

BUSINESS TREND ANALYSIS OF RMG INDUSTRY IN CONTEXT OF BANGLADESH - A CASE STUDY

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ABSTRACT – Bangladesh has made a tremendous contribution to Ready-made garment (RMG) sector since the 1970s. Textiles and apparels consider for about 85% of the total export earnings of Bangladesh. Though it is quite difficult to meet the dimension of performance and objection of the RMG sector in Bangladesh, this study made a search based on the study of attainable documents. The beauty of this study lies in its narration and a sequential way of description. The study discovers that since its inception, the RMG industry contributed significantly to Bangladesh economy especially during the last three decades. The cross-check analysis was conducted to compare the last three decades' export of RMG, specific garments export, gross domestic product (GDP), market share, etc. to achieve a lucid idea of the business trend of the RMG industry. These initiatives focus more on the establishment of sound structure, skilled manpower, enhanced market access, access to finance at the competitive interest rate, adaptation with advanced technology as well as institutional development. Therefore, both public and private sectors need to take several preliminaries, independently and collaboratively to overcome these challenges. Moreover, to take control and reserve the golden share of RMG, assured branding needs to be expansive.

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INTRODUCTION

The ready-made garment (RMG) sector of Bangladesh is making a remarkable positive impact on the development of the nation's economy and playing an extremely vital role in transforming Bangladesh into a middle-income country from the category of a least developed nation (Baumann-Pauly, Labowitz, & Stein, 2018; Mostafa & Klepper, 2018; Polas et al., 2021). Most people in Bangladesh are still dependent on the agricultural sector, but a greater portion of these farmers are marginal farmers and due to insufficient land and lack of advanced technology, people have shifted from agriculture to industry. As a result, the agriculture-based economy of this country has become an industry-based economy which is a fundamental part of the upliftment of a country. Among these industries, the export-oriented RMG sector in Bangladesh is the one that commenced its journey in the late 1970s and brought a massive change to its economy (Mia & Akter, 2019; Mujeri & Mujeri, 2020). To create history, the combination of the national economy and global trading opportunities is truly unrivaled in the growing world. It is the RMG sector that came first to take the position of jute and jute goods, and then get over these when they were losing their traditional markets with a drastic fall in foreign earnings. The RMG sector slowly injected mobility in the export as well as in the domestic saving, while the traditional export sector failed to yield expected results through backward and forward linkage economic activities (Rahman & Chowdhury, 2020; Raihan, 2002).

Being the greatest export earning sector in Bangladesh, the RMG has contributed to socio-economic prospects, creating a huge number of employment opportunities mostly for the poor illiterate female workforce of the country (Farhana, Syduzzaman, & Munir, 2015). But the journey of the RMG sector in Bangladesh was not always smooth and this sector faced several devastating industrial accidents including the unfortunate Rana Plaza and Tazreen Fashion factory that provided a wake-up call for the industry and its stakeholders both locally and internationally (Motlagh & Saha, 2014). It reiterated the fact that despite the benefits that the sector has been providing locally and globally, there is still more work needed to be done to make the industry safer and better in terms of environmental sustainability, working conditions, social standards, building, and fire safety. However, over the past years, the industry has made unprecedented efforts and investments to ensure the safety of the workers (Alama et al., 2020; Sádaba, SanMiguel, & Gargoles, 2019). Currently, the Covid-19 pandemic has unnerved the global economy and caused a big shift in stock markets. The severity of lockdown and delays in vaccination might halt the global market share. Moreover, due to Covid-19, the IT sector has been covered around the world immensely (Nicola et al., 2020). All types of businesses are shifting to the online system, but the greatest irony is that the garment sectors cannot completely transform themselves into an online-based platform. Therefore, it becomes a challenging time for this sector to sustain itself properly.

LITERATURE REVIEW

The RMG industry is the largest industrial zone for the economy of Bangladesh. The journey begins with the evolution of Dhakai Muslin from the sixteenth to the nineteenth century in Mughal times. In 1978, there were only 9 export-oriented garments manufacturing units namely Reaz Garments, Paris Garments, Jewel Garments, Baishakhi Garments, etc. Bangladesh's garments industry was reputedly known worldwide through its main zone of the European market and it earns the confidence of global brands and consumers through its tireless efforts in the past decade. In 1977, Jewel Garments have first exported on consignment in Bangladesh's history. West Germany was the first buyer. Despite a humble beginning, phenomenal growth has been attained over the last two decades in which RMG is the mass-produced finished textile product of the clothing industry. After 1970 when the jute industry started to collapse its market, the RMG industry grabbed the position. It became the top profit-making sector in the country for decades (Farhana et al., 2022; Kabeer, 1991; Van Schendel, 2020; Yunus & Yamagata, 2012).

Table 1. Important issues related to the Bangladesh RMG industry (Yunus & Yamagata, 2012).

Years	Parameters
1977-1980	Early period of the apparel business
1982-85	Boom day of the apparel business
1985	Assessment of quota restriction
1990	Significant development in the knitting sector
1993-1995	Child labor problems and solution
2003	Removal of Canadian quota restriction
2005	Phase-out of export quota system
2006	Riots and strikes by garment labor
2007-2008	Stable growth
2008-2015	Continuous growth

The literature study has exhibited the ups and downs of the RMG sector in Bangladesh and its contribution to the economy. The RMG industry is the exclusive multi-billion-dollar manufacturing and export industry in Bangladesh. Whereas the industry contributed only 0.001% to the country's total export earnings in 1976, its share increased to about 76% of those earning in 2005, and still, now its contribution is uprising day-by-day (BGMEA, 2006; Rahman, Habibullah, & Masum, 2017). There are more than 5000 RMG industries in Bangladesh where above 95% of firms are locally owned, and few farms are foreign-based located in the EPZ area. The garment export earnings of the country are still dominated by woven garment products. Knit garment products are responsible for more than 40% of the country's total export earnings which has been burgeoned after the first period of the 1990s (Ahamed, 2013; Haider, 2007; Hasan et al., 2016).

From 1983 to 1984, national export earning was supported by only 3.89% by RMG but things have changed and it reached about 83.9% now. As of it, the percentage of ready-made garments contribution to gross domestic product (GDP) was only 2.74% in FY 1990-1991 and in the fiscal year 2017-2018, it was replaced by 12.26% (BGMEA, 2020). According to Rock (2001), Bangladesh started exporting garments in 1976. Desh Garment in association with Daewoo, a South Korean company was the first joint venture company. Raihan (2002) enunciated that the growth of RMG exports has indisputably positive effects on macroeconomic balances. Chowdhury, Ali, and Rahman (2006) addressed the barriers of unskilled labor whose low productivity increased the per-unit cost of production. Rahman and Anwar (2007) marked weak physical infrastructures such as scarcity of energy supply, port facilities, etc. are the major hindrance faced by the RMG sector. Bangladesh Garment Manufacturers and Exporters Association (BGMEA) mentioned on their website that the RMG sector is the 81% export earning sector of Bangladesh which contributes more than 13.5% to GDP. It has changed the view of society through poverty minimization, the creation of more employment, and women empowerment.

Bangladesh is renowned as one of the top apparel manufacturing countries in the world. According to statistics from WTO, Bangladesh is the fourth largest clothing exporting country in the world (WTO, 2014). According to the FY 2008-2009, export figures for woven, light knit, and sweaters were US\$ 5.92 bn, US\$4.57 bn, and US\$ 1.86 bn respectively. Bangladesh's RMG sector has employed more than 4.4 million people from 2012 to 2013. According to Bangladesh Bank data, export shipment of readymade garments in July-August of the fiscal year 2013-2014 was 4160.34 million US\$. Besides, the massive growth of the RMG industries is the stout development of entrepreneurship in Bangladesh. Mr. Nurul Kader, the first RMG entrepreneur, launched his venture in 1978, then it was quite unimaginable that the number could go beyond the mark of 5000 by the year 2010 (Sikder, 2019).

Currently, around 5000 member factories are under one shade of BGMEA which captures more than 80% of total garments earnings in the country (BGMEA, 2014). Chowdhury, Hoque, and Kabir (2015) depict that the largest portion of export earnings in Bangladesh is gained from RMG and these items are mostly shipped to Latin American and European countries. If something worse happens such as order shifting to middle African countries like Ethiopia, Nigeria, etc., countries under China's supervision, or the demand falls by any means, then severe problems are waiting for Bangladesh. Another alarming feature of RMG products is very low domestic value addition. They argue that the nature of trade business towards the garments industry prevails and put emphasis on higher-value addition so that the sector can survive under a free business environment after 2004 when the quota facility would be completely withdrawn. Since its commencement, the Bangladesh RMG sector has been spectated remarkable growth. RMG export industries' annual compound growth rate in Indonesia (31.2%), Mauritius (23.8%), and Dominican Republic (21.1%) in comparison to that

of Bangladesh (81.3%) over the 1980-1987 periods. Bangladesh receives about 78% of export earnings from the RMG sector. In a comparison of foreign earnings and employment, this sector has greater potential than any other sector of Bangladesh (Chandra & Ferdous, 2020). To remain successful, the government needs to take a more strategic policy for investment in the RMG sector to maintain competitiveness in the global RMG market. It is also time to change the conventional trade and trade policies. Special focus should be given to the RMG sector in Bangladesh's longer-term plans to ensure sustainable growth of the industry, which means incorporating RMG issues into every stage of the development planning cycle.

METHODOLOGY

The mainstream of this study is to obtain the required object data collection. The data was collected through secondary sources. Herein, the data was collected from different research articles, survey reports, newspapers, BGMEA annual reports, files, journals, etc. Data were analyzed by using software and illustrated by various images. The analytical data was dissected into three decades such as 1990 to 2000, 2000 to 2010, and 2010 to 2020 within these spectrums. Moreover, data was interpreted in text form as well. The entire methodology of this study is presented in Figure 1.

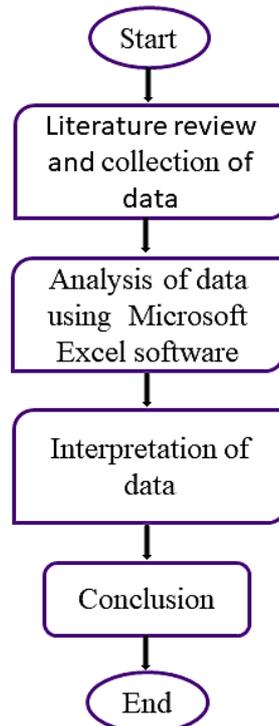


Figure 1. Process flow of research work.

FINDINGS AND DISCUSSIONS

The emergence of the RMG sector is seen as one of the best things that happened in Bangladesh's economy as it created enormous employment opportunities for the labor force, especially for women. It provided room for women's participation and empowerment. More than four million workers are directly employed in the RMG sector. RMG sector's contribution to the country's export has experienced phenomenal growth over the years. It has evolved as the main export earning sector of Bangladesh. Over the last two decades, the RMG industry has emerged as the thrust sector and ensured the fuel of growth and development of the economy. In 1972, the World Bank approximated the GDP of Bangladesh at US\$ 6.29 billion and it grew to \$ 173.82 billion by 2014, with \$ 31.2 billion of that generated by exports, 82% of which was ready-made garments. As of 2016, Bangladesh held second place in producing garments just after China. Bangladesh is the world's second-largest apparel exporter of western fast fashion brands. 60% of the export contracts of western brands are with European buyers and about 30% with American buyers, and 10% with others. Only 5% of the textile factories are owned by foreign investors, with most of the production being controlled by local investors. In the financial year 2016-2017, the RMG industry generated US\$ 28.14 billion, which was 80.7% of the total export earnings in exports and 12.36% of the GDP. The rising trends in the number of factories in Bangladesh have been depicted in Figure 2.

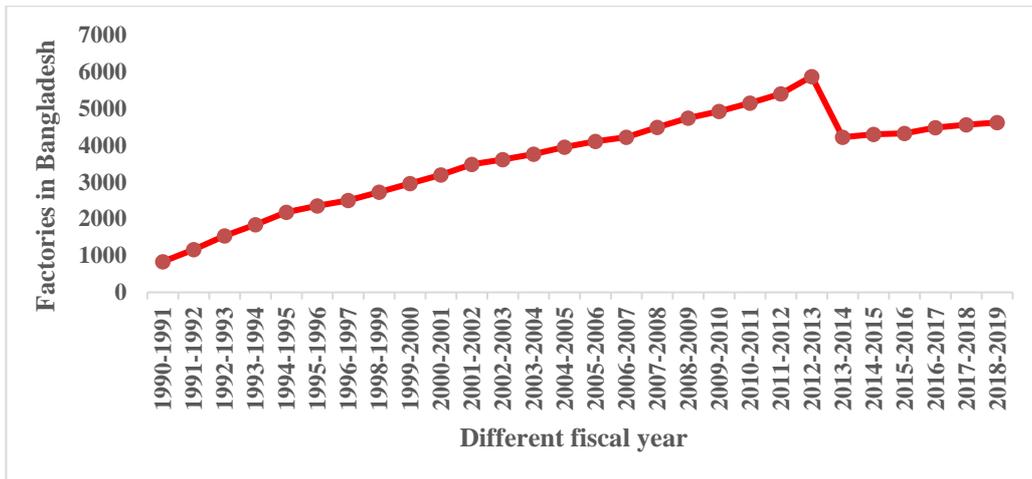


Figure 2. Number of factories.

It can be observed that from the year 1990 to 2011, the number of garment factories was increasing rapidly but in the year 2012 to 2013, there was a sudden fall in factories establishment. On 24 November 2012, the Tazreen Fashion fire tragedy took place, and on 24 April 2013, the Rana Plaza incident happened which both became the major reasons for the decline of the garment factory. But from the year 2014 to 2019, the number of garment factories was increasing slowly. Besides, in Figure 3, it can be observed that the horizontal line indicates different years and the vertical line indicates the employment of workers (in million). Employment had been increasing continuously from the year 1990 to 2013. From the year 2013 to 2018, it was a steady stage and after that, it reaches its peak position.

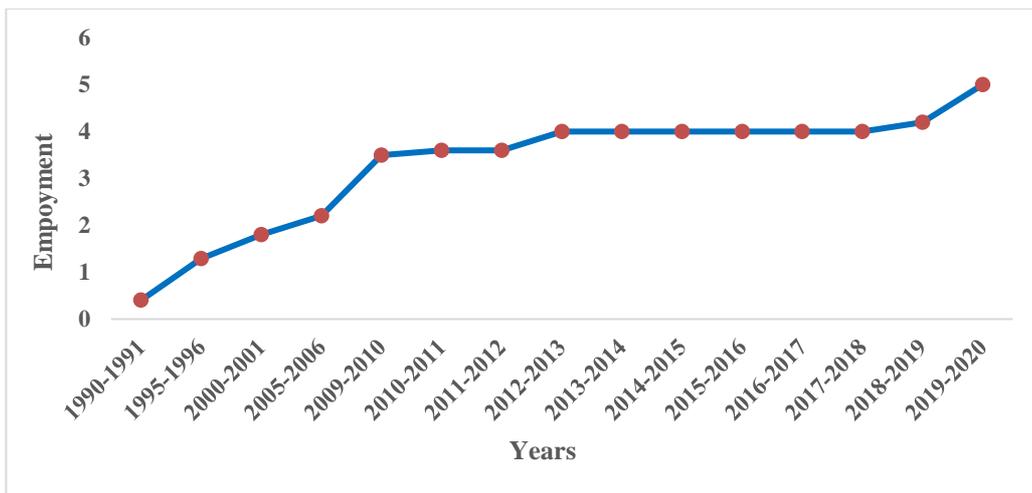


Figure 3. Employment of workers.

The export of RMG and the total export of Bangladesh in various countries are portrayed in Figure 4. Export of RMG in total export of Bangladesh was increasing within the year but when the year comes to 2019-2020, there was a sudden fall in export of RMG. Covid-19 is the major cause behind this fall. Moreover, in an earlier period, the export of woven garments was more than the export of knitting, and both woven and knit export values increased from the year 1992 to 2019. But in the year 2020, the export value decreased. It is an overall description of three decades where comparative analysis was done. Different kinds of garment items and their comparative exports are shown in the graph. It is lucid that the export value of the shirt was higher than the other items. As in the 20th-century, machinery, mechanism, and expert labor were inadequate. Knits and high-quality garments such as a sweater, jackets, etc. were not the main export item. Woven-based shirts and other garments were mainly exported. But after 2001-2002, knit and sportswear became the main export item whereas basic shirt and woven garments export started to decline. Apart from that, it is also prominent that in the fiscal year 2019-2020, all types of export decreased due to the Covid-19 crisis.

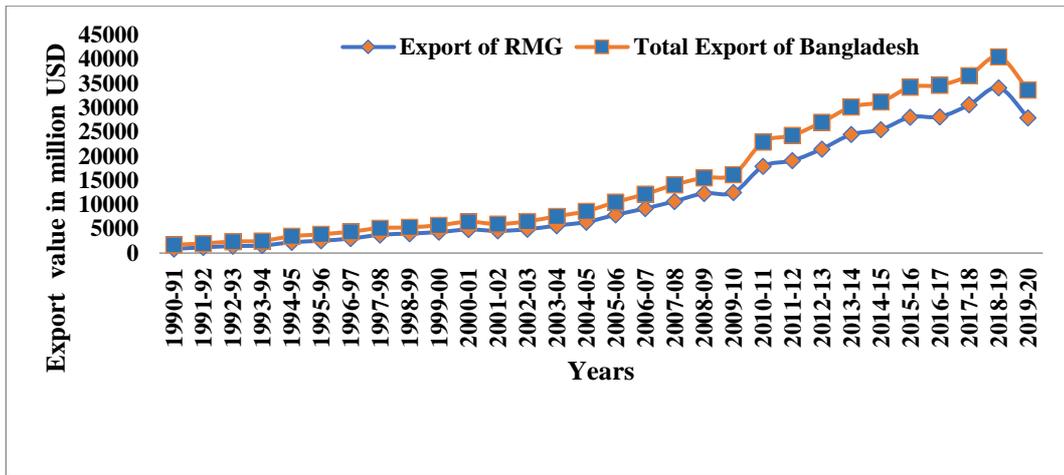


Figure 4. Export of RMG.

In the early time of the 1st decade, the export was comparatively lower than the last of the decade. Gradually, the export of RMG and total export of Bangladesh started to boom simultaneously. It is also noticeable that the export value of RMG occupied maxed the value of total export. It is acknowledged that Bangladesh’s economy is largely dependent on the textile sector as shown in Figure 5.

1st decade

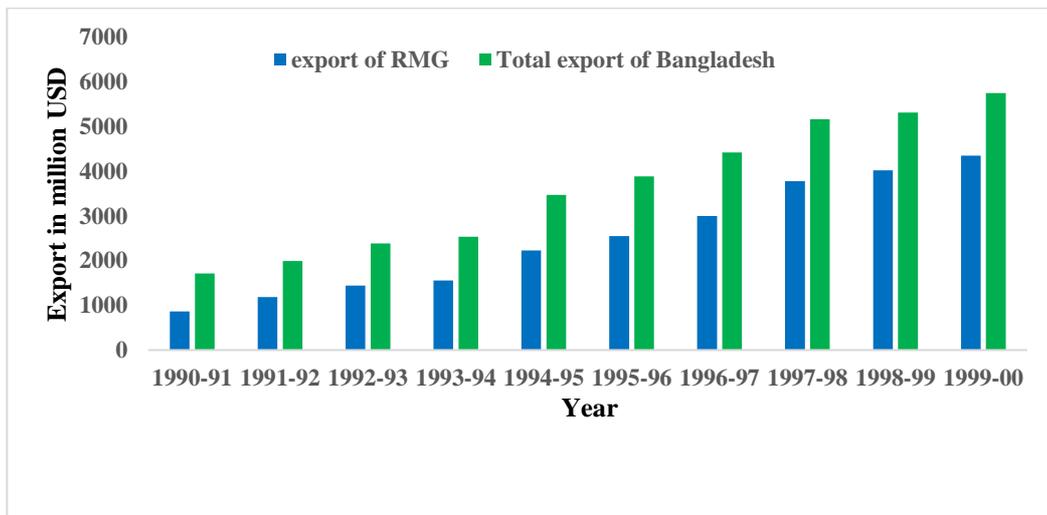


Figure 5. Export of RMG (1990-2000).

The above 3-D clustered column was enunciated about the export of woven and knit with the total export of garments. The contribution of knit and woven garments in total garments is portrayed side by side in Figure 6. In the first decade (1992-2000), the amount of knit garment export was very low even at the end of the decade it remained low too. Total export was not so mammoth, but it has shown incredible growth.

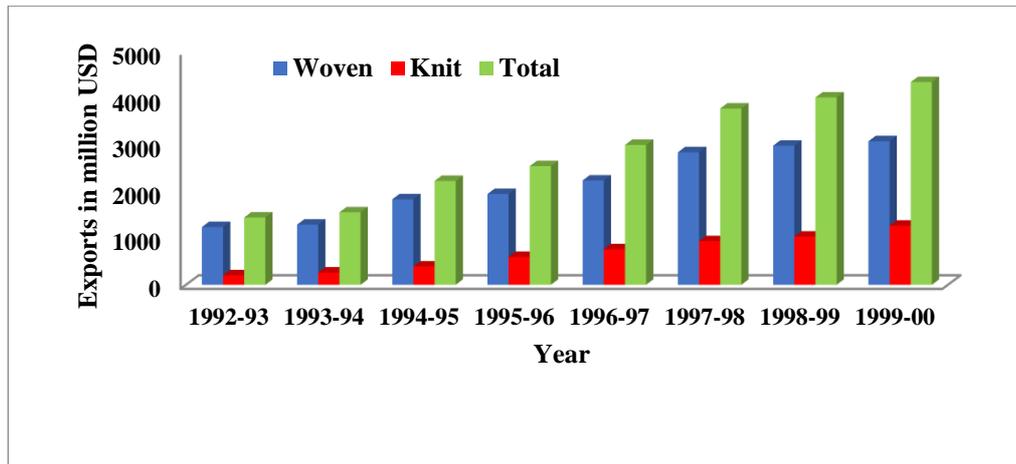


Figure 6. Export of woven and knit (1992-2000).

Different types of garments such as shirts, trousers, jackets, etc, and their export in the early age of Bangladesh’s garments history are displayed in Figure 7. It was a very tough time for the RMG industry in Bangladesh because the new start of any business is always challenging. Availability of technology, raw materials, expert manpower, successful negotiation with buyers, access to the new market, support of the government, delivery process, etc. were the key reason behind the lower export of garments. It is a kindling light that despite having many obstacles, the RMG industry continued to accelerate its export in different items such as basic designed shirts to complicated jackets, sweaters, etc.

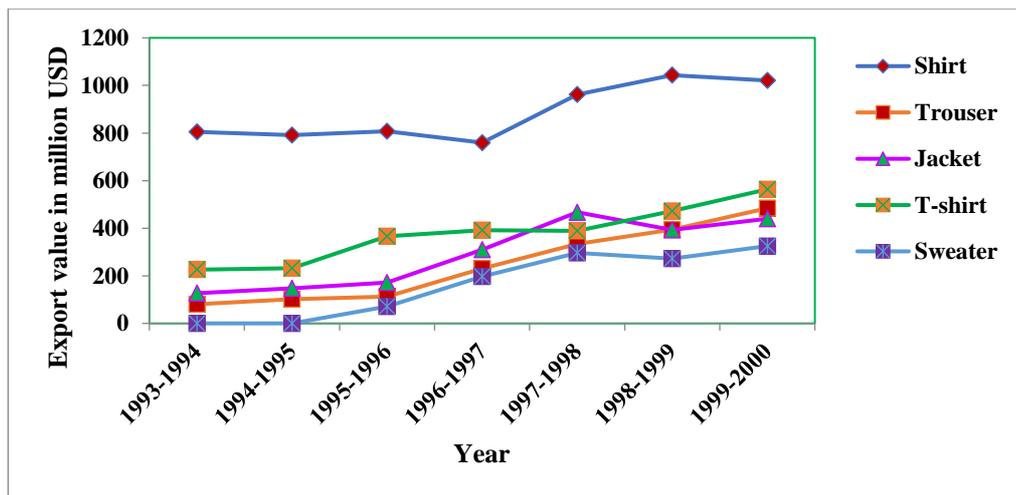


Figure 7. Export of specific garments (1993-2000).

2nd decade

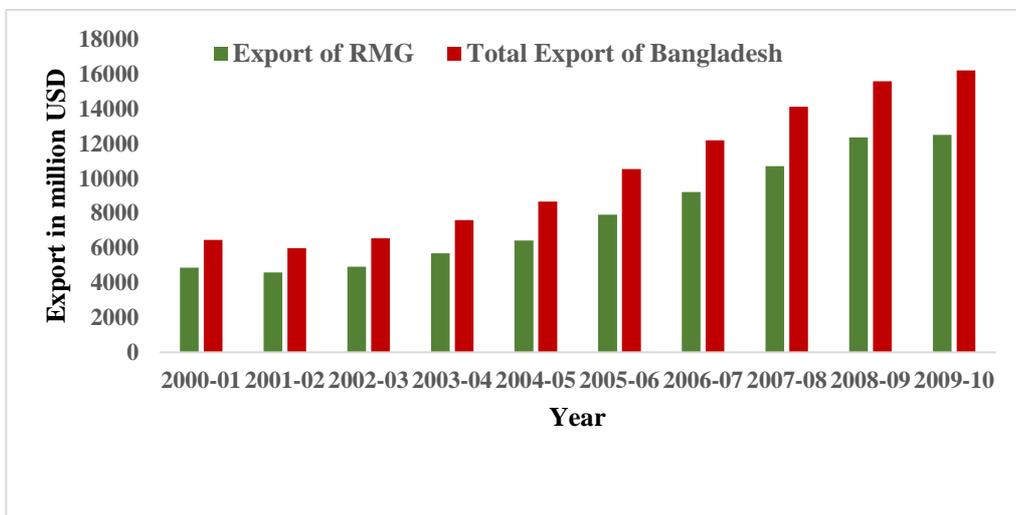


Figure 8. Export of RMG (2000-2010).

According to Figure 8, from the fiscal year 2000-2001, the export of RMG and total export of Bangladesh started to surge, and it continued till the last of the decade. In 10 years, export value was multiplied four times in the end than at the beginning. Withdrawal of Canadian quota restriction, phase-out of the export quota system, riots, strikes by garment labor, etc. flourished the rising of RMG export. 2nd decade (2000-2010) was the peak time for the growth of knit garments export as it started with a slow pace but started to expand gradually. In the first decade (1991-2000), the woven product was in the hit list of the export list but knit garment replaced its position in 2nd decade. From fiscal year (2007 to 2008), knit garments superseded woven garments. At the eleventh hour of the 2nd decade, knit and woven garment export was almost the same in value as presented in Figure 9.

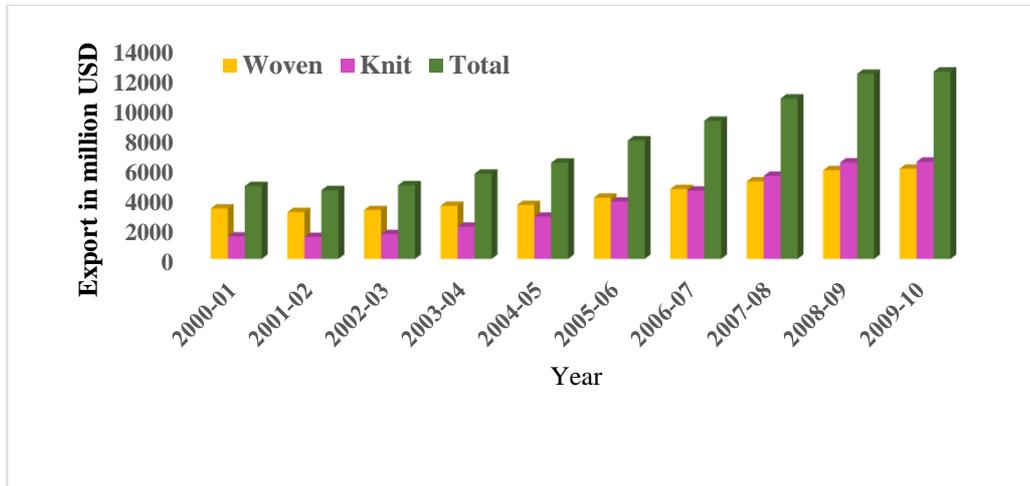


Figure 9. Export of woven and knit (2000-2010).

Different type of garments export is shown where a notable difference was obvious as shown in Figure 10. Knit and sportswear item claimed their position in the upper list of export. New technology-developed methods and availability of raw materials expelled their growth. On the other hand, export of woven shirts remained in a standstill position as it was in 1st decade. It can be estimated that the export of knit items was twice that of woven items in the 2nd decade. From the mid-decade export of jackets, sweaters started to turn in an upward direction.

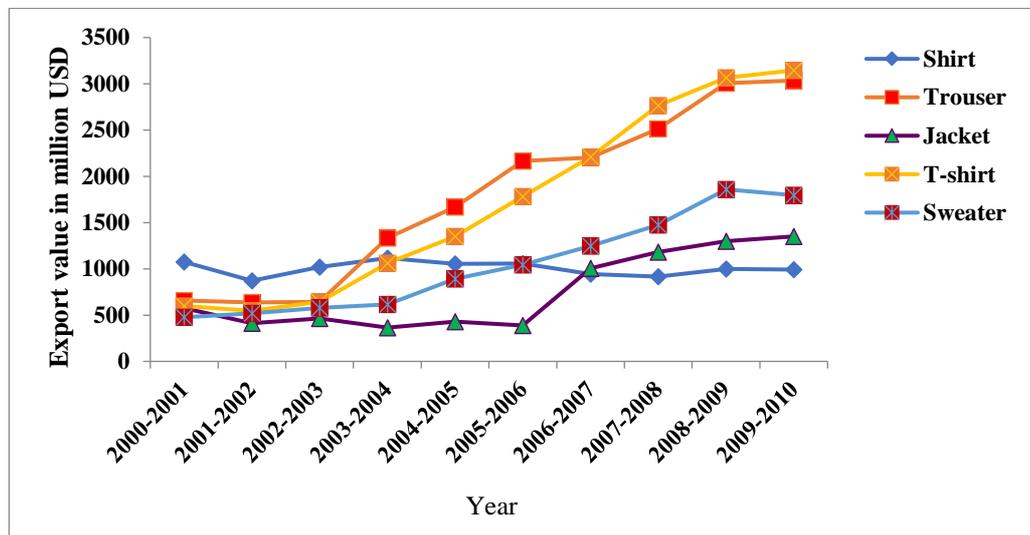


Figure 10. Export of specific garments (2000-2010).

3rd decade

According to Figure 11, the export of RMG and total export in the 3rd decade are shown. In this decade, export reaches their apex. In the past 30 years, the RMG industry achieves a tremendous milestone. Export value touches almost \$35 billion while it was only \$1000 million at the beginning. But in this decade, a zigzag line of RMG export growth can be seen in the graph. In the fiscal year 2015-2016 and 2016-2017, export was quite the same in value although at that time Bangladesh came to 2nd place just after China, and in 2019-2020, it showed negative growth. Thus, in the 3rd decade, almost stable growth can be seen in the RMG industry of Bangladesh.

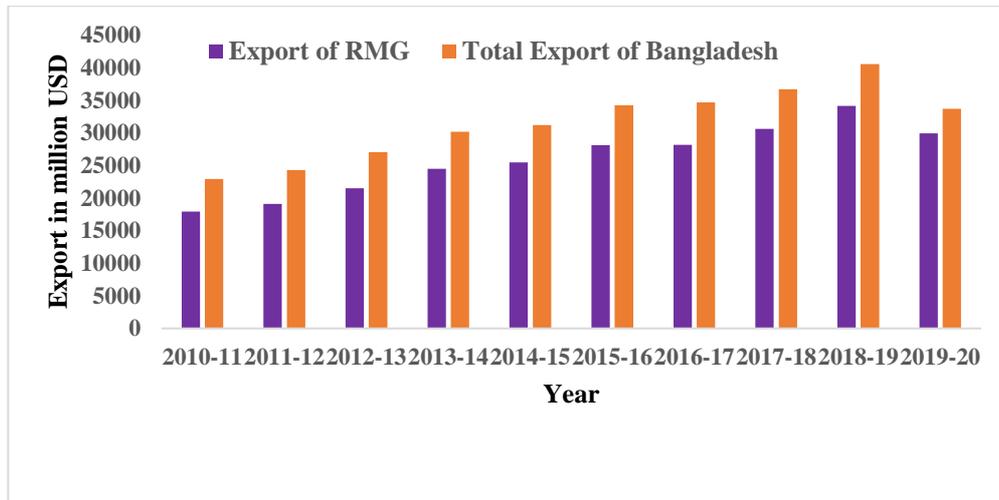


Figure 11. Export of RMG (2010-2020).

Figure 12 shows the export of woven and knit in the 3rd decade. In the fiscal year (2010-2011), the export value of knit still exceeded the value of woven export. Then, the export of knitwear started to slow down than woven but in the fiscal year (2018-2019), both woven and knit export touched their towering point. However, in the fiscal year (2019-2020), Covid-19 breaks out in almost every country; therefore, the export of woven and knit collapsed though the values are almost similar.

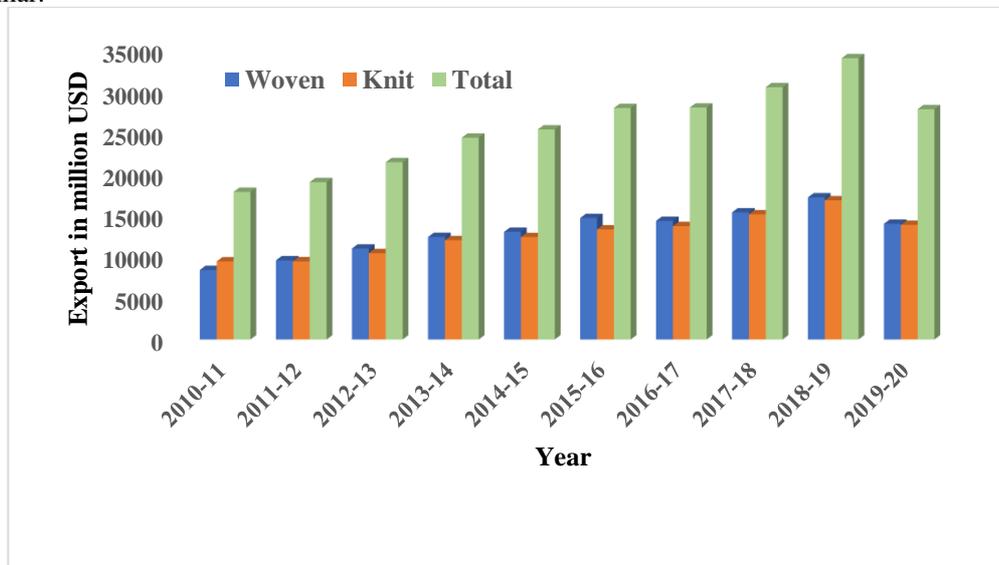


Figure 12. Export of woven and knit (2010-2020).

Figure 13 shows the export value of specific garments in the 3rd decade. Zigzag trends are shown in this image indicating export values of different garments. It can be observed that the export of T-shirts and trouser remains in the higher position than the export of shirts, jackets, and sweaters. The export value of shirts indicates the lowest position among others. However, the export of all these garments was balanced. However, in the fiscal year (2019-2020), export value deteriorated due to Covid-19.

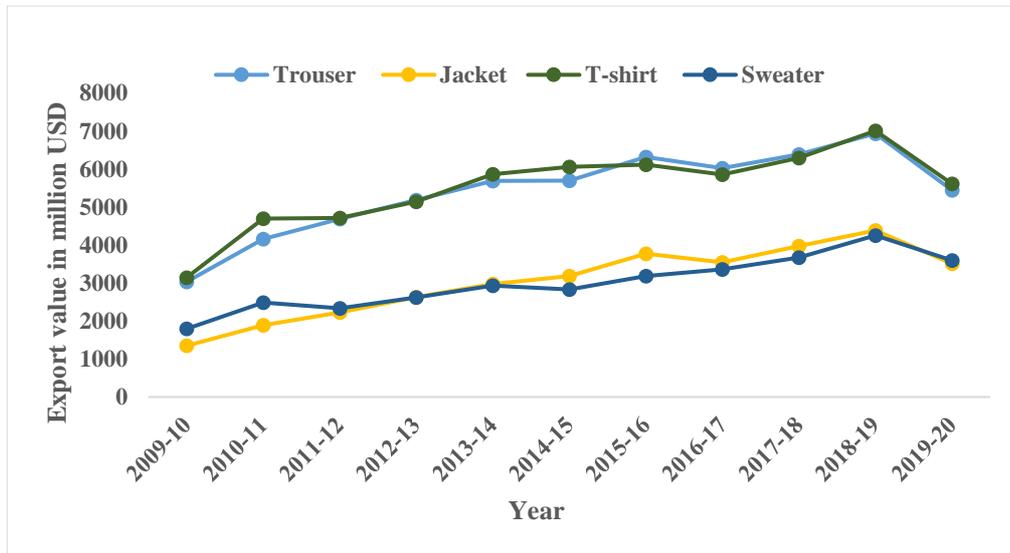


Figure 13. Export of specific garments (2010-2020).

Contribution of the garment industry to Bangladesh's Economy

Bangladesh's RMG sector contribution in terms of GDP is highly remarkable. Figure 14 displays that in the fiscal year (2013-2014), the contribution of Bangladesh's RMG sector to GDP was 14.17%, and in the fiscal year (2014-2015), there was a sudden fall in its contribution. However, it continues to decrease subsequently and in the fiscal year (2017-2018), there was a drastic fall. Among other reasons, the main reason behind it was the failure of Bangladesh to export diversified value-added products. Thus, diversified export sectors should get focused on attaining expected export growth.

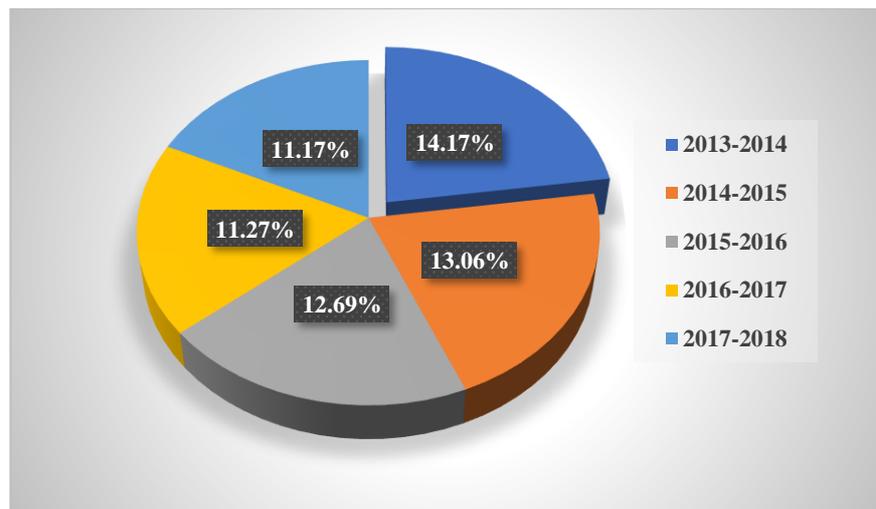


Figure 14. Contribution to GDP.

Major competitors

Major competitors of Bangladesh are China, Vietnam, and India. In Figure 15, it can be seen that Bangladesh still retained its position as the world's second-largest apparel exporter in the world by contributing a 6.8% share of the global market. Incomparable China remained the largest apparel supplier position by contributing 30.8% to the global market share. Vietnam is moving very fast and has come in third position displacing India by contributing 6.2% in global market share which is a great threat for Bangladesh to remain in its current position.

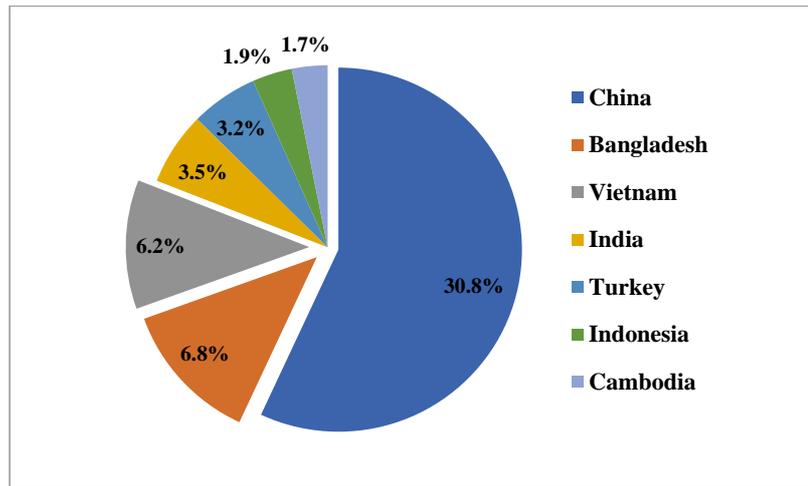


Figure 15. Global Market Share in percentage.

Drawbacks

Workers’ unrest, political violence, lack of utility services, non-compliance issues, the high interest of bank loans, increment of workers’ wage, terrorism, low price of RMG products, and unavailability of raw materials in the home country are the most vital problems of this sector. Regulatory authorities such as BGMEA, BKMEA’s guidance, and government support are badly needed to reach the sector at the peak of success. A good workplace environment and payment should be ensured to workers. Different financial and non-financial incentives should be given to their dependents also. The relationship between owner and worker should be improved. New markets should be searched before it is too late. Hartal, political violence, and workers' unrest should be stopped strictly. Fire safety instruments should be installed in every factory. Proper building code should be maintained. Thus, it could be a better move to a perfect garments sector in Bangladesh which will lead the world garment industry one day after doing all the already mentioned aspects.

CONCLUSION AND RECOMMENDATIONS

RMG sector has emerged as the single most important contributor to employment generation, income and foreign earning, and growth of Bangladesh’s economy. The share of exports, especially ready-made garments, in GDP could be expected to increase many folds. A summary of the study about the increase and decrease in three decades has been drawn. The number of garments factories was increasing by 255.27% in the first decade, 53.90 % in 2nd decade, and 10.27% decreased in 3rd decade. Hence, it can be stated that the number of factories is declining with the times. Besides, the export of RMG was increasing by 401.77% in the first decade, 157.14 % in the 2nd decade, and 56.01% in the 3rd decade. Moreover, in the first decade, the export of woven was five times higher than knit products, in 2nd decade export of woven was 7.81% lower than knit products and finally, at the end of the 3rd decade, woven products were 0.94% higher than knit products. Not only that but the contribution to GDP in % was decreasing by 21.17% in recent years.

Abbreviation	
BGMEA	Bangladesh garment manufacturers and exports association
BKMEA	Bangladesh knitwear manufacturers and exports association
EPZ	Export processing zone
GDP	Gross domestic product
RMG	Ready-made garment
3-D	Three-dimensional

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CONFLICT OF INTEREST

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