

# The Apparel Story

এ্যাপারেল স্টোরি

July-August 2023

## BANGLADESH APPAREL SUMMIT 2023

Melbourne,  
Australia



BANGLADESH GARMENT MANUFACTURERS & EXPORTERS ASSOCIATION (BGMEA)

বাংলাদেশ পোশাক প্রস্তুতকারক ও রপ্তানীকারক সমিতি

• বাংলাদেশ তৈরি •



Leather Goods And Footwear Manufacturers  
& Exporters Association of Bangladesh



MINISTRY OF COMMERCE  
BANGLADESH

4<sup>th</sup> Bangladesh  
Leather Footwear  
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International  
Sourcing Show 2023



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The People's Republic of Bangladesh.



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Exhibition : **12–14 October 2023**  
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# EDITORIAL

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In the face of a challenging global economic climate, Bangladesh's ready-made garment (RMG) industry continues to march forward with resilience and determination. Despite the myriad challenges it encounters, the industry is not only catering to the ever-growing demands of its traditional markets but also making efforts to explore newer horizons. In this edition of The Apparel Story, we have tried to bring to you an exploration of how Bangladesh's RMG industry is striving to diversify its export basket.

Bangladesh has already established its firm presence in major markets such as the European Union and the United States. However, recognizing the need for market diversification for sustainable growth, the industry is now standing at a pivotal juncture, where it seeks to expand its market share into previously unexplored territories like Japan, Australia, and the Middle Eastern countries.

The cover story of this issue is on the Bangladesh Apparel Summit held in Australia. This is a part of the ongoing initiative of the Bangladesh Garment Manufacturers and Exporters Association (BGMEA) to tapping into the full potential of untapped markets. The summit provided a unique platform for industry leaders, stakeholders, and policymakers to come together, exchange ideas, and forge new partnerships. The event played a significant role in highlighting the strengths of Bangladesh's RMG industry and its export potential in Australia.

We would like to thank HSBC for extending support to make the event a success. We would also like to express our sincere appreciation to the Bangladesh High Commission in Australia for their unwavering support in organizing the event. We want to acknowledge and thank our esteemed partners, Snowtex Group, Team Group, Green Textile Limited (a concern of Epic Group), and BTMA for their support.

This issue also contains the RMG export performance and trend of Bangladesh. Besides, an exclusive interview of the Swedish Ambassador to Bangladesh sheds light on potential areas of collaboration to expand bilateral trade between the two countries.

As we navigate these uncertain economic waters, Bangladesh's RMG industry is not merely surviving but thriving. It is a testament to the resilience, adaptability, and entrepreneurial spirit of the nation.

**The Editorial Board**  
The Apparel Story





## Disclaimer:

*The Apparel Story* is published for private circulation by Bangladesh Garments Manufacturers & Exporters Association (BGMEA). BGMEA assumes no responsibility for the correctness of items quoted in the magazine although every effort is made to give information from sources believed to be reliable.



# The Apparel Story

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Cover Story

# Unlocking the Untapped Potential

## Bangladesh Apparel Summit in Australia Opens a New Horizon

Australia is one of the emerging and high-potential non-traditional markets for Bangladesh's apparel industry. Over the past decades, bilateral trade relations between Bangladesh and Australia have increased significantly. Bangladesh is now the second highest apparel exporter to Australia, the 12th largest economy in the world. However, given the size of the Australian economy and its burgeoning consumer market, there is huge scope for Bangladesh to increase its trade relations with the country. Since BGMEA has been proactively exploring opportunities in new markets under its flagship "apparel diplomacy" campaign, a high-level delegation of the apex trade body of Bangladeshi apparel manufacturers visited Australia from 17-21 July 2023 to explore further avenues for growth of RMG export to the country. As part of this endeavor, a day-long "Bangladesh Apparel Summit" was organized in Melbourne, Australia on 18 July, followed by a series of bilateral meetings with Australian policymakers, top officials, chamber of commerce, NGOs and academicians in Canberra and Sydney. All the events were meticulously planned to showcase the strength and transformation of Bangladesh RMG industry, while it also presented a unique opportunity to build rapport and trust with valued buyers, retailers, suppliers, consumers, development partners and other stakeholders through

exchange of information and facts on recent developments in the industry.

Bangladesh is enjoying complete duty-free market access to Australia as an LDC. The benefit of it has played a vital role behind the continuous growth of Bangladesh apparel export to Australia. The purpose of the visit to Australia, therefore, also covered the discussion on carrying duty-free market access forward in post-LDC era.

### Bangladesh Apparel Summit



20  
speakers



130+  
participants

8 CEOs | 7 NGOs



32  
brand  
representatives

17  
academicians

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Organized by BGMEA in collaboration with the HSBC Bank, the Bangladesh Apparel Summit was held at the Inter Continental Melbourne on 18 July 2023. The summit was partnered by Snowtex group, Team group, EPIC group and Bangladesh Textile Mills Association (BTMA) and supported by the High Commission of Bangladesh to Australia.

This event signified a milestone in fostering collaboration and strengthening the bonds between the apparel manufacturing industries of Bangladesh and Australian retailers. This summit brought together a number of 130 participants from diverse range of stakeholders, including buyers, retailers, suppliers, consumers, development

partners, and the supportive Australian government policymakers, creating an opportunity for fruitful discussions, meaningful interactions, and the exchange of ideas and information. Throughout the day, the esteemed speakers shared their insights through opening plenary and two panel discussions titled 'Trade between Australia and Bangladesh – Charting the path for next decade' and 'Sustainability matters – ESG collaborations to shape the future of fashion'.

BGMEA President Faruque Hassan delivered a keynote presentation highlighting the immense potential of Bangladesh and critical issues such as supply chain transparency, responsible sourcing, and ethical manufacturing practices. He solicited collaboration for a future where the fashion industry flourishes prioritizing the social, environmental and responsible business norms and values.

Faruque Hassan, President of BGMEA is delivering his speech



**Faruque Hassan**

"There is a wider perception that Bangladesh is a commodity producer, which is not true anymore. You will be surprised to know that we are manufacturing garments worth more than 100 dollars of unit price. We have taken a vision to remodel our industry - from labor intensive manufacturing to innovation, high-value and modern manufacturing process. And, that is where, I believe, Bangladesh and Australia have much to gain and benefit by collaborating with each other."

"I know, many of our friends here are yet to be fully aware of the tremendous strides we made in social and economic fronts, in respect of human development and climate action. In the past few years, we have fast transformed our manufacturing as responsible undertaking – in all respect – be that caring about safety, social norms and environment. To expedite our sustainability journey, BGMEA has taken sustainability vision 2030 by prioritizing ESG that means Environment, Social and Governance. Under this vision, we have taken a series of initiatives which aims to reduce 30% carbon emission, 50% use of sustainable raw materials, 50% reduction of groundwater usage, 100% use of ZDHC chemical usage, 30% reduction of energy usage, 20% use of renewable energy and 30% reduction of deforestation."

He also shared Bangladesh's seriousness about the circular economy and how there is scope for collaboration and joint partnership. "We are now promoting circular economy and carbon neutrality in the industry, especially we have the raw materials for the recycle industry which is cotton textile scraps. If we can turn the 500 million dollars worth of these scraps into 5 billion dollars recycled goods, this will add to our export turnover, employment and national economy", he added.



High Commissioner of Bangladesh M. Allama Siddiki is sharing his insights during the opening session



## M. Allama Siddiki

The High Commissioner of Bangladesh M. Allama Siddiki brought in the perspective of historic and cultural connections between the two nations, and urged to exploit it for strengthening bilateral trade and investments for mutual interests.

“Bangladesh is the connection between the South and Southeast Asia. Despite having the geographical advantage, we haven’t been able to reap the complete benefit yet. I believe if BGMEA and the High Commission join hands, we will be able to deepen the relationship between two countries very well”.

Antony Shaw, CEO of HSBC Australia is sharing his views



## Antony Shaw

Managing Director of Kmart Group Ian Bailey is talking in the opening session of Bangladesh Apparel Summit



## Ian Bailey

The Managing Director of Kmart Group Ian Bailey praised Bangladesh’s transformation on social and environmental sides, while stressed on the importance of leveraging industry level data and information management to steer supply chain efficiency and productivity. He opined to upgrade the tier 2 and tier 3 factories in Bangladesh while continuing the ESG standards in tier 1 factories.

Antony Shaw, CEO of HSBC Australia praised the progress Bangladesh has made in its industry and the overall infrastructure. He touched upon a few strategically crucial issues including - deepening integration between businesses in Australia and Bangladesh as an unlock to current productivity through technology and data sharing.

“The best facilities are always wonderful. How do we make sure all facilities over time migrate to that same standard? And I think that would be an opportunity for any retailer in Australia.”

“Bangladesh competes on the global stage. It is competing against countries that has very efficient transport and very efficient ports. I would say that Bangladesh has a lot of opportunity to go ahead, and we, HSBC is proud to be a part of that journey.”



Opening plenary of Bangladesh Apparel Summit

## Panel discussion-01:

### Trade Between Australia & Bangladesh – Charting The Path For Next Decade

The session focused on Bangladesh-Australia bilateral trade relationship, the progresses in infrastructure development in Bangladesh, and the textile and garment industry's transformation. The objective was to steer discussion over charting a pathway for Bangladesh's ambitious goal of achieving a '100 billion dollars' RMG export turnover and how Australia could complement particularly in the area of innovation, technology adaptation and high-end segments.

Bangladesh's readiness to cater high-end ready-made garments (RMG) products got focus, while the significance of supply chain collaboration was also discussed. Discussions revolved around issues like trade policies especially duty-free market access beyond 2026 and the need for trade policy rearrangement. The session allowed participants including brands, retailers and prospective investors to share their experiences, challenges and suggestions

regarding trade related aspects including trade logistics, finance and so on.

Moderated by Asif Ashraf, Director, BGMEA; the panelists for this session were Md. Mahbub Ur Rahman, Chief Executive Officer, HSBC Bangladesh; Paul Murdoch, Brand Production Manager, Cotton On Group; Kevin Roberts, Co-Founder, No Timid Souls; and Dr. Wahed Waheduzzaman, Lecturer, Swinburne University of Technology.



**Asif Ashraf**  
Director, BGMEA

**The global fashion is getting more competitive day by day. One way to stand out in this market is to further improve the process. And it's not going to be easy. There has to be a balance between transparency in the supply chain and remaining cost competitive. The market is really saturated with marginal profit and we have to consider that. I believe in Bangladesh, and we are more transparent than any other (manufacturing) country."**

“



### **Mahbub Ur Rahman**

Chief Executive Officer, HSBC Bangladesh

There could be room for having to diversify further, from cotton to the man made fibers and we need to do that. I think in the backward and forward integrations, the sector has diversified a lot. And today, we have set the vision of 100 billion dollar exports. As for the economy as well as for the readymade garment sector, there is still room for improvement. But I can tell from the trend of last couple of years, the dream of achieving 100 billion USD worth of RMG export is a reality, not anymore just a dream. Like all of you, I am also looking forward to the future.”

“



### **Paul Murdoch**

Brand Production Manager, Cotton On Group

After 2013, there has been a massive structural change in the Bangladesh RMG industry and there's no way to ignore that. The development that took place afterwards the tragic incident was phenomenal. A pool of young workers and highly entrepreneur minded business people are behind the growth of this industry. I think we all should celebrate that achievement actually rather than comparing whether Bangladesh is better or worse than other countries.

“Volume is something what drove Bangladesh as an industry from the beginning. I think time has come to change this mindset.”

“



### **Kevin Roberts**

Co-Founder, No timid souls

For my business, I often go to Bangladesh and in every second trip, I find something new and amazing. There'll be something new that you haven't experienced before, it might be renewable energy initiative, it might be new production lines particularly, innovative and technical fabrics and production techniques that weren't there previously. Therefore, I can confidently say that Bangladesh actually has world's best factories at this moment.”

“



### **Dr. Wahed Waheduzzaman**

Lecturer, Swinburne University of Technology

There's no doubt in Bangladesh's growth in terms of RMG sector. But I would say, diversification is something where we should put our focus now. And that should happen both in terms of market and products.”



The speakers also stressed upon the importance of trade policies enabling business and economic interests of both countries, particularly with regard to policy priorities to support smoother transition for Bangladesh's graduation from LDC. Sam Meyerson, Business Relations, Visits & External Affairs Officer, Victoria State Office, DFAT shed lights on the Australian govt.'s initiative to deepen the trade relation between Bangladesh and Australia.



**Sam Meyerson**

Business Relations, Visits & External Affairs Officer,  
Victoria State Office, DFAT

**There is a lot of interest in deepening the trade relationship between Australia and Bangladesh, and we believe there are opportunities to be had on both sides. The trading relationship is balanced reasonably and evenly because Australia and Bangladesh's economy are highly complementary. Australia produces things that Bangladesh needs and Bangladesh produces things that Australia needs."**



## Panel discussion-02:

### Sustainability Matters

#### – ESG Collaborations To Shape The Future Of Fashion

The second session of the event was moderated by Shams Mahmud, Chairman, BGMEA's Standing Committee On Foreign Affairs. The panelists of this session were Leila Naja Hibri, Chief Executive Officer, Australian Fashion Council (AFC); Lyn Morgain, Chief Executive, Oxfam Australia; Rachid Maliki, General Manager, Global Sourcing And Supply Chain, Country Road Group; Dr. Shelley Marshall, Associate Professor, College Of Business And Law, RMIT University;

Charith Jayasundera, Associate Director, KPMG Australia. This session explored the critical aspects of sustainability within Bangladesh's Ready-Made Garments (RMG) sector and Australia's priorities. The session highlighted the well-being of workers, emphasizing on rights, safe working conditions, and social welfare. The session also presented Bangladesh's remarkable sustainability transformation, showcasing the country's commitment to sustainable

practices and its progress toward achieving key environmental, social, and governance goals. Transparency, traceability, responsibility, and the need for fair and equitable share in the supply chain were discussed. The session explored strategies and best practices to bridge the gap and promote sustainable practices that benefit the nations. The importance of responsible trade shaping the path toward achieving sustainability goals also got importance.



#### Leila Naja Hibri

Chief Executive Officer, Australian Fashion Council (AFC)

I think it's a new way of doing business, and it's an absolutely new way of thinking about a business model to move from linear way to circular way of doing business, which is rethink, reuse and recycle. I think the most challenging thing about it is to balance economic return and growth, while going circular. It's very much doable, but we just have to have a complete mindset shift".



#### Lyn Morgain

Chief Executive, Oxfam Australia

When it comes to the ensuring wages to the workers who are making your clothes, Australian consumers are very concerned about that. And I can say that, Bangladesh RMG is taking some incredibly positive moves to ensure that."



#### Rachid Maliki

General Manager, Global Sourcing and Supply Chain, Country Road Group

Sustainability is embedded in everything we do and is also being highly endorsed by the brands. Bangladesh's progress in this term is excellent and I have seen the change in mindset among the leaders there, which gives me more hope about how we are moving towards positive transformation."



Discussions also encompassed issues related to rights and wellbeing of the workers, and ethical sourcing practices and sustainable trading by brands fostering responsible business.



**Dr. Shelley Marshall**

Associate Professor, College of Business and Law,  
RMIT University

It is evident that concern for health and safety for the workers in Bangladesh has been increased massively. But what we are particularly concerned about is the fact that brand payment periods on average have doubled since COVID. This effect could be passed on to the workers, which will offset the improvements achieved and so, brands have to be really cautious about that.”



**Charith Jayasundera**

Associate Director, KPMG Australia

ESG and sustainability practices are becoming more and more important in the global landscape nowadays. My understanding is by 2028, ICSP has mandated that most organizations would have to report on traceability in their supply chain and this is something Bangladesh should take preparation for.”



**Shams Mahmud**

Managing Director, Shasha Denims

BGMEA has adopted ESG as its core values and sets targets for example 30% less carbon emission, transparency, and green factories. From a safety standpoint of view, we have homegrown solutions called RMG Sustainability Council which looks after the workers' safety.”

The summit was wrapped by a closing speech of Joanne Ryan, MP, Federal Member For Lalor & Chief Government Whip, House Of Representatives For Lalor, Victoria; followed by Dr. Sharif-As-Saber's, President, Gain International. Ms. Ryan, MP emphasised on the long lasting 50 years relationship between Bangladesh and Australia and expressed interested to take that agenda further.  
Joanne Ryan

## Appearance of Dignitaries in the Summit





## MAJOR TAKEAWAYS

- It has been confirmed that Australia will continue providing the Duty free access to Bangladesh even after the LDC graduation.
- The photo exhibition regarding Bangladesh's nature and heritage created a positive buzz among the participants.
- One of the main part of the summit was a magnificent display of high end fashion items manufactured by Bangladeshi RMG industry. The attendees, especially the representatives from different brands appreciated the display very much and was enthusiastic to know more.
- The dinner at the end of the summit was catered by Ms. Kishwar Chowdhury, grand finalist of the Masterchef Australia. It was another attempt to brand Bangladesh in front of the diverse audience and it earned a very positive feedback.
- Budding interest has been shown from Australian cotton as well as Wool association to import raw wool and cotton from Bangladesh. BGMEA is in the process of initiating a dialogue with the necessary authorities.

## Moments from the Summit



## Side-events



### Product Showcase

In the sideline of the Summit, we organized a 'Product Showcase' where 100+ selected garments made in Bangladesh were displayed in professional format. The product showcase was open for all the participants at the Summit and almost all who attended the event visited the presentation space, including buyers. For your kind information, BGMEA collected the dresses from its Member factories, curated and shipped those to Melbourne. The purpose was to give a real impression about Bangladesh's RMG industry's trajectory to high-end market segment.

### Photo Exhibition

An exclusive photo exhibition on Bangladesh was organized where 20 selected photographs of Bangladesh, its nature, landscape and people have been displayed.



### Dinner

The dinner was prepared and served by Mastercheff Australia Kishwar Chowdhury herself. She delivered a speech sharing her inspiration and journey in presenting Bangladeshi delicacies with her own passionate innovation.



### Networking

On the sideline of the Summit, the BGMEA delegation has conducted several bilateral meetings with the Australian govt. representatives, brand, NGO, NRB, and some other important stakeholders.



## The Dialogues: Acumens from the Bilateral Meetings

In addition to hosting the Bangladesh Apparel Summit in Melbourne, the delegates attended a number of bilateral meetings in Canberra and Sydney.



The BGMEA delegates met Honorable Matt Burnell, Member of the Australian House of Representatives for the Division of Spence, and the Chair of Australia-Bangladesh Parliamentary Group on 19th July at a dinner at the residence of Bangladesh High Commissioner in Canberra. A number of issues were discussed there including continuing market access for Bangladesh, supply chain collaboration, i.e. import cotton and wool from Australia, and also to broaden the Parliamentary Group on Bangladesh. Honorable MP informed about his effort to increase the membership in the Bangladesh Group in Australian Parliament which currently stands at 44. BGMEA President invited Mr. Burnell and the MPs in Bangladesh Group in Australian Parliament to visit and exploring business opportunities in Bangladesh.



On 20th July BGMEA delegates visited Australian Chamber of Commerce and Industry (ACCI) office in Canberra. They met Chief Executive Officer Andrew McKellar along with Head of Business Development and International Affairs Chris Bames. Discussed about issues including investment opportunities, potential partnership, joint ventures, policy supports offered by the governments to facilitate trade and investment Bangladesh even after its LDC graduation. Stressed on the importance of enhancing industry connections between the businessmen of Australia and Bangladesh to further strengthen bilateral trade.





Later on that day the delegates had a meeting with Mr. Gary Cowan First Assistant Secretary, North and South Asia Division, Department of Foreign Affairs and Trade (DFAT) at the DFAT office, Canberra. The issue of Bangladesh's LDC graduation, its implications on the economy and trade and preparations to deal with the challenges got due importance in the discussion. Gary Cowan informed the BGMEA delegation of the Australian government's decision of continuing duty-free market access for Bangladesh even after its LDC graduation. BGMEA President Faruque Hassan mentioned Bangladesh's interest in increasing import of cotton and wool from Australia to meet the growing demand of its RMG and textile industry.



The delegates also met Daniel Boyer, Deputy CEO of Australian Trade and Investment Commission (Austrade) on 20th July in AusTrade office, Canberra. Discussion encompassed how both sides could work together to explore potential trade and investment sectors and achieve win-win results. Exchanged information regarding the current trade volume between the two countries and major challenges of increasing two-way trade. Apprised the Deputy CEO of Austrade of the investment opportunities being offered by Bangladesh alongside developing infrastructure, special economic zones and improved business climate. Highlighted the importance of knowledge and technology transfer to accelerate economic growth.



On 21st July, BGMEA delegates met Australian Assistant Minister for Trade Senator Honorable Tim Ayres at the Commonwealth Parliamentary Office, Sydney.

Australian Assistant Minister for Trade Senator Tim Ayres assured that Australia would continue duty free facility for Bangladesh's exports even after graduation out of LDC in 2026. BGMEA President reiterated Bangladesh's interest in enhancing exports of cotton and wool from Australia for its RMG sector, emphasizing the need for enhancing industry connections between Australian exporters of raw materials like cotton, wool and importers and manufacturers in Bangladesh. BGMEA President sought cooperation of Australia in developing knowledge and skills of the students of BGMEA University of Fashion and Technology (BUFT) in textile, apparel, fashion, design and business through collaboration with leading Australian universities and fashion institutes.



The Bangladesh High Commission in Canberra organized a view exchange meeting with the Australian business community in Sydney on 21st July. A good number of Australian businessmen, investors, buyers and other stakeholders attended the event where they were briefed by the BGMEA delegation about potential trade and investment opportunities in Bangladesh. Asif Ashraf, Director, BGMEA, made a keynote presentation on the readymade garment industry of Bangladesh with focus on how the sector has made vast progress in workplace safety, environmental sustainability and workers' wellbeing. BGMEA President highlighted the opportunities of different industrial sectors such as ICT, electronics, light engineering, textile, leather etc.

Overall, the recent visit to Australia was an approach to create a buzz about Bangladesh as a potential destination for trade and investments. The visit and the activities did not only showcase the strength of Bangladesh apparel industry in front of the significant counterparts, but also paved way for future growth and opportunities.

We extend our deepest gratitude to H.E Mr. Jeremy Bruer, Australian High Commissioner to Bangladesh and other officials from the high commission including Duncan McCullough, Second Secretary, Economic and Commercial Diplomacy, Australian High Commission, Bangladesh for their kind cooperation. At the same time, we extend our

sincere thanks to the High Commissioner of Bangladesh in Canberra H.E Mr. M. Allama Siddiki and the officials from the high Commission Counsellor & Head of Chancery Mr. Tahleel Dilawar Moon and Commercial Counsellor Mr. Rony Chakma for their all out support and cooperation to make the mission successful. <sup>A</sup>



# RMG's Performance Bodes Well for Future

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**Faruque Hassan**

A few decades ago it was near to impossible to imagine that Bangladesh would ever become a dominant force in the world of apparel manufacturing and that 13 out of the world's top 15 green factories would be Bangladeshi. It was inconceivable that Bangladesh would overtake China – the world's largest apparel exporter – in apparel exports in the lucrative European market. It is heartening to see not only has Bangladesh surpassed China in RMG export volume to the EU market but also recently become number one cotton-made apparel supplier to USA. Bangladesh's total apparel exports to the USA is also rapidly increasing as more and more US brands are shifting their sourcing

orders from China to Bangladesh. Thanks to its high level of adaptability to due diligence best practices, resilience and unwavering commitment to become more dynamic and comparative, Bangladesh RMG industry has succeeded in earning the trust of the global brands and consumers. One can figure out the stunning rise of the industry by the fact that export earnings from this sector have more than doubled in last one decade, reaching a whopping USD 46.99 -billion in previous 2022-23 fiscal year. This impressive growth of Bangladesh RMG industry has made it the world's second largest garment supplier, with its products selling in 167 countries.



**Table1: Last five years RMG export performance of Bangladesh (value in million USD)**

Fiscal Year	Woven	Knit	Total RMG	Growth
2018-2019	17.24	16.89	34.13	11.49%
2019-2020	14.04	13.91	27.95	-18.12%
2020-2021	14.50	16.96	31.46	12.55%
2021-2022	19.40	23.21	42.61	35.47%
2022-2023	21.25	25.74	46.99	10.27%

Source: Export Promotion Bureau (EPB)

Some other amazing facts about the RMG sector includes it accounts for around 84.58 percent of total export earnings of Bangladesh. With 3,500 active clothing factories at present and USD 20 -billion in investment, the sector contributes 11 percent to GDP and supports over 4 million jobs directly. Of those, 60 percent are female. So, it would not be an overstatement to say that the apparel sector is the largest source of employment for women in the industrial sector.

The quality and success of RMG overseas has also brought pride and honour to every Bangladeshis. Today when someone abroad mentions they are from Bangladesh, "superior quality" springs to mind of the foreigners, similar to Switzerland for its watches. The export-oriented garment sector

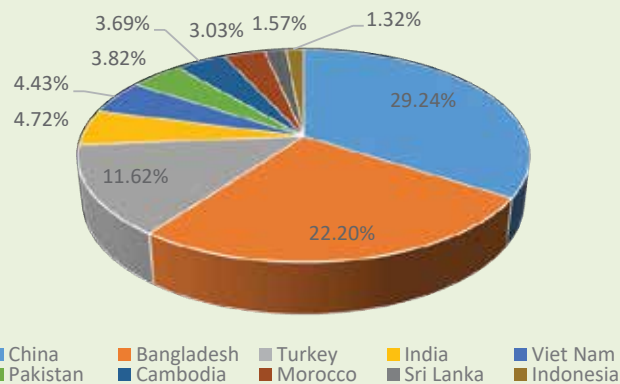
began in 1978 in a rudimentary way. Bangladesh didn't reach its present level of sophistication and robust growth just out of the blue. It has been a long journey of trial and error, perseverance and hard work for apparel makers. In

response to the dedication, enormous efforts and contribution of all, the industry has undergone massive transformation and grown manifold since its inception. Its technology features, safety, product quality and category, and environmental sustainability all have improved by several orders of magnitude. As a result, from time to time a new success story is being written by the RMG industry. Here I'll focus on some of the recent amazing success stories of the industry, its future potential and challenges.

## Overtaking China in EU market

The European Union (EU) is the world's largest importer of apparel

**Figure1: Share of top countries in EU's total apparel import in 2022**



**Table 2: EU's Apparel import from the world and top sourcing countries**

Country	2017	2018	2019	2020	2021	2022	CAGR in last 5 years
World	83.49	90.54	89.46	78.64	85.23	103.10	4.31%
China	26.03	27.30	25.87	23.60	25.76	30.15	2.98%
<b>Bangladesh</b>	<b>14.60</b>	<b>16.44</b>	<b>16.75</b>	<b>14.18</b>	<b>16.87</b>	<b>22.89</b>	<b>9.42%</b>
Turkey	9.23	9.93	9.86	9.30	10.88	11.98	5.35%
India	4.47	4.60	4.39	3.39	4.02	4.86	1.73%
Viet Nam	2.96	3.33	3.49	3.16	3.38	4.57	9.11%
Pakistan	2.42	2.55	2.73	2.45	3.08	3.94	10.29%
Cambodia	3.37	3.83	3.68	2.80	2.81	3.81	2.51%
Morocco	2.83	3.06	2.95	2.32	2.93	3.12	1.98%
Sri Lanka	1.09	1.25	1.35	1.19	1.41	1.62	8.18%
Indonesia	1.26	1.27	1.28	1.04	1.10	1.36	1.59%

Source: EUROSTAT

**Table 3: USA's Apparel import from the world and top sourcing countries**

Country	2017	2018	2019	2020	2021	2022	Last 5 years CAGR
World	80.17	82.88	83.70	64.06	81.59	99.93	4.50%
China	27.01	27.37	24.91	15.15	19.61	21.73	-4.25%
Vietnam	11.55	12.22	13.55	12.57	14.37	18.25	9.57%
<b>Bangladesh</b>	<b>5.06</b>	<b>5.40</b>	<b>5.92</b>	<b>5.23</b>	<b>7.15</b>	<b>9.75</b>	<b>13.99%</b>
India	3.68	3.81	4.06	3.02	4.20	5.68	9.09%
Indonesia	4.56	4.48	4.40	3.51	4.14	5.61	4.23%
Cambodia	2.15	2.41	2.68	2.82	3.39	4.35	15.20%
Honduras	2.46	2.57	2.79	1.83	2.66	3.19	5.30%
Mexico	3.57	3.36	3.12	2.20	2.84	3.16	-2.39%
Pakistan	1.27	1.36	1.46	1.40	2.22	2.75	16.61%
Korea, South	0.23	0.22	0.20	0.15	0.18	0.23	0.03%

Source: OTEXA

and textile. In 2022, the block imported US\$ 103.09 -billion worth of apparel products from the rest of the world. According to EUROSTAT, the statistical agency of the European Commission, during the past five years (2018-22), the value of EU's apparel import from Bangladesh has grown by 9.42% as per compound annual growth rate (CAGR), whereas their import from the world has shown 4.31% average annual growth.

As per the data, the EU imported US\$ 22.89 -billion worth of apparel from Bangladesh in 2022, which was US\$ 16.87 -billion in 2021 and US\$ 16.44 -billion in 2018. With 22.20% share in value terms Bangladesh remains the second largest apparel import source for the EU after China.

China, being the top apparel import source for EU and having a 29.24 % share, registered 17.01% Y-O-Y growth in 2022. EU's imports from China reached US\$ 30.14 -billion in 2022 from US\$ 25.76 -billion in 2021, which was US\$27.20 -billion in 2018.

However, in terms of quantity (measured in kilogram), our share (28.90%) has crossed the share of China (28.46%) in 2022 and gained the top position for the very first time

in EU. In value term we also hope to be the top apparel sourcing country for EU by end of 2023. As per the data, value-wise in 2018 the share of Bangladesh EU's total apparel import was 18.16% which climbed to 22.20% in 2022. In contrast, China's share has declined to 29.24% in 2022 from 30.15% in 2018.

## Export to USA doubled in five years

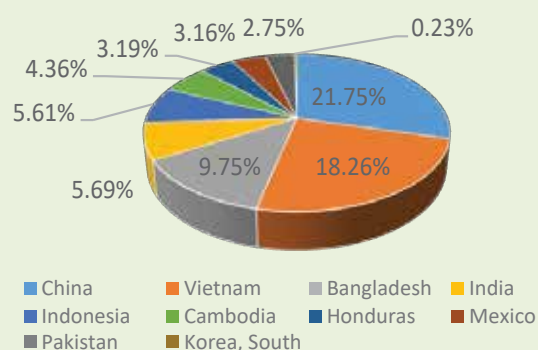
It is encouraging that garment exports to our largest export market the USA has nearly doubled over the past five years to reach US\$ 9.75-billion in 2022. According to the Office of Textiles and Apparel (OTEXA) of the U.S. Government, in the last five years (2018-2022),

USA's apparel import from Bangladesh increased by 13.99% CAGR whereas their import from the world has grown only by 4.50% annually.

In 2022, USA's import from the world increased by 22.48% year-over-year and reached US\$ 99.93 -billion from US\$ 81.58 -billion in 2021. Bangladesh remains the third largest apparel source for USA with a 9.75% share of its total apparel import, which was 8.76% in 2021.

In 2022, USA's clothing imports from Bangladesh grew by 36.38% year-over-year. USA imported US\$ 9.74-billion worth of apparel from Bangladesh in 2022, which was US\$ 7.16-billion in 2021 and US\$ 5.40 -billion in 2018.

**Figure 2: Share of top countries in USA's total apparel import in 2022**





If we look at the quantity based statistics measured in per square meter equivalent (SME), USA's apparel import from Bangladesh registered 20.65% year-over-year growth, which reached to 3.14-billion SME in 2022 from 2.60- in 2021. On the other hand USA's import from China declined by 3.11% quantity-wise in 2022 compared to 2021. China, being the top apparel import source for USA and having a 21.75 % share, posted 10.83% year-over-year growth in 2022 in dollar value. USA's apparel import from China reached USD 21.73 -billion in 2022 from US\$ 19.60 -billion in 2021 which was US\$ 27.37 -billion in 2018. On the other hand, Vietnam remains in the second position. The value of USA's clothing from Vietnam was USD 12.21 -billion in 2018 which increased to USD 14.37 in 2021 and reached US\$18.24 -billion in 2022. The share of Vietnam in USA's total apparel import also increased to 18.26% in 2022 from 14.74% in 2018. India and Indonesia both countries have shown over 35% growth in 2022 compared to 2021. The share of both countries increased to 5.69% and 5.61%

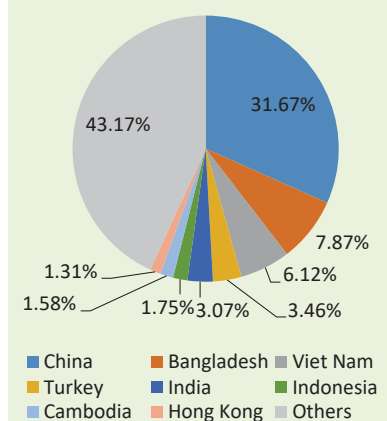
respectively in 2022 from 4.59% and 5.40% in 2018. Since the American share of Bangladesh apparel imports is only 9.75%, a huge opportunity awaits us. Bangladesh has already gained the top position in USA's denim imports. There are few more product categories where we have great potential to further penetrate. Besides, we still have a number of US brands yet to source from Bangladesh or are sourcing at a limited scale. So, while we urge for diversifying our markets, we think we still have a huge scope of specialization and opportunity to grow more in the existing ones.

### Bangladesh's share in global apparel market grows

The World Trade Organization (WTO) has recently published the annual global apparel trade data for the year 2022. As per the data, the world apparel trade has increased by 7.26 % in 2022 year-over-year and reached US\$ 576-billion from US\$ 537-billion in 2021. As per the data, Bangladesh retains its position as the world's

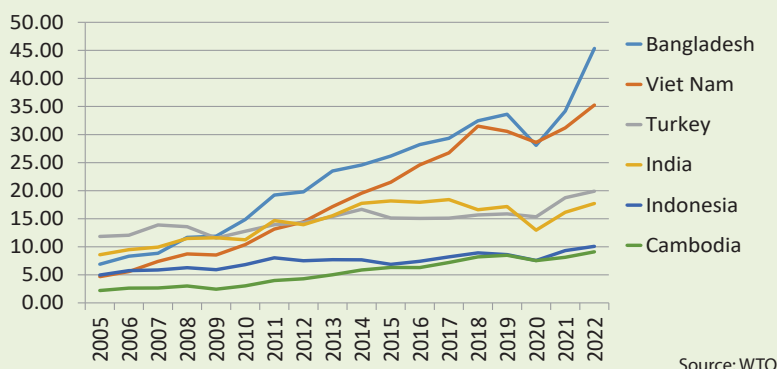
second-largest clothing exporting country after China. Bangladesh's share in the world apparel market has climbed to 7.87% in the mentioned year from 6.37% in 2021. It is to mention that since 2016 Bangladesh has been maintaining over 6% share in the world apparel market and for the first time the share crossed 7% mark last year. This is certainly encouraging for us in this depressing time.

**Figure 3: Global clothing export share, 2022**





**Figure4: Export trend of major clothing exporting countries**



It reflects the indomitable spirit of the entrepreneurs, the hard work and dedication of the workers, and the confidence of the global brands and retailers have in us. It does not only prove our competitiveness, but also the increased preference on Bangladesh as a sustainable sourcing destination. Most importantly, the policy has support from the Government of Bangladesh. For instance, we have seen how proactive and dynamic the role the government has played to protect and recover from the damage caused by Covid-19; the political stability we have seen in the past decade, which is expected to continue in coming years, and most importantly the visionary leadership of our Honorable Prime Minister Sheikh Hasina in laying the foundation of a prosperous nation, have been the crucial driving forces behind this steady performance and success. In 2022, Bangladesh's apparel export to the world increased by 32.60% year-over-year to USD 45.35-billion from USD 34.20-billion in 2021. At the same time, China's apparel export to the world grew by 3.60% year-over-year, i.e. to 182.42-billion in 2022 from US\$ 176.08-billion. However, the share of China fell to 31.67% in 2022 from 32.79% in 2021. Vietnam ranked as the third largest exporter to the global apparel market with 6.12% share followed

by Turkey with 3.46% share. In 2022, Vietnam's apparel export to the world grew by 13.05%. i.e. to US\$ 35.27-billion in 2022 from US\$ 31.20-billion in 2021. At the same time, Turkey's clothing export to the world also reached US\$ 19.91-billion in 2022 from US\$ 18.73-billion in 2021; 6.27% growth. In 2022, the difference in the market share occupied by Bangladesh and Vietnam has widened. Exports of other top countries like India, Indonesia and Cambodia also grew by 9.67%, 8.14%, and 12.14% respectively. Besides, the share of these countries to the world apparel market also increased to 3.07%, 1.75%, and 1.58% respectively. Now if we look at 2023 and its performance, we can see that the sourcing of major markets has drastically gone down. Particularly, the RMG import of USA from the world has declined by 23.17% during January-June 2023 while EU's global apparel import also declined by 8.84% during the first five months of 2023. Bangladesh is also witnessing a slowdown in apparel export in the past few months. The global economic growth, retail and trade outlook show a depressive picture, meaning that the slowdown in demand and order may continue rest of the year. And the price of raw materials and shipping cost is getting back to normal state from unusually higher levels in

2022.

Therefore, the year 2023 will not be a good year in terms of apparel trade measured in dollar values. And my projection is that the global trade of apparel will drastically fall in 2023, which we will see in next year's report by WTO.

However, we can certainly see a dynamic shifting in sourcing pattern as China is slowly, but gradually losing its once enviable global share, which is now being gained by a few countries including Bangladesh. If we can prepare ourselves with the right investments in product, technologies, skills and of course in safety and sustainability, we will certainly be on the top as a sourcing country. Plus, we need to explore our potential in the areas where the global market is trending, like circular fashion and digital marketplace. We need to continue our efforts in enhancing efficiency, product development capability, and invest in reducing carbon emission. Impressively our factories are ahead of the game and making all the necessary efforts to meet these challenges and very innovatively at that. More and more investments are coming in via non-traditional items and in backward linkage industries. So, the vision we have set to earn US\$ 100-billion by capturing 12% of the global apparel market share by 2030 is doable and not over optimistic. As mentioned above in quantity term we have already surpassed China's share in the European Union and hopefully by the end of this year we can surpass their share in dollar value. Despite all the odds stacked up against us we reached 7.87% share of the world market last year. Given all the positive transformation that has happened in the industry and in the country's infrastructure, we will certainly be able to reach 12% by 2030. **A**

Faruque Hassan is the President of Bangladesh Garment Manufacturers and Exporters Association (BGMEA).



## We see a big potential to enhance and balance our trade relationship

**H. E. Alexandra Berg von Linde**  
Ambassador of Sweden to Bangladesh

Sweden and Bangladesh have a longstanding partnership that spans various areas of cooperation and collaboration. The bilateral relationship between the two countries continues to diversify and strengthen. In an exclusive interview with The Apparel Story, H. E. Alexandra Berg von Linde, the Ambassador of Sweden to Bangladesh, shares her insights on various aspects of the bilateral relationship between Sweden and Bangladesh. With nearly three years of diplomatic service in Bangladesh, Ambassador von Linde also discusses her experiences and perspectives on key areas of cooperation and collaboration between the two nations.

**You have been in Bangladesh for almost three years. What do you like most about Bangladesh?**

That is indeed a difficult question! There are so many things that I like about Bangladesh: from the warmth and generosity of its people, the colorful culture, the tasty food...All of these amazing aspects that I have experienced on my travels across the country.

But another way of putting is that I see Bangladesh as a land of untapped opportunities. The economic development this country has gone through during the last five decades is truly impressive. What I have seen during my years in Bangladesh is the potential it has – not least for increasing our commercial ties. Bangladesh offers a large domestic market with a growing consumer base, a strategic location for partnering up for a sustainable future, and a demographic dividend with an unstoppable youth force that is ready to take on the world. And as Bangladesh has developed so has the bilateral relationship with Sweden. I am delighted to be in Bangladesh at this point in time, where we have experienced the 50th anniversary of the country in 2021, but also just having concluded the celebration of 50 years of bilateral relations in 2022. Sweden was one of the first countries to recognize Bangladesh as a sovereign and independent state and we have a broad, deep and rich relationship that spans from development cooperation to trade and academic exchange - just to name a few areas. But a lot more can be done – and we look forward to joining hands for the exciting journey ahead!

**The bilateral trade relationship between Bangladesh and Sweden has been growing significantly in the past decades. How could the partnership between these two countries be further extended?**

Our trade relations and commercial ties have indeed grown steadily

**Today Bangladesh is a preferred destination for some of our global Swedish brands in several business sectors, not least within the fashion and textile industry, where we have had a strong presence for decades. At the moment, we have around 50 Swedish companies operational here that have found Bangladesh to be a competitive market.**

during the last years. For instance, the total imports from Bangladesh to Sweden in 2022 were around 8.4 billion SEK (0.8 billion USD), compared to 5.4 billion SEK (0.6 billion USD) in 2021, so that reflects a substantive growth. To be noted is of course that the registered trade statistics underestimate the import figures, as Bangladeshi products intended for the Swedish market are often off-loaded in other countries in the European Union, so the figures are actually higher than that. Today Bangladesh is a preferred destination for some of our global Swedish brands in several business sectors, not least within the fashion and textile industry, where we have had a strong presence for decades. At the moment, we have around 50 Swedish companies operational here that have found Bangladesh to be a competitive market. We also see that the growing sourcing market is inspiring other new companies to explore the possibilities of partnering up and doing business with Bangladesh.

In this context, we appreciate the continued dialogue with Bangladesh to further improve the business climate, including smoother procedures for imports and exports, as well as stability in the business processes, which would make the country even more attractive for foreign investments.

That said, we see a big potential to enhance and balance our trade relationship, especially within the wider domain of sustainability and the green transition. Swedish companies have a lot to offer when it comes to sustainable solutions, services and skills, as well as green

and climate-smart technology and know-how. For Sweden, the RMG-sector is a good entry point for introducing more sustainable technologies arelated to for example renewable energy, energy efficiency, textile waste recycling, circularity and water management.

**A lot of efforts have been made in terms of sustainability in the past decade in the RMG industry in Bangladesh. How can Sweden contribute to this work?**

Sweden and Bangladesh have a longstanding cooperation when it comes to promoting inclusive and sustainable development in Bangladesh. The RMG sector is of high strategic and economic importance for both our countries and we will continue to scale up our efforts in promoting sustainability, as well as the 2030 Agenda. Swedish brands are at the forefront of sustainability and have adopted ambitious climate goals that make it necessary for them to find solutions that make their global supply chains greener and cleaner.

In this context, Sweden recently launched an initiative called the “Sustainable Fashion Platform by Sweden” led by the Swedish Embassy in Dhaka and Business Sweden, comprising of the Swedish RMG-brands H&M, IKEA and Lindex, the Nordic Chamber of Commerce and Industry (NCCI) and the Sweden-Bangladesh Business Council (SBBC). With this platform, we are trying to combine our efforts within the green transition and



collectively promote sustainability within the RMG-industry in Bangladesh.

The platform has two tracks, one that offers matchmaking between Swedish innovative companies in the green-tech sector, and the Swedish RMG-brands' suppliers, and the other track focuses on policy dialogue between relevant Swedish and Bangladeshi stakeholders. We are glad to have had two fruitful policy dialogues during 2022-2023, within the framework of the Sustainable Fashion Platform. One focused on promoting renewable energy and the other one on promoting circularity within the RMG-sector.

It is also important that the environmental sustainability goes hand in hand with social sustainability. Towards this end, Sweden supports in providing skills development to RMG workers, with a special focus on women, to make sure we support those affected by automation linked to the green transition within the industry. Moreover, Sweden also supports the Decent Work Agenda since many years so that more workers can enjoy decent working conditions through improved policies and laws, accountable labour market institutions, and sustainable business practices.

From our perspective, we see a big potential for Sweden and Swedish brands to further cooperate with Bangladesh for the benefit of both countries and to sustain and strengthen Bangladesh's global competitiveness within the RMG-sector - while at the same time achieving our overall goals on sustainable development.

### **How do you think Bangladesh can collaborate with Sweden for sharing the knowledge and expertise in the area of innovation and design development which will benefit both countries?**

It is true that Sweden nurtures innovation at its core and we have a well-developed innovative digital economy. In population we are a small country – but we have a long

tradition of innovation and creativity and investing in science, research and technology. Focus on information, innovation and internationalization are key features of Sweden's strong business sector. Today, Sweden ranks as one of the most innovative countries in the world and is the proud inventor and developer of many world-renowned innovations and inventions such as Ultrasound, Bluetooth, Skype, Pacemaker, GPS, Spotify, SoundCloud, TrueCaller and Life-saving drones – to name a few. There are many areas where we believe that exchanging lessons learned and expertise between Sweden and Bangladesh can be mutually beneficial. For instance, there is great potential to work together to enhance innovative smart city solutions for Dhaka and other major cities in Bangladesh. Swedish innovative urban designing skills could be used in Bangladesh transport and infrastructure sector, to foster human development through systematic urbanization. Swedish investments, research, and natural resources for green solutions are playing an important role in global energy collaborations and transforming innovation in production, distribution, and storage across the global value chains. As Bangladesh's economy continues to develop, energy efficiency will remain key to achieving the Sustainable Development Goals – and its ambition to become a high-income competitive economy. Going forward, we are convinced that energy can be one linking factor in the future of the bilateral trade relationships between Bangladesh and Sweden.

Moreover, waste, which continues to increase by Bangladesh's expanding industry and growing consumer market, is scarcely used as a resource today. The potential, especially for smaller scale waste-to-energy installations across Bangladesh is huge. By tapping into Sweden's automation expertise and thriving innovation environment, industrial companies in Bangladesh can become part of a greener and smarter future, benefitting both

countries.

Sweden has made some useful lessons learned on cultivating economic growth - whilst simultaneously pursuing the reduction of CO2 emissions and energy consumption, as well as the sustainable use of natural resources. We want to partner up with Bangladesh to find interesting ways to cooperate within sustainability.

### **Since Bangladesh has graduated from LDC and is going to be a developing country by 2026, how Bangladesh should prepare itself during the transition phase to take on the challenge of a developing country.**

There are multiple important changes in both regulations and policies on their way that underline the importance of continued coordinated efforts on sustainability. The upcoming LDC-graduation is one important milestone, and in addition to that the EU Due Diligence Regulation on Corporate sustainability is another, that remind us of the importance of finding solutions to facilitate a green and sustainable transition. Advances in the area of Decent Work and Human Rights, including labour rights and union rights, are also important to support Bangladesh's compliance with the criteria under the EU GSP+ regime that Bangladesh may move into after the "Everything but Arms" preferential trade agreement comes to an end. In the context of a possible GSP+ accession, it is also important to continue to promote a diversification of Bangladesh's economy and export.

All this could be seen as building an opportunity to pave the way for further cooperation within, trade, investments, innovation and sustainability, which ultimately will deepen relations with the EU and help sustain and enhance Bangladesh's global competitiveness. **A**

# Responsible Business Hub Unit

## **BGMEA in Strengthening Human Rights and Environmental Due Diligence in the RMG Sector**



Ribbon cutting at the inauguration of Responsible Business Hub at Westin on 11th June, 2023

In recent times, global onset of social and environmental challenges is demanding much fairer and environment friendly products. Keeping the context in mind, the European Commission has accepted a proposal for a directive on corporate sustainability due diligence on February 23, 2022, which integrates human rights and environmental concerns into business operations and corporate governance. Main purpose of this directive is to promote sustainable and responsible corporate behavior by connecting with new legislations and regulations. This directive is

expected to come in action in the coming years, and will require the companies to address all the adverse impacts of their operations in supply chains both inside and outside of Europe. While implemented, it will bring an overall impact on large fashion brands, retailers, as well as on the RMG sector in Bangladesh. With the new scenario, manufacturers who could adopt these changes, will be prepared for the future business interactions with German and European companies. To comply with these regulations, Bangladesh Garment Manufacturers

and Exporters Association (BGMEA) has set up a Responsible Business Hubs (RBH) unit with the support of Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) which is expected to play a key role in strengthening capacities of manufacturers. This initiative was kicked off with a colorful inauguration ceremony of RBH on 11th June, 2023 at Westin, Dhaka. Shahidullah Azim, Vice President of BGMEA; along with Jan Janowski, Deputy Head of Mission, Embassy of Germany in Dhaka; Fazlee Shamim Ehsan, Vice President of BKMEA; Abdullah Hil



BGMEA Vice President Shahidullah Azim said “In emerging due diligence, there are too many laws and regulations getting passed every day regarding the same issue. To avoid complexities there is a need for a unified principle-based legislation which will be accepted by all the players in the global supply chain.”

Shahidullah Azim, Vice President, BGMEA giving his welcome remarks at the inauguration ceremony of Responsible Business Hub

Rakib, Director, BGMEA graced the ceremony. Among others, representatives from civil society organizations, factories, print and electronic media were also present. At the beginning Jan Janowski, delivered his welcome remarks on behalf of the German Embassy in Dhaka.

He mentioned that “The upcoming legislation won’t create any new burdens to the industry, rather it will help to uphold the issues of human rights and environmental responsibility and the German government will support every way of its effective implementation.” Later on, BGMEA Vice President Shahidullah Azim delivered his speech and stated that Bangladesh’s RMG industry has proved its resilience and shown the commitment towards any sort of positive changes and become the

role model of workplace safety, transparency, environmental sustainability and worker’s wellbeing over the past decades. He additionally mentioned that “In emerging due diligence, there are too many laws and regulations getting passed every day regarding the same issue. To avoid complexities there is a need for a unified principle-based legislation which will be accepted by all the players in the global supply chain”. Following that Reinhard Junker, Deputy Head of Division, Sustainable Supply Chains, and Federal Ministry for Economic Cooperation and Development (BMZ) delivered the keynote speech of the event. He upholds the current developments on mandatory Human Rights and Environmental Due Diligence in Europe. During his speech, he also presented its emerging impact on the global supply chains. Afterwards, Khandakar Mohammed Abdun Noor, Project Coordinator, RBH, BGMEA presented the background of the BGMEA RBH unit, introduced his team members, services, future plans and events. In addition, Farzana Sharmin, Joint Secretary, Compliance Cell, BKMEA also talked

about the RBH cell of BKMEA.

A panel discussion was held followed by the presentation from BGMEA and BKMEA, regarding the necessity of establishing the RBH unit, future implementation of HREDD standards in the factory etc. Sheikh H.M. Mustafiz, Chairman, Standing Committee on Sustainability, BGMEA stated that “Brands and retailers are subject to due diligence regulations in Germany and other countries which will ultimately tighten their criteria for suppliers. Manufacturers with increased adaptability to the impending reforms will be better equipped for future commercial interactions with German and European brands.”

Md. Akhter Hossain Apurbo, Vice President, BKMEA; Jenefa Jabbar, Director, Social Compliance & Safeguarding, BRAC; Abdullah Hil Rakib, Director, BGMEA & Managing Director, Team Group, also joined the discussion as panelist. This session was ended by the interactions with the audience through questions and answer. Finally, the Inauguration ceremony was wrapped up with the closing remarks from Werner Lange, Coordinator-Textile Cluster, GIZ, followed by cutting the ribbon for inauguration of RBH and Photo session.

It is expected that BGMEA will play a key role in offering due diligence and sustainability services to its members, by creating a formalized RBH unit. This unit will consolidate BGMEA’s existing training and sustainability offerings, as well as newly created services, and promote training and services provided by other eligible companies in the schemes of Environment, Social and Governance. The inauguration of such one-stop service is intended to give value to BGMEA members and promote consistency and continuity in BGMEA’s sustainability initiatives. It will help BGMEA to meet the aims outlined in its Sustainability Vision 2030 as well. <sup>A</sup>





**‘The future is ripe with possibilities;  
it's up to us to seize them’**

**- Dr Mohammad Abdur Razzaque**

Dr Mohammad Abdur Razzaque is the Chairman of the Research and Policy Integration for Development (RAPID). He is an economist with a formidable expertise in applied international trade, development, and public policy issues. In an exclusive interview with The Apparel Story Dr Abdur Razzaque delves into the pressing issues that are poised to reshape Bangladesh's trade landscape in the coming years. With his insights and a keen understanding of the intricate webs of global trade, he responds to a series of pivotal questions.

## **Bangladesh's graduation from LDC is going to take effect in less than 3 years' time. What immediate impacts are awaiting us in terms of trade?**

Given Bangladesh's overwhelming reliance on the apparel sector for exports, the primary concerns related to LDC graduation pertain to the export performance of this sector. Graduating out of LDCs is a notable achievement, but it also means that certain trade preferences will be forgone, potentially impacting our export competitiveness. However, understanding the trade implications is not straightforward. Firstly, the conditions and nature of trade preferences for LDCs vary among preference-granting countries. This necessitates a focus on individual nations and regions to fully grasp the post-LDC repercussions. The EU, as an economic bloc, is the largest buyer of our exports, accounting for 45% of Bangladesh's exports. Distinctively, the EU and the UK offer an additional three-year transition period for graduating countries, during which they can avail of all LDC-related preferences. Considering the UK represents 10% of our exports, I believe that, for 55% of our exports, LDC graduation itself is unlikely to pose challenges until the end of 2029. In contrast, the United States, which accounts for nearly 18% of our exports, doesn't offer us any favourable terms. Thus, LDC graduation shouldn't raise concerns for that market. It's essential to note that LDC graduation doesn't signify the end of trade preferences. In several instances, there are preferential schemes for developing nations. Moreover, improved access can be negotiated through proactive engagement with trade partners. If we can obtain favourable terms with the EU post our LDC graduation, it could play a pivotal role in mitigating potential adverse impacts.

The EU unveiled its draft GSP scheme for 2024-34, but its implementation has been postponed until 2027. If this draft EU proposal were to be adopted, Bangladesh's garment exports would not receive any trade preferences post-LDC graduation. This delay should be viewed as an opportunity for Bangladesh, allowing our policymakers to actively liaise with the EU. Without delving into specifics, Bangladesh boasts a significant apparel export share in the EU, making it susceptible to EU safeguards which might prevent our apparel products from enjoying tariff concessions. With this additional time, it's crucial to engage with the EU for better post-LDC GSP preferences. EU policymakers recognise our vulnerabilities stemming from heavy reliance on the garment sector and the potential impact of policy shifts that would see tariffs on our exports rise from zero to approximately 12%. The RMG sector has catalysed economic transformation in Bangladesh, and I'm confident we can persuade the EU to adopt a more lenient trade policy approach that considers the ramifications for a nation like Bangladesh. It's worth highlighting that post-LDC graduation EU preferences would depend on recipient countries ratifying and implementing up to 29 international conventions related to human and labour rights, environmental concerns, and climate change commitments. Among major apparel export markets, our market access conditions in India and Japan are set to shift dramatically with the onset of LDC graduation in 2026 since neither offers a preference scheme for non-LDC developing nations. It's imperative to initiate dialogues with these countries, aiming to secure an extended transition period similar to the EU's offering.

**The U.K. introduced its new tariff policy DCTS. Can you please share your observations on it,**

**particularly about the frameworks, rules of origin, eligibility criteria, etc? Does U.K. offer any transition time after 2026? What preparations would be crucial for us to adapt with changes in U.K. tariff policy?**

Indeed, the UK recently adopted its own trade preference scheme called the Developing Countries Trading Scheme (DCTS). It appears to be the most generous scheme for LDCs as well as for LDC graduates. The UK has retained the EU's provision of an additional three-year transition period after LDC graduation. Subsequently, Bangladesh should be able to access the Enhanced Preference scheme for developing countries. This will allow Bangladesh's apparel products to continue to enjoy duty-free market access. However, the rules of origin conditions will require double transformation of garment items, implying that locally produced yarn will have to be used in knitwear items and domestically manufactured fabrics in woven garments. For the knitwear sector, this should not pose any major problem. However, the woven garment sector will need to bolster its backward linkage by investing in textile production. The DCTS will provide duty-free market access for almost 92 per cent of Bangladesh's UK-bound exports. The preferences under DCTS are not conditional upon ratification and implementation of international conventions, but the UK retains the power to suspend a country on the grounds of human and labour rights violations and broadens these powers to include violations concerning anti-corruption, climate change, and environmental conventions.

**We heard that the Finance Bill for 2023/24 was placed in the Canadian Parliament proposing to create GPT+. The Bill also proposed to renew the GPT for**

**2024-2034. We have also come to know that Canada will allow a 3 years transition time, from 2026 to 2029 for us. What update and analyses you have on it, and what would be our two cents to the Government of Canada?**

Canada previously lacked a preferential scheme for developing countries, notably in sectors such as garments and footwear. They are bringing in a new GPT programme, which includes provisions for these items and extends to a broader set of developing countries. At the time of this interview (September 2023), I have yet to see detailed policy guidelines, including conditions for accessing benefits in Canada after LDC graduation.

The provision of an additional 3-year transition should ideally be extended to all graduating LDCs, which would be advantageous for Bangladesh. Canada represents an apparel export market worth over one billion dollar for Bangladesh. Vietnam recently began enjoying duty-free market access in Canada under the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). This development led to a significant increase in Vietnam's exports to Canada, positioning Vietnam as the second-largest apparel exporter (after China) in that market. Therefore, favourable terms for apparel exports under the forthcoming GPT will be crucial for Bangladesh.

**Australia is also a big market for us and we are enjoying GSP facility there. How does Australia's trade policy look like as of now for graduating LDCs? During BGMEA's trade mission to Australia in July 2023, a number of policy makers and Australian government officials were met there. They have all assured that the duty free**

**Within the garment sector, over 70 per cent of Bangladesh's exports are cotton-based apparel, while the global garment trade is dominated by man-made fibre-based apparel. Thus, Bangladesh faces a dual concentration problem: export earnings are heavily reliant on garments, and within this sector, the dependence on cotton is disproportionately high. Hence, diversification both within the garment range and away from it is crucial. A limited export basket means we have few products with which to tap into the vast global market.**

**market access will continue for Bangladesh. What does the Australian System for Trade Preferences (ASTP) refer to?**

Australia grants trade preferences under the Australian System of Tariff Preferences (ASTP) to five types of exporters: LDCs, Forum Island Countries, developing countries (DC), developing countries subject to Developing Country Status (DCS) duty rates, and developing countries subject to Developing Country (DCT) duty rates. LDCs receive duty-free market access for 100 percent of their exports under the ASTP LDC scheme. Graduating LDCs will no longer benefit from Australia's LDC-specific preferences, but may qualify for its GSP for developing countries, which provides tariff-free preferences for 98 percent of tariff lines. Australia generally has low MFN duty rates, and in most cases, the maximum is 5 percent.

Australia has previously extended duty-free access to graduating LDCs, including the Maldives, Samoa, and Equatorial Guinea, in 2011, 2014, and 2017 respectively. Given the precedence, it is likely to continue with the same policy. The RoO requirement for preferential access to Australia is at least 25 percent of value added but after LDC graduation this could rise to at least 50 percent, with no automatic GSP transition period. This is one area which will require careful attention in understanding the implications for Bangladesh. Graduated LDCs on previous occasions were not significant apparel exporters, so the rules of origin implications couldn't be assessed. As the average tariff rate is low, it is unlikely that graduation will have any major adverse implications for Bangladesh's exports.

**What should be the priorities for Bangladesh at this moment, i.e. for the industry, government and other stakeholders for next 3 years?**

The main priority will be to enhance competitiveness. Within the garment sector, over 70 per cent of Bangladesh's exports are cotton-based apparel, while the global garment trade is dominated by man-made fibre-based apparel. Thus, Bangladesh faces a dual concentration problem: export earnings are heavily reliant on garments, and within this sector, the dependence on cotton is disproportionately high. Hence, diversification both within the garment range and away from it is crucial. A limited export basket means we have few products with which to tap into the vast global market.

While the garment sector has invested significantly in modernising the production process and establishing many LEED-certified factories, further preparations are necessary. Under the EU's Green Deal, carbon taxes could be imposed in the future.



Bangladesh faces the challenge of an energy transition (from fossil fuel-based to renewables), which may impact export competitiveness in the coming decade, as many global brands and investors are now committed to drastically reducing their GHG emissions.

Outside the garment industry, most sectors don't seem export-ready, as their Environmental, Social, and Governance (ESG) record is considerably weaker. Additionally, high profitability from domestic production, shielded by unwarrantedly high tariff protection, has hampered their export potential. Implementing the necessary reforms in this area has proven challenging for Bangladesh. Product standards for the domestic market are typically far below global standards, and even these minimal standards are scarcely enforced, further hindering export readiness.

Alongside the aforementioned issues, enhancing the business environment and reducing the cost of doing business should be top priorities for Bangladesh.

Given that our current LDC preferences in the EU and UK will continue until late 2029, we have several years to develop medium-term, concrete action plans to address longstanding constraints. In the short term (within the next 2-3 years), we must devise strategies to maintain our current level of market access in India and Japan. Pursuing free trade agreements (FTAs) within such a brief period is unrealistic. Bilateral engagements, drawing on precedents from other countries, might be useful in securing an extended transition period.

Exporters are expected to relinquish the export subsidies provided by the government as soon as the country exits the LDC group in 2026. There's no transition period for this change. Hence, the immediate challenge will be to reduce costs either through enhanced firm-level efficiency or by improving the business environment, which includes aspects like infrastructure, port management, customs handling,

internal transportation, and other trade logistics.

### **What would be pragmatic and long-term strategy for Bangladesh as far as the importance of market access and our progression to a high-income country by 2041 are concerned? What are the constraints, where should we build capacity?**

For the garment sector, I believe Bangladesh will remain competitive. China's share in the global apparel trade has been declining and is expected to continue to decrease, providing the much-needed space for other countries, including Bangladesh. The extensive foundation of garment exports means the industry benefits from economies of scale. However, factors such as lead time, ESG and due diligence compliance, weak governance, low labour productivity, and a lack of skilled manpower could pose significant challenges. Numerous infrastructure projects are on the horizon, but managing these efficiently could also be a formidable task.

In my opinion, reorienting the overall economy requires a fresh perspective. Our export orientation (i.e., the export-GDP ratio) dropped from around 20 per cent in the early 2010s to currently just about 11 per cent. This decline indicates that the emphasis on building external competitiveness hasn't been prioritised. We need profound policy reforms, complemented by effective implementation, to steer the economy back on course.

Bangladesh boasts a sizeable manufacturing sector (relative to its GDP), but its export potential, outside of the garment sector, remains largely untapped. Enhancing productivity, adopting advanced technology, and ensuring compliance with product quality, standards, and environmental regulations should be viewed as essential components in expanding and diversifying exports.

A specific area of focus should be the attraction of Foreign Direct Investment (FDI) into export-oriented activities. FDI can significantly influence skill upgrading and productivity enhancement. It can also enable knowledge and technology transfers and promote superior management practices. We must scrutinize our policies to understand why foreign investors have been hesitant to invest in Bangladesh.

Strengthening institutional capacity should take precedence, ensuring that appropriate policies are in place for effective implementation with proper accountability. The Savar Tannery Estate serves as a prime example of extensive attention over many years resulting in minimal progress. Savar Tannery State is a classic example of so much attention being given for so many years with so little improvement. There is no denying that Bangladesh has come a long way. But this also means we need the next round of transformative policy agenda to advance our development trajectory. Imagine a Bangladesh where it can harness the power of the Internet of Things (IoT) to optimize public transportation and reduce energy consumption. Consider a scenario where agri-tech startups revolutionize our farming sectors, enabling precision agriculture, boosting crop yields, ensuring global standards. Picture a thriving local manufacturing hub for electric and electronic products, supplying not just to our domestic market but to the whole world. Visualize a situation where local firms set up joint ventures with global companies for the next big global export, from sustainable textiles to cutting-edge software solutions. Such economic transformations can modernize the systems in place, boost productivity, rapidly expand exports, sustain growth, and, crucially, generate a plethora of jobs for the burgeoning youth population. The future is ripe with possibilities; it's up to us to seize them. 

# Bangladesh Hits Double Century of Green Factories

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**Faruque Hassan**

Congratulations and a big round of applause are due to Bangladeshi apparel makers for bringing glory to the nation by reaching a new milestone of having 200 globally certified green factories. Achieving

LEED certification, which stands for Leadership in Energy and Environmental Design, always carries great pride for any individual factory, but when no less than 200 factories from a single sector achieve such recognition, it brings prestige, pride and joy beyond comparison, not only to the individual factories, but the nation collectively.

Therefore, when the news broke that the number of globally recognized green garment factories reached 200 in Bangladesh, I along with all stakeholders of the sector felt overwhelmed with joy and pride. Presence of such a large number of green factories cannot be found in any other countries except Bangladesh. That means

Bangladesh is a global leader in green garment production and environmental sustainability. For us it is a matter of enormous pride and prestige that Bangladesh is leading the world in the green manufacturing initiative. Bangladesh hosts not only the highest number of LEED certified green garment factories, but also is home to half of the world's top 100 green factories including the highest rated or best green factory in the world.

Awarded by the U.S. Green Building Council (USGBC), the LEED rating system is an effective and globally accepted tool to evaluate the environmental performance of buildings and measure their sustainability. It provides a





framework for healthy, efficient, carbon and cost-saving green buildings. It is widely recognized as the industry standard for green building in the United States, and used in over 160 countries. The LEED rating system is based on a 110-point scale. Buildings earn points for meeting certain criteria in categories such as energy efficiency, water conservation, and indoor environmental quality. The more points a building earns, the higher is its LEED rating.

There are four levels of LEED certification: Certified (40-49 points), Silver (50-59 points), Gold (60-79 points) and Platinum (80+ points).

Among the 200 Bangladeshi green garment factories, 73 are rated platinum category, 113 in gold category and 10 in silver category, while rests are simply received certifications. Some 500 more Bangladeshi factories are in the pipeline of receiving LEED certifications.

In February this year a Bangladeshi garment factory named Green Textile Limited Unit 4, a joint concern of Epic Group and Envoy Legacy of Bangladesh, became the best green factory in the world by scoring 104 out of 110.

## To take environmental sustainability to the next level, Bangladesh RMG industry is now focusing on circular fashion. To this end, manufacturers, buyers, and recyclers are making concerted efforts in collecting and reusing textile wastes.

To receive the certificate, factories are required to maintain the highest standards regarding carbon emission, energy and water usage, waste management, indoor environmental quality etc. under strict supervision of the USGBC. Green factories use energy-efficient and environment-friendly technology and practices that save water, energy, minimize pollution and help save the planet as well as protect the health of its employees. The air and water bodies are not polluted in the vicinity of green factories thanks to their advanced waste management system.

Growing number of green garment factories in the country is a testament to Bangladesh RMG industry's rapid transition towards environmental sustainability. Pursuing economic growth at the expense of the environment is no longer an option for us, because Bangladesh along with the whole world is facing severe impacts of climate change.

So, it is heartening that an increasing number of Bangladeshi apparel makers are becoming conscious about climate change and taking all out measures to mitigate pollution. At the same time major brands and buyers prefer sourcing apparel products from green factories as part of ethical sourcing and ethical consumerism campaigns. That means going green is not only good for the environment, but also for business. Moreover, to take environmental sustainability to the next level, Bangladesh RMG industry is now focusing on circular fashion. To this end, manufacturers, buyers, and recyclers are making concerted efforts in collecting and reusing textile wastes. As a result, clothes are being produced using recycled fibers and fabrics, which is giving rise to a circular and climate-neutral garment sector in Bangladesh.

As mentioned above, the LEED certification award is given in recognition of individual factory's effort to adopt environmentally friendly measures in the manufacturing process, but it glorifies the image of the whole sector and the nation. So, once again I congratulate the managements of the factories that received LEED certification and those who are awaiting certification. I hope more and more factories will follow in their footsteps and make the world a better place to live in. **A**

Faruque Hassan is the President of Bangladesh Garment Manufacturers and Exporters Association (BGMEA).



# Effective Grievance Mechanisms in Bangladesh's RMG Industry

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In the bustling heart of Bangladesh, the ready-made garments (RMG) industry stands as a vital pillar of the nation's economy. It's a sector that employs 4 million workers and generates substantial revenue. Though the industry has transformed a lot in the area of safety, environmental sustainability and workers well being over the years, there are still few issues which has plagued the reputation of the industry. Identifying and resolving the grievance in workplace is one of them. To address these concerns and ensure a safer working environment, the implementation of a strong grievance mechanism has become paramount. Delving into the concept

of grievance, its importance, the processes involved, and how the Conciliation-Cum-Arbitration Committee (CAC) of BGMEA is spearheading this transformative change.

## **What is Grievance?**

Grievance, in the context of the RMG sector, refers to the dissatisfaction or complaints voiced by one or more workers/employees regarding the breach of their rights under various aspects, including legal rights, employment contracts, work rules, internal regulations, and customary practices. These complaints encompass a wide array of issues, such as non-compliance

with working conditions, unfair treatment by supervisors, disciplinary actions without due procedure, discrimination, and even bullying.

## **The Power of a Strong Grievance Mechanism**

A robust grievance mechanism offers an array of benefits for both management and workers in the RMG sector. For management, it acts as a risk identification tool and an early warning system, allowing them to address issues proactively. It fosters improved workforce morale and facilitates better communication with workers, all while assuring investors and buyers that concerns

are being addressed, thus preventing any reputational damage. On the workers' front, a well-structured grievance mechanism provides a safe space to voice concerns. It helps employees better understand policies, resolves individual or collective rights-based problems, and fosters a sense of respect and being heard within the workplace.

Grievance mechanisms can take both formal and informal forms. Ideally, they should support problem resolution at the lowest possible level, primarily within the factory itself. The entire procedure and process should be documented and shared with all employees. It encompasses steps for addressing grievances that arise at work or in work-related situations. The overarching objectives of a grievance mechanism include addressing employees' concerns quickly and systematically, identifying problems early to prevent escalation, minimizing disruptions to production, building trust between workers, their representatives, and management, and allowing workers to raise complaints without fear of retaliation.

In recent times, human rights due diligence regulations have placed significant emphasis on the need for effective grievance mechanisms within supply chains. Various regulations, such as the German Supply Chain Act, EU Corporate Sustainability Directive, and Japanese Guidelines, now require companies to ensure such mechanisms are in place. Consequently, many buyers are increasingly prioritizing this aspect when dealing with suppliers in the RMG sector.

The process of a grievance mechanism typically involves three key stages:

**01. Intake:** This stage focuses on how employees can raise concerns. It may include an open-door policy, suggestion boxes, telephone hotlines, or even dedicated apps like WhatsApp or IMO.

**02. Investigation and Resolution:**

Once a grievance is raised, it's crucial to have a process for investigating and resolving it. Responsible individuals, including HR personnel and top management, may be involved. In some cases, union representatives or external parties could also play a role.

**03. Integration and Learning:** Continuous tracking, record-keeping, and monitoring are essential for identifying and taking actions to prevent similar issues in the future. This stage ensures that the mechanism evolves and improves over time.

**The Eight Effectiveness Criteria of UNGP**

UNGP 31 sets out eight “effectiveness criteria” for non-judicial grievance mechanisms. Mechanisms should be: legitimate, accessible, predictable, equitable, transparent, rights-compatible, based on dialogue and engagement, and a source of continuous learning. These criteria are essential benchmarks that help organizations assess the quality and functionality of their grievance processes.

Firstly, legitimacy is fundamental, as it establishes trust among all parties involved. When employees, management, and stakeholders have confidence in the system's fairness and integrity, it paves the way for constructive conflict resolution.

Accessibility is the second criterion, emphasizing the importance of ensuring that the grievance mechanism is easily understood and usable by all employees. An accessible system encourages workers to voice their concerns without barriers or complexities.

Predictability, the third criterion, revolves around having a well-defined, step-by-step process in place. Clarity in the grievance procedure ensures that everyone knows what to expect and how to navigate through the resolution process.

Transparency, the fourth criterion, promotes openness and accountability. When the process is transparent, it helps build

Grievance Mechanism according to the Bangladesh Labour Act (BLA) and Bangladesh Labor Rule (BLR)
According to the section 33, BLA 2006: Raising and disposing of grievances
According to the section 33 (3, 6), BLA 2006: Timeline
According to the section 124 (A), BLA 2006 and BLR 113,: Wage and dues payment.
According to the section 132, BLA 2006 : Deduction of wage
According to the section 134 (1), BLA 2006 : Payment of wage
According to the section 209 to 213, BLA 2006: Industrial dispute
BLA-89(8), BLR 79 (2/C) and 202(24): Supporting areas at factory level

confidence that complaints will be handled fairly and without bias. Equity, as the fifth criterion, underscores the need for a fair and equal treatment of all parties involved. This ensures that no individual or group is disadvantaged or favored during the grievance resolution process. The sixth criterion, rights compatibility, stresses alignment with the legal framework. It is imperative that the grievance mechanism operates within the bounds of applicable laws and regulations to avoid potential legal complications. Engagement and dialogue, the seventh criterion, encourage active participation and communication between parties. A grievance process that promotes engagement allows for the exchange of ideas, concerns, and perspectives, ultimately facilitating resolution. Lastly, the eighth criterion focuses on continuous learning. An effective grievance mechanism should be proactive in identifying areas for improvement and adapting to evolving circumstances. This



approach ensures that the system evolves over time to better meet the needs of all stakeholders. Collectively, these eight criteria form a comprehensive framework that not only gauges the efficiency of grievance mechanisms but also sets the stage for a fair, transparent, and responsive system that benefits both employees and organizations alike.

### BGMEA CAC: Driving Change

The Conciliation-Cum-Arbitration Committee (CAC) was established in April 1998 as a pivotal step towards addressing grievances within the RMG sector. The CAC is composed of a Chief Arbitrator, representatives from BGMEA, and representatives from registered Trade Union Federations of the sector, with secretarial support from BGMEA Labour Cell. The CAC's primary

goals include the rapid resolution of disputes between owners and workers to ensure uninterrupted production. It strives to resolve these disputes before resorting to legal action, thus saving time and expenses for all parties involved. The CAC operates under the "BGMEA Conciliation-cum-Arbitration Rule, 1999," which outlines the procedure for addressing grievances. Workers submit their grievances in writing, which are then shared with the concerned factory for their input. If disagreements persist, the Chief Arbitrator convenes a meeting to discuss the issues and ultimately arrives at a satisfactory solution. The decisions are documented and signed by all parties involved. Apart from the CAC, BGMEA also resolves disputes individually through negotiations involving workers, union representatives, and management. These settlements are formalized through Memorandum of

Understanding (MoUs) and are executed accordingly, reducing the need for litigation. From 1998 to June 2023, the CAC received 19382 cases where 18041 cases were successfully resolved which benefitted 59072 workers and realizing a substantial amount of funds. The introduction of effective grievance mechanisms is ushering in a new era of transparency, fairness, and worker empowerment in Bangladesh's RMG sector. BGMEA CAC plays a crucial role in ensuring that grievances are addressed promptly, promoting harmonious labor relations, and contributing to the sector's long-term sustainability and success. As the industry continues to evolve, the implementation and strengthening of these mechanisms will remain vital in ensuring a safer and more equitable workplace for all involved. <sup>A</sup>





# Are Fair Prices Going to Remain a Myth Only?



**Barrister Shehrin Salam Oishee**

Over the decades, the readymade garment (RMG) sector of Bangladesh has flourished and spread its reach in exporting its products across continents. As per recent reports, 202 Bangladesh's garment industry had LEED Certification by the USGBC and over 500 factories are awaiting the certification in the pipeline. It not just strengthens our goal towards sustainability but also proves the commitment of Bangladesh's apparel industry towards being the safest industry in the world. But is this commitment being paid for by our buyers despite the strides made? It's an alarming issue nonetheless as our apparel sector is grappling in obtaining fair prices for its products from international buyers. As apt as we see the global buyers are in ensuring safety measures, Green factory

initiatives, etc, we manufacturers look forward to the day when our workers, their workmanship, our products and dexterity shall be equally valued and paid for in terms of "Fair Prices."

Bangladesh RMG sector had taken up to transform not just into green factories but with other compliant facilities of eco-friendly technologies, focus on reducing energy consumption, minimizing waste, and maintaining higher standards of worker safety and well-being. A huge personal investment was made by the individual RMG industry for these compliances. But the challenges in achieving fair prices from buyers make business tougher for manufacturers, alongside maintaining the debt of these investments.





The journey of manufacturers to ensure fair prices of their product is an old feud. International buyers are consistently paying lower than the global average price to apparel manufacturers in Bangladesh but higher to some of the country's competitors. International Trade Centre (ITC) stated that it looked at the problem using a cost-to-value analysis and saw a different picture. According to the ITC, local garment manufacturers receive rates that are 32 per cent to 83 per cent lower than the highest prices paid to the suppliers in other countries. This validates, for the first time, Bangladeshi garment manufacturers' claims about receiving lower prices from global buyers and underscores the importance of moving up the value chain. Fair and ethical prices are

necessary to ensure that the garment manufacturers could work towards improving the sector in terms of safety, security and workers' rights. In a study report titled "The Garment Costing Guide for small firms in value chains" ITC stated there is a growing argument that customers -- retailers and brands -- should pay their suppliers a fair free-on-board (FOB) price since they are often paying the prices that are below the factory costs. Many factories have been forced to close because of the lower FOB prices. It's crucial we realise that the problem is not that customers are paying these RMG factories less, but rather customers are paying everyone else more. One may think why this is happening and research states clearly that the lower prices that is

causing the handful of RMG factories to fail in running and finally succumb to their losses and close down, the value provided by the failing factories is nearly worthless. The scenario is not only in Bangladesh, countries like Pakistan, and Cambodia are also consistently paid lower than the world average prices, whereas Vietnam, Indonesia, Turkey and Mexico are given higher than the average rates. For instance, men's woven cotton trousers made in Bangladesh were sold for \$7.01 per piece in 2020, which was 9.20 per cent below the global average of \$7.72, being one of the many examples. Often these rates are justified on the grounds that the supplying countries that fail to meet the needs of the customers (i.e. requirements) are paid lesser than

the others. But Bangladesh is no longer in that state to receive lesser prices, reasons stated above already. Another report published by World Trade Organization shows that Bangladesh gets lower prices compared to its competitor countries like Vietnam, Cambodia, India, Turkey, etc. from its two largest apparel exporting destinations – the United States and European Union (EU) countries.

This devaluation of our products is persistent due to certain reasons. The opacity of pricing structures within the fashion supply chain is a significant hurdle. The negotiating grounds for the Bangladesh RMG manufacturers are very scarce and limited. Often, buyers negotiate prices based on their own projections, leaving manufacturers with little room for negotiation. This lack of transparency makes it difficult for factories to understand the fair value of their products. Additionally, the power dynamics between buyers and manufacturers further exacerbates the issue. A buyer who has a widespread global ambit holds an upper hand due to their global reach and access to multiple suppliers and can possibly determine and also dictate terms, leaving manufacturers with limited bargaining power, due to the fear of losing the orders. The market competition is such that manufacturers in Bangladesh fear that buyers from across the globe shall shift their orders sooner than imagined to their competing nations nearby. Long-term contracts between manufacturers and buyers were often seen to lock factories into unfavorable terms, making it difficult to renegotiate prices even if costs or market conditions change. Bangladesh has always been known for its ardent and delicate hand in production at lower production cost. The phrase “Cheap Labour” has often overshadowed our significant growth and despite passage of decades, the global ideology remains quite the same. As massive investments are made to transform into green factories as a means to



add value to our production chain, even then overcoming this stereotype and justifying higher prices remains a challenge, often threatening the viability of these efforts.

To combat this state, the manufacturers in Bangladesh are opting for a new sect in production – value added products. A little while ago, a major European retailer in Dhaka stated, "It is true that the prices of garment items made in Bangladesh are a bit lower compared to those in other countries and the average world price because local manufacturers are still strong in basic garment items." He further added, "So, a hidden unhealthy competition has also kept the prices of the items lower." The state is not as simple as the words display it to be. This major change shall be a challenge for several medium and small manufacturers in Bangladesh who shall still be combating the price cuts.

A fair pricing of our products from foreign buyers shall support entrepreneurs to provide decent wages and maintain congenial atmosphere in the garment factories of the country, further allowing the maintenance of standards of production and labour rights. The statement is simple, higher standards in value addition in production requires high prices, these are complementary stances and shall allow us to accentuate the

RMG state.

Around 85% of the garment factories in Bangladesh have already met the international standard, as assessed by Accord and Alliance — the two international organizations of major global retailers. Hence fair pricing has been a major and long-standing demand of the Bangladesh RMG producers. As ruthless as it might sound, some factories are forced to handle rising overheads, compounded further by the recent hike in workers' minimum wage, amounting to 51% increase, and even then compromise in prices just to breakthrough the competition chain and keep their factories running, as closing down shall be an even greater loss than the numerous financial debts that pile up during their functioning. The manufacturers seek a more equitable partnership between buyers and manufacturers, by means of enhancing transparency in pricing, and fostering a deeper understanding of the value proposition presented by green garment factories can be some effective solutions. Regulatory interventions, such as international guidelines for fair pricing, could also play a role in leveling the playing field and it must be a collective initiative of all the stakeholders involved.

The RMG sector in Bangladesh houses a history of constant growth, contributing significantly to the rise of the nation singlehandedly at times too. Hence its subsistence and growth is a matter of National concern as this sector is nothing less than a National Asset. The prices that the manufacturers seek are not just righteous but also deserving given the products manufactured and its quality and demand across the globe. The tag of “Made in Bangladesh with Pride” is not just a statement but a pride, and it's time that it's rightly valued. **A**

*Barrister Shehrin Salam Oishee is a Director of Bangladesh Garment Manufacturers and Exporters Association (BGMEA), Director of Envoy Group and an Advocate of the Supreme Court of Bangladesh.*



# My Tryst with Art, Design & Fashion



Waterlily print on Jamdani



Hand pleated like basket weave

Photo Credit: Edge Gallery



Kuhu Plamondon

My journey into the world of fashion started at a very young age. The thought process began when I graduated from the Holy Cross High School right after 1971. There was no fashion schools back then so it was decided I would attend an art institute, which was then the closest to learning fashion designing or fashion illustration.

From my earliest thoughts, fashion was much more than a glancing interest to me. Its distinctive patterns, colours and shapes I found spellbinding, fascinating, captivating, and a great joy to observe and appreciate. Fashion means different things to different people. To me it embraces the beauty of the world, the joy and beauty I feel within and it's the hallmark of my culture.



I think I was awakened to fashion seeing my mother, sisters and aunts wearing saree – six yards of unstitched exquisite, colourful fabric. Seeing how it draped across the body like a second skin and enhancing every human curve was a delight to see. Its intricate beauty was – and is – inspirational. I took delight in seeing my beloved mother gently unfold and gently caress her saree before putting it on in a kind of respectful ritual; and my sister leaving the house every

morning wearing her saree with a matching blouse, sometimes in long sleeves and sometimes in short sleeves, with earrings to match. She would give a quick last minute glance in the hallway mirror and step out looking so beautiful and so immaculate.

While I held every admiration for the traditional saree everyone loved and admired, I wanted to transport it into modern times, into the 21st century, and I began thinking of ways of how to design the unique

six yards to make it more fun, fusion, and make it more modern, for the younger generation. Most of the designs of sarees were based on motifs. So I sought a new, different approach. I wanted to capture the beauty of local flowers like the Shapla, Krishnachura, Rajnigandha and the animals, in particular the majestic Royal Bengal tiger, which has been an on-going inspiration to me. There is something about the tiger that gives me energy in abundance and an indescribable pleasure to draw its unique pattern on textile.

I also find endless inspiration in our landscape, in our architectures like the mosques. The mosques of our country have beautiful divine-inspired patterns, many of which I try to capture on textiles. Bagha Mosque of Rajshahi is my personal favourite. It is enriched with a beautiful terracotta design and I've used these patterns in my fashion designing.

Fashion is inseparable from art. As a student of fine arts at Dhaka University, my art is very closely linked to my country. When I do a design or surface pattern, I open my mind and try to find inspiration in local subjects such as landscape, rivers, boats, trees, flowers, architecture and so on. I think, as an artist it is my duty to seek out the beauty in our culture and encapsulate it in our designs so its life is extended and while at the same time bringing an entirely different, fresh look to the fashion, because we are promoting our local designs, culture and traditions through the textiles.

I've been working for the past 15 years with Jamdani, the royalty in hand loom woven cotton fabric. I think these fabrics have enormous potential. It can be turned into a model garment and given a contemporary design to make it up skill specifically for the new generation. In this regard the designer has a key role to play. For the last three years I have been working with Banarasi weavers. And I'm quite successful in giving that model a contemporary look. The people liked it. Both my





Spring



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Jamdani cotton and Banarasi silk have been successful. People are returning to order over and over again.

I do not work in the villages where the weavers reside. I prefer to bring them to my studio and work with them one on one. If I were to work in the village there's every likelihood the weavers, the entire village, would produce the same thing and the charm and uniqueness would be lost.

Design has to evolve, design has to be contemporary, surface design needs surface designers to change it, but craft must be grounded, heritage must be grounded. So as a designer, if I'm going to use a heritage textile whether it is Jamdani or Mirpur Banarasi silk, I need to bring these weavers to my studio and work with them separately. This is something I truly believe. This is something I have experimented with and my method works.

Working with the weavers not only did I teach them something different, but I, too, learned from them. In the first two months, every piece that I started, there were lots of mistakes because either I failed to understand the weaver or the weaver failed to understand me. But then a point was reached where we learned from and understood each

other. And then it became easy. The designs flow in very quickly.

I truly believe in working with the craft of our society, of our country. I may have learned much over the years, but I still have a lot to learn from them. The craft master has to be the keeper of this age-old art, not me. I will bring innovation, new designs, new energy, but the craft master must keep it grounded. I'll always be thankful to former



Royal Bengal tiger print on sports wear

BGMEA President Ms. Rubana Huq. She had first invited me to do some designs with the Royal Bengal Tiger and Sundarban. The current President Mr. Faruque Hassan later invited me to do a project. Many thanks to both.

I started working with some young fashion designers at BGMEA. Together we have designed contemporary clothing for the modern market. We have used denims, knitwear and muslin. It was an enjoyable learning experience for all.

There is no exclusivity on thought or design. Each human being thinks differently. I think independent designers like me and those who work for the garment industry see fashion from different angles and we all can learn from each other.

Under the BGMEA project, we paired denim and knits with muslin. We did an entire collection with these three fabrics and the team did a very good job. The surface designs that we used for the royal Bengal tiger as well as the Kalboishakhi print came out very well. We also did some scarfs, sarees and long tunics for the eastern wear. The designs were all west-oriented.

If we want to promote our heritage fabrics globally, we need to come up with a product that can be made with heritage fabric such a beautiful jacket that can be worn over and over again; wedding dresses that can be passed from mother to daughter, or even a beautiful scarf that can be worn globally.

A heritage fabric is interwoven with love and commands respect from all. It is a slow and tedious process. When we make something from heritage fabric, not only do we use a fabric, but also it incorporates a piece of our heart and our soul. It is something we want to wear... it is something we are proud to wear and wear often. It is not something to throw away after wearing it for a few days or disrespected. It is something that is made with love, worn with love and it reflects who you are and it is timeless. **A**

*Ms. Kuhu Plamondon is an artist and fashion designer.*



# Leading the Way in Home Textile Sector

**Zaber & Zubair Fabrics**



For decades, Bangladesh has been renowned as a global apparel manufacturing hub, securing reputation as the world's second-largest exporter of readymade garments. As the country's readymade garment industry continues to flourish and contribute significantly to its economic growth, new sectors are emerging with tremendous potential. Among these promising sectors, the home textile industry stands out, showcasing remarkable growth and bright prospects. Bangladesh's home textiles sector

crossed the USD 1 billion mark in the fiscal year 2020-21. This accomplishment testifies to Bangladesh's growing popularity on the global stage, with renowned brands and buyers now sourcing their home textile products from Bangladesh.

Among the companies which are shaping Bangladesh's global reputation in the home textile sector, Zaber & Zubair Fabrics is at the forefront. Established in the year 2000, this company embarked on a mission to become an internationally recognized home

textile manufacturing powerhouse. With its unwavering dedication to producing sustainable and innovative home textile products, Zaber & Zubair Fabrics has not only met the demands of global customers but also earned their trust and satisfaction.

## **Journey Begins**

Zaber & Zubair Fabrics' journey began in March 2000 when it commenced commercial production. The company's manufacturing process is nothing short of impressive; it is fully vertically



Rainwater harvesting at Zaber & Zubair Fabric



ETP



Solar panel

integrated, encompassing spinning, weaving, printing, dyeing, and a comprehensive back process. With its CAD Designing Studio, Singeing & Desizing, Continuous Bleaching Plant, and Stitching Unit, Zaber & Zubair Fabrics operates at the forefront of technology. Located in Tongi, near the capital city of Dhaka, the company has invested a staggering USD 600 million in state-of-the-art machinery, positioning itself to meet the challenges of the 21st-century textile world. The mill has a daily production capacity of

approximately 400,000 meters of finished fabrics or 100,000 sets of various home textile products, including bed linens, window furnishings, table and kitchen linens. The factory can produce 320 tons of yarn production per day. It has a capacity of weaving 800 thousand meters fabrics per day. Besides, the mill has the capacity of 180 thousand meters printing, and 120 thousand meters dyeing per day. This impressive output is a testament to a pool of highly skilled professionals and a dedicated workforce of around 8,000

employees under the dynamic leadership of the management. Zaber & Zubair Fabrics has secured its position as the highest exporter of Bangladesh for 13 consecutive years, proving its mettle in the home textile industry.

### Commitment to Sustainability

In an era where sustainability is paramount, Zaber & Zubair Fabrics has taken the lead in adopting eco-friendly practices. The company places a strong emphasis on sustainable materials, and fair labor





Production Floor



Energy efficient machines

practices, showing its commitment to a greener textile industry and its responsibility toward both its craft and the planet.

### Some key sustainability initiatives include:

- \* Installation of 400 kWp PV solar power on the rooftop with plans to increase capacity to 3.5 MWp by 2026.
- \* Implementation of energy-efficient technologies such as EGB, VFD in motors, LED lighting, and more, resulting in significant natural gas and electricity savings.
- \* Operation of the largest Biological

ETP in Bangladesh, complying with ZDHC wastewater guidelines, ensuring responsible chemical use in production.

- \* Utilization of rainwater harvesting, saving significant amounts of fresh water.
- \* Incorporation of 100% BCI in the supply chain and a focus on sustainable materials like Lyocell, Jute, Modal, Hemp, and Linen.

Zaber & Zubair Fabrics' commitment to sustainability extends to its manufacturing processes. They have implemented a wide range of sustainable technologies and equipment,

including solar PV, LED lighting, VFD motors, economizers for boilers, rainwater harvesting systems, and more, ensuring a holistic approach to eco-friendly production.

### Sustainability Goals

The company has set ambitious sustainability goals, aiming for a 30% reduction in GHG emissions and energy consumption by 2026, with a further 56% reduction by 2030, starting from 2022. They also plan to reduce water usage by 40% by 2026 and 50% by 2030, beginning in 2022, with the ultimate aim of achieving net-zero emissions by 2050.

### Innovations Beyond Tradition

Zaber & Zubair Fabrics strives to go beyond traditional approaches in its manufacturing processes. They are known for their innovative use of textiles, constantly pushing the boundaries of what is possible in fashion. Their experimentation with new techniques, fabrics, and blends has earned them international acclaim and sets them apart in the industry.

### Caring for Workers

Alongside their commitment to sustainability, Zaber & Zubair Fabrics takes the well-being of their workers with utmost importance. They operate fair price shops, ensure a healthy work environment, offer childcare centers, and are involved in various welfare initiatives, including the Ismail Anjuman Ara welfare trust and the construction of a 200-bed hospital as part of their CSR activities. Zaber & Zubair Fabrics is a shining example in the home textile industry of Bangladesh. With its remarkable achievements, commitment to eco-friendly practices, and ambitious future goals, Zaber & Zubair Fabrics is poised to continue shaping the future of Bangladesh's home textile sector while contributing positively to the economic growth of Bangladesh. <sup>A</sup>



# ESG Reporting Elevates Cute Dress in the Apparel Industry

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Cute Dress Industry Ltd., a prominent apparel manufacturer based in Bangladesh, distinguishes itself from its industry peers through its unwavering commitment to ethical and sustainable practices. The company annually releases an ESG (Environmental, Social, and Governance) report, a globally accepted tool for evaluating the environmental, social, and

governance impacts of corporate operations. ESG data, while instrumental in tracking progress and setting meaningful targets, also serve as a crucial indicator of a company's dedication to sustainability and ethical practices in its manufacturing processes. Given the escalating concerns about climate change and the fashion industry's significant contribution to global

warming, profitability is no longer the sole measure of corporate success.

In today's evolving business landscape, companies face heightened scrutiny regarding their impact on the planet, treatment of employees, and ethical governance practices. Eco-conscious brands and consumers prioritize sourcing from environmentally friendly garment factories, and ESG data has



Sheikh H M Mustafiz, the Managing Director of Cute Dress, expressed their commitment, stating, "Sustainability Reporting enables us to gauge our sustainability progress, establish improvement targets, and present our overall performance to stakeholders. By consistently publishing this report, we have set a benchmark for sustainable growth, demonstrating that our business thrives without compromising the environment or exploiting workers in any way."

emerged as a potent instrument for assessing eco-friendly and ethical business practices.

In this context, Cute Dress is paving the way for a more sustainable future in Bangladesh's ready-made garments (RMG) industry. The company diligently collects, analyzes, and annually publishes ESG data in the form of a 'Sustainability Report,' available for download on their website, [www.cutedress.net](http://www.cutedress.net). Cute Dress has not only embedded sustainability at the core of its manufacturing process, employing advanced

manufacturing and supply chain management solutions, but has also established a comprehensive measurement tool to assess all direct and indirect parameters of sustainability. These data-driven initiatives have garnered recognition and appreciation from a wide spectrum of stakeholders. He further emphasized, "Our primary objective is to provide transparent information about our sustainability initiatives in compliance with international standards, serving as a model for other firms in the industry." Sheikh

H M Mustafiz also serves as the Chairman of the Standing Committee on Sustainability at the Bangladesh Garment Manufacturer and Exporter Association (BGMEA). Established in 2003, Cute Dress boasts a clientele of over 40 high-end brands across multiple countries, including Denmark, Sweden, Norway, Germany, Spain, Belgium, Canada, USA, Japan, Australia, South Africa, and others. The company stands out with its state-of-the-art, environmentally friendly factory, certified as LEED Platinum and recognized as one of





the top-rated green factories globally by the US Green Building Council. Additionally, Cute Dress undergoes audits by ACCORD/RSC for workplace safety and social compliance, and it is rated A by amfori-BSCI. To promote material sustainability, the company offers a diverse range of products traceable and certified in accordance with various industry standards, including GOTS (Global Organic Textile Standard), OCS (Organic Content Standard), BCI (Better Cotton Initiative), USCTP (US Cotton Trust Protocol), GRS (Global

Recycle Standard), RWS (Responsible Wool Standard), and Oeko-tex Standard 100, among others. Cute Dress actively participates in the Better Works program and is a stakeholder in the Sustainable Apparel Coalition's HIGG initiative. Cute Dress's unique approach lies in its recognition of each customer's distinct needs, offering a wide array of flexible solutions. This flexibility extends across various facets, including adaptable minimum order quantities, enabling brands to order precisely what they require without

excess inventory. The company also provides flexibility in fiber composition, allowing brands to align with their product and sustainability values by choosing from sustainable material options. Furthermore, Cute Dress offers a diverse range of product categories, from t-shirts to outerwear, ensuring brands have abundant choices. Their flexible lead times and on-demand services are tailored to ensure accuracy in fulfilling brand orders, making Cute Dress's business model synonymous with unparalleled flexibility and





customization.

In addition to its comprehensive sustainability efforts, Cute Dress aligns its operations with the United Nations Sustainable Development Goals (SDGs) and has received a 'Certification of Appreciation' from UNDP for its commitment. The company was also honored with the 'Impact Excellence Award' in 2021 by Hey Social Good in the USA, recognizing its sustainability practices.

Moreover, Cute Dress proudly joins the ranks of signatories to the UNFCCC (United Nations Fashion Charter for Climate Change). Their steadfast commitment to this charter involves a rigorous reduction target of 50% in greenhouse gas (GHG) emissions by 2030, with a long-term aim of achieving net-zero emissions by 2050. This proactive stance underscores their dedication to

environmental sustainability and aligns with global efforts to combat climate change, firmly positioning Cute Dress as a significant contributor to a more eco-conscious and climate-resilient future.

The Sustainability Report for 2022, prepared by Cute Dress's Sustainability Management team, meticulously collects information about factory premises, labor and production processes, integrated departmental functions, corporate social responsibilities, stakeholder perspectives, and environmental management systems. The data analysis follows the guidelines of the Global Reporting Initiative (GRI) Standards 4.0, one of the most widely recognized frameworks for sustainability reporting. Throughout the report preparation process, Cute Dress focused on setting goals, measuring performance, and managing change

to enhance performance. Notably, the company introduced benchmarks to gauge the environmental impact of garment production.

The report highlights that Cute Dress excelled in water management but experienced increased energy consumption and GHG emissions due to expansion-related energy usage and frequent power outages. The company's solar initiatives generated 55,515 kWh of electricity and conserved over 2,500,000 liters of groundwater through their water recycling system. Moreover, an Effluent Treatment Plant (ETP) was installed in the printing section, ensuring the cleaning and filtering of chemical-mix water for recycling purposes. The company effectively managed its CO2 emissions, with no waste being landfilled.

Cute Dress's strong social performance in 2022 reflects its commitment to improving working conditions. The company not only met all basic criteria for employee welfare but also launched an internal program called "Happy Faces of Employees" to further enhance social performance.

In summary, Cute Dress stands as an exemplar of environmental sustainability, worker well-being, and high-quality product production. Their practices are meticulously designed to minimize pollution, landfill waste, and harm to ecosystems. The company's management anticipates further improvements in environmental performance in the future.

Sheikh H M Mustafiz, the dynamic Managing Director of Cute Dress, encapsulated their ethos, stating, "At Cute Dress, we are not merely a garment manufacturing industry; we are a company that values sustainability, quality, and innovation. We are dedicated to creating a better future for our employees, customers, and the environment." By setting such an example, Cute Dress provides a blueprint for other factories to emulate in their pursuit of greater sustainability in the fashion industry. <sup>A</sup>

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### Shital Pati: cool by nature

Shital Pati is a mat that is popular and common throughout Bangladesh. It is used as a sitting mat, bedspread or prayer mat. Made from natural fibres, this mat is an intrinsic part of Bengali lifestyle. Its ultra smooth surface, which is cold to the touch, emits a soothing feeling to the body even during hot humid days.

Shital Pati is made from cane or murta plants, which grows in great abundance in the alluvial tracts of water bodies in Sylhet, Sunamganj, Barisal, Tangail, Cumilla, Noakhali, Feni and Chattogram. UNESCO has recognized the traditional weaving of Shital Pati to be an art form exclusive to Bangladesh; and included it on its representative list of the Intangible Cultural Heritage of Humanity.





## Manipuri handloom: a hand-woven heritage

Bangladesh has a rich and diverse handloom heritage. Its handloom products are widely acclaimed and coveted worldwide for their dominant quality and aesthetic beauty. Manipuri handloom is a distinct and integral part of the country's hand-woven heritage, copiously praised for its elegant, exquisite and colorful designs and textures. Woven with precision by the Manipuri community, who live predominantly

in the Sylhet region, Manipuri handloom is an integral part of this indigenous group's culture and tradition. The Manipuri handloom textile products include saris, shawls, bed-covers, bed-sheets, women's three-piece clothes, scarves and bags etc. The unique products can be found not only in Bangladesh, but in Macy's of New York, Harold's of London and in many other leading stores around the world. <sup>A</sup>

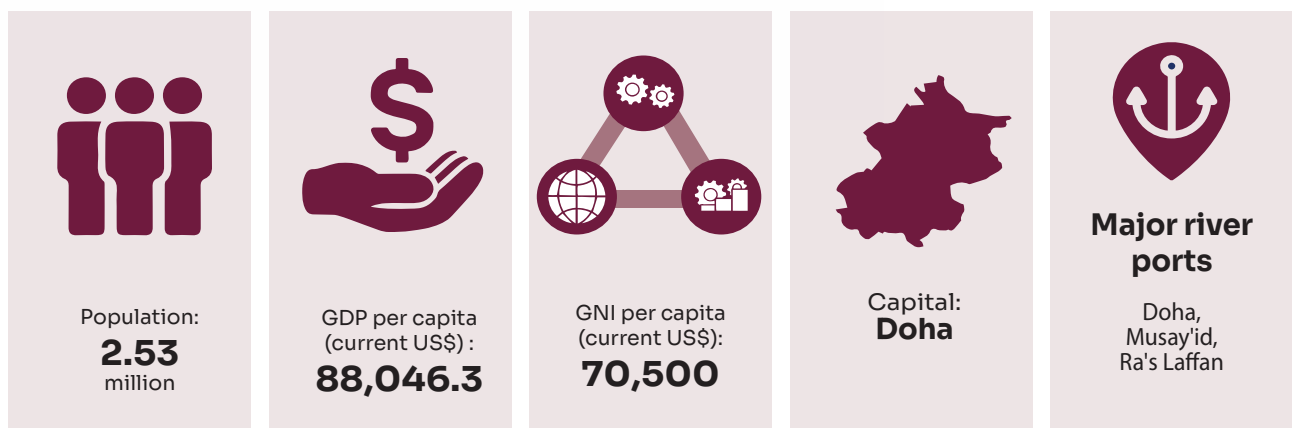


# Tapping the Emerging Market: Qatar

**Q**atar is one of the largest economies in the world based on GDP per capita. Qatar has the world's third largest proven natural gas reserve and is the second-largest exporter of natural gas. More than 70% of total government revenue, more than 60% of gross domestic product, and roughly 85% of export earnings of this country come from Petroleum and natural gas. Qatar is one of the members of the Gulf Cooperation Council (GCC) and also the member of Organization of the Petroleum Exporting Countries (OPEC). Qatar is one of the potential markets for Bangladesh in the Middle Eastern Region. As the number of travelers, migrant workers, and businessmen from the different sectors of Bangladesh has gradually increased in Qatar, Bangladesh has a huge potential to increase its garments export to this country further. Not only garments, but also other sectors may have the potential to increase export to Qatar and draw investments.



## Demographic and Economic Overview of Qatar



Source: The World Factbook – CIA & World Bank



# Bilateral Trade:

Table-1: Bilateral trade between Bangladesh and Qatar (Value in millionUSD)			
Year	BD's Export to Qatar	BD's Import from Qatar	Trade Balance
2017-18	38.95	204.95	-165.99
2018-19	47.12	1050.51	-1003.39
2019-20	35.30	1218.73	-1183.43
2020-21	51.04	1020.98	-969.94
2021-22	42.29	2177.62	-2135.33

Source: Bangladesh Bank and Export Promotion Bureau (EPB)



# Qatar’s Clothing Import from the World:

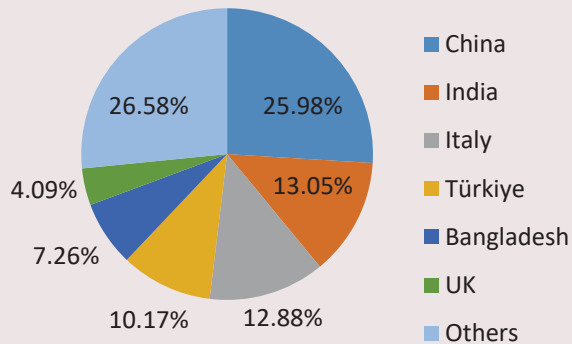
Though Bangladesh is the fifth largest apparel sourcing country of Qatar, the share of Bangladesh in Qatar's total RMG import is only 7.26%. In 2022, Qatar imported USD 62.37 million apparel from Bangladesh. China tops as a supplier with 25.98% share.

Table-2: Qatar’s Clothing Import from the World and share in 2022  
(Value in million USD)

Exporters	2020	2021	2022	Share in 2022
China	171.10	167.97	223.31	25.98%
India	66.38	92.05	112.20	13.05%
Italy	45.98	64.14	110.71	12.88%
Türkiye	99.79	73.25	87.40	10.17%
<b>Bangladesh</b>	<b>33.16</b>	<b>52.70</b>	<b>62.37</b>	<b>7.26%</b>
UK	71.41	46.80	35.15	4.09%
Others	171.90	241.94	228.45	26.58%
Total	659.71	738.86	859.58	100.00%

Source: ITC Trademap

Figure-1: Qatar's Major Sources of Apparel Imports in % in 2022





# Bangladesh's Clothing Export to Qatar:

Qatar is one of the nontraditional markets for Bangladesh RMG industry. Bangladesh's RMG export to Qatar reached US\$ 3.33 million in FY2022-23 with declined 21.34% year-on-year growth.

**Table 3: BD's Knit, Woven and Total apparel Export to Qatar (Value in million USD)\***

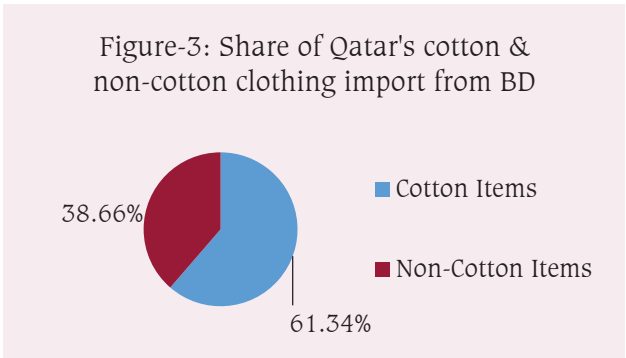
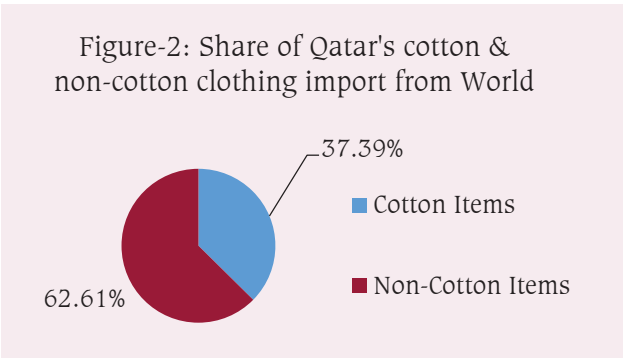
Year	Knit	Woven	Total	Growth
2012-13	0.98	0.29	1.27	28.01%
2013-14	1.53	0.19	1.72	35.67%
2014-15	1.06	0.11	1.18	-31.72%
2015-16	1.75	0.42	2.17	84.13%
2016-17	2.24	0.65	2.90	33.66%
2017-18	2.48	0.53	3.01	3.92%
2018-19	3.07	0.83	3.90	29.52%
2019-20	2.53	0.48	3.02	-22.71%
2020-21	1.2	2.61	3.81	26.35%
2021-22	3.61	0.62	4.23	11.02%
2022-23	3.04	1.10	3.33	-21.34%

\* Data may differ between EPB and ITC Source: Export Promotion Bureau (EPB)



## Qatar's cotton & non-cotton clothing import share in 2022

Qatar imported USD 859.58 million worth of apparel from the world where the share of cotton made items was 37.39%. On the other hand, the share of non-cotton items by Qatar from Bangladesh was 38.66% only of total apparel imports while the share of cotton items was 61.34%.



# Qatar's Major Clothing Items Import from Different Countries in the World

Following Table-4 shows the top 20 clothing items imported by Qatar from Bangladesh and competitor countries of Bangladesh in 2022 and the Compound Average Growth Rate (CAGR) of those clothing import by Qatar from the world during 2017-2022.

HS Code	Items	World 2022	China	India	Italy	Türkiye	BD	UK	Viet Nam	CAGR of Qatar's import from world (2017-2022)
620190	M/B non cotton woven overcoats, car-coats, capes	102.02	23.79	1.22	1.34	4.63	1.40	27.74	0.31	#DIV/0!
610910	Cotton knitted T-shirts	90.17	16.48	20.47	8.43	10.31	11.50	0.61	2.66	12.70%
620443	W/G synthetic woven dresses	29.55	6.78	2.46	7.76	1.93	0.15	1.26	0.34	11.89%
610990	Non cotton knitted T-shirts	28.97	5.77	4.60	1.39	3.06	2.72	0.23	2.55	1.54%
611020	Cotton knitted Jerseys & pullovers	25.81	4.92	2.01	5.37	2.31	2.83	0.03	1.67	9.12%
620140	M/B MMF woven overcoats, car-coats, capes	23.61	5.04	1.23	1.02	4.61	2.30	0.00	1.03	#DIV/0!
620312	M/B synthetic woven suits	22.81	4.81	0.83	0.08	5.15	2.93	0.00	0.33	39.53%
621210	Non cotton woven Brassieres	20.55	5.64	1.85	0.16	0.85	5.69	0.00	1.94	5.91%
620342	M/B cotton woven trousers	20.02	1.31	3.44	2.19	2.11	5.77	0.02	0.56	0.11%
611030	MMF Knitted Jerseys & pullovers	19.54	6.24	0.36	1.52	2.58	1.38	0.16	2.45	18.09%
611120	Cotton knitted Babies' garments	18.27	3.56	5.96	1.90	1.26	1.67	0.00	1.08	1.81%
620130	M/B cotton woven overcoats, car-coats, capes	17.89	3.66	0.57	0.78	4.27	2.41	0.00	0.20	#DIV/0!
620449	W/G non cotton woven dresses	14.55	3.91	1.04	4.76	0.22	0.13	0.32	0.00	8.22%
620520	M/B cotton woven shirts	14.11	1.84	5.57	1.83	1.35	1.75	0.02	0.96	-5.53%
610342	M/B cotton knitted trousers	13.86	2.98	3.11	1.05	1.27	1.10	0.00	0.60	8.38%
620442	W/G cotton woven dresses	11.89	2.47	2.99	3.61	1.01	0.22	0.25	0.00	4.28%
620462	W/G cotton woven trousers	11.48	1.68	1.13	2.30	1.66	2.12	0.09	0.27	-0.61%
620343	M/B synthetic woven trousers	11.37	2.32	1.17	0.42	0.76	0.60	0.02	1.84	16.70%
610462	W/G cotton knitted trousers	10.50	2.29	2.21	0.66	0.86	1.70	0.00	0.65	2.75%
611490	Non cotton knitted sporting special garments	9.92	6.77	1.60	0.06	0.18	0.39	0.00	0.08	65.57%

Source: ITC Trademap







Table-5 shows the major apparel items imported by Qatar from the world which had positive annual growth in the last 5 years (from 2017-2022). But the shares of Bangladesh in these items are comparatively less. So Bangladesh has the potential to export those items to Qatar as they have high demands for those products.

Table-5: Major apparel items imported by Qatar in 2022 with positive CAGR & the share of BD, Value in MN USD

HS code	Items	Qatar's import from world	Qatar's import from BD	BD's share in Qatar's total import	CAGR of Qatar's import from world during (2017-2022)*
'611030	MMF Knitted Jerseys & pullovers	19.54	1.38	7.08%	18.09%
'620449	W/G non cotton woven dresses	14.55	0.13	0.86%	8.22%
'620343	M/B synthetic woven trousers	11.37	0.60	5.29%	16.70%
'611490	Non cotton knitted sporting special garments	9.92	0.39	3.89%	65.57%
'610463	W/G synthetic knitted trousers	8.42	0.39	4.68%	13.65%
'610443	W/G synthetic knitted dresses	5.08	0.15	2.95%	0.91%
'620463	W/G synthetic woven trousers	4.64	0.27	5.86%	1.83%
'620469	W/G non cotton woven trousers	4.29	0.22	5.01%	11.56%
'620433	W/G synthetic woven jackets & blazers	3.12	0.06	2.02%	5.89%
'610469	W/g non cotton trousers	2.40	0.09	3.62%	16.99%

Source: ITC Trademap

## Market Access

The bilateral trade and investment between Bangladesh and Qatar are gradually growing and the relationship between the two countries also developed in recent years. The Qatar has adopted the GCC common tariff, and customs duties are fixed at 5% of the CIF value of most products. Currently, Bangladesh has to face a 5% duty for exporting garments to the Qatar. <sup>A</sup>

## News in Pictures



A distinguished team headed by H. E. Dr. Lilly Nicholls, High Commissioner of Canada to Bangladesh, visited BGMEA and met with BGMEA President Faruque Hassan. The team included Dr. Bernd Spanier, Deputy Head of Mission of the European Union in Bangladesh; Jan Janowski, Deputy Head of Mission of the German Embassy; Duncan Overfield, Deputy Development Director of the UK High Commission; Tuomo Poutiainen, Country Director, ILO Bangladesh; Ms. Leena Khan, Labor Attaché of the US Embassy; Bradley Coates, Political Counsellor of the Canadian High Commission; and Ms Vanessa Beaumont, Second Secretary Political of the UK High Commission. BGMEA Vice Presidents Shahidullah Azim and Md. Nasir Uddin, Chair of BGMEA Standing Committee on Labour and ILO Affairs ANM Saifuddin and Chair of BGMEA Standing Committee on Press, Publication and Publicity Shovon Islam were also present at the meeting. In the meeting, BGMEA President Faruque Hassan expressed deep concern over the death of labour leader Shahidul Islam and demanded a transparent and thorough investigation into the incident to find out all the culprits behind his death. He also demanded that all those who are involved in the incident should be brought to trial and punished.

The Bangladesh Garment Manufacturers and Exporters Association (BGMEA) and Green Power Limited signed an MoU to support garment factories in becoming more energy efficient with green and clean sources of energy. BGMEA President Faruque Hassan and Managing Director of Green Power Shaikh Ehsanul Habib inked the MoU on behalf of their respective organizations. Former Vice President of BGMEA Md. Moshikul Azam Shajal and Chair of BGMEA Standing Committee on Labour and ILO Affairs ANM Saifuddin were also present at the MOU signing ceremony held at BGMEA Complex.



Ambassador of Turkey to Bangladesh H. E. Ramis Sen paid a courtesy call on BGMEA President Faruque Hassan at BGMEA Complex in Uttara, Dhaka. BGMEA Vice President Shahidullah Azim, Chair of BGMEA Standing Committee on Foreign Mission Cell Shams Mahmud were also present at the meeting. During the meeting, they discussed various issues of mutual interests including potential areas of trade and investment.





BGMEA President Faruque Hassan visited the residence of labour leader Shahidul Islam in Sreepur, Gazipur to express condolences over his death. He also conveyed sympathy to the bereaved family members of Shahidul Islam and handed over a financial donation to his wife. The BGMEA President also demanded that all those who are involved in the incident are brought to trial immediately and punished. Amirul Haque Amin, President, IndustriALL Bangladesh Council (IBC); Kutubuddin Ahmed, General Secretary, IBC; Babul Akhter, General Secretary, BGIWF; Z.M. Kamrul Anam, President, Bangladesh Textile and Garments Workers League; Salahuddin Sapan, President, Bangladesh Biplobi Garments Sramik Federation; Rashedul Alam Raju, General Secretary, BIGUF; Kamrul Hasan, General Secretary, Akota Garments Sramik Federation; and leaders of other labour organizations were also present on the occasion.



A meeting was held between leaders of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) and IndustriALL Bangladesh Council (IBC) at BGMEA Complex in Dhaka. BGMEA President Faruque Hassan presided over the meeting which was also attended by Senior Vice President SM Mannan (Kochi), and Vice President Md. Nasir Uddin. From the IBC side, Amirul Haque Amin, President, IBC; Kutubuddin Ahmed, Secretary General, IBC; Babul Akhter, Secretary General, Bangladesh Garments Industrial Workers Federation; Z.M. Kamrul Anam, President, Bangladesh Textile and Garments Workers League; Towhidur Rahman, President, Bangladesh Poshak Shilpa Sramik Federation; Rashedul Alam Raju, Secretary General, BIGUF; China Rahman; Secretary General of the Federation of Garments Workers; Nurul Islam, Secretary General of United Federation of Garments Workers; and Kamrul Hasan, Secretary General, Akota Garments Sramik Federation were present at the meeting. BGMEA and IBC issued a joint statement over the death of labour leader Shahidul Islam.



A delegation of AMANN Group led by Florian Seiberlich, Director Global Marketing, AMANN Group together with ColorDigital, represented by Kai Timpe, General Manager Sales called on BGMEA President Faruque Hassan. Md. Shahidullah Azim, Vice President of BGMEA, Md. Rokonzaman, Managing Director of AMANN (Bangladesh), Arshad Hassan, Business Development Director, AMANN Group and Ehsanul Huq, Commercial Director, AMANN Bangladesh were also present at the meeting. They discussed various issues related to the RMG industry, including the present situation of the sector, global market demand and trends, and current challenges and opportunities.



A delegation from the Uzbekistan Textile and Garment Industry Association (UZTEXTILEPROM) paid a visit to BGMEA. During the visit, they held a meeting with BGMEA Vice President Shahidullah Azim to discuss potential areas of collaboration to gain mutual trade benefits in the apparel and textile sector. Mukhammadsaidov Bakhtiyor, Head, Department of the Textile, Garment and Knitwear Industry, Ministry of Investment, Industry and Trade of Uzbekistan and Sherzod Akbarov, Head of Department, UZTEXTILEPROM, and Mehdi Mahbub, Adviser, UZTEXTILEPROM, were present at the meeting.

BGMEA President Faruque Hassan addressed the opening of the Textile Talent Hunt (TTH)'s 8th season as chief guest. Prof. Dr. Shah Alimuzzaman, Vice Chancellor, Bangladesh University of Textiles, Mohammad Ali Khokon, President, Bangladesh Textile Mills Association (BTMA), and Engr. Md. Shafiqur Rahman, President, Institution of Textile Engineers and Technologists, were present as special guests at the program held in Dhaka.



Faruque Hassan, President of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) addressed the opening ceremony of liaison office of Sports Group Denmark in Dhaka. Bjarne Jeppesen, CEO; Heidi Langergaard Kroer, Supply Chain Manager; and Jan Rossel, Sourcing and Country Manager, Sports Group Denmark were present at the opening ceremony. He called on international buyers including Sports Group Denmark to increase sourcing garments, especially high-value ones from Bangladesh.





The 40th annual general meeting (AGM) of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) was held at BGMEA Complex in Uttara, Dhaka. BGMEA Senior Vice President S. M. Mannan (Kochi) chaired the meeting. BGMEA Vice President Shahidullah Azim, Vice President (Finance) Khandoker Rafiqul Islam, Vice President Rakibul Alam Chowdhury, BGMEA Directors and general members of the association also attended the AGM.

The construction work (2nd phase) of BGMEA Hospital at Milkvita Road in Mirpur, Dhaka was inaugurated by BGMEA Senior Vice President S.M. Mannan (Kochi). BGMEA Vice President (Finance) Khandoker Rafiqul Islam, Chairman of BGMEA Standing Committee on Mirpur Hospital Md. Jahander Rashid Jewel, Chairman of BGMEA Standing Committee on Mirpur Health Center and School Sultan Ahmed and Chairman of BGMEA Standing Committee on Labour Welfare and Education Md. Abdul Ahad Ansary, garment industry entrepreneurs of Mirpur area, labor union leaders and local dignitaries were present at the inaugural ceremony.



Faruque Hassan, President of BGMEA, addressed a program organized by the RMG Sustainability Council (RSC) to welcome 19 independent factories who have been newly enlisted in the RSC. Miran Ali, Vice President, BGMEA; Mohammad Hatem, Executive President, BKMEA; Nafis-Ud-Doula; Director, RSC; Abdul Haque, Managing Director, RSC; George B Faller, Chief Safety Officer, RSC; Amirul Haque Amin, President, IBC; Z.M. Kamrul Anam, President, Bangladesh Textile and Garments Workers League; China Rahman; Secretary General of the Federation of Garments Workers; and Babul Akhter, Secretary General, Bangladesh Garments Industrial Workers Federation were also present at the program held in Dhaka.



The leaders of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) paid rich tributes to Father of the Nation Bangabandhu Sheikh Mujibur Rahman, marking his 48th martyrdom anniversary and the National Mourning Day. BGMEA President Faruque Hassan along with the BGMEA Board members paid homage to Bangabandhu by placing wreaths at the portrait of the great leader in front of Bangabandhu Memorial Museum at the capital's Dhanmondi. BGMEA Vice President Shahidullah Azim, Directors Asif Ibrahim, Tanvir Ahmed, Faisal Samad, and Haroon Ar Rashid were present on the occasion.

BGMEA organized a discussion and a special prayer in observance of the 48th martyrdom anniversary of Father of the Nation Bangabandhu Sheikh Mujibur Rahman. Md. Atiqul Islam, Mayor, Dhaka North City Corporation (DNCC) attended the program as chief guest while BGMEA President Faruque Hassan chaired the event held at BGMEA Complex in Dhaka. BGMEA First Vice President Syed Nazrul Islam, Vice President (Finance) Khandoker Rafiqul Islam, Vice Presidents Shahidullah Azim, Md Nasir Uddin, Miran Ali, and Rakibul Alam Chowdhury were also present at the program.



A delegation of Associated British Foods (ABF) led by its Chief Executive George Weston met with BGMEA President Faruque Hassan to discuss potential collaboration in achieving shared goals around sustainability and opportunities for expanding business base in Bangladesh. The delegation also included Paul Lister, CFO of ABF; Paul Marchant, CEO of Primark and Matt Rhodes, Manager of Primark. BGMEA Vice President Miran Ali, Directors Faisal Samad, Navidul Huq, Barrister Vidiya Amrit Khan, Chair of BGMEA Standing Committee on Press, Publication and Publicity Shovon Islam and Chair of BGMEA Standing Committee on Trade Fair Mohammad Kamal Uddin were present at the meeting held at BGMEA Complex in Uttara, Dhaka.





A delegation of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) led by President Faruque Hassan met with Engineer Haidar Al-Athari, Chairman of the Najaf Chamber of Commerce in Iraq to discuss possible avenues of bilateral trade and investment. Ambassador of Bangladesh to Iraq H. E. Fazlul Bari accompanied the BGMEA delegation which included Mohammed Nasir, former Vice President (Finance), BGMEA; Nazrul Islam, former Director, BGMEA; Ms. Sharmeen Hassan Tithi, Director, Giant Group; Mohammed Shohel, Managing Director, Bangla Poshak Ltd; Mohd Shawket Hossain, Director, Bangla Poshak Ltd; and Nisher Khan, Managing Director, Banika Fashion Ltd.

A delegation of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) headed by President Faruque Hassan met Atheer Daoud Salman Al-Ghariri, Minister of Trade, the government of Iraq at the latter's office. During the meeting, they had discussions about possible ways of boosting bilateral trade and investment between Bangladesh and Iraq.



A delegation of BGMEA headed by President Faruque Hassan met Khaled Battal Najm Abdullah al-Jughifi, Minister of Industry and Minerals, the government of Iraq. The other members of the delegation were Mohammed Nasir, former Vice President (Finance), BGMEA; Nazrul Islam, former Director, BGMEA; Sharmeen Hassan Tithi, Director, Giant Group; Mohammad Shohel, Managing Director, Bangla Poshak Ltd; Shawket Hossain, Director, Bangla Poshak Ltd and Nisher Khan, Managing Director of Banika Fashion Ltd. They discussed issues of mutual interests including possible areas of cooperation, environment of doing business, trade and investment opportunities between Bangladesh and Iraq.



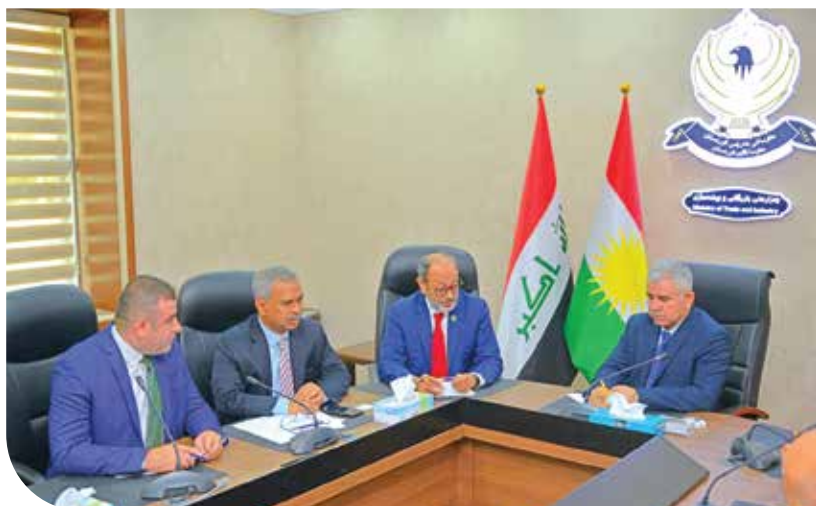
Country representatives of international apparel brands including H&M, Inditex, PVH, El Corte Inglés, Kontoor and VF Corporation met with BGMEA Vice President Miran Ali at BGMEA Complex in Dhaka. BGMEA Director Md. Imranur Rahman was also present at the meeting. They discussed issues pertaining to the apparel industry of Bangladesh, including potential of business expansion and how competitiveness of the country could be enhanced.

A delegation of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) headed by President Faruque Hassan met Dr. Dara Jaleel Al-Khayat, President, Erbil Chambers of Commerce and Industry, and also President of Kurdistan Federation Chambers of Commerce and Industry in Erbil, Iraq. They had discussions about available trade and investment opportunities between Bangladesh and Iraq and means to tap in the potential.



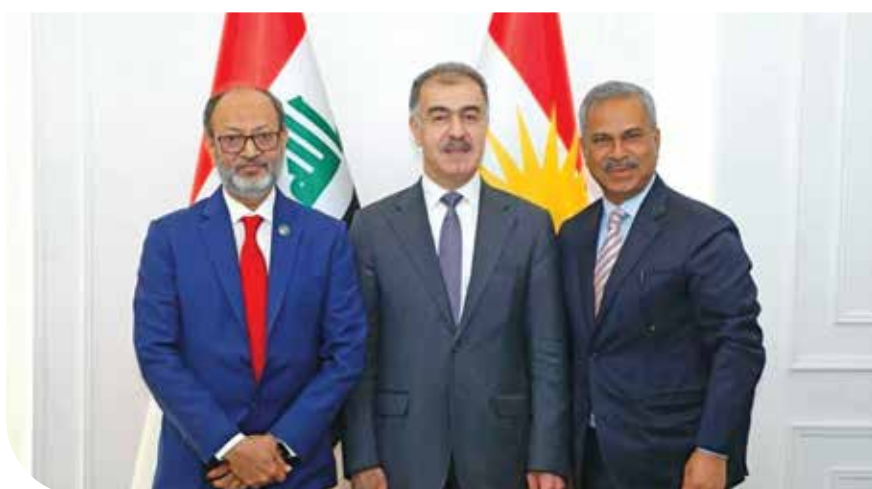
BGMEA President Faruque Hassan called on Dr. Mohammed Shukri, Chairman of Board of Investment, Kurdistan Regional Government in Erbil, Iraq. H. E. Fazlul Bari, Ambassador of Bangladesh to Iraq; Dr. Ahmed Jalal, President of Kurdistan-Bangladesh Business Council; Sharmeen Hassan Tithi, Director, Giant Group; Mohammed Shohel, Managing Director, Bangla Poshak Ltd; Mohd Shawket Hossain, Director, Bangla Poshak Ltd; and Nisher Khan, Managing Director, Banika Fashion Ltd were also present at the meeting. Their discussions centered on means of promoting bilateral trade and investment between Bangladesh and Kurdistan.





A delegation of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) led by President Faruque Hassan met Kamal Muslim, Minister of Trade and Industry, Kurdistan Regional Government in Erbil, Iraq. Sarwar Kamal Hawari, Deputy Minister of Trade and Industry, Fathi M. Ali Almudaris, Economic Relations Advisor; Dr. Ahmed Jalal, President of Kurdistan-Bangladesh Business Council were also present at the meeting. They discussed issues of mutual interests, especially prospects of expanding business and investment between Bangladesh and Iraq.

BGMEA President Faruque Hassan met Mala Majeed Swrchi, Chairman, Board of Directors, Erbil Chamber of Commerce and Industry in Erbil, Kurdistan, Iraq. Promoting bilateral trade and investment through deepening cooperation was the main objective of the meeting.



A delegation of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) led by President Faruque Hassan met Safeen Dizayee, Minister, Department of Foreign Relations, Kurdistan Regional Government in Erbil, Iraq. They had discussions about strengthening the bilateral trade relations between Bangladesh and Iraq, especially Kurdistan to unlock potential and reap mutual benefits.

## Statistics

### Bangladesh's RMG Export to World

Value in Million USD

Month	2021	2022	2023	2023 VS 2022	2023 VS 2021
January	2862.16	4084.58	4421.33	8.24%	54.48%
February	2625.29	3511.72	3943.87	12.31%	50.23%
March	2454.91	3931.40	3890.55	-1.04%	58.48%
April	2516.98	3934.18	3325.07	-15.48%	32.11%
May	2556.95	3158.58	4053.28	28.33%	58.52%
June	2894.88	4092.00	4360.82	6.57%	50.64%
July	2887.22	3366.91	3953.74	17.43%	36.94%
August	2753.38	3745.76	4044.86	7.99%	46.91%
September					
October					
November					
December					
Total	21551.77	29825.13	31993.52	7.27%	48.45%

Source: EPB

### Knitwear

Value in Million USD

Month	2021	2022	2023	2023 VS 2022	2023 VS 2021
January	1462.94	2112.41	2300.70	8.91%	57.27%
February	1352.64	1795.68	2099.95	16.94%	55.25%
March	1312.43	2050.18	2077.15	1.32%	58.27%
April	1341.77	2122.69	1830.25	-13.78%	36.41%
May	1366.37	1743.29	2310.38	32.53%	69.09%
June	1597.71	2228.44	2460.09	10.40%	53.98%
July	1658.45	1854.15	2266.48	22.24%	36.66%
August	1600.44	2061.53	2315.73	12.33%	44.69%
September					
October					
November					
December					
Total	11692.75	15968.37	17660.73	10.60%	51.04%

Source: EPB

### Wovenwear

Value in Million USD

Month	2021	2022	2023	2023 VS 2022	2023 VS 2021
January	1399.22	1972.17	2120.63	7.53%	51.56%
February	1272.65	1716.04	1843.92	7.45%	44.89%
March	1142.48	1881.22	1813.40	-3.61%	58.72%
April	1175.21	1811.49	1494.82	-17.48%	27.20%
May	1190.58	1415.29	1742.90	23.15%	46.39%
June	1297.17	1863.56	1900.73	1.99%	46.53%
July	1228.77	1512.76	1687.26	11.54%	37.31%
August	1152.94	1684.23	1729.13	2.67%	49.98%
September					
October					
November					
December					
Total	9859.02	13856.76	14332.79	3.44%	45.38%

Source: EPB



# Bangladesh's RMG Export to World

(January-August 2022 & 2023)

Export Value in Million USD

EU Countries	Woven			Knit			Total		
	Jan -Aug	Jan -Aug	Growth	Jan -Aug	Jan -Aug	Growth	Jan -Aug	Jan -Aug	Growth
	2022	2023	%	2022	2023	%	2022	2023	%
Austria	9.21	9.92	7.61	20.95	23.67	13.03	30.16	33.59	11.37
Belgium	140.39	183.73	30.87	340.08	340.44	0.11	480.47	524.17	9.10
Bulgaria	0.15	0.10	-32.29	0.70	0.84	20.29	0.85	0.94	10.94
Denmark	279.33	263.15	-5.79	527.23	646.64	22.65	806.56	909.79	12.80
Finland	4.51	10.05	122.71	23.39	24.46	4.57	27.91	34.52	23.68
France	611.36	725.61	18.69	1,086.44	1,205.18	10.93	1697.79	1930.80	13.72
Germany	2,064.21	1,561.87	-24.34	2,832.03	2,661.16	-6.03	4896.24	4223.04	-13.75
Greece	8.57	12.74	48.60	33.66	41.01	21.84	42.23	53.75	27.27
Italy	385.67	513.39	33.12	764.09	965.51	26.36	1149.76	1478.90	28.63
Ireland	62.17	70.48	13.36	98.11	120.68	23.00	160.28	191.16	19.26
Netherlands	462.46	540.05	16.78	613.96	734.79	19.68	1076.43	1274.84	18.43
Portugal	21.55	28.27	31.16	40.51	58.14	43.52	62.06	86.41	39.23
Romania	2.61	10.32	295.13	10.61	42.94	304.67	13.22	53.26	302.79
Spain	904.10	1,109.66	22.74	1,238.36	1,491.20	20.42	2142.46	2600.87	21.40
Sweden	195.94	220.91	12.75	368.80	415.12	12.56	564.74	636.04	12.62
Cyprus	0.17	0.38	130.63	1.68	1.86	11.02	1.84	2.25	21.85
Czech Republic	100.20	131.94	31.67	106.23	121.35	14.24	206.43	253.29	22.70
Estonia	0.06	0.11	80.37	0.81	1.59	96.09	0.87	1.70	94.98
Hungary	25.22	27.63	9.55	81.13	95.05	17.16	106.35	122.68	15.36
Latvia	0.13	0.36	176.76	0.36	3.42	842.01	0.49	3.78	665.88
Lithuania	0.07	0.03	-54.51	0.21	0.10	-51.24	0.28	0.13	-52.07
Malta	0.07	0.04	-50.56	0.22	0.13	-40.60	0.29	0.16	-43.10
Poland	493.98	459.45	-6.99	833.87	823.25	-1.27	1327.85	1282.69	-3.40
Slovakia	17.44	17.10	-1.91	47.34	44.81	-5.35	64.77	61.91	-4.42
Slovenia	21.63	10.98	-49.21	77.85	39.28	-49.55	99.48	50.26	-49.47
Croatia	3.89	17.47	349.39	10.53	36.84	249.84	14.42	54.32	276.68
Luxembourg	0.14	0.93	582.38	1.34	2.57	91.31	1.48	3.50	136.46
Sub -Total (EU)	5,815.23	5,926.68	1.92	9,160.48	9,942.05	8.53	14,975.71	15,868.73	5.96
EU % of World	41.97	41.35		57.37	56.29		50.21	49.60	
USA	4,163.04	3,744.18	-10.06	2,038.06	1,955.76	-4.04	6201.11	5699.94	-8.08
% of USA	30.04	26.12		12.76	11.07		20.79	17.82	
U.K.	1,327.02	1,504.22	13.35	1,848.60	2,103.15	13.77	3175.62	3607.37	13.60
% of U.K.	9.58	10.49		11.58	11.91		10.65	11.28	
Canada	478.09	563.72	17.91	472.49	451.39	-4.47	950.58	1015.11	6.79
% of Canada	3.45	3.93		2.96	2.56		3.19	3.17	
Non -Traditional Markets									
Japan	368.86	474.02	28.51	417.83	662.48	58.56	786.68	1136.50	44.47
Australia	217.81	293.78	34.88	345.94	571.78	65.28	563.75	865.56	53.54
Russia	99.39	95.58	-3.84	172.22	192.47	11.76	271.61	288.05	6.05
India	301.54	394.76	30.91	236.21	251.59	6.51	537.75	646.35	20.20
Korea Rep.	171.00	190.07	11.15	179.28	211.04	17.72	350.28	401.11	14.51
China	94.37	120.28	27.46	51.46	87.37	69.77	145.83	207.65	42.39
United Arab Emirates	91.44	80.90	-11.52	107.14	107.77	0.59	198.58	188.68	-4.99
Mexico	114.01	116.89	2.52	101.38	109.80	8.31	215.39	226.69	5.25
Malaysia	45.78	61.90	35.21	124.68	117.35	-5.88	170.46	179.25	5.16
Saudi Arabia	36.80	43.80	19.01	62.55	72.91	16.57	99.35	116.71	17.47
Turkey	83.40	118.86	42.52	85.61	108.65	26.92	169.00	227.51	34.62
South Africa	32.55	37.60	15.50	46.97	49.31	4.99	79.52	86.91	9.29
New Zealand	21.61	25.30	17.10	53.55	70.77	32.16	75.15	96.07	27.83
Chile	60.72	54.27	-10.63	70.48	66.31	-5.92	131.21	120.58	-8.10
Brazil	27.60	51.64	87.14	38.61	63.77	65.16	66.21	115.41	74.32
Other Countries	306.49	434.34	41.71	354.83	464.99	31.04	661.33	899.33	35.99
Total (Non -Trad. Markets)	2,073.37	2,593.98	25.11	2,448.74	3,208.38	31.02	4,522.12	5,802.36	28.31
% of Non -Traditional	14.96	18.10		15.33	18.17		15.16	18.14	
GRAND TOTAL	13,856.76	14,332.79	3.44	15,968.37	17,660.73	10.60	29,825.13	31,993.51	7.27

Source: EPB

## Bangladesh's Top 30 Apparel Items Export to World

Value in Million USD

SL	HS Code	Products Description	Jul-Aug, 2022 -23	Jul-Aug 2023 -24	Growth
1	610910	Cotton T-shirts	1,197.29	1,097.72	-8.32%
2	611020	Cotton knitted Jerseys & pullovers	694.95	898.32	29.26%
3	620342	M/B cotton woven trousers	938.02	865.99	-7.68%
4	620462	W/G cotton woven trousers	537.02	567.46	5.67%
5	611030	MMF knitted Jerseys & pullovers	494.94	516.90	4.44%
6	620520	M/B cotton woven shirts	361.46	333.48	-7.74%
7	610462	W/G cotton knitted trousers	221.25	276.38	24.91%
8	611120	Cotton knitted Babies' garments	88.82	180.87	103.62%
9	620343	M/B synthetic woven trousers	192.68	174.95	-9.20%
10	610510	M/B cotton knitted shirts	127.73	168.43	31.87%
11	610342	M/B cotton knitted trousers	104.56	163.44	56.31%
12	610711	M/B cotton knitted underpants	95.89	117.78	22.83%
13	610821	W/G cotton knitted briefs & panties	105.83	103.93	-1.80%
14	621210	Non cotton woven Brassieres	91.76	96.65	5.33%
15	610831	W/G cotton knitted nighties	61.26	91.24	48.95%
16	611090	Non cotton knitted Jerseys & pullovers	81.80	88.46	8.14%
17	610990	Non cotton knitted T-shirts	75.50	77.09	2.10%
18	620463	W/G synthetic woven trousers	62.43	71.54	14.59%
19	610442	Cotton knitted Dresses	44.74	69.18	54.62%
21	620333	M/B synthetic woven jackets & blazers	51.84	65.80	26.93%
20	610463	W/G synthetic knitted trousers	49.11	63.88	30.08%
23	620530	M/B MMF woven shirts	49.76	58.75	18.07%
22	620920	Cotton woven Babies' garments	34.37	55.59	61.75%
25	610721	M/B cotton knitted pyjamas	31.11	49.43	58.87%
26	620630	W/G cotton woven blouses	40.16	47.66	18.68%
24	620332	M/B cotton woven jackets & blazers	55.61	46.65	-16.10%
27	610343	M/B synthetic knitted trousers	24.90	37.61	51.02%
28	620339	M/B non cotton woven jackets & blazers	15.79	36.61	131.86%
29	620433	W/G synthetic woven jackets & blazers	29.69	35.91	20.97%
30	610443	Synthetic knitted Dresses	21.87	34.33	56.97%

Source: EPB

Note: M/B= Men's or boys

W/G= Women's or girls



## EU Apparel Import Growth

Growth: 2023 VS 2022								
Country	Jan	Feb	Mar	April	May	Jun	Jul	Jan-Jul
World	3.75%	-4.71%	-7.66%	-16.75%	-13.35%	-11.39%	-2.98%	-7.44%
China	-7.62%	-18.50%	-25.22%	-13.43%	-4.90%	-4.19%	-2.71%	-10.88%
Bangladesh	12.13%	3.94%	-0.34%	-29.91%	-29.98%	-26.58%	-5.57%	-11.73%
Turkey	-7.16%	-16.13%	-11.70%	-12.68%	-6.29%	-8.54%	-11.41%	-10.60%
India	14.27%	17.17%	-5.34%	-12.08%	-22.73%	-16.93%	-7.07%	-5.79%
Cambodia	2.69%	6.68%	-1.54%	-21.06%	-24.91%	-16.77%	6.22%	-7.20%
Viet Nam	15.52%	8.81%	5.14%	-12.79%	-12.73%	-14.33%	-2.00%	-1.84%
Pakistan	7.12%	0.13%	-9.93%	-23.49%	-17.53%	-19.47%	-5.35%	-9.81%
Morocco	-11.89%	-23.78%	-15.58%	-8.34%	-4.60%	-12.24%	-11.69%	-12.59%
Sri Lanka	-6.79%	-18.85%	2.73%	-30.44%	-19.76%	-16.78%	-5.55%	-13.72%
Indonesia	7.60%	-10.57%	-4.96%	-17.93%	-33.81%	-36.24%	-22.84%	-17.56%

Growth: 2023 VS 2021								
Country	Jan	Feb	Mar	April	May	Jun	Jul	Jan-Jul
World	29.58%	15.01%	13.92%	1.52%	17.96%	14.87%	19.36%	16.08%
China	12.25%	0.32%	-12.27%	1.62%	17.11%	23.19%	28.01%	9.99%
Bangladesh	65.08%	33.69%	52.20%	-4.22%	13.46%	5.34%	29.47%	26.88%
Turkey	9.03%	3.60%	6.68%	6.56%	20.11%	10.02%	-10.49%	5.95%
India	41.00%	20.37%	12.67%	3.80%	22.14%	18.84%	30.33%	20.12%
Cambodia	19.09%	42.88%	32.73%	7.23%	12.19%	63.69%	61.62%	32.21%
Viet Nam	45.47%	32.33%	24.77%	5.92%	17.27%	13.25%	15.62%	22.05%
Pakistan	39.77%	25.02%	16.31%	-2.07%	14.83%	22.71%	-1.80%	15.91%
Morocco	13.02%	-6.76%	1.59%	-0.80%	25.87%	9.41%	-16.82%	2.90%
Sri Lanka	9.89%	-4.24%	14.66%	-28.44%	-1.83%	9.55%	-4.17%	-1.26%
Indonesia	41.33%	21.54%	16.05%	-14.73%	-7.48%	-4.28%	9.86%	7.88%

Growth: 2023 VS 2020								
Country	Jan	Feb	Mar	April	May	Jun	Jul	Jan-Jul
World	3.58%	12.00%	34.02%	64.61%	72.61%	38.86%	11.36%	27.46%
China	-4.90%	4.35%	48.05%	47.67%	13.34%	9.39%	3.85%	11.71%
Bangladesh	28.20%	29.66%	33.88%	36.09%	134.66%	116.50%	57.18%	49.94%
Turkey	3.41%	11.64%	47.01%	150.44%	107.66%	56.31%	-8.75%	35.64%
India	10.55%	17.37%	31.16%	91.90%	180.44%	91.75%	34.77%	47.78%
Cambodia	-4.87%	22.03%	22.66%	27.44%	43.16%	33.17%	17.02%	20.16%
Viet Nam	17.31%	29.97%	65.98%	80.91%	94.63%	44.80%	23.71%	43.92%
Pakistan	25.45%	41.51%	19.81%	63.10%	161.73%	80.05%	36.91%	48.45%
Morocco	-8.77%	-3.22%	24.13%	811.95%	541.86%	70.99%	-21.55%	45.19%
Sri Lanka	-2.57%	12.66%	36.10%	22.82%	201.36%	67.79%	-2.09%	28.93%
Indonesia	-3.57%	13.36%	8.98%	18.47%	24.96%	-10.24%	-1.23%	6.05%

Source: Eurostat

## U.S. Apparel Import Growth

Growth: 2023 VS 2022								
Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Jan-July
World	-3.78%	-19.96%	-32.48%	-29.41%	-25.85%	-24.37%	-17.51%	-22.28%
China	-24.63%	-35.39%	-45.71%	-23.01%	-22.04%	-23.72%	-27.13%	-28.75%
Viet Nam	-0.45%	-20.02%	-44.23%	-36.13%	-30.74%	-20.08%	-14.29%	-24.76%
Bangladesh	15.34%	-11.76%	-35.36%	-31.39%	-24.42%	-43.87%	7.80%	-19.82%
Indonesia	4.62%	-19.09%	-33.66%	-44.54%	-35.67%	-38.01%	-13.58%	-27.26%
India	9.90%	-9.08%	-27.20%	-30.52%	-35.70%	-25.20%	-18.70%	-21.13%
Mexico	-0.72%	-3.76%	-7.88%	-14.10%	-9.51%	-11.87%	-11.27%	-8.69%
Honduras	-20.38%	-3.77%	-22.30%	-34.16%	-13.94%	-24.40%	-28.78%	-21.49%
Cambodia	-12.96%	-44.10%	-38.52%	-40.23%	-33.85%	-20.64%	-18.95%	-30.10%
Pakistan	-3.40%	-37.18%	-37.40%	-37.43%	-39.24%	-28.15%	-26.24%	-30.61%
Korea	1.06%	-32.80%	-16.66%	-1.37%	-20.31%	-5.40%	12.76%	-8.91%

Growth: 2023 VS 2021								
Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Jan-July
World	31.08%	10.83%	-3.61%	1.21%	2.65%	6.02%	10.25%	7.99%
China	10.94%	-5.62%	-24.19%	7.39%	7.26%	1.41%	1.91%	-0.11%
Viet Nam	18.01%	7.07%	-24.45%	-11.58%	-5.16%	16.65%	17.17%	1.75%
Bangladesh	66.79%	25.35%	26.22%	19.44%	4.35%	-6.42%	31.73%	23.50%
Indonesia	64.35%	24.38%	14.09%	-14.54%	2.28%	1.03%	34.53%	15.95%
India	68.61%	29.20%	17.78%	13.74%	-2.52%	27.47%	41.81%	25.72%
Mexico	26.05%	15.20%	8.43%	9.37%	13.16%	-3.99%	-6.87%	7.51%
Honduras	-10.39%	11.55%	-0.06%	-17.60%	6.01%	-8.99%	-12.70%	-4.42%
Cambodia	23.23%	-14.09%	-21.66%	-10.82%	12.17%	51.28%	42.71%	8.61%
Pakistan	37.77%	13.88%	-10.67%	6.95%	-7.38%	-11.96%	-2.98%	1.78%
Korea	97.78%	13.36%	41.96%	39.64%	36.63%	-0.34%	32.04%	34.00%

Growth: 2023 VS 2020								
Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Jan-July
World	7.12%	1.13%	20.74%	68.17%	137.85%	64.81%	29.59%	35.28%
China	-11.11%	0.75%	63.85%	69.33%	71.66%	30.99%	17.57%	24.18%
Viet Nam	-3.92%	2.80%	0.90%	24.21%	80.71%	46.79%	15.62%	18.47%
Bangladesh	39.15%	14.05%	27.00%	40.58%	268.71%	123.83%	77.48%	58.04%
Indonesia	9.83%	-7.64%	7.61%	13.66%	74.65%	45.98%	36.40%	19.36%
India	30.96%	1.46%	18.30%	90.94%	507.03%	234.35%	97.50%	67.34%
Mexico	9.71%	-0.33%	16.82%	238.70%	170.57%	38.20%	22.76%	40.61%
Honduras	-18.82%	-3.34%	18.49%	767.84%	825.28%	210.58%	37.08%	66.91%
Cambodia	1.89%	-23.05%	4.45%	26.04%	84.51%	57.84%	17.08%	17.17%
Pakistan	54.26%	31.27%	34.74%	51.44%	375.20%	82.27%	80.90%	72.15%
Korea	50.41%	-18.31%	50.68%	112.32%	101.58%	32.77%	42.49%	45.79%

Source: Otexa



## World Apparel Market

Value in Billion dollars

Countries	2015	2016	2017	2018	2019	2020	2021	2022	Growth 2022 VS 2021	Growth 2022 VS 2019	Share in 2022
World	445.00	443.71	454.47	505.00	492.00	448.38	537.00	576.00	7.26%	17.07%	
China	174.71	161.38	158.44	157.85	151.58	141.59	176.08	182.42	3.60%	20.34%	31.67%
Bangladesh	26.16	28.22	29.34	32.45	33.63	28.07	34.20	45.35	32.60%	34.86%	7.87%
Viet Nam	21.50	24.59	26.75	31.50	30.56	28.60	31.20	35.27	13.05%	15.40%	6.12%
Turkey	15.12	15.06	15.10	15.67	15.86	15.35	18.73	19.91	6.27%	25.51%	3.46%
India	18.17	17.94	18.41	16.61	17.17	12.97	16.15	17.71	9.67%	3.14%	3.07%
Indonesia	6.88	7.41	8.21	8.93	8.61	7.55	9.32	10.08	8.14%	17.09%	1.75%
Cambodia	6.32	6.30	7.19	8.20	8.50	7.55	8.13	9.11	12.14%	7.20%	1.58%
Pakistan	5.02	5.10	5.47	5.94	6.34	6.18	8.46	8.87	4.88%	39.95%	1.54%
USA	6.09	5.68	5.71	6.05	5.96	4.84	6.14	7.16	16.70%	20.07%	1.24%
EU	112.15	116.97	129.76	143.47	135.56	125.00	150.87	156.38	3.66%	15.36%	27.15%

Source: WTO

# FABRIC OPTIMIZATION



Adaptation of modern technology will reduce fabric wastage. Usage of Auto cutting and spreading machine, Camera Based Visual Fabric Inspection technology will help to reduce fabric wastage.

Maintain a chart regularly to analyze top defects in cutting that will help to do data analysis as well as will help to know the reason behind fabric wastage.

Be committed to produce defect-less products that will ensure to reduce fabric wastage. To ensure defect less products, the workplace must be neat and clean as well as need to conduct regular maintenance of sewing machines.

Proper cutting plan must be followed. Fabric incurs more than 60% of total garment cost. So, if you can save at least 1% fabric from the total order you can save a huge amount of money per year.

Use a pin table instead of a normal table for stripe & check fabric spreading. It will not only reduce fabric consumption but also will reduce defects like skewing & bowing and will help to improve quality.



# বস্ত্র সাশ্রয়ীকরণ



আধুনিক প্রযুক্তি ব্যবহারের ফলে কাপড়ের অপচয় সাশ্রয় হয়। স্বয়ংক্রিয় কাটিং, স্প্রেডিং মেশিন ও ক্যামেরা ভিত্তিক ভিজুয়াল ফেব্রিক পরিদর্শনের মাধ্যমে কাপড়ের অপচয় কমানো সম্ভব।

কাটিংয়ের গুরুত্বপূর্ণ সমস্যাগুলি সমাধানের জন্য তালিকা তৈরী করুন, যা তথ্য বিশ্লেষণে সাহায্য করবে এবং কাপড় অপচয় কমিয়ে আনবে।

বাতিল বা নষ্ট পণ্য উৎপাদন করা থেকে বিরত থাকলে কাপড়ের অপচয় কম হয়। এজন্য কর্মস্থল পরিষ্কার-পরিছন্ন রাখুন এবং পাশাপাশি সেলাই মেশিনের নিয়মিত রক্ষণাবেক্ষণ নিশ্চিত করুন।

সঠিক কাটিং পরিকল্পনা গ্রহণ করা আবশ্যিক। যেহেতু কাপড় মোট তৈরি পোশাকের ৬০% এরও বেশি খরচ বহন করে তাই অর্ডার থেকে কমপক্ষে ১% কাপড় সংরক্ষণ করতে পারলে বছরে অনেক সাশ্রয় করা সম্ভব।

স্ট্রাইপ বা চেক কাপড়ের স্প্রেডিং এর জন্য পিন টেবিল ব্যবহার করুন। এটি কাপড় সাশ্রয় এবং বোয়িং বা স্কিউয়িং এর সমস্যা কমিয়ে গুণগত মান উন্নয়ন করবে।

# ARKA Fashion Week

Oct 26-28, Aloki

ARKA Fashion Week, scheduled from 26-28th October 2023, is a premier event debuting in Bangladesh with the aim to democratize fashion. Recognizing the challenges smaller brands and designers face, especially those originating from e-commerce platforms, ARKA provides an equal platform for all. It is not just about showcasing fashion, but celebrating Bangladesh's evolution from a garment-centric nation to one nurturing distinctive fashion talents.

## ARKA features six diverse segments:

1. **Marketplace:** Hosting 40-50 participants, it prioritizes local, small-scale designers, e-commerce brands, and sustainable fashion—particularly those utilizing upcycled materials.
2. **Fashion Show:** Spanning two days with 8 unique shows, it emphasizes youth, experimentalism, and sustainability. The event will not just promote traditional couture but will spotlight designs blending Bangladeshi culture with Western fashion influences.
3. **Design Lab:** An interactive arena for attendees to personalize apparel using various design techniques like block printing, hand-painting, and embroidery.
4. **Food Zone:** Beyond a regular food court, it offers an eclectic mix of cuisines in a relaxed ambiance.
5. **Art Gallery:** Transcending a traditional gallery, it delves into Bangladesh's journey from 'analogue' (traditional) to 'digital' (modern) through the works of six artists.
6. **Music:** Each night culminates with varied musical performances, ensuring a holistic experience.

ARKA Fashion Week is a captivating celebration, offering a vibrant blend of fashion, culture, art, and music, all coming together in a unique showcase.



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VENUE  
**BICC**  
DHAKA, BANGLADESH

OVER  
**100**  
BRANDS

OVER  
**15,000**  
VISITORS

Organized By



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