	<b>11.14</b>	<b>18.39</b>	<b>6.24</b>	<b>5.22</b>	<b>18.76</b>	<b>4.61</b>	<b>8.21</b>

*Source: BGMEA Website (Modified by the Researchers)*

The percentage of RMG export out of total export during the last ten years from 2005 to 2015 has been shown in **Table 2**. The table shows a constant growth during the period under study. The contribution of RMG in total export was 75 percent in 2003 which became the highest ever 81.68 percent in 2015. This is definitely an indication that RMG sector is the main contributor of Bangladesh's economy, especially in the export of the country.

**Table 2: Comparative Statement on Export of RMG and Total Export of Bangladesh**

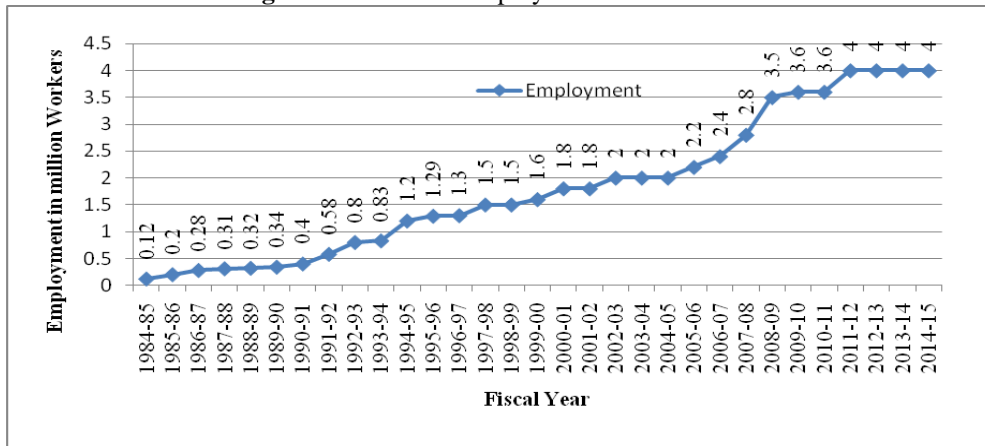
Year	Export of RMG (in million US\$)	Total export of Bangladesh (in million US\$)	% of RMG's to total export
2005-06	7900.80	10526.16	75.06
2006-07	9211.23	12177.86	75.64
2007-08	10699.80	14110.80	75.83
2008-09	12347.77	15565.19	79.33
2009-10	12496.72	16204.65	77.12
2010-11	17914.46	22924.38	78.15
2011-12	19089.69	24287.66	78.60
2012-13	21515.73	27027.36	79.61
2013-14	24491.88	30186.62	81.13
2014-15	25491.40	31208.94	81.68

*Source: BGMEA Website (Modified by the Researcher)*

### III. Contribution Of RMG Sector To The National Economy

The Ready Made Garments (RMG) industry contributes to the Bangladesh economy in a distinctive manner. The industry plays a significant role in terms of employment and income generation of millions of people especially the poor. More than five million workers are directly and more than twelve million inhabitants are indirectly associated with the industry. In addition to its economic contribution, the expansion of RMG industry has caused noticeable changes by bringing more than 3.2 million women into the workforce. Hence it is quite apparent that this sector has played a massive role in the income generation of a large portion of our population. RMG's contribution in terms of GDP is highly remarkable; it has reached at 13 percent of GDP which was only about 3 percent in 1991. It also plays a pivotal role in the development of other key sectors of the economy like banking, insurance, shipping, hotel, tourism, road transportation, railway container services, etc. About 80 percent of total workforce employed in RMG sector is women who have mostly come from rural areas. Thus the industry helps in the country's social development, women empowerment and poverty alleviation. The enhanced purchasing power of the poor contributed significantly to the growth of the economy through its multiplier impact in terms of consumption expenditure and savings.

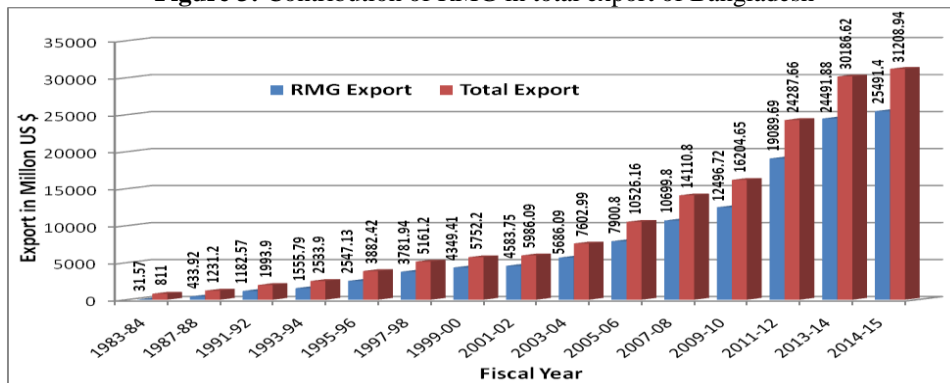
**Figure 2: Year-wise employment in RMG sector**



Source: BGMEA Web Site (Graph Designed by the Researchers)

Over a period of 25 years, the garments sector has grown into a US\$6 billion industry. During the period, it has boosted the overall economic growth of the country and raised the viability of other export sectors. About 76 percent of total export earnings of the country come from RMG sector. Fig. 2 shows that in FY 2001-02 RMG sector of Bangladesh earned around US\$ 4,883 million, in FY 2007-08 the value was US\$ 10,700 million, and finally in FY 2014-15 the value stood at US\$25,491 million.

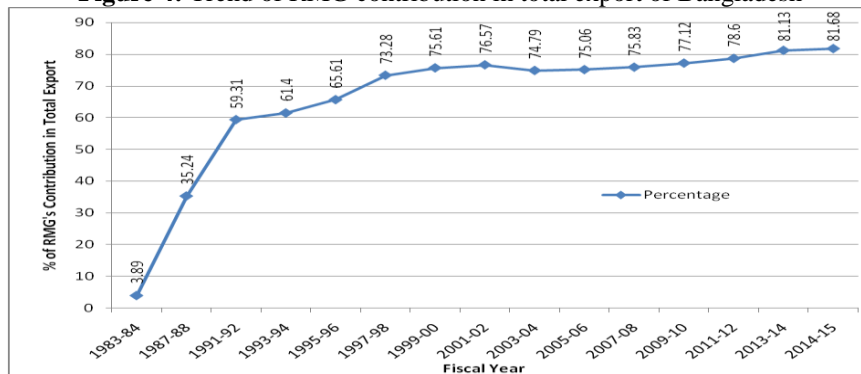
**Figure 3: Contribution of RMG in total export of Bangladesh**



Source: BGMEA Web Site (Graph Designed by the Researcher)

Bangladesh’s RMG industry, with its woven and knit sub-components, is a pre-dominantly export oriented sector, with 95 per cent of the woven and 90 per cent of the knit exports being directed to foreign markets. The cumulative foreign currency earnings by the sector, since 1978, when first export was registered, is estimated at US\$ 70.56 billion. Bangladesh’s RMG export earning stood at US\$ 9.21 billion in FY2007.

**Figure 4: Trend of RMG contribution in total export of Bangladesh**



Source: BGMEA Web Site (Graph designed by the researcher)

Fig. 4 shows that in 2014-15 RMG sector contributed 81.68 percent of the total Bangladesh export of US\$ 31.21 billion in the same year. As shown in Table 3, RMG export in FY2007 was equivalent to 13.25 percent of Bangladesh's GDP over the corresponding year. Accordingly, local value addition by the sector in 2007 was about US\$ 4.15 billion which was equivalent to 5.96 percent of GDP for the same year. The value addition created by the sector itself was 25 percent of total RMG export earnings which amounted to about US\$ 2.30 billion or equivalent to 3.32 percent of GDP.

**Table 3: Contribution of RMG Sector in the Economy**

Macro Contribution of RMG Sector	Amount (billion US\$)	As Percentage of GDP
Total RMG Exports	9.21	13.25%
Local Value Retention	4.15	5.96%
Direct Value-Addition by RMG Sector	2.30	3.32%

*Source: BGMEA Website*

Growth of RMG sector in Bangladesh has generated a whole new set of linkage industries and facilitated expansion of many service sector activities of the country. The RMG industry has not only boosted the growth of spinning, weaving, dyeing and finishing industries, production of accessories and spare parts, but also contributed to some other economic activities such as banking, insurance, real estate, packaging, hotel and tourism, recycling, consumer goods, utility services, and transportation. The RMG sector has overwhelmingly high backward linkage with textile sector providing fabrics, yarn and other ancillaries. It has also important backward linkage with utility sectors such as electricity and gas. It has forward linkage with transport, communication, banking and insurance and trade services. Besides, there is a considerable subcontracting linkage within the sector. The buying houses also play important role towards bringing the manufacturers and buyers of RMG products closer. The RMG value-added ratio to output stood at 19 percent in 1993-94. Since then the RMG sector has undergone important changes, with substantial movements in terms of enhanced value addition. Knitwear sector is the leader from the view point of value addition and net retention as shown in Table 4.

**Table 4: Value Addition and Net Retention Rate of Bangladesh Knitwear Sector**

Year	1994	2000	2008	2012	2013	2014
Value Addition	50%	70%	75%	72%	75%	75%
Net Retention	40%	55%	61%	53%	50%	48%

*Source: BKMEA Website*

The 5 million workers in the industry have created a large demand for consumer goods. A regular source of earning increases the basic consumption needs such as improved diet, better healthcare, improvements in family utensils and housing conditions etc. The sector has created an increasing demand for consumption of low cost commodities, cosmetics items, dresses, footwear, fast food, and other products. Different industries have been created to serve these growing demands which again created employment opportunities for hundreds of thousands of people.

#### **IV. Challenges Of RMG Sector In Bangladesh**

Thanks to the rapid spread of automated procedures for movement of goods and services; global integration of production networks; significant reduction of transportation costs; modernization of ports, customs administration, and other trade infrastructure; trade openness in goods as well as in services is likely to be the order of the coming decades [11]. Theory and historical evidence supports that Bangladesh should continue on a path of export-oriented development. Focus on export markets, rather than the limited domestic market, could be the main driver of employment for the vast number of labor force entering the market as an outcome of the demographic transition of Bangladesh. But the changing trade patterns are creating opportunities as well as challenges for RMG sector of the country. RMG industry is a springboard for national development of Bangladesh because of its low fixed costs and emphasis on labor-intensive manufacturing. The industry has been functioning in the country since long as a catalyst for sustainable development and growth. Despite the stupendous growth of the RMG industry, and its bright prospects, challenges are still there. A few of these challenges are as follows:

One of the biggest challenges for RMG industry in Bangladesh is the long lingering political unrest which seriously threatens production as well as marketing of the same. Compared to Bangladesh's exports to the USA in January 2014, exports in January 2015 experienced a downslide of 7.16 percent. The reflection was not only in value but also in volume. In January 2015, Bangladesh exported 15,200,000 square meters of garments which were 8.38 percent less than the corresponding month of previous year [12].

Most of the RMG industries in Bangladesh are export-oriented. The main markets of RMG products of Bangladesh are the EU and North American countries. Although thousands of RMG industries in Bangladesh are

engaged in manufacturing RMG products, they have been facing fierce competition from China, India, Sri Lanka and Vietnam in the neighboring region for their market share in the predominant markets of the USA, EU and Canada.

Structural development is badly needed to cope with the competitors. But the RMG sector of Bangladesh has been confronting some structural problems like inadequate and uninterrupted energy supplies, low gas pressure, poor road and transport facilities etc. The successive governments in Bangladesh have failed to provide the required infrastructure and uninterrupted energy supply, making per unit production cost in Bangladesh higher than most of its competitors, if the wage cost effects are isolated.

RMG sector has been facing several compliance related challenges and associated consequences. After the Tragedy of Tazrin Garments and Rana Plaza, the international buyers of the country's Readymade garments especially the EU and the USA have been pressuring the Bangladesh to comply with some standards. In the meantime GSP facilities for Bangladesh have been stopped. Getting the GSP facilities back is another challenge for the RMG industry of Bangladesh.

The raging controversy over wage hike in the readymade garments (RMG) sector in Bangladesh may be a challenge for the industry. This is happening at a time when the industrial structure in China, the world's largest exporter of apparel products and one of the major competitors of Bangladesh, is undergoing rapid transformations. While the China shift could benefit Bangladesh's RMG in the medium to long run, the industry faces some short-term challenges largely owing to economic problems in the advanced economies [13]

While the emerging markets returned to the high growth path following the great recession of 2008-09, the advanced countries' economic outlook remains gloomy. The hope of economic recovery is overshadowed by continuous job losses in the US and the sovereign debt problem on the both shores of the Atlantic. Further, many countries in Europe are announcing a series of austerity measures that could slash their demand for imported goods and services significantly. However, the recent austerity measures and a less than rosy outlook of advanced economies could affect Bangladesh's apparel sector adversely.

Recent reports by various analysts and researchers reveal that Bangladesh RMG industry is suffering from the dearth of professional and highly skilled marketing personnel and has to rely on the expert personnel from abroad who are very expensive to hire.

## **V. Conclusion And Recommendations**

It is expected that over the next twenty years, international trade will become the lifeline of Bangladesh economy than today. The share of exports, especially readymade garments, in GDP could be expected to increase many folds. Therefore, trade policy reforms at the border and within the border will have to be undertaken to utilize the potentials of garments industry and to grow the economy out of poverty and under-employment. It is also time to change the conventional trade and trade policies. Special focus should be given on RMG sector in Bangladesh's five year plans and other longer-term plans to ensure a sustainable growth of the industry, which means incorporating RMG issues into every stage of the development planning cycle. This must be underpinned by strong inter-ministerial coordination and consultative processes with a wide range of stakeholders, including consumer groups. It is the responsibility of the stakeholders, business leaders and the government to protect the interest of the RMG industry which has given Bangladesh economy a strong foothold, created jobs for millions of people, especially for women, freeing them considerably from the shackles of poverty.

RMG industry in Bangladesh has already proved itself to be a resilient industry and can be a catalyst for further industrialization of the country. However, the industry still depends heavily on imported fabrics. To face the upcoming challenges in RMG sector, some new thinking and new directions in trade policy orientation have become the latest imperative. Some of them could be as follows:

- High protection for a long period creates inefficiency and undermines competitiveness over the long term. Therefore, we have to review the protection policy, scale down the level of protection, and establish a mechanism of time bound protection for import substitutes.
- In Bangladesh, tariffs are among the highest in the world. Recognizing that a high tariff regime undermines export competitiveness, it is time to seriously start scaling back NPR on domestically produced RMG items.
- In Bangladesh, 98 percent of exports are final consumer products with little or no intermediate goods. Trade and domestic policies have an anti-intermediate goods bias. This needs to change as trade in intermediate goods is the fastest growing component of global trade. Bangladesh needs to exploit the opportunities created by cross-border production networks to produce and export intermediate goods that could be assembled elsewhere.
- Bangladesh should also continue seeking market access under the various bilateral and regional trade and investment arrangements. What is notable is that it might be easier to sign on to South-South regional arrangements, but the greatest gains may come from North-South regional communities. Bangladesh should be looking forward and preparing to reach trading arrangements with some forthcoming mega pacts like TPP, TTIP, and RCEP, where the bulk of our future export markets will lie.

- It is the prime duty of RMG entrepreneurs to provide a safe working condition for the workers who have given the economy a strong footing. Unconditional and quick implementation of core labor standards and labor laws at workplace of all RMGs and establishing a compulsory social safety net package for RMG workers are essential. Continuous training program to sensitize the workers about their rights and interest should also be undertaken.
- To develop productivity and efficiency level, capacity building training and re-training activity for employers and workers in RMG sector should be undertaken.
- Backward and forward linkage industries are of prime necessary for the growth and sustainability of any industry. Although a tremendous development has been observed, still there are a lot of things need to be developed for the betterment of RMG.
- Tariff and non-tariff measures, trade policies, and customs administration related to garment industry that impede the growth of the industry should be found out and reshuffled as much as needed as required for the smooth functioning of the RMG sector of Bangladesh.

In a nut shell, in order to address the challenges of RMG sector in Bangladesh, a number of collaborative and coordinated steps should be initiated. Along with establishing sound infrastructure, skill manpower, and improved productivity, enhanced market access, and market diversification are of very urgent. Access to finance at competitive bank interest rate and establishment of secured special industrial zones are also crying need. Finally, to bring the sweet fruits of RMG a positive branding should be continued.

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