

The Apparel Story

এ্যাপারেল স্টোরি

March - April 2022

APPAREL DIPLOMACY GAINS MOMENTUM

SWEATER

*Promising Prospect
in Global Market*

NEXT 50 YEARS OF BANGLADESH

*Journey Towards
Excellence*

DUE DILIGENCE

*For Aligning
Trade Amid
Rapid Changes*



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MANUFACTURERS AND EXPORTERS
ASSOCIATION (BGMEA)**

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EDITORIAL

Bangladesh has made impressive strides in socioeconomic fronts over the last few decades, earning global accolades as a model of development to be emulated by others. The country, already on the track of graduating from the LDC category to a developing nation, aims to become a higher income and a developed economy by 2030 and 2041 respectively. The success achieved so far has been made possible thanks to the prudent and visionary leadership of Honorable Prime Minister Sheikh Hasina who has continued to spearhead the initiatives and efforts to drive Bangladesh towards the path of prosperity. While LDC graduation gives us immense pleasure and makes us proud, it will also bring a set of opportunities and challenges for Bangladesh. We have to get prepared to turn the challenges into opportunities and time is ripe to roll up our sleeves and do the right thing at the right time.

It's heartening to see the government has already taken a number of development plans in alignment with the vision, especially the mega projects to develop infrastructure in the country, especially capacity enhancement of the Chittagong sea port, construction of bay terminal, the 3rd terminal of Hazrat Shahjalal Internet Airport, the Padma Bridge, upgrading railway etc. The projects once completed will spur industrial growth, bring more investment and propel development overall activities in the country. Hence it's of utmost importance to complete the projects in the shortest possible time to get their full benefits.

To brace for the challenges, capacities of the industrial sector will have to be enhanced and diversification of the export basket is now the need of the hour to give the economy a stable base, enabling it to continue the growth momentum. We have to intensify our economic diplomacy to create more trade opportunities and derive economic benefits.

We have opportunities and challenges too in the coming days. What is needed to do is to make pragmatic and timely steps in a well-coordinated way by both public and private sectors to steer Bangladesh forward. We are hopeful that what is our optimism today will be a reality tomorrow.

Editorial Board
The Apparel Story



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The Apparel Story



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Avery Dennison Bangladesh Celebrating Women on IWD: Journey to Leadership



The Avery Dennison Bangladesh team celebrates International Women's Day every year, and this year was no exception. This team firmly believes a work environment that values Diversity, Equity, and Inclusion (DE&I) and where everyone is treated with dignity and respect is a major strength for any organization. Committed to supporting female employees in pursuing their dreams, the team focuses on large life goals that cover the core objectives of women's empowerment and development.

#BreakTheBias is the 2022 theme for International Women's Day, focusing on "forging gender equality for a more diverse, equitable and inclusive world." Under this broad theme, the Avery Dennison Bangladesh team celebrated IWD 2022 at the workplace with all employees. The theme of the celebration was 'A journey to leadership by breaking the bias.'

After two years' of virtual celebrations due to COVID-19, the Avery Dennison Bangladesh team was excited to celebrate Women's Day in person this year. Many colleagues had not seen one another over the past two years, and everyone missed the warmth of seeing one another face-to-face.

Renowned corporate leader of Bangladesh Zara Mahbub (CEO of Dun and Bradstreet Bangladesh) was

invited to share her experience and journey to leadership. She grabbed everyone's attention with witty, inspirational stories in which she shared life lessons, choices she made, and how she stood by them to achieve her dreams. She related her story to the theme of this year's women's day, making it a wonderful learning experience.

The International Women's Day celebration enhanced cross-functional collaboration with fun and engaging activities, including games, peer-to-peer recognition, and an opportunity for participants to share their views on leadership. As a token of appreciation, everyone received a best-selling book on leadership.



By Faruque Hassan |

Apparel Diplomacy Gains Momentum



A delegation from the Bangladesh Garment Manufacturers and Exporters Association (BGMEA) headed by President Faruque Hassan met with the World Trade Organization (WTO) Director-General Dr. Ngozi Okonjo-Iweala in Geneva.

When we speak of diplomacy, political issues and conflicts usually come to mind. Economic issues, however, are equally important. Some would even argue that they are even of greater importance. Why? Because most of the bilateral and multilateral cooperation revolves around generating new business, facilitating established business and enhancing trade ties -- all key essential elements for the sustenance of a nation. Since the readymade garment sector of Bangladesh is a significant export-oriented industry, diplomacy has an important and direct bearing on the sector's sustenance and overall growth. With competition growing worldwide, the role of a diplomatic service exclusively for the

RMG industry has never been more urgent than it is today because of the imminent graduation of Bangladesh from the least-developed country (LDC) category to the grouping of the developing countries. Ironically, the economic success of Bangladesh could become an enemy of sorts to itself because it will no longer be the underdog expecting or receiving special considerations. The RMG industry, in particular, has grown to become a world leader and requires a fresh approach to building on the success achieved. Astute, planned and relentless diplomacy will go a long way in helping us retain and extend market access facilities in the post-LDC era. Besides, economic diplomacy is imperative for exploring new

markets and new avenues for profitable growth. With this understanding and vision in mind, the present board of the Bangladesh Garment Manufacturers and Exporters Association (BGMEA) has launched its own brand of economic diplomacy entitled 'apparel diplomacy' to meet the challenges ahead. The aim of apparel diplomacy is to leverage the power of diplomacy for the betterment of the industry and benefit the millions of Bangladeshis employed in the sector. As part of the apparel diplomacy, we are striving tirelessly with our own professional team as well as through our missions abroad. With the support of our government, the BGMEA is making concerted efforts

so that the RMG sector can achieve greater success. This will increase the industry's profits handsomely and bring greater prosperity to the nation.

In the first phase of the 'apparel diplomacy' concept, we toured the US and Canada. In the second phase, we toured three European countries - England, Belgium and Scotland. During these tours, we held meetings with stakeholders in the supply chain and apprised them of the sector's tremendous progress over the last decade and its limitless potential.

We also hammered home the message of what our partners in the supply chain can do to supplement the efforts of the manufacturers in safeguarding the interest of the sector.

In the third phase, we visited Belgium, Switzerland and the US. One of the most significant aspects of the European tour was the first-ever official meeting by any delegation from the BGMEA with the Director-General of the World Trade



BGMEA President Faruque Hassan along with Vice President and Directors held a meeting with Jordi Curell, Director for International Affairs in the Directorate General for Employment, Social Affairs and Inclusion, European Commission in Brussels.

Organisation (WTO) Ngozi Okonjo-Iweala. During the meeting, we informed her of the coronavirus pandemic's devastating impacts both on our public health and the economy and explained to him why Bangladesh needs at least a 10-year extension for smooth and sustainable LDC graduation.

We requested the WTO chief to drum up support for Bangladesh among its member countries and sought its assistance in trade negotiations and economic diplomacy, especially in the areas of the signing of the Free Trade Agreements (FTAs) and Regional Trade Agreements (RTAs). WTO's intervention to ensure due



The BGMEA delegation headed by President Faruque Hassan met with Guy Ryder, Director-General of the International Labour Organization at the ILO headquarters in Geneva.



BGMEA President Faruque Hassan met with Ms. Ewa Synowiec, Director of Directorate C, Africa, Caribbean and Pacific, South East and South Asia, Trade and Sustainable Development, Green Deal DG TRADE of the European Commission in Brussels.



AAFA President and CEO Steve Lamar and BGMEA President Faruque Hassan inked an agreement in Washington, D.C. during the annual AAFA Executive Summit. The two groups will explore opportunities and work together to increase trade access for Bangladesh to the U.S. market.



The BGMEA team led by President Faruque Hassan called on President of Amfori Ms. Linda Kromjong and Senior Legal Advisor – Trade and Customs Stuart Newman in Brussels.

diligence in trade in commercial terms, in collaboration with its signatory members and global forums, has been sought since a number of global brands went broke during the pandemic, creating uncertainty for suppliers over payments. Dr Okonjo-Iweala took note of the issues and assured us of all-out support from the WTO. The European tour turned out to be an opportunity for us to highlight the RMG sector's achievements and potential before the European Union. During a meeting with Jordi Curell, director for international affairs at the Directorate General for Employment, Social Affairs and Inclusion at the European Commission in Brussels, the BGMEA delegation shed light on the progress made by the garment industry, particularly in maintaining labour standards and workers' welfare.

A team from the European Commission, led by Jordi Curell, visited Bangladesh in March to assess the progress on labour conditions and the national action plan and roadmap to achieve the parameters towards obtaining GSP Plus and have a smooth LDC graduation. We informed them of the sector's progress in these areas and asserted our firm commitment to keep the momentum going forward.

We urged the EU to continue its trade benefits for Bangladesh for 10 years after the country's graduation from LDCs in 2026 and requested the EU officials to support Bangladesh in attaining GSP Plus.

We met with Ewa Synowiec, director for Africa, Caribbean and Pacific, South East and South Asia, Trade and Sustainable Development and Green Deal of the European Commission in Brussels. We informed her that while LDC graduation will pose several new challenges for Bangladesh, it would also bring immense opportunities. The EU can play a key role in enabling Bangladesh to tap those potentials.

In Brussels, the BGMEA delegation met with Linda Kromjong, president of Amfori, which represents more



A MoU was signed by Avedis Seferian, President and CEO of WRAP and Faruque Hassan, President of BGMEA, on behalf of their respective sides at WRAP's headquarters in Arlington, Virginia, USA.



The BGMEA delegation met with Ms. Sharan Burrow, General Secretary of International Trade Union Confederation (ITUC) in Brussels.



BGMEA President Faruque Hassan paid a courtesy call on Atle Høie, General Secretary of IndustriALL Global Union and Ms. Christina Hajagos-Clausen, Director, Textile and Garment Industry in Geneva.

than 2,400 retailers, importers, brands and associations from over 40 countries.

We discussed possible areas of collaboration to enable the RMG industry to pursue greater excellence in social and environmental sustainability. We solicited Amfori's support in promoting Bangladesh as a safe and sustainable apparel-sourcing destination among its members and securing the "Everything but Arms (EBA)" facility from the EU.

We met Rensje Teerink, a senior official of the EU, and requested her to promote Bangladesh within the EU. She has been a good friend of Bangladesh as she closely observed the development and transformation of the industry into a safe and sustainable one. We hope Rensje Teerink would continue her friendly support to promote the interests of Bangladesh in the EU.

The delegation of the BGMEA met with Sharan Burrow, general secretary of the International Trade Union Confederation, as well. During a meeting with Matthijs Crietee, secretary-general of the International Apparel Federation (IAF), we chalked out the programme details for the 37th IAF World Fashion Convention to be held in Bangladesh in November 2022.

We had a fruitful meeting with ILO Director-General Guy Ryder at the ILO headquarters in Geneva. He praised the progress made by Bangladesh in making the workplace safer and improving working conditions in the apparel industry. The BGMEA delegation had an impromptu meeting with Alke Boessiger, deputy general secretary of the UNI Global Union in Geneva. Both sides expressed their intent to work together to carry forward the achievements made by the garment industry.

During the US tour in March, the BGMEA team joined the Executive Summit of the American Apparel & Footwear Association (AAFA) in Washington. We apprised them of the paradigm shift in Bangladesh's garment industry.

The industry is also increasingly focusing on diversifying its products,



Ambassador of Bangladesh to Belgium Mahbub Hassan Saleh hosted a reception in honor of a delegation of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) at his residence in Brussels.



BGMEA President Faruque Hassan, Vice President Miran Ali, Directors Asif Ashraf, Tanvir Ahmed and Abdullah Hil Rakib, met senior official at the European Union, Rensje Teerink, in Brussels.



Bangladesh Ambassador to the USA M Shahidul Islam hosted a lunch in honor of the BGMEA President and the delegation in Washington D.C.

especially high-end non-cotton items and building capacities to cater to the demands of global brands and buyers. Diversification of products is a key to ensuring sustained growth of the apparel industry.

I called upon global apparel brands to collaborate with suppliers to build their capacities in the manufacturing of high-end apparels, especially non-cotton items and textiles. During the tour, we tried to ensure that bilateral trade ties between Bangladesh and the US don't get hampered under any circumstances. The BGMEA and the AAFA signed a memorandum of understanding on March 10.

As per the MoU, the AAFA will support Bangladesh in promoting its trade interests in the US market, especially advocating for the withdrawal of the GSP suspension. Given the current circumstances, having such a deal with the AAFA, which represents more than 1,000 famous brands, retailers and manufacturers, is really inspiring and reassuring.

We hope our diplomatic efforts will play a proactive role in upholding the interests of Bangladesh in the international arena. **A**

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

National Budget: A Guided Recipe for Securing Better Tomorrow



Bangladesh has risen from the trails of deaths, devastation and destruction of the Liberation War in 1971, just as the Phoenix rose from the ashes. At birth, the country was dismissed as an 'economic basket case', but today it is considered a rising economic star and role model for development. A surprised world looks at Bangladesh as a symbol of resilience, hope and resurgence. Propelled by industrial growth, especially in the ready-made

garment (RMG) sector, Bangladesh has already become a middle-income country and aspires to become an upper-middle income country by 2031 and developed country by 2041. The country is inching towards fulfilling the perspective plans through implementation of policies approved through the annual budget. So, the role of the budget is very significant and the upcoming budget for 2022-23 is going to be crucial for the country's

industrial sectors.

In the previous budget, the main focus of the government was on health and incentivizing various important economic sectors. However, this year, it is expected that the government will make many important announcements to strengthen post-pandemic recovery of key economic sectors and help them prepare for the post-LDC era. The RMG industry, one of the mainstays of the country's economic

growth, is also expected to contribute very significantly for Bangladesh to achieve its short-term and long-term developmental goals. In view of the sector's enormous contribution and future potential, the industry expects the government to consider the following issues in the upcoming budget to help it navigate the challenges and continue to post healthy growth in the coming years.

1) Maintaining policy stability

Policy stability is of utmost importance for entrepreneurs. Over the years the government has significantly contributed to the growth of the RMG sector through various fiscal and non-fiscal measures and policy support. Apparel manufacturers highly expect that the favorable policies which have been taken so far including the existing tax structure will be kept unchanged for a certain period of time. A stable policy helps create confidence among entrepreneurs, whereas policy flip-flop erodes investors' confidence.

2) Ensuring sustainable recovery from Covid shock

Covid-19 pandemic had initially plunged the RMG industry in a state of chaos and confusion due to an unprecedented disruption in the supply chain. But eventually the apparel sector has bounced back strongly thanks to steps taken by the stakeholders and various policy support by the government. The overall Covid management capacity of the government under the visionary leadership of Prime Minister Sheikh Hasina has also helped the industry recover to a large extent.

The sector, however, is still experiencing some difficulties due to aftershocks of the pandemic, and it is hoped that the government will take some useful steps in the upcoming budget to help strengthen the sector's recovery from the pandemic.

3) Rising up to the challenges of LDC graduation

Bangladesh's graduation from the Least Developed Country (LDC) category is one of its biggest

developmental milestones since independence. And it has been celebrated as such during the country's golden jubilee celebration of freedom. But in the post-LDC period, the global market will become more competitive and challenging for the country's export oriented sectors. As a result massive investment will be required in capacity building of the industrial sectors. If a determined and qualitative focus is given through fiscal and non-fiscal measures, investment for capacity building will be more encouraged and facilitated.

“Keeping the development vision in mind, it's of utmost importance to devise a budget incorporating fiscal and non-fiscal policies and support to spur the development of the industrial sector, the main engine for driving the economic growth of Bangladesh.”

For example, the backward linkage capacity of the RMG sector is still poor, and so is our textile capacity. Woven fabric in particular has to be imported in huge quantities. In order to encourage investment in this sector, as well as in the non-cotton sector, the government should offer tax related facilities and other policy support. The aim should be to tap the full potential of the non-cotton market, textile sector and a strong backward linkage so that we can retain our market in the post-LDC era.

Faruque Hassan, President of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) said, “Immense is the pleasure and pride for us as Bangladesh has risen from a ‘basket case’ to a lofty position in an eventful journey of 50 years. Bangladesh's graduation from LDC is another milestone in its indomitable journey towards development, achieved under the prudent and visionary leadership of honorable Prime Minister Sheikh Hasina.”

He also said, “While LDC graduation is a matter of pride for us, it also brings a lot of challenges which we will have to address in the coming days. We have to enhance our capacities and skills in order to retain our competitiveness in the world post-LDC era when we have to face double transformation in availing GSP plus facilities. For that we have to develop our own backward linkage industries. We have to shift from quantity to quality and volume to value and pay more focus on high-end non-cotton apparel items, which requires investment in the non-cotton textile sector. Keeping the development vision in mind, it's of utmost importance to devise a budget incorporating fiscal and non-fiscal policies and support to spur the development of the industrial sector, the main engine for driving the economic growth of Bangladesh.”

4) Helping the sector create its own brand

Despite being one of the world's biggest apparel manufacturing hubs, it is a matter of regret that Bangladesh is yet to have any internationally renowned brands. The Made in Bangladesh tag has already earned fame and popularity in the internal arena, but the products are being sold under various international brands. Many think that it is time for Bangladesh to create its own brand story by capitalizing its strong manufacturing capability and four decade long experience in this business. However, a number of local brands have already hit the ground running, and proper policy support could help some of them go global.

5) Improving ease of doing business

That Bangladesh finds itself down the ladder in the World Bank's ease of doing business report is frustrating, to say the least. There is no alternative to improving ease of doing business to secure more FDI and facilitate growth of businesses. For example, Bangladesh RMG is a dynamic industry where product features and sophistication are continuously changing. As a result apparel makers are trying to manufacture more and more value-added products, which require import of various types of sophisticated raw materials. But sadly a cumbersome bureaucratic procedure in the port often gets in the way of importation of these new raw materials, impeding the manufacturers' initiative to diversify products.

Although improving ease of doing business is more of a governance related issue than budget related, the industry insiders hope that the government would leave no stone unturned to improve the situation. Beginning from our bureaucracy to taxation to port facility, everything should be simplified.

Faruque Hassan said, "Now we are pursuing the vision of a developed Bangladesh by 2041. In alignment with the vision, the government has already taken a number of mega projects which will be instrumental in realizing our cherished dream." "To realize the full benefits of these megaprojects, it's equally important to improve ease of doing business and other policy support from the government to foster growth in the industrial sector. We have to diversify our industrial sector to strengthen the foundation of the economy and facilitate sustainable growth. We have to foster other promising sectors like spare parts, textile machinery, even light engineering, ICT, jute, leather, pharmaceuticals, ceramics and ship building to give our economy strong footing to move ahead steadily," he opined.

Alongside improving ease of doing business, it's very important to ensure energy security to facilitate industrial growth in the country. Md. Nasir Uddin, Vice President of



BGMEA, said, "To sustain targeted levels of economic growth energy security is a prerequisite because more development requires more energy. With steady expansion in industrialization, demand for energy is also on the rise in Bangladesh. Needless to mention that the government, under the visionary leadership of the honorable Prime Minister, has made huge achievements in the power and energy sector. Bangladesh is the first country in South Asia that has brought its population under 100% electricity coverage." "Energy security has to be ensured to bring new investment and seize new opportunities that lie ahead of the RMG industry of Bangladesh. Uninterrupted gas supply is a must for the industry to realize its full potential. Short-, medium- and long-term actions are need to meet the energy demand in industries. Here the government may mull over allowing trade associations like BGMEA to import LNG for their respective industrial sectors to ensure required energy supply," he added.

6) Human resource development

Human resource development is one of the focus areas of the government. It is also one of the key concerns of apparel makers because low labor productivity has long been undermining the sector's growth

potential. Against this backdrop, if the government takes sector-wise initiative for human resource development and contributes to upskilling and reskilling initiatives of garment workers and mid to top level professionals, the sector will be hugely benefited.

7) Sustainability

Bangladesh has already become a role model in terms of sustainable apparel manufacturing as the country has the highest number of green garment factories in the world. The RMG industry is grateful to the government for facilitating the green revolution in the garment sector through various favorable policies like extra 2% corporate tax rebate for green factories and creation of technology upgradation fund. Now, to accelerate the sustainability momentum and to deal with issues like circular fashion and inclusive growth etc., some more policy support will be required. Overall, some immediate measures and a long-term strategy outline from the government in the upcoming budget are requisite for RMG sector which accounts for more than 80 per cent of the country's export earnings. The industry has huge potential to contribute towards the Vision 2041 of building a developed Bangladesh. All out measures should be taken to tap its potentials to the fullest. **A**

Next 50 Years of Bangladesh: Journey Towards Excellence



Abdullah Hil Rakib

It is a matter of great pride as a nation to celebrate the 50 years of independence of Bangladesh. We have been able to make some praiseworthy successes in this journey in social and economic indicators. Besides maintaining GDP

growth of over 8% for the last few years our achievements in poverty eradication, creating employment, developing massive infrastructures, digitalization has paved the way for graduating from the LDC status. Industry's contribution to GDP has



increased from 17.31% in FY1980-81 to 35.36% in FY2019-20. The economy of Bangladesh has already “take off” and is ready to drive for maturity. At this significant juncture, we must chalk out the plan of development for the next 50 years for Bangladesh. In the days to come, the economic growth of Bangladesh will heavily be dependent on the manufacturing sector. Bangladesh now is living in the era of demographic dividend; around 63.2 million people are engaged in the labor market while around 2 million people are joining the labor force every year. This huge labor

force illustrates the comparative advantage of Bangladesh's growth led by the manufacturing sector. The RMG industry of Bangladesh currently exports around US\$ 34 Bn while employing 4.4 million workers directly and creating indirect employment of 10 million. Bangladesh will not be enjoying this demographic dividend for an unlimited period of time to ensure desired growth and resilience of the economy and lives of people we must learn how to make the best use of this huge labor force and convert this population to human capital. Despite the fact that Bangladesh is

the 2nd largest exporter of Bangladesh our export basket is highly homogenous and it is confined to some 5/6 basic items at a price range of \$15/kg! There are huge opportunities for us to grow in the untapped market through diversifying the export basket. In doing so one of the major impediments is the skill gap. With the current skill set, we are not in a position to cater to the value-added and diversified market segment. So to reduce this gap along with connecting the dots the most prudent way would be to develop skills of the fresh population to feed the industry demand, up-skilling and re-skilling of the existing labor force. On the verge of the era of disruptive technologies we need to cope up with the challenges of industry 4.0 and we need broad varieties of skills.

We must thank the visionary leadership of BGMEA for their prudent initiative BGMEA University of Fashion and Technology (BUFT). The BUFT envisages creating a center of excellence that will provide training, research, innovation, and development services especially in the field of the apparel manufacturing sector. Started its journey as an institute the BUFT is now emerged as a full-fledged university with seven faculties, one institute, three centers and one research institute. With 500,000 sq. feet area having 75 well equipped modern Class Rooms and 53 state of the art Laboratories, Modern Library the university created a platform where students from diverse backgrounds can maximize their potentials through innovation, creativity, and perseverance. The university provides all state-of-the-art facilities to their pupils to craft their dreams into reality. To date around thirteen thousands of students graduated from BIFT & BUFT who are serving the apparel industry of Bangladesh and creating impact through their leadership role. Many of the graduates are also serving beyond the boundary and earning respect at the global level.

Global apparel sourcing is being reconsolidated and competition among manufacturing countries



getting more intense overtimes. The competition will also intensify since we have graduated from LDC and our competitors are getting involved in bilateral and regional trade arrangements, and also improving their efficiency, scale, and value-added capabilities. Bangladesh

has significant room to improve in productivity and efficiency compared to competitor countries' benchmarks as these will be key to the future growth and sustainability of Bangladesh's apparel industry. On this backdrop, BGMEA has taken the initiative named "Centre of

Innovation Efficiency and OSH" for its member factories to enhance the competitiveness of the RMG industry of Bangladesh through re-skilling of its human resources.

The center will provide need-based training to mid-level professionals and there will be occasional sessions for top management. The training program would include business, finance, market development, management process, and marketing to inspire the top management, while the technical people will be trained on product development, innovation, efficiency enhancement, virtual sampling, 3D prototyping, environmental sustainability, worker management relationship, grievance handling, workers wellbeing, occupational safety and health, and leadership development, etc.

Bangladesh apparel industry has so far been followed the model of volume-driven business considering the priority of creating more employment for a huge labor force. But for the days to come besides economic emancipation we need to excel to exceed ourselves and ensure economic resilience. In this journey toward excellence, the only key is to develop human capital. **A**

Abdullah Hil Rakib is a Director of the Bangladesh Garment Manufacturers & Exporters Association (BGMEA).

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Interview of the Month



“Powered by ecommerce, consumers are increasingly focusing on buying more sustainably sourced and produced products. Bangladesh can and should be part of that evolution.”

Stephen Lamar, President and CEO of AAFA

The American Apparel & Footwear Association (AAFA) is an American industry trade group representing more than 1,000 world famous name brands, retailers, and manufacturers. AAFA President and CEO Stephen Lamar, in an exclusive interview with The Apparel Story, shares his thoughts on current business trends and prospects of Bangladesh's apparel exports to the US market. He also talks about strategic priorities of Bangladesh's RMG industry to sustain growth in the US market and ways to deepen partnership between buyers and suppliers for capacity development.

Bangladesh has been a trusted partner to most of the U.S. fashion brands for over 40 years. How do you see the journey and what prospects do we have in future?

Bangladesh has indeed been a trusted partner of the U.S. textile and apparel industry for a long time. As supply chains continue to pivot and evolve, we would expect Bangladesh – particularly in light of investments it has made over the past decade in areas of corporate social responsibility – to remain an important partner. The industry is going through a generational sourcing shift and Bangladesh has an important role to play in that shift. But, for Bangladesh to ensure it continues to attract business, it needs to focus on those areas – such as its commitment to ESG and in particular investments in environmental and human sustainability – that are vital for the U.S. industry.

What should be the strategic priorities for Bangladesh's apparel industry while considering the sustained growth in U.S. market? For example – currently our export remains highly concentrated to a few core items and most made of cotton, what are the potential to diversify?

Beyond looking at a healthy diversification of product mixes and building up vertical capacity and capability, which has already been vital for Bangladesh's growth and development as a valued textile and apparel partner, Bangladesh should ensure it remains focused on and aligned with the fashion's industry's emphasis on sustainability, traceability, transparency, and worker safety and worker rights.

What scope do you see for deepening partnership among the buyers and their strategic suppliers, and collaborative capacity building initiative by the trade associations of

Bangladesh should ensure it remains focused on and aligned with the fashion's industry's emphasis on sustainability, traceability, transparency, and worker safety and worker rights.

respective countries? For example – new product development, partnership in technological capacity building, support in eco-friendly production, etc.

All these areas are ripe for further development and cooperation. The supplier/buyer relationship will continue to rebalance to ensure resilient supply chains. Increasingly, buyers are going to be focused on a few trusted suppliers while many of those same suppliers will make similar decisions, focusing on servicing trusted relationships with key buyers. Critical for all of this will be communication and partnership on the range of issues – such as ESG and technology – that will define the industry over the coming decade.

How would you evaluate the pandemic led disruption in the consumers' buying behavior and the resulting changes in sourcing pattern? How should a manufacturing country like Bangladesh, being unique in the area of scale economy, prepare itself to cope up with the changes?


Consumers are constantly changing their buying patterns and what's happening during the pandemic is no different, albeit at an accelerated pace. Powered by ecommerce,

consumers are increasingly focusing on buying more sustainably sourced and produced products. Bangladesh can and should be part of that evolution by continuously implementing responsible production methods and deploying traceability and tracing practices to ensure those methods.

The U.S. is the developed country where Bangladesh faces one of the highest tariffs. There had been several bills introduced in the U.S. House of Representatives in the past, but none of them could touch the floor. How optimistic are you about trade preference, bilaterally or unilaterally, for Bangladeshi goods getting duty free access in U.S. market? Can U.S. cotton be a starting for such discourse?

U.S. tariff policy is outdated and needs to be modified to reflect today's industry. How and when this will occur remains to be seen although there is some sympathy in Congress for the high tariffs that Bangladesh's main exports face – since tariffs on apparel and footwear are highly regressive. As a first step, Bangladesh should take the steps it needs to take with respect to workers' rights so it can rejoin the Generalized System of Preferences (GSP). Although the GSP does not currently include apparel and footwear, it does include travel goods and any future tariff reduction activities with respect to preferences will no doubt build off the GSP program.

What scope do you see for us to communicate Bangladesh's progress to the U.S. market to create further trade opportunities? What is lacking?

It is vital for BGMEA and Bangladesh government agencies to remain in constant contact with their counterparts to ensure a constant and trusted sources of verified information on these topics. We look forward to engaging in that partnership as well. 

RISE OF A KINGDOM

Part-04: Paris Garments (Pvt.) Limited



First export fair stall of Paris Garments (Pvt.) Ltd



Md. Mohiuddin Rubel

The ready-made garment industry has earned Bangladesh name and fame all over the world. Going to East or West, the presence of garments with a "Made in Bangladesh" tag is ubiquitous. Overcoming various odds and challenges in an eventful journey of about four decades, Bangladesh has secured the prestigious position as the second largest apparel exporting country in the world. The industry that began its start with the exports of only 12 thousand dollar almost 40 years ago is now the mainstay of Bangladesh's economy, accounting for more than 81 percent of the total export earnings and creating

employment for around four million people in the country. Mohammad Humayun is one of those who made an invaluable contribution to laying the foundation of the enviable success attained by the RMG industry. He prepared the path of prosperity for the garment industry. He set up one of the first export-oriented garment factories in Bangladesh—Paris Garments (Pvt.) Limited. Mohammad Humayun began his business career as an importer of fabrics in the early 1960s and later expanded his venture into shirt making and retailing in the local market. The



Mohammad Humayun, Founder and Managing Director of Paris Garments Ltd

Paris Shirt, manufactured by his company, gained huge popularity among fashion-loving people in Bangladesh. In the late 1970's, he became interested in bulk garment manufacturing and exporting. His experience in fabric import and shirt-making helped him to move into the RMG export business. He set up his garment factory in 1980, named Paris Garments (Pvt.) Limited, in Tejgaon with 300

imported machines. Later expanded the factory to Kawran Bazar with 1200 machines. However, the journey wasn't cozy for him as the business was very new with very little know-how and experience in mass garment production for exports. Moreover, workers neither had knowledge of nor experience in working with electronic sewing machines. He had to invest both time and money in arranging training for them.

As the founding managing director, Mohammad Humayun worked hard with devotion, zeal, and ingenuity. His efforts, infused with dynamism, paid off as Paris Garments secured a strong position as one of the largest export-oriented garment factories in Bangladesh. Paris Garments began its garment exports by making the first shipment of garments to the American buyer/company Sears. The name of the garment factory was inspired by the city of Paris, which is popularly regarded as the world's capital of fashion. It reflects the lofty ambition of Paris Garments to go beyond the boundary of Bangladesh to win the confidence of people around the world with garments crafted with care. It's the inspiration, ambition, dedication, and hard work of Mohammad Humayun that led Paris Garments to

carve out a niche as a promising apparel exporter in Bangladesh. He started touring to Europe and USA to take part in international trade fairs to meet buyers and get work orders. But the task wasn't easy as Bangladesh was little known to the western world at that time. However, Mohammad Humayun, using his marketing skills, managed to persuade buyers about his capability to manufacture products with international quality and deliver them on time. Thus, his business grew steadily over the years. Mohammad Humayun was a visionary entrepreneur who envisioned laying the groundwork for an industry and its flourishing, which would contribute to the strengthening of Bangladesh's economy, which was struggling to rise from the ashes of the Liberation War. He pinned his focus on the development of the garment industry because he thought the sector would not only bring valuable foreign exchange for Bangladesh but also create employment for a huge number of people. To continue the import of raw materials and export of the readymade garments in a smooth way Md. Humayun, was the person who proposed to allow the facility of Bonded Ware House for the garments sector which was



Mohammad Humayun, along with Mr. Zakaria, owner of Jewel Garments, and A.M. Musa, founder of Bond Garments Ltd., posed for a photograph in New York, where they attended the international apparel expo in the 70's.



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Mohammad Humayun shared his knowledge, experience, and tricks of the trade with others and even helped them with credit to venture into the RMG business. Following in his footsteps, many garment factories came into being and the apparel business started growing steadily. Many of the entrepreneurs who started businesses with the help of Mr. Humayun are now the owners of top RMG exporters in Bangladesh.

Mohammad Humayun, along with some fellow entrepreneurs who initiated RMG business in the country, felt it necessary to create a common platform to give the industry a strong footing. He is one of those visionary leaders who contributed to the creation of the Bangladesh Garment Manufacturers and Exporters Association (BGMEA), which was established in 1983 with the aim of paving the way for the growth of the apparel industry. He was the first secretary of BGMEA.

With his immense contribution to the flourishing of the garment industry in Bangladesh, Mohammad Humayun etched his name into the history of the RMG industry as one of the pioneer of this sector. He will always be remembered with great respect and admiration by all stakeholders in the RMG industry of Bangladesh. **A**

Md. Mohiuddin Rubel is a Director of the Bangladesh Garment Manufacturers and Exporters Association (BGMEA) and Director of Denim Expert Ltd.

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Due Diligence for Aligning Trade Amid Rapid Changes



**Barrister Shehrin
Salam Oishee**

The apparel sector is undergoing a period of rapidly changing environmental effects. The sector is operating in a rapidly shifting environment. Global supply chains are constantly changing. Shifting to circular business models is critical in delivering sustainability for the industry and requires global approaches with radically new visions and ways of doing business. This can only be achieved by mobilizing actors across regions and at all levels of the textile value chain, including leveraging the capabilities of and providing opportunity to SMEs and workers. A systemic approach is needed to build transparency and resilience in the textile value chain and enable its

transition towards circularity and sustainability. At this point, its crucial to point to three trends that are particularly pressing for the sector with respect to due diligence. Firstly, we are living in a time of economic uncertainty. The apparel export is a cross boundary trade spread across the globe. By this means, a nation in the East caters the apparel need of a continent in the West and the export nets grow larger each day. Keeping this trade mechanism in mind, with due respect to the various political instability, economic downfall and policy changes in several exporting nations, protectionist trade measures are taken to reduce and distort trade, disrupt global supply



networks, lower productivity, and weigh on confidence, jobs and income. The effect of one measure adopted affects everyone around the globe. This economic uncertainty greatly influences cross-border trade. It is therefore not only one of the most pressing concerns for firms globally, but also causes a huge impact on the apparel sector. Secondly, the world is facing a climate crisis. The effect of this change in climate is evidently going to take a huge toll on the apparel sector, as the sector itself is one of the great contributors of it. Total greenhouse gas emission from ready-made garment production is approximately 1.2 billion tonnes annually. That is more than the



emissions of all international flights and maritime shipping combined. It is quite worrying to know that carbon emissions from the sector are expected to increase by 60% by 2030 to 2.8 billion tons approximately. Clearly the industry has a huge role to play in tackling the climate crisis and developing innovative climate solutions to be implemented across the full supply chain.

At this point, there is one action that can be taken: we must reassess our consumption patterns. Today, the average person buys 60% more items of clothing, compared to 15 years ago; yet keeps them for about half as long. We consume over 100 billion items of clothing a year and the global apparel and footwear

industry together is predicted to generate 102 million metric tons of products by 2030. At this rate, by 2050 the fashion industry will shockingly use up a quarter of the world's carbon budget.

Thirdly, the world shopping trends have changed. The Online platform had been one of the most lucrative means of shopping especially during the COVID-19 period and this still remains the same. Shops are just a click away on one's phone and/ or computer, and delivery is right at your doorstep in no time. With these benefits in online shopping, buyers are now keen to be more inclined to it causing the supply chains to go digital. 27% of all fashion sales now take place online. The global online

fashion market is predicted to reach USD 765 billion by 2022, that's an increase of USD 281 billion, or 58%, from previous years. In the United States alone, online apparel sales account for more than one-third of all apparel sales.

There is no doubt that digitalisation creates boundless opportunities besides increasing the job markets, but it can also bring unintended consequences. For example, the digitalisation of the supply chain management may reduce lead times and shift production from one site to another more quickly. In this environment, more vigilant and systematic efforts to promote responsible purchasing practices are critical. Similarly, as consumers

move online, companies will have to consider how to reconcile consumption patterns while trying to build circular economies. With the ever-changing trends in sale and supply chain, there yet remains some of the most constant aspects, that remains unchanged. The mode of production that majority of the South-East Asian exporting nations adhere to are yet to be innovated and modernised in order to meet the standards of production in the exporting nations. Concentration there is of utmost importance to ensure that skilled labour and in turn modern machines, can lead to better production means in shorter period of more high-quality products. Its crucial to not just sit back and identify these above mentioned issues. Its high time that several priority actions are outlined that can be taken to tackle these challenges. A few such steps are mentioned below:

Firstly, it is crucial now to reconcile due diligence with trade tensions and/ or disruptions, and supply chain disruptions to ensure that companies can continue producing and sourcing responsibly, across borders. As tensions in global trade facilitates and encourages companies to seek and research on new markets, enabling trade expansion, it is imperative to understand the impact that increased production has on the environment and on outsourcing. Here, guidance on responsible purchasing practices have never been more relevant to encourage better practices in trade while expansion is evident.

Secondly, the manufacturers must need to re-think business models in the ready-made garment sector to ensure that it contributes to the circular economy. Companies are increasingly realising that if they do not take steps towards a circular economy, they will be left behind, not simply in the race of acing in orders and profits, but also in the name game around the world amidst the competing manufacturers. In the garment sector youth consumers are increasingly concerned about the carbon footprint of the products they buy and wear. Concerned consumers shall in turn mean that

This objective can be achieved in a number of ways. In the very initial stage, training of the trainers could be a start. Even engaging trade unions could bring considerable solution yet the result remains untested.

manufacturers will have to develop more concern and conscience on responsible production means. This is also a strategic move. Innovation in production processes can create value by helping to find alternatives to conventional chemical use, and reduce energy and water use, as well as waste production.

Thirdly, the government role is of crucial importance. The manufacturers must continue strengthening the role of governments in driving sustainable and responsible supply chains, facilitating sustainable production goals and creating environmental awareness. Policymakers from across key economies in the ready-made garment sector must come together under one roof and share the same dialogue to discuss policy options for promoting vibrant and responsible supply chains in the sector across the globe. A unified dialogue in apparel sector might bring about the desired changes in a fast track.

Governments' role in driving supply chain due diligence needs to be assisted by a focus on mandatory due diligence to be exercised in the overall sector. It is important for governments exercising such practises already to come forward and shed light on how to integrate responsible business conduct considerations into industrial policy. Regional approaches are also crucial and it is an ardent belief that majority of the manufacturing nations shall express consent on collaborating with the EU and the ILO on promoting responsible supply chains.

Fourthly, the most integral part of this sector comes to concern, the workers. The manufacturers must ensure that their companies engage meaningfully with workers through due diligence. In this respect, social dialogue is integral to responsible business conduct. This objective can be achieved in a number of ways. In the very initial stage, training of the trainers could be a start. Even engaging trade unions could bring considerable solution yet the result remains untested. For a stronger dialogue among companies, increased awareness about healthy social working standards need to be known, besides the strong dialogue among companies, workers and governments.

Lastly, to ensure that the impact of all the efforts to successfully adapt due diligence, the manufacturers must assess the alignment of the industry and multi-stakeholder initiatives. An improved dialogue between these two will have multiple benefits, including: improved trust and credibility of initiatives; better understanding of how companies and governments can rely on them; and better mutual recognition. The adoption of the same assessment by all economies shall help develop the sector even more.

The ready-made garment industry bears a great responsibility to our economies, to societies and to the planet. A war-torn Bangladesh, after Independence in 1971, was greatly dependent on this sector as a major driver of the economy to come in today's state as a role model of development. Only through deeper, more effective, more ambitious international co-operation on due diligence and responsible business conduct can we hope to multiply opportunities and to transform lives around the globe. Every government is expected to continue working with this endeavour. Our future endeavours must be to take this notion forward to help design, develop and deliver better due diligence policies for better lives. **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.



Bangladesh will need to focus on niche products and shift from quantity to quality of products. I see future potential for Bangladesh in high-end fashion products.

H. E. Enrico Nunziata, Ambassador of Italy to Bangladesh

Italy is one of the major export destinations of Bangladeshi garments. In an exclusive interview with The Apparel Story Enrico Nunziata, Ambassador of Italy to Bangladesh, shares his thoughts on ways to strengthen business partnership pertaining to the RMG sector, fashion market outlook and Bangladesh's potential in Italian market. He also sheds light on the possible areas of cooperation and collaboration between the two countries to drive development in the RMG industry of Bangladesh.

During the pandemic period, most of the Italian fashion brands showed commitment and true partnership. How do you think Bangladesh and Italy can maintain and strengthen long term business partnership with regard to RMG and beyond? What will be your advice to Bangladeshi suppliers and businessmen for further exploring the trade potential in Italy within the space of fashion market?

Yes, rightly said that like many other countries Italy was badly affected by the Covid-19 pandemic. The impacts of the pandemic were also huge on the Italian brands and retailers which faced an unprecedented disruption in commerce as they had to keep their shops closed for many months due to strict lockdown measures. The situation led to reduction in purchase from customers. I remember very well that during the pandemic when there was lockdown we had several meetings with the President of BGMEA and the diplomats in Dhaka to understand the situation and problems faced by the suppliers and workers. On the other side, we also tried to understand the problems and difficulties of brands and retailers by having direct contact with all the Italian brands and retailers sourcing from Bangladesh. We discussed what to do in order to maintain their commitments to suppliers, especially maintaining their orders and making payments. I had constant contact with major brands working in Bangladesh like Benetton, OVS, Teddy Group, Renova, Capri Group SRL to understand what were the main issues for them, especially to renew or maintain their orders and of course to make their payments. From their side I found their commitment to find solutions in terms of maintaining work orders and making payments. Trust between the brands and retailers and suppliers played an important role here. They have mutual understanding and long-term relationship. They are like friends

So when you say what can be done more to strengthen the relationship, I think this mutual trust between brands and retailers and suppliers will remain the basis of the relationship to continue work in Bangladesh.

who have known each other for a long time and of course the relationship is built upon mutual trust which was developed over a long time with timely shipment and quality products from the suppliers. And of course the regularity in payments from brands and retailers also. This mutual trust has helped to overcome the massive challenges. So when you say what can be done more to strengthen the relationship, I think this mutual trust between brands and retailers and suppliers will remain the basis of the relationship to continue work in Bangladesh. Besides, Italian brands and retailers believe in the investment the local garment industry is making in all the requirements and benchmarks that are necessary to keep the reputation of the brands and retailers in Italy because this is very important for consumers since they are careful in knowing from where the products are coming and how they are produced. So the use of green technology, green production, sustainability, worker rights – all are all very important that these benchmarks are always maintained in order to continue to have Italian and European brands and retailers producing here. So this is mainly what must always be at the basis of relationships and beyond.

In 2020, Bangladesh held the second position in Italy's total apparel imports from the world; even though the share was as low as 9%. Italy mostly imports basic garments from Bangladesh like- trouser, t-shirt, shirt, etc. which accounts for about 80% share of their import from Bangladesh. How do you think both countries can collaborate in the area of design, innovation and producing high end apparel, since Bangladesh is still lagging behind in these particular areas?

I think, for Bangladesh there are some segments of the fashion market that are still unexplored. Bangladesh has long been producing basic garment products in massive quantities. Bangladesh will need to focus on niche products and shift from quantity to quality of products. I see future potential for Bangladesh in high-end fashion products. New brands and retailers from Italy who are now producing specific higher fashion products in Italy and some other European countries can also come to Bangladesh to produce products manufactured with high technologies. But for that of course investment will be required in technology, education and skills. Besides, designers here are also able to follow new lines of production. It is much linked to what I said before, let's say training and education because it's a long process to become a designer in the fashion field. In Italy there are very good institutes like Marangoni Institute in Milan, Polimoda or European institutes of design. On 23rd March, we organized Italian design day in Bangladesh. The theme of this year is much more focused on urbanization and regeneration of architecture. But of course the design is also in fashion. Now, we are focusing on architecture and in the future we can focus on fashion design in such a specific event which is organized every year all over the world by the embassies, Italian Institute Of

Culture and the external trade agency of Italy. There is a scope of possible collaboration between Italy and Bangladesh in fashion design. So if a Bangladeshi wants to be specialized in fashion design and they do not have opportunities at international level, they should go abroad to study in institutes in Italy, London, Paris and other European countries, and the United States. I think students should be encouraged to study in international schools in other countries to have professional knowledge and skills and be specialized in fashion design. Of course, there can be collaboration between foreign and local fashion institutes. And this is what I would like to promote. BGMEA can also play an important role in this regard. I think this kind of cooperation should be encouraged both by the embassy and BGMEA. We are ready to collaborate for the students who want to go to Italy to study fashion design by facilitating their visa procedure.

How has the pandemic affected the retail market of Italy as far as economic consequences are concerned? How fast is it turning around now? What are the future prospects of the fashion business and economy at large in Italy?

As you said, the situation was really very bad during the pandemic with the decrease of the growth, not only in Italy but also in all other countries that have been impacted by the pandemic. But now the situation is much better after vaccination. All the commercial activities have resumed while the economy is on the track of recovery. The economy is growing again on a basis of 3% on annual basis. This year the growth was more than that of the last year. But due to inflation and current geopolitical situation, the provision of the growth is a little bit less than it was before and it will be at the level of 3%. However, growth is there and it is, of course, in all sectors, including the manufacturing industry. And I'm hopeful this trend in growth will continue.

New brands and retailers from Italy who are now producing specific higher fashion products in Italy and some other European countries can also come to Bangladesh to produce products manufactured with high technologies. But for that of course investment will be required in technology, education and skills.

How do you see the consumers' buying pattern changing from brick-and-mortar based retail to digital marketplace in Italy, and what is your prediction?

When the Covid-19 pandemic confined people to their homes and stores remained closed, consumers have found this new way of shopping online useful for their necessities. But it's a trend that is absolutely not only for food and grocery but also in fashion. And I also have some statistics on that. In 2021, online shopping in Italy reached the level of 39.4 billion euros, which was 2.1% up compared to the year 2020. And in the apparel sector online shopping was 1 billion euros in 2021. The number of web shoppers in Italy are 2.7 million and

23% of all products bought on the web are apparel. Of course, the main purchased items are the food, grocery and services, but apparel is the 23 percent of the total products. So this is a trend and we are recuperating probably the gap that we had in the past and it's growing in Italy.

How can we work together to have an extended transition time for graduation at least by 10 years to continue duty free market access after Bangladesh's graduation from LDC?

As you know, this is a part of dialogue, collaboration and cooperation between the European Union and Bangladesh. We encourage this process to reach the desired results. We are supporting this process. And of course there are some benchmarks to be maintained in order to benefit from GSP plus. These benchmarks are related not only to economic growth but also to human rights and labour rights. In particular, labor rights progress is evident. So I would like to see the glass as half-full. So there is a good perspective for Bangladesh to be recognized with these benefits from GSP plus.

Anything else you would like to add?

Since the beginning of my arrival in Dhaka, I have had a very good relationship with BGMEA with regard to the garment industry as it's the main export sector of Bangladesh. Of course for us it's extremely important to have a good relationship with the BGMEA and strict collaboration for the development of the industry. Here I would like to underline the fact that the direct shipping service established between the Italian port and Chattagram port is a revolutionary step that will benefit both brands, retailers and local suppliers. The direct shipping service takes just 16 to a maximum 20 days without any transit and with a reduction of time and cost. I think this must be emphasized as a part of our cooperation. **A**

Sweater

Promising Prospect in Global Market



Being the second largest garment manufacturer in the world, Bangladesh has already established its name and fame in the world market. Timely delivery, competitive price, excellent quality and most importantly, the commitment towards sustainability has taken Bangladesh to a new level. Once the aid dependent country is now being labeled as one of the emerging

economies of the South Asia. And with the growth and development of Bangladesh, our RMG industry has also gained significant momentum. Before Covid disrupted the global economy, we reached the milestone of USD 35 billion RMG export in FY 2019-20, which was the highest amount for any fiscal year. Even during the Covid, with the support and assistance from Govt. and the dedication from manufactures and

workers, the industry has been successfully able to maintain the balance between live and livelihood with minimum Covid infection rate and decent export earnings. Now that the world is turning around slowly, Bangladesh has huge potential ahead of it in terms of exploring new and untapped items. By tapping these opportunities, we can certainly expand our market

share from 6.26% and in that journey, Sweater can be a very good gateway. In our article, we will try to present some of the facts and figures regarding the ground level reality and potential of Bangladesh RMG in this sector along with the case study of Designtex Knitwear Ltd., which has established itself as a promising hub for exporting sweaters across the world.

If we look at the data, we can see that from 1248.09 MN USD in Fiscal Year 2006-07, Bangladesh RMG has come a long to export 4063. 60 MN USD worth of sweater only through July to March of Fiscal year 2021-22. With around 14% growth rate every year, Bangladesh has become a trusted sourcing destination for Sweater export in the world. Among the total export, almost 60% of the products go to the EU market followed by around 11% to US, 11% to UK, around 4% to Canada and an impressive around 14% to non-traditional markets.



Tanvir Ahmed, Executive Director, Designtex Knitwear Ltd

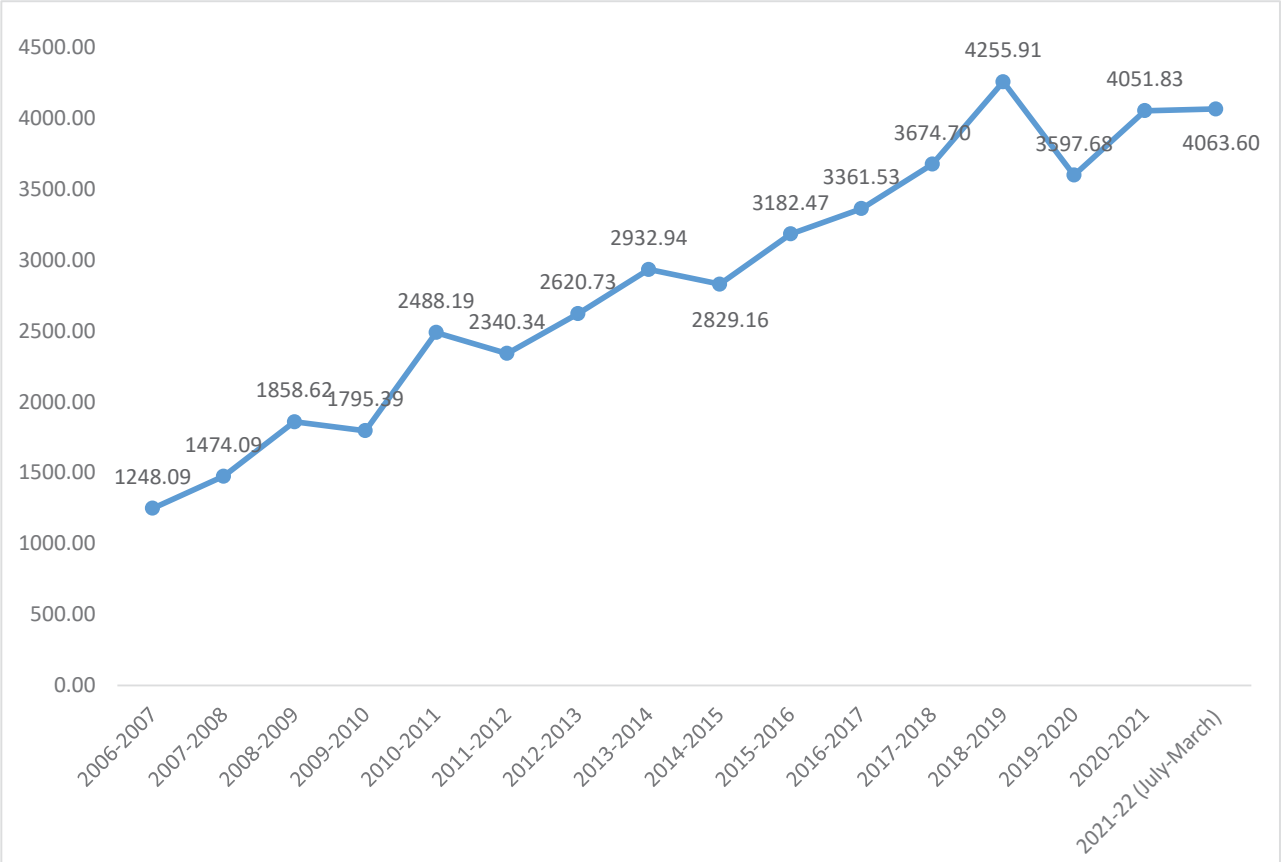
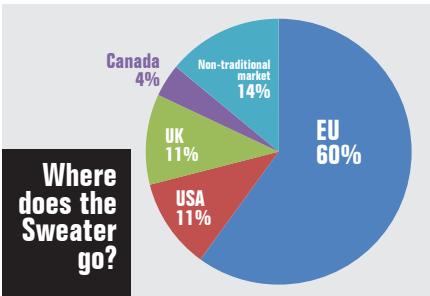


Figure- Bangladesh's Sweater Export to the World (Value in MN USD); Source: EPB

An overview of the World Sweater Market

Mirroring the scenario of total RMG export, China stands as top Sweater exporter of the world with around 30% share in the global market. Bangladesh is positioned as the second one with around 10% market share, followed by Vietnam with around 7% share.

Since Bangladesh occupies only a tiny portion of the world Sweater market, it has immense potential ahead of it in terms of expanding it. Since Sweater is a season specific product, if we can expand our export markets to the Southern and Eastern Hemisphere countries like Australia, Africa etc. then our manufacturers will be able to utilize the whole year instead of having a lean period of almost six months.

Where does Bangladesh stand in the EU and USA market?

As mentioned in the paragraph, EU is the largest export destination for Bangladesh in terms of exporting Sweater. However, in US market Bangladesh occupies only 4.47% share and ranks 7th in terms of USA's Sweater import from world. So it is clear from the data, that Bangladesh has huge opportunity in expanding both markets. Dedicated research focusing on potential Sweater export items, collaboration from brands and buyers, branding the fact how far Bangladesh has progressed in the sweater segment will help to fulfil the cause.

Top Exporters	2016	2017	2018	2019	2020	Share %
China	17695.83	17325	18131.29	18922.63	16079.43	30.98073
Bangladesh	4532.722	4737.718	5436.261	5719.307	5084.322	9.796121
Viet Nam	2605.834	2915.549	3498.208	3934.324	3428.269	6.605353
Italy	2579.161	2819.161	3272.415	3513.911	3002.707	5.785409
Germany	1872.24	2344.947	2652.628	2640.057	2611.718	5.032078
Turkey	1626.031	1795.768	1931.887	1989.998	1989.524	3.833278
Hong Kong, China	3633.028	3250.138	3251.028	2816.247	1730.613	3.334426
Spain	1364.613	1564.728	1579.918	1642.246	1521.749	2.932001
Netherlands	933.086	1086.383	1307.004	1413.432	1386.965	2.672309
France	1020.568	1136.551	1382.307	1398.608	1316.579	2.536694

Table: Top 10 Sweater exporting countries in the world (Value in Mn USD)
Source: ITC (Value is Million USD)

Country	2017	2018	2019	2020	2021	Share %
China	4572.324	4759.792	4275.332	2343.752	3008.102	20.3407
Vietnam	2219.7	2422.283	2702.128	2385.066	2685.907	18.16203
Honduras	756.2535	909.4074	995.006	653.1057	990.8797	6.700302
Indonesia	886.8365	908.2561	863.1016	744.7379	886.0584	5.991504
Guatemala	571.7237	626.083	569.3318	545.2776	794.607	5.373112
Cambodia	409.0935	460.4475	548.2033	635.8268	767.3047	5.188494
Bangladesh	380.7977	430.4848	517.763	464.8689	662.312	4.478536
Nicaragua	371.8449	389.8156	461.628	377.5153	575.5335	3.891742
India	473.3265	496.4346	523.8526	369.5064	549.7939	3.717692
Jordan	460.0799	477.6781	526.6935	382.2953	482.045	3.259576

Table: USA's Sweater import from Top 10 countries, Source: OTEXA (Value in Mn USD)

Country	2017	2018	2019	2020	2021	Share
China	3973.729606	4161.288	3800.955	2996.627	3787.582	16.10079
Bangladesh	2285.617626	2648.158	2688.484	2208.876	2861.246	12.16299
Germany	1922.390761	2125.139	2084.84	2137.955	2580.299	10.9687
Turkey	1249.204761	1384.286	1391.312	1365.042	1820.114	7.737197
Italy	1170.378256	1305.634	1299.865	1254.4	1583.83	6.732767
Netherlands	911.4757483	1084.054	1115.522	1010.528	1355.813	5.763479
Poland	554.5277573	574.5307	708.3775	911.6886	1235.631	5.252595
Spain	781.2947919	949.0709	1034.27	981.4685	1188.901	5.053949
France	590.5246244	744.9335	710.6816	669.0286	860.7897	3.659166
Belgium	575.2492535	677.4186	628.1022	559.1549	806.8113	3.429707

Table: EU's Sweater import from top 10 countries, Source: EuroStat (Value in Mn USD)



Since Bangladesh occupies only a tiny portion of the world Sweater market, it has immense potential ahead of it in terms of expanding it. Since Sweater is a season specific product, if we can expand our export markets to the Southern and Eastern Hemisphere countries like Australia, Africa etc. then our manufacturers will be able to utilize the whole year instead of having a lean period of almost six months.

Along with sourcing the yarn from local spinner mills, Designtex source yarn from China, Taiwan and Italy. With 32 lines production unit and around 3000 skilled workers, DKL source to almost all of the world class brands.

"China is dominating the yarn market with thousands of varieties. With Government's support to reduce the bureaucratic hassle and some kind of incentive will motivate our local manufactures to invest in the backward linkage facilities, which will eventually help us to reach our target of exporting USD 100 BN/year. We already have experience, commitment and a capable labor force. A little nudge towards updated knowledge and technology will take us far away"- said Tanvir Ahmed, Executive Director, DKL.

One of the main distinguished features of the Designtex is that, the factory is equipped with all the updated machines and technologies which is reducing the manual labor and increasing efficiency to a significant level. Whereas, in early days of Sweater production, it required one dedicated person to run a single machine, nowadays an operator can simultaneously operate at least 8-10 machines. For linking the separately produced different parts of the Sweater, there is also updated machine available which can link the whole garment within 15-20 seconds.

Under the guidance of a German Fashion designer, DKL now have a full-fledged design studio with brands acceptance rate of around 60-70%. Having own design facility is helping the factory with reduced lead time and a strong bargaining power while negotiating the price. It is also helping them to strengthen the relationship with their brands and suppliers as it provides them reduced cost and multiple designs to choose from. ^(A)

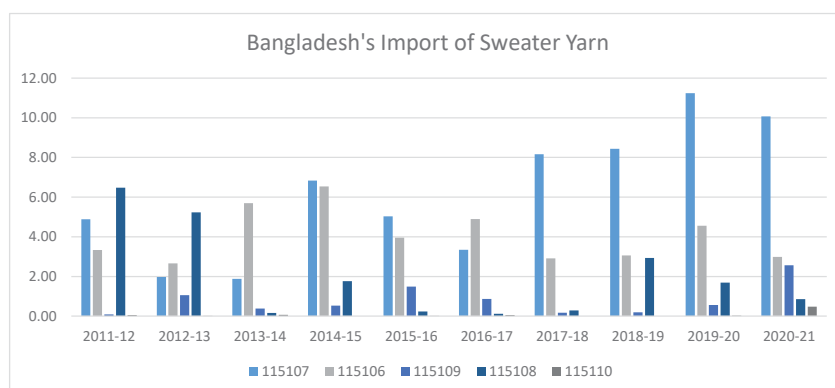


Figure: Year Wise Bangladesh's Import of Sweater Yarn

Bangladesh's Import of Sweater Yarn

Like the woven sector, Bangladesh is severely dependent on the raw materials for Sweater production. Sweater production is often called "Knit to shape"; meaning that it does not require any backward linkage product other than the yarn itself. With the increase in export, the amount of Bangladesh's yarn import has also been on the rise. Even though it hampers with the lead time; quality, price concern and inadequacy of local suppliers are forcing the manufacturers to source it via import, mostly from China. But in case of importing the yarn, manufacturers are facing several problems such as HS code related difficulties, measurement unit

related hindrance, difficulties of issuing a VAT exemption certification for factories, Bond related structure of NBR etc. Solving these problems will not only increase the overall Sweater export of the country but also will enhance the economic opportunities.

Designtex Knitwear Ltd (DKL) - A Pioneer in Sweater Export

Established in 2018, Designtex is a 100% export oriented Sweater producing factory, which has established itself a pioneer in Sweater export with excellent designer team, computerized machine technology and committed delivery.

Bridging Skill Gap to Retain Competitiveness



The RMG industry is increasingly witnessing a shift from manual labour to automation where adoption of more advanced technologies is the current demand of the global supply chain. Moreover, business dynamics are also rapidly changing in the competitive global market. The Apparel Story speaks to two young entrepreneurs to hear their thoughts on to what extent the skill gap in terms of technical know-how and fundamental skills are required for RMG manufacturing jobs – from entry-level to mid-level management in Bangladesh. They share their opinions on how this skill gap is posing a challenge to the sector and what can be done to address the challenge.



SM Nishat Bin Zia Rumman

To achieve significant milestones in the aforementioned competitive arena there needs to be an inherent intersection of modern Machinery and pertinent Labour. Currently the RMG sector is overseeing a shift towards the automated industry to avoid human errors and gaining a competitive advantage in the global market. The reason for the shift is also due to Garments workers earning a better wage and preparing their next generation for a higher tier of job expertise, which is a ray of light for the economy and a step towards a more developed country. However, the lack of technical knowledge or usage regularity is causing the gap in the efficiency between man and machineries. Despite having excellent engineers in the country we're having issue as they are not practically trained yet to use these high-tech machineries. The ultimate goal to gain full productivity is not achieved as the machineries are sometimes mishandled and are run based on ideas. Due to this a lot of technical experts are being brought

from foreign countries which is causing our entry level and mid-level to be away from the limelight. Also because of not having availability of parts or knowledge machineries are kept idle causing deliveries to get pushed back, not only does the machinery stay idle but makes the industry suffer delivery schedule which leads to a degrade in the companies face value.

As a young entrepreneur if my advice is taken into consideration, the way to improvement is by making institutions that teach practically on how to use such machineries. Custom Machineries developed locally so that it is more time effective and price effective in terms of logistics, so that the ROI is gained earlier. Bringing in Custom made imported machineries that would be more compatible and user friendly can also give a competitive advantage. For example, to get better efficiency make machineries that are easily adapted with average Bangladeshi body type along with regular viability of parts so that engineers locally can fix the issues.

To conclude, my suggestions to the young entrepreneurs of the future→



Maheer Mannan

→ would be to not treat Machineries and Labour as competing elements but rather as supplements to one another. The goal of absolute efficiency can only be achieved when a proper balance of these components are realized. Therefore we must strive to constantly enhance the technical dexterity of our work force while keeping in times with technological advances in Machines.

SM Nishat Bin Zia Rumman

Marketing Director
Amazing Fashions Ltd &
Universal Yarn Dyeing Ltd

The growing need for automated systems in the Bangladesh RMG industry in the present time is undeniable, especially when you consider how the Bangladeshi market compares to those of our competitors. Compared to other countries, Bangladesh is recognized as a source of cheap manual labour — and I believe that is part of the reason why the majority of companies in our sector are resistant to this positive change in technologies adopted. Consider the type of RMG products coming out of Bangladesh. Here, we tend to manufacture fewer value-added products, but the same is not true for other garment-exporting nations. For example, the RMG industries of Egypt and Morocco focus heavily on the production of suits—a highly value-added product compared to the simple T-shirts that we see most Bangladeshi RMG companies producing. The need for advanced technologies is felt in the demand for value-added products such as swimwear, lingerie, sportswear etc., which are likely to require machinery and process upgradations. As well as garments of higher quality, we are currently also seeing a shift of buyers demanding more ethically-sourced garments. However, orders keep dropping while the cost of manufacturing provided by the buyer continues to decrease. This, in turn, reduces efficiency, and we end up facing losses.

Because our low price offerings are the primary determining factor in buyers selecting Bangladesh for their manufacturing destination, I think we will continue to produce the lower value-added products alongside newer, higher value-added products. However, producing more of the higher-value products will allow us to transform into a quality sourcing destination rather than remain a cheap sourcing destination. Why should we embrace or celebrate being the cheapest source of RMG products when we could be scaling up?

If product diversity is prioritised, I believe machinery upgradations will occur automatically, and the training of staff will follow. Because that is our next biggest constraint: the resistance to change that is observed often in mid-level employees. Although dedicated to the work itself, mid-level employees lack the motivation required to innovate solutions. They will be more motivated to adopt changes if they are taught to apply new solutions, empowering them to learn more and perform better.

Of course, the training/retraining of line workers is an undeniably arduous and expensive process. However, with gradual upscaling, I believe change is possible. At Shangu Tex, for example, a few line processes have already been automated, including many QC elements. The transition was far from easy, but not unachievable. Our efforts have streamlined the production follow-up process and real-time observations leading to an increase in quality and a reduction in defects.

Changes in the ecosystem can be brought about through collaboration and incentivization, from financial institutions to manufacturing companies and government bodies. Our focus should be on creating conditions for existing entities and newcomers to thrive in the Industry 4.0 landscape and capitalise on the ongoing technological boom. I also believe that government involvement in providing vocational training in RMG (one of the country's most profitable industries), aided by BGMEA, can make a world of difference. The higher the quality of our products, the higher their price can be. We are currently earning upwards of US\$50 billion in the current world climate; thus, if we focus on retraining our workforce and reengineering our production set-up, we will be prepared to earn more money from less work. **A**

Maheer Mannan

Deputy Managing Director
Shangu Tex Limited

Rise of Fashion Brands in Bangladesh

Blucheez

A Combination of Trendiness, Quality and Comfort



Online-based local clothing brand Blucheez started its journey in late December of 2021 with the promise of bringing a world-class fashion trend. Blucheez is committed to meeting the need of fashion lovers while giving the feel of elegance, quality and comfort.

A combination of trendiness, quality, and comfort is a top priority that Blucheez brings in all its products – be it ethnic or western. That's why

the brand believes in its tagline "Comfortably You".

Blucheez founder Dr Md Kamruzzaman said, "We're working tirelessly through our own designers to ensure that our customers get a variety of products that are trendy in design, great in quality and also comfortable."

He thinks people's dependence on online shopping around the world and of course in Bangladesh is on the rise. The tendency has



intensified by the pandemic which confined people within walls of their homes for a certain period of time and led people to buy their essentials from online markets. Hence, the brand Blucheez sets its venture online as it is easy and convenient for customers to order by just a click on the mouse or mobile phone.

In response to a question: "What sets Blucheez apart from other brands?" Co-founder Simeen Zaman said, "We are committed to ensure 100% quality and comfort. In a way we are combining fashion, trendiness, comfort and quality to ensure customer satisfaction." Blucheez conducts a thorough lab-testing of its fabrics and products to maintain quality. "We select fabric very carefully so that it suits in our tropical weather. Then we carry out fiber testing in our lab, and then when we get a good result we go for production," said Simeen Zaman.

She said, "We are trying to grab customer loyalty by proving that we are more than just a brand selling clothes. We aim to get emotionally connected with the customers. We are always on the lookout for new techniques in western and ethnic wear. We also try to add our own value by





combining traditional and modern techniques, such as embroidery with karchupi and print with embroidery.”

With the target of catering to the needs of fashion conscious young Bangladeshi millennials, the online fashion brand has come up with a wide range of product lines. Their collections are designed taking in to consideration of colors, pattern and motifs which are influenced by seasons, festivals and occasions. The brand has a wide variety of collections for all seasons. Blucheez has a young and talented team of fashion designers and employees.

The men's wear includes Panjabi (Essential, Elegant, Exclusive), Pyjama, Waistcoat, Formal Shirt, Casual Shirt, Denim Bottom, Casual Bottom, T-shirt, Polo shirt, Sweater, Sweatshirt, Jackets & Bombers and Hoodies. The women's wear includes Shalwar Kameez (3 pcs), Kurti (1 & 2 pcs), Western Tops, Denim Bottom, Casual Bottom, Stand Alone Bottom, Sweater, Sweatshirt, Jackets & Bombers and Hoodies. Apart from winning the hearts of fashion lovers in Bangladesh, Blucheez also has a vision for reaching a global customer base with its fashionwear. ^A



Blucheez founder Dr Md Kamruzzaman and Co-founder Simeen Zaman along with BGMEA President Faruque Hassan are seen in the launching ceremony of Blucheez.

Rise of a Charity Empire

RP Shaha: An Epitome of Philanthropist



Kumudini Hospital in Tangail

Ranada Prasad Shaha's contribution to the service of humanity and social welfare is so vast that it is next to impossible to list all of his work in one or two articles. Nonetheless, in the previous issue of Apparel Story we attempted to portray a brief life sketch of this legendary philanthropist. In continuation of that endeavor, here we will shed

light on the immense contribution of this great man and his organisation - Kumudini Welfare Trust. RP Shaha and Kumudini Welfare Trust are synonymous and there is no scope for separating one from the other. In a recent visit to Tangail, where RP Shaha grew up and left behind an indelible mark, the Apparel Story team found a

seemingly endless work extravaganza of his eight-decade old organisation. From providing free healthcare service and education to offering nursing and technical training, generous contribution and extraordinary mark of the legend is felt everywhere. In general, the women and the poor are at the core

of the Trust's endeavors.

RP Shaha had become a leading businessman of the undivided Bengal from scratch by virtue of hard work, dedication, discipline and good management skills. After reaching the zenith of success in business, it was time for him to deliver on a childhood pledge so that no one else would have to face the same fate as that of his mother (who died due to lack of medical facilities).

The rags-to-riches businessman strongly believed that the foremost requirements for ensuring women's rights and empowerment are healthcare and education.

Therefore, to begin with, he set up Shova Sundari Dispensary with outdoor facilities at his village home in 1938. It was named after his grandmother. Then he founded the fully fledged Kumudini Hospital named after his mother. It was inaugurated on July 27, 1944 by the then Governor of Bengal, Lord R G Casey.

While inaugurating the Kumudini Hospital, Lord Casey had summed up the spirit of the endeavor saying: "I have come here today because I feel that this hospital affords a high example of what can be done when the initiative, enterprise and public spirit of one man are directed towards the welfare and the well being of the community".



Kumudini Women's Medical College

Located on the bank of Louhajang River at Mirzapur, Tangail, 70 k.m. away from Dhaka, the Kumudini Hospital emerged as one of the most modern hospitals in East Bengal during the British period. RP Shaha had brought in physicians and nurses from Europe to ensure quality treatment and service at the hospital.

The hospital continued through the turmoil of Pakistan time and is still serving the people of Bangladesh. Initially the hospital had only 20 beds, but the number of beds has gradually been extended to 1050 so far. It has proved its worth during the Covid-19 pandemic by providing

Covid patients with various facilities like free hospital bed, oxygen therapy, checkup facilities and even food as always, while other hospitals and clinics have been charging exorbitant fees for these services. RP Shaha's grandson Rajib Prasad Shaha established Kumudini Women's Medical College under the Trust in 2001. Since then, interns and specialist doctors of the college have been serving patients at the Kumudini Hospital. Moreover, students from another sister concern of the Trust - Kumudini Nursing School and College - get a scope for hands-on training at the hospital. Meanwhile, when the groundwork



Students of Bharateswari Homes in their class



Students of Bharateswari Homes



Ranada Prasad Shaha University

for the hospital was being set in 1938, RP Shaha's wife had laid the foundation stone of a residential school for girls at Mirzapur. The school named Bharateshwari Homes was officially inaugurated in 1945. It was the first residential school in Bangladesh.

The school, apart from giving a safe residential environment, encourages students to participate in various cultural activities and physical exercises. Students are even motivated to do a set of chores. As a result, Bharateswari Homes not only excelled academically, but also earned reputation all over the country for its students' drill on various national day celebrations and festivals in Dhaka. It was conferred the Independence Award in 2020.

Other than Bharateswari Homes, RP Shaha also established Kumudini Girls' College in Tangail in 1943 to facilitate higher education for girls. It was the first college for girls in the greater Mymensingh region. He also founded Debendra College in Manikganj after his father's name.

Besides, he helped fund the establishment of the Huseyn Shaheed Suhrawardy College in Magura. Many other educational and socio-cultural organisations flourished because of his generous contributions. In July 1944 he donated Rs. 2,50,000/- to the British Red Cross Appeal Fund. In the early fifties he also financed construction of the first pucca building of Combined Military Hospital (CMH) in Dhaka. Thus he went on establishing one after another impressive institutions. Considering his endless zeal for philanthropy and amazing acts of kindness, he was given the title Danbir (the hero benefactor). He used to refer to his institutions as his 'shrines'. In order to ensure that his institutions can sustain without any help from others, he set-up Kumudini Welfare Trust of Bengal (Bd) Ltd. in June 1947 and in his will named the Trust as the sole benefactor. Thus, the Trust has been a self-financing organization and working mainly in the field of health-care, education and empowerment of the underprivileged

women.

As the founding father and first managing director, he incorporated a set of values, rules and customs into the Trust so that it could change with the times and achieve its goal of serving mankind, even after his death.

His death came unexpectedly. During the War of Liberation the Pakistani Army, aided by their local collaborators, abducted the great philanthropist and his son Bhabani Prasad Shaha on May 7, 1971. They never returned.

The incident jolted his family and the Trust as well, but after independence his daughter Joya Pati took charge of it and worked with compassion and vigor that would have made her father proud. She launched the Trust's handicraft industry to support the women widowed or left destitute as a result of the war. It generated job opportunities for some 30,000 poor women.

Despite all the hurdles and set-backs the Trust encountered, it has splendidly upheld the vision of its founder and continued to expand welfare activities. Recent inclusion in the line of educational institutions is the Ranada Prasad Shaha University (RPSU), which began functioning from April 2014 at its Shitalakhya, Narayanganj campus, while construction of Kumudini International Institute of Medical Sciences and Cancer Research (KIIMS CaRe) in Narayanganj is underway. In addition to that, the Trust is in the process of building an Inland River Container Terminal capable of handling 2,50,000 TUEs of containers annually on its premises at Naryanganj. This venture is expected to generate a reasonable amount of revenue to help support the welfare activities. It is also gearing up to set-up an Elderly Citizens' home for the poor and needy at Mirzapur.

Last but not least, the legacy and noble works of RP Shaha lives on. Rajiv Prasad Shaha, his grandson, is the present Managing Director of the Trust. And even in absentia, the legendary philanthropist is fueling the Kumudini Welfare Trust's onward journey through his guiding principles. **A**

How the RMG Industry Changed a Life



Epyllion Group has named its fair price shops after its first employee Ranu Miah

Like many of his friends Ranu Miah wanted to go aboard to change his life, but he was cheated by the recruitment agent and lost all his money. In pursuit of a career Ranu Miah migrated to Dhaka back in 1987 from his native village in Mymensing. He managed to get a job in BS Industries Ltd. a garment factory at Karwan bazar, Dhaka as a sewing helper at a salary of only 250 Tk. At that period the export value of Bangladesh RMG industry was around 1 billion USD\$, there was no such formal sector established in Bangladesh but the apparel industry was growing.

Starting his career as a helper in BS Industries Ranu Miah couldn't wait to become an operator so he started taking coaching from his boss at

night and with his dedication and hard work managed to learn the basics of operation. One day his boss (the operator) was sick and he was given the opportunity to run the machine, he successfully joint 5 numbers of pockets in shirts and the quality inspector was convinced to accept him as operator, within just a month he got promoted and stepped the first ladder of an amazing journey.

It was 1998 Bangladesh RMG industry has just overcome the issue of child labour, export reached to USD\$ 4 billion good numbers of new factories coming into operation; a new generation of entrepreneurs is entering into the RMG sector. After sojourning in many factories Mr. Ranu Miah becomes an expert in

sample making. And as he decided to live in Mirpur he stand in the queue of walk in interview of a new Garment Factory called Epyllion and he got recruited as the 1st worker in the Epyllion in the position of "Sample Man" with the



Ranu Miah, AGM, Epyllion Group



responsibility of preparing sample product to get approval from the buyer to have the full order. Mr. Reazuddin Al Mamoon, Chairman of Epyllion Group took him to the sample section and gave him the responsibility of the sample section. A journey started no one knows where it will take them to but one thing was behind their mind is to grow and reach to excellence that time they both worked together 10 to 12 hrs a day to prepare samples, do the necessary costing, making patterns. They were determined to go miles before they sleep. As it says that hard work never betrays, so they also get paid off, 7 companies from Bangladesh including Epyllion went to Brussels at the HQ of C&A (A reputed global fashion brand) and the sample made by Mr. Ranu were rated as finest by the officials of the brand, this small happening open up a huge window of opportunity for the company. C&A eventually becomes the strategic buyer of Epyllion group. With the success of C&A Epyllion also started to cater to some other brands and gradually enhancing their production capacity. They were strict to the motto of “Quality and timely delivery” which helped them to create a strong footprint in the supply-chain of the brands. But in one area Epyllion was excellent that is preparing perfect sample and Mr. Ranu Miah was the artist behind the curtain.

While everything was going very smooth for both Epyllion and Mr. Ranu, in the year 2002 Mr. Ranu got sick due to Typhoid, the owner then took him to his own house and treats him properly for a period of two months!

“My MD sir not only just take care of me and my health he also taken care of the education and welfare of my children, once my wife got seriously ill due to multiple health issues she got treatment in abroad at one of the best hospital of the world” Mr. Ranu Said. His younger daughter Sabina Akter Mou is now pursuing Biomedical Science programme at Taylor’s University in Malaysia. “There were many ups and downs in my journey with Epyllion we faced many tough situations but we were never deprived of increments, or promotions or any of the welfares being provided by the organization” Said Mr. Ranu Miah. The company always tried to create a win-win situation for workers, brands and others who are involved; in return the employees also gave their best to take the organization to better heights.

While Epyllion was growing fast the sample department was also getting bigger and Ranu Miah also being promoted. As things are changing for Epyllion it was also rewarding for Mr. Ranu. Growth and prosperity cannot be achieved in isolation it requires combined effort and team

work.

Started with a department of only 3 people Mr. Ranu is now running a department of 250 people with a capacity to produce thousands of samples.

Mr. Ranu Miah is now working as an AGM (Assistant General Manager) of the Product Development Centre at Epyllion Group that employing over 20,000 of workers and exporting millions of dollar worth apparel goods. The RMG industry now exporting nearly 40 billion \$USD worth of apparels and Mr. Ranu Miah earns BDT 220,000 per month! With very little educational qualification he managed to achieve a leadership position in a top-notch garment manufacturing company through his dedication, commitment and hard work. It is beautiful to see people grow and flourish and creating a bond with his organization in a sustained manner. Ranu’s 20 years journey was not only rewarding for him it was win-win! As a tribute to his contribution, Epyllion named all its fair price shops after him “Ranu” Bengali word means pollen, source of life.

The story of Ranu Miah and RMG industry of Bangladesh progressed in parallel and a testament of how the RMG industry of Bangladesh has transformed lives of millions of people. ^A

Tapping the Emerging Market



Brazil is the 9th largest economy in the world with growing purchasing power, per capita consumption, and abundant natural resources. It is the fifth most populated country on the Earth and accounts for one-third of Latin America's population. Brazil, being a member of BRICS continues to pursue economic growth and development of its interior.

Brazil is one of the significant trading partners of Bangladesh. The bilateral trade between the two countries improved significantly in the past

years. In the fiscal year 2021-22, total trade between the two countries stood at 1.82 billion dollars which were the highest ever. Brazil is also an emerging market for Bangladesh's apparel. Though Brazil produces clothing, it also imports a significant amount of apparel from the world. As the seasonal cycle of Brazil is opposite to Bangladesh's major apparel export destinations i.e. Europe and North America, Bangladesh has the huge opportunity to export the winter clothing during the lean season.

Demographic and Economic Overview of Brazil



Population:
213.45
million
July 2021 est.



GDP per capita
(current US\$):
6,796.8
USD in 2020



GNI per capita
(current US\$):
7,850
USD in 2020



Capital:
Brasilia



Major Sea Ports:

Belem, Itajai,
Paranagua, Rio
Grande, Rio de
Janeiro, Santos, Sao
Sebastiao, Tubarao.

Source: The World Factbook – CIA & World Bank

Bilateral Trade

Table-1: Bilateral trade between Bangladesh and Brazil (Value in million USD)			
Year	BD's Export to Brazil	BD's Import from Brazil	Trade Balance
2016-17	115.64	1181.28	-1065.65
2017-18	176.90	1442.10	-1265.20
2018-19	175.44	1402.40	-1226.96
2019-20	120.26	1428.68	-1308.42
2020-21	88.02	1738.20	-1650.18

Source: Bangladesh Bank and Export Promotion Bureau (EPB)



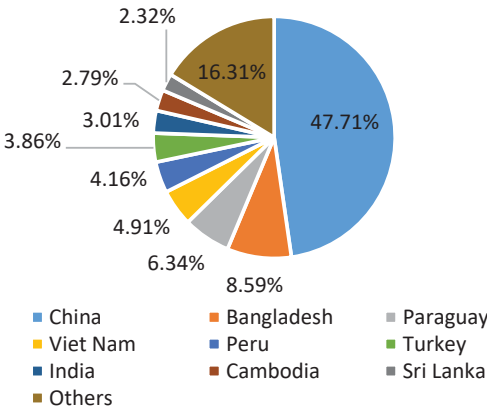
Brazil's Clothing Import from the World

Bangladesh is the 2nd largest apparel import source for Brazil with 8.59% shares of total apparel imports of Brazil. In 2021, Brazil's import from Bangladesh was 98.70 million dollars whereas their global import was 1.14 billion dollars. China is the top clothing import source of Brazil with 47.71% share. Brazil's import from China was 547.98 million dollars in 2021.

Table-2: Brazil's Clothing Import from the World and share in 2021 (Value in million USD)				
Exporters	2019	2020	2021	Share
World	1657.19	1114.12	1148.48	100%
China	915.93	604.05	547.98	47.71%
Bangladesh	160.75	111.98	98.70	8.59%
Paraguay	48.43	48.65	72.77	6.34%
Viet Nam	75.94	56.40	56.42	4.91%
Peru	54.65	35.73	47.79	4.16%
Turkey	45.88	26.04	44.29	3.86%
India	53.20	27.98	34.53	3.01%
Cambodia	33.23	25.85	32.08	2.79%
Sri Lanka	28.83	20.71	26.59	2.32%
Others	240.31	156.68	187.29	16.31%

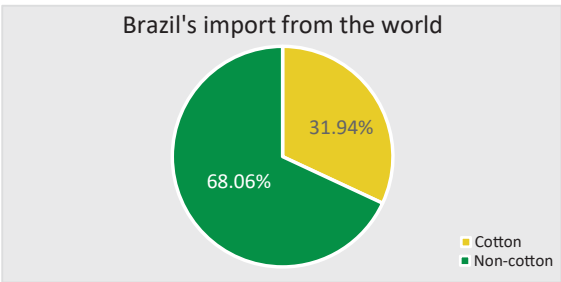
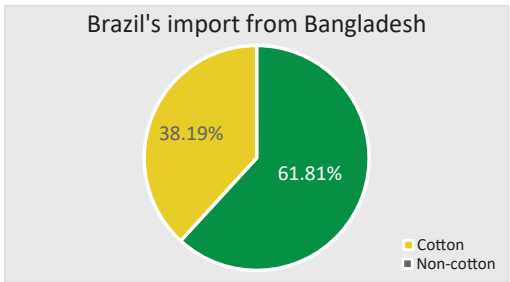
Source: ITC Trademap

Figure-1: Brazil's major source of apparel imports in 2021



Brazil's cotton & non-cotton clothing import share in 2021

The share of non-cotton apparel items imported by Brazil from the world was 61.81% in 2021 whereas only 38.19% of imports was cotton-based. On the other hand, Brazil imported mostly cotton based products from Bangladesh. During the mentioned year, the share of cotton items imported by Brazil from Bangladesh was 68.06%, and only 31.94% were non-cotton products.



Source: ITC Trademap
(Data differs between ITC and EPB)

Bangladesh's Clothing Export to Brazil

Table-3 shows the export of Bangladesh to Brazil in last 5 years. As per the data of the Export Promotion Bureau (EPB), during the fiscal year 2018-19, Bangladesh exported about 160 million dollars worth of apparel to Brazil. But due to Covid, the exports have declined by more than 33% in the last two consecutive fiscal years. And during FY 2020-21, Bangladesh's export to Brazil declined to 70.73 million dollars whereas the exports of knitwear and woven were worth 35.76 million and 34.97 million dollars respectively.

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

Year	Knit	Woven	Total	Growth
2016-17	51.43	48.38	99.81	-16.96%
2017-18	77.74	80.64	158.38	58.68%
2018-19	77.65	82.86	160.51	1.34%
2019-20	55.67	50.96	106.63	-33.57%
2020-21	35.76	34.97	70.73	-33.67%

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

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

The following table-4 illustrates the top 20 clothing items imported by Brazil from the world in 2021 and the Compound Average Growth Rate (CAGR) of those clothing imported by Brazil from the world during 2014- 2019.

Table-4: Brazil's top 20 imported items from the world and major countries in 2021 (Value in MN USD)

HS code	Products	World	China	BD	Paraguay	Viet Nam	Peru	Turkey	Others	CAGR of Brazil's import from world during 2014- 2019*
610910	Knitted cotton t-shirts	59.77	7.54	10.27	0.07	2.83	21.15	2.94	14.98	4.22%
611610	Gloves, mittens and mitts	47.34	35.55	0.00	0.00	0.55	0.00	0.00	11.24	-12.09%
620343	M/B MMF woven t-shirts	44.50	25.19	3.84	0.71	6.12	0.02	1.19	7.43	14.10%
621010	Garments made up of felt	40.51	26.31	0.00	3.34	0.64	0.00	0.00	10.22	-0.11%
620342	M/B MMF woven trousers	39.91	4.72	13.76	5.96	0.65	0.00	3.08	11.73	21.73%
611030	Knitted jersey and pullover	35.69	19.78	10.63	0.13	0.16	0.04	1.65	3.30	7.35%
620462	W/G MMF woven trouser	34.74	4.69	6.76	5.55	0.30	0.00	8.11	9.34	18.44%
620193	M/B MMF anorke	34.65	25.34	1.25	0.01	2.56	0.00	0.14	5.36	-2.87%
620293	W/G MMF anorke	34.57	27.66	0.48	0.79	2.28	0.00	0.14	3.22	5.86%
610990	Knitted t-shirt of MMF	34.28	9.35	1.89	0.62	3.78	0.12	0.37	18.15	11.71%
620640	W/G MMF woven blouse	30.54	16.01	0.96	1.74	2.84	0.00	1.83	7.15	19.60%
611596	Knitted stockings incl. footwear	30.03	13.70	0.01	14.56	0.04	0.00	0.39	1.34	-22.59%
611120	Babies garments & accessories	27.44	11.66	1.38	0.04	3.26	0.41	0.15	10.55	-2.99%
610343	M/B MMF knitted trouser	25.76	15.82	0.59	0.17	2.76	0.01	0.72	5.69	-4.08%
610620	W/G MMF knitted blouse	24.85	13.63	4.84	4.26	0.20	0.19	0.04	1.69	20.34%
620520	M/B woven cotton shirts	23.69	6.36	8.95	0.41	0.21	0.08	1.39	6.29	12.68%
620463	W/G MMF woven trousers	22.90	11.38	0.25	0.43	3.74	0.00	2.53	4.56	6.92%
611595	Knitted stockings excl. footwear	22.17	7.95	0.00	9.49	0.27	0.15	0.62	3.69	-3.99%
610463	W/G knitted MMF trousers	21.87	11.27	0.48	1.44	2.62	0.02	0.36	5.68	0.21%
610510	M/B knitted cotton shirts	21.34	2.08	3.05	0.45	1.14	11.37	0.36	2.90	26.83%

Source: ITC Trademap



Table-5 shows the major apparel items imported by Brazil from the world which has had positive annual growth in the last 5 years (from 2014-2019) before Covid. But the shares of Bangladesh in these items were comparatively less. So Bangladesh has the potential to export those items to Brazil as they have high demands for those products.

Table-5: Major apparel items imported by Brazil in 2019 with positive CAGR & the share of BD

HS code	Items	Brazil's import from world	Brazil's import from BD	BD's share in Brazil's total import	CAGR of Brazil's import from world during 2014-19*
620193	M/B MMF woven anoraks	58274	1242	2.13%	2.95%
611610	Plastics or rubber, knitted Gloves	39357	0	0.00%	13.75%
611596	Knitted Full or knee-length stockings	36172	12	0.03%	29.18%
611120	Cotton knitted Babies' garments	32541	2314	7.11%	3.08%
610230	W/G MMF knitted overcoats	32255	2480	7.69%	4.13%
610343	M/B synthetic knitted trousers	32218	789	2.45%	4.26%
620469	W/G non cotton woven trousers	27023	995	3.68%	6.92%
611595	Knitted Full or knee-length stockings	24438	530	2.17%	4.15%
620444	W/G artificial fibers woven dresses	21943	90	0.41%	0.82%
610342	M/B cotton knitted trousers	19834	1392	7.02%	18.72%
621010	Woven Garments	17727	0	0.00%	0.11%
611430	MMF knitted sporting garments	17648	57	0.32%	27.41%
610469	W/g non cotton trousers	16463	149	0.91%	15.17%
611241	W/G synthetic knitted swimwear	15558	1280	8.23%	12.31%
621143	W/G MMF woven tracksuits	13788	4	0.03%	2.43%
620113	M/B MMF overcoats & raincoats	11595	485	4.18%	2.55%
611530	Women's knitted hosiery	6224	0	0.00%	85.29%
610459	W/G non cotton knitted skirts	5644	60	1.06%	19.54%

*Though the import data of 2020 & 2021 is available, but the CAGR was calculated considering the data of 2019 intentionally to avoid the Covid period.

Market Access

Bangladesh faces 35% duty while exporting apparel to Brazil. ^A

Pohela Boishakh



It is called that Bangladeshi people celebrate thirteen festivals across twelve months of the year. These celebrations inaugurate with the “Pohela Boishakh”- the first day of Bangla New Year on 14th April each year. The history of Nobo Borsho dates back to Mughal Empire Akbar, when according to Akbar’s decision,

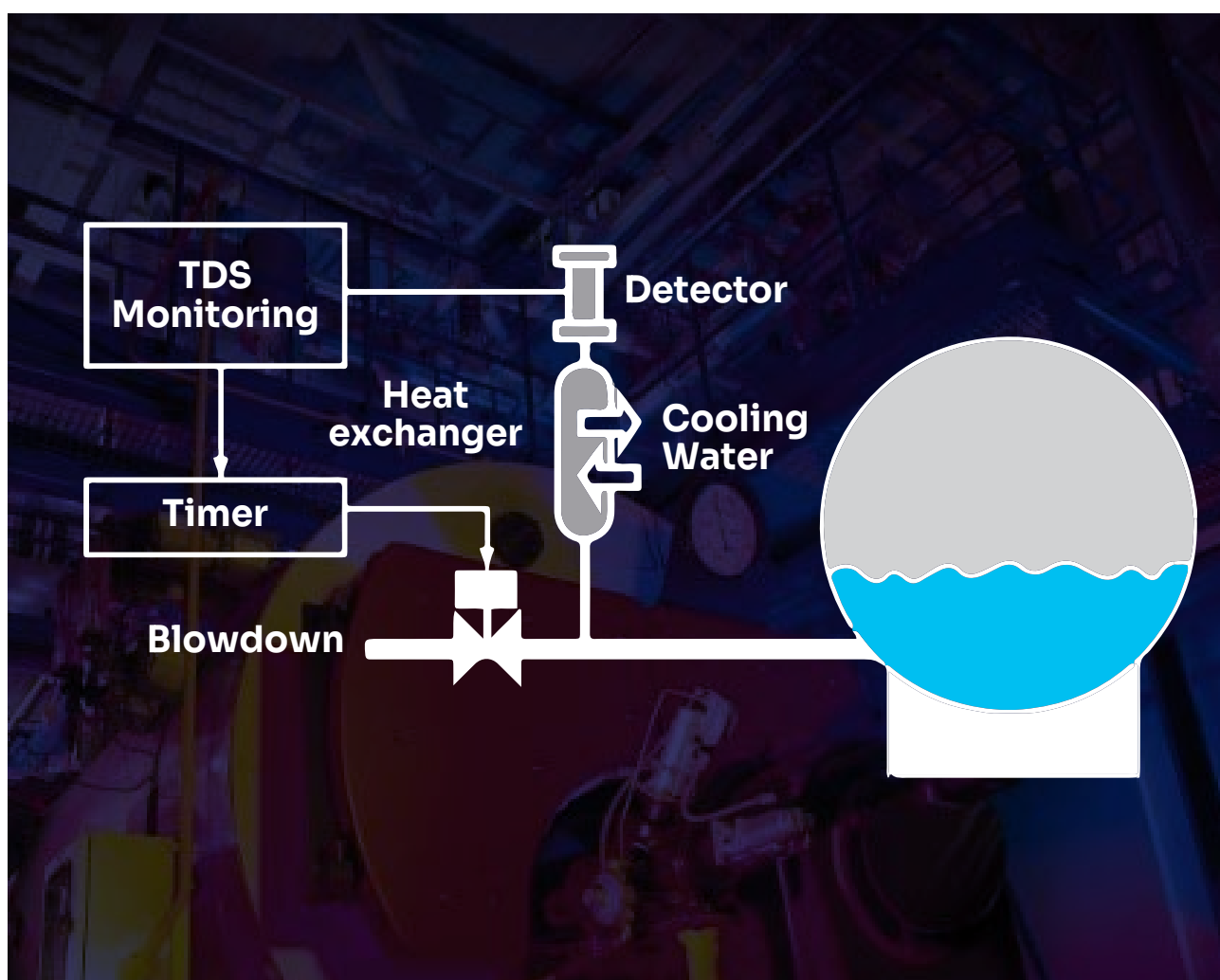
a renowned astronomer Fatehullah Shirazi formulated the Bangla year on the basis of the lunar Hijri and Bangla solar calendars. Which started as a merely financial affair is now a festival close to the heart of all Bangladeshis regardless of religious and regional differences. “Pohela Boishakh” is all about color,

vibrancy, reminiscing traditional and cultural roots and festivities. Even before the actual date, Bengali people start the celebration through “Alpona” (drawing traditional designs in wall, front or back yard, roads), buying special traditional dresses particularly in combination of red and white and most



importantly with the preparation of “Panta-ilish” (the traditional food of “Pohela Boishakh” which consists soaked rice and Hilsha fish along with mashed potato). Whereas Boishakhi Mela (fare), kite flying, jatra, bull fight, boat race etc. are the core components behind the rural celebration of Pohela Boishakh; gathering around the Banyan tree at Ramna Batmul, Mongol Shovajatra (which has been termed by UNESCO as a “cultural heritage of humanity”), exchanging gifts among loved ones are seen celebrated in urban part of the country. ^A

Automatic Blowdown Control System



Steam is widely used as an energy carrier in textile processes such as dyeing, washing, and finishing. Blowdown is one of the primary reasons for energy loss at the places where steam is generated and this energy waste needs to be reduced. An automatic blowdown control system can optimize blowdown rates by regulating the volume of water discharged from the boiler in relation to the concentration of dissolved solids

present.

A factory may install TDS (Total Dissolved Solids) sensor to check the TDS level of boiler water. Once the TDS level reached the limit set by the factory, the blowdown valve automatically opened and reduced the TDS level in boiler. The valve gets closed once the TDS level reached to the acceptable range. Such blowdown system can reduce energy losses, saves fuel and water by 3 to 5%.

A factory of 8 tons per hour boiler capacity run by natural gas can reduce:

Water consumption:

Upto 2000 m³ /year

Natural Gas consumption:

32000 m³ /year

GHG emission reduction:

70 tCO₂e/year

Installation automatic blowdown would cost around BDT 400,000 for a 8 ton boiler system but saves around BDT 300,000 every year. **A**

News in Pictures

BGMEA President Faruque Hassan along with Vice Presidents Shahidullah Azim, and Md. Nasir Uddin met with Cabinet Secretary Khandker Anwarul Islam at the secretariat. They had discussions on the current and future challenges of Bangladesh's RMG industry and possible strategies to address them.



BGMEA has launched its online-based Membership Management System to make membership registration procedures faster, simpler and more convenient for garment factories. It will also help the existing members of BGMEA to easily manage their membership information online. BGMEA President Faruque Hassan inaugurated the digital "BGMEA Membership Management System" (MSS) in presence of BGMEA Vice Presidents and Directors.



Ranjan Mahtani, Founder and Executive Chairman of Epic Group, paid a courtesy call on BGMEA President Faruque Hassan at the latter's office in Gulshan, Dhaka. BGMEA Director Tanvir Ahmed was also present on the occasion. They had discussions issues, especially the potential and future priorities of Bangladesh's garment industry and long-term business partnership of Epic Group with Bangladeshi suppliers.



BGMEA President Faruque Hassan paid a courtesy call on Foreign Secretary of India Harsh Vardhan Shringla at his official residence in New Delhi. BGMEA Director Tanvir Ahmed was also present. They discussed potential areas of cooperation and collaboration to enhance trade between Bangladesh and India.

BGMEA President Faruque Hassan met with Ambassador of Greece to India Dionyssios Kyvetos at the embassy in New Delhi and had discussions on different issues of mutual interests, including potential areas and ways of promoting bilateral trade and investment between Bangladesh and Greece.



BGMEA President Faruque Hassan urged the High Commission of Bangladesh in New Delhi to strengthen diplomatic efforts to boost bilateral relationships with India and expand trade and business between the two countries. He made the call during his meeting with Deputy High Commissioner Md Nurul Islam at the High Commission. BGMEA Director Tanvir Ahmed were also present at the meeting.



BGMEA President Faruque Hassan called on Ambassador of South Korea to Bangladesh Lee Jang-keun at the Korean embassy in Dhaka where he stressed on the need for intensifying cooperation and collaboration to realize trade potential between Bangladesh and South Korea.

A delegation of BGMEA led by President Faruque Hassan met with Nasrul Hamid, MP, State Minister for the Ministry of Power, Energy and Mineral Resources at the secretariat and requested to keep gas supply to the export-oriented industries uninterrupted to facilitate industrial growth.

BGMEA Vice President Shahidullah Azim, Senior Secretary at Energy and Mineral Resources Division Md. Mahbub Hossain, Managing Director of Titas Gas Transmission & Distribution Company Limited Engr. Md. Haronur Rashid Mullah, Acting Chairman of Petrobangla A K M Benjamin Riaz were also present at the meeting.



A delegation of BGMEA led by President Faruque Hassan met with Honorable Railways Minister Md. Nurul Islam Sujon, MP at the Railway Bhaban in Dhaka. They urged the government to operate special train services and add more coaches to ease travel of passengers, especially garment workers ahead of Eid-ul-Fitr. BGMEA Directors Asif Ashraf and Barrister Vidiya Amrit Khan were present at the meeting.



BGMEA President Faruque Hassan met with Senior Secretary of the Finance Ministry Abdur Rouf Talukder at the Secretariat in Dhaka and discussed the present business situation in the country, especially hurdles being faced by the RMG industry and possible measures to deal with the challenges.

Epyllion Group lifted the BGMEA Cup 2021 trophy beating rivals Bando Design Ltd 3-1 in tie-breaker at the final held at the Army Stadium in Dhaka. Minister for Youth and Sports Zahid Ahsan Russel, MP, handed over the trophy to the winning team while BGMEA President Faruque Hassan, FIFCO (Federation International de Football Corporate) President Albert Zbily, Mayor of Dhaka North City Corporation (DNCC) Md. Atiqul Islam, former BGMEA Presidents, incumbent BGMEA Vice Presidents and Directors were present on the occasion.



The Technical Committee of CIEOSH formed involving industry experts, academia, brands, development partners and other stakeholders sat together to discuss how the centre will serve the industry in developing its capacities in the changing business landscape. BGMEA President Faruque Hassan presided over the first meeting of the Technical Committee held at BGMEA's PR office in Gulshan, Dhaka where BGMEA Director Abdullah Hil Rakib and Chairman of BGMEA Standing Committee on Industrial Engineering SM Khaled, among others, were present.



The members of the Sustainable Terms and Trade Initiative (STTI) unanimously selected Miran Ali as the Spokesperson for the entire initiative. Miran Ali, Vice President of Bangladesh Garment Manufacturers and Exporters Association (BGMEA), was entrusted with the position in STTI during its board meeting of members in Istanbul, Turkey.



BGMEA hosted a dinner in honor of the visiting delegates of the European Union in Dhaka. The EU delegates included Jordi Curell Gotor, Director for International Affairs in Directorate-General for Employment, Social Affairs and Inclusion (DGEMPL); Ivo Schutte, Deputy Head of Division, Asia and the Pacific-Regional Affairs and South Asia, European External Action Service (EEAS); Alessandro Tonoli, Policy Officer, Directorate-General for Trade (DG TRADE), European Commission; and Benedikt Bünker, Policy Officer, Directorate-General for Employment, Social Affairs and Inclusion (DGEMPL), European Commission. Ambassadors of a number of European countries posted in Dhaka also joined the dinner. BGMEA President Faruque Hassan welcomed the EU delegates and expressed thanks for joining the dinner.



BGMEA organized a press conference at a hotel in Dhaka to share the experience and outcomes of just-concluded visit by a delegation of BGMEA to the Europe and the USA. BGMEA President Faruque Hassan spoke at the press conference while BGMEA Vice Presidents, Directors and chairs of different standing committees and members were also present.



Leaders of BGMEA headed by President Faruque Hassan paid rich tributes to Father of the Nation Bangabandhu Sheikh Mujibur Rahman, marking his 102nd birth anniversary. They paid homage by placing a wreath at the portrait of Bangabandhu in front of Bangabandhu Memorial Museum at Dhanmondi Road No. 32 in Dhaka. BGMEA Vice President Shahidullah Azim, Directors Asif Ashraf, Barrister Vidiya Amrit Khan, chairs of different standing committees of BGMEA and members of BGMEA were present on the occasion.

BGMEA organized a program at its headquarters in Uttara, Dhaka in observance of Bangabandhu's birthday and the National Children's Day-2022. A cake was cut and prizes were distributed among the meritorious students of BGMEA's school, marking the occasion. BGMEA President Faruque Hassan chaired the program which was attended by Senior Vice President SM Mannan (Kochi), Vice President Shahidullah Azim, Directors Md. Khosru Chowdhury, Rajiv Chowdhury, and members of BGMEA.



A delegation of the Enhanced Integrated Framework (EIF) of the World Trade Organization (WTO) called on BGMEA President Faruque Hassan at the latter's office in Gulshan, Dhaka. The EIF delegation led by its Executive Director Ratnakar Adhikari also included Ms. Hang T.T. Tran, Senior Coordinator, EIF and David Daepp, Regional Portfolio Manager, EIF. Md. Hafizur Rahman, Project Director, Export Diversification and Competitiveness Development Project (Tier-II) and DG, WTO Cell, Ministry of Commerce was also present at the meeting. They had discussions on potential areas where the Enhanced Integrated Framework can support the RMG industry of Bangladesh to improve its trade capacity and enhance export competitiveness.



BGMEA President Faruque Hassan held a meeting with Peter Lund-Thomsen, Professor at Copenhagen Business School, and Gavin Bridge, Professor at Durham University, at BGMEA in Dhaka. BGMEA Vice President Miran Ali was also present at the meeting.

BGMEA President Faruque Hassan addressed a ceremony of Social Responsibility Award for inspiring transgender people held in Dhaka. Honorable State Minister for Cultural Affairs KM Khalid attended the program as chief guest.



BGMEA leaders including President Faruque Hassan are seen at an Iftar Mahfil organized by BGMEA for its members in Dhaka.



BGMEA President Faruque Hassan met with Zakia Sultana, Member (VAT and Policy) of the NBR, at her office in Dhaka and sought policy support for the backward linkage industries. BGMEA Vice President Shahidullah Azim, Kazi Mustafizur Rahman, Commissioner, customs bond commissionerate, Kazi Farid Uddin, first secretary (VAT Policy), and Kazi Rezaul Hasan, second secretary (VAT Act and Rule), were also present at the meeting.

A delegation led by BGMEA President Faruque Hassan held a meeting with Hossain Ahmed, Member (Customs Export, Bond and IT) of the National Board Revenue (NBR) in Dhaka and requested NBR to ease business procedures including customs and bonds to support the export-oriented garment industry in realizing its potential. BGMEA Vice President Shahidullah Azim was also present at the meeting.



BGMEA President Faruque Hassan met with Senior Secretary at Energy and Mineral Resources Division Md. Mahbub Hossain and urged the government to cut all illegal gas connections in the country. BGMEA Vice President Shahidullah Azim was also present at the meeting.



BGMEA President Faruque Hassan along with Honorable Commerce Minister Tipu Munshi MP and State Minister for Labour and Employment Begum Munnujan Sufian MP are seen a program organized by the Ministry of Labour and Employment in observance of the National Occupational Health and Safety Day-2022 in Dhaka.



Iftar Mahfil organized by BGMEA for the journalists working in the print, electronic and online media at Dhaka. In his address to the journalists, BGMEA President Faruque Hassan sought cooperation and support the media to change the narrative of Bangladesh's garment industry which has a lot of achievements and positive stories to tell the world. BGMEA Vice President Shahidullah Azim, Vice President Md. Nasir Uddin, Directors Abdullah Hil Rakib, Haroon Ar Rashid, Barrister Vidiya Amrit Khan, and Neela Hosna Ara, Chairman of BGMEA Standing Committee on Press, Publication & Publicity Shovon Islam, Chairman of BGMEA Standing Committee on Trade Fair Mohammed Kamal Uddin Chairman of BGMEA Standing Committee on UD-Woven & Knit Md. Nurul Islam were present at the Iftar Mahfil.



BGMEA organized an Iftar Mahfil for the leaders of garment workers' organizations in Radisson Blu in Dhaka. BGMEA President Faruque Hassan, former BGMEA President Md. Siddiqur Rahman, incumbent Senior Vice President SM Mannan (Kochi), Vice President Shahidullah Azim, Vice President (Finance) Khandoker Rafiqul Islam, Vice President Md. Nasir Uddin, Directors Tanvir Ahmed, Abdullah Hil Rakib and Rajiv Chowdhury and BGMEA Standing Committee on ILO & Labour Affairs ANM Saifuddin were present. Leaders of the national federation of trade unions in RMG sector, including General Secretary of Bangladesh Trade Union Kendra Dr. Wajedul Islam Khan and President of IndustriALL Bangladesh Council (IBC) Mir Abul Kalam Azad attended the Iftar Mahfil.



BGMEA President Faruque Hassan along with Vice President Shahidullah Azim, Directors Inamul Haq Khan (Bablu), Md. Imranur Rahman and Neela Hosna Ara and Santanu Dutta Gupta, USGBC Faculty, Regional Head - Market Development GBCI – Eastern India, Bangladesh & Vietnam Markets are seen at an Iftar program organized by the US Green Building Council (USGBC) at Hotel Amari in Dhaka.

Imranur Rahman, Managing Director of Laila Group and also a Director of BGMEA, has been appointed as the Vice President of the International Federation of Corporate Football (FIFCO). The FIFCO is the world governing body of corporate football and headquartered in Montreal in Canada.



BGMEA President Faruque Hassan, First Vice President Syed Nazrul Islam, Vice President Rakibul Alam Chowdhury, Director Mohammed Meraj-E-Mostafa (Kaisar) and former Director Syed M Tanvir are seen at an Iftar Mahfil organized by BGMEA in Chattogram. **A**

Bangladesh's RMG export to world

Wovenwear

Value in Million USD

Month	2019/20	2020/21	2021/22	2021-22 VS 2020-21	2021-22 VS 2019-20
July	1632.32	1494.66	1228.77	-17.79%	-24.72%
August	1163.32	1103.52	1152.94	4.48%	-0.89%
September	1091.70	1064.54	1513.55	42.18%	38.64%
October	1151.69	985.50	1515.82	53.81%	31.62%
November	1240.03	1110.12	1459.55	31.48%	17.70%
December	1539.16	1261.05	1868.44	48.17%	21.39%
January	1625.00	1399.22	1972.17	40.95%	21.36%
February	1505.58	1272.65	1716.04	34.84%	13.98%
March	1200.37	1142.48	1881.22	64.66%	56.72%
April	194.55	1175.21	1811.49	54.14%	831.12%
May					
June					
Total	12343.72	12008.95	16119.99	34.23%	30.59%

Source: EPB

Knitwear

Value in Million USD

Month	2019/20	2020/21	2021/22	2021-22 VS 2020-21	2021-22 VS 2019-20
July	1678.16	1750.28	1658.45	-5.25%	-1.17%
August	1242.69	1364.50	1600.44	17.29%	28.79%
September	1249.37	1348.88	1905.29	41.25%	52.50%
October	1368.13	1338.22	2045.89	52.88%	49.54%
November	1271.28	1334.47	1775.50	33.05%	39.66%
December	1396.17	1389.82	2176.06	56.57%	55.86%
January	1414.22	1462.94	2112.41	44.39%	49.37%
February	1278.70	1352.64	1795.68	32.75%	40.43%
March	1055.83	1312.43	2050.18	56.21%	94.18%
April	180.12	1341.77	2122.69	58.20%	1078.49%
May					
June					
Total	12134.67	13995.95	19242.59	37.49%	58.58%

Source: EPB

Total (Woven+ Knit)

Value in Million USD

Month	2019/20	2020/21	2021/22	2021-22 VS 2020-21	2021-22 VS 2019-20
July	3310.48	3244.94	2887.22	-11.02%	-12.79%
August	2406.01	2468.02	2753.38	11.56%	14.44%
September	2341.07	2413.42	3418.84	41.66%	46.04%
October	2519.82	2323.72	3561.71	53.28%	41.35%
November	2511.31	2444.59	3235.05	32.34%	28.82%
December	2935.33	2650.87	4044.50	52.57%	37.79%
January	3039.22	2862.16	4084.58	42.71%	34.40%
February	2784.28	2625.29	3511.72	33.77%	26.13%
March	2256.20	2454.91	3931.40	60.14%	74.25%
April	374.67	2516.98	3934.18	56.31%	950.04%
May					
June					
Total	24478.39	26004.90	35362.58	35.98%	44.46%

Source: EPB

U.S. Apparel Import Growth

Growth: 2021 VS 2020													
Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	JanDec, 2021
World	-18.28%	-8.75%	25.26%	66.16%	131.70%	55.46%	17.55%	22.97%	22.56%	20.33%	39.75%	51.07%	27.36%
China	-19.88%	6.75%	116.14%	57.68%	60.03%	29.16%	15.37%	21.18%	32.34%	24.98%	49.18%	56.84%	29.40%
Vietnam	-18.58%	-3.99%	33.56%	40.47%	90.54%	25.83%	-1.32%	21.78%	0.98%	1.79%	4.54%	36.13%	14.33%
Bangladesh	-16.57%	-9.01%	0.62%	17.70%	253.34%	139.20%	34.73%	5.36%	42.92%	29.51%	78.33%	117.58%	36.69%
Indonesia	-33.17%	-25.74%	-5.68%	32.99%	70.75%	44.49%	1.38%	22.88%	23.29%	31.52%	56.83%	78.75%	17.92%
India	-22.33%	-21.47%	0.44%	67.88%	522.71%	162.30%	39.27%	30.65%	36.97%	36.83%	54.74%	87.04%	38.92%
Mexico	-12.96%	-13.49%	7.74%	209.69%	139.10%	43.94%	31.83%	27.12%	29.61%	24.87%	30.59%	19.27%	28.74%
Honduras	-9.41%	-13.34%	18.56%	953.14%	772.81%	241.26%	57.02%	27.43%	13.13%	-5.84%	53.01%	32.07%	45.63%
Cambodia	-17.31%	-10.43%	33.32%	41.34%	64.50%	4.33%	-17.97%	31.32%	37.51%	46.60%	30.82%	22.44%	20.05%
Pakistan	11.96%	15.27%	50.84%	41.61%	413.06%	107.03%	86.45%	53.76%	38.86%	20.72%	84.69%	48.76%	58.23%
Korea	-23.95%	-27.93%	6.15%	52.04%	47.54%	33.22%	7.92%	40.70%	68.96%	6.69%	58.47%	42.33%	22.75%
Growth: 2021 VS 2019													
Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	JanDec, 2021
World	-26.85%	-18.71%	7.07%	-7.73%	-7.63%	-11.11%	-20.77%	-4.28%	4.76%	12.03%	33.27%	27.23%	-2.53%
China	-48.49%	-42.56%	2.97%	-35.39%	-36.38%	-33.58%	-42.58%	-28.71%	-5.87%	10.97%	36.83%	25.31%	-21.28%
Vietnam	-15.20%	-1.21%	43.31%	12.68%	11.38%	0.98%	-12.52%	20.38%	-3.24%	0.64%	18.66%	15.14%	6.04%
Bangladesh	-2.31%	-4.53%	-0.86%	2.08%	13.08%	3.74%	16.42%	21.88%	39.90%	31.76%	57.91%	88.01%	20.62%
Indonesia	-32.24%	-29.59%	-14.43%	2.91%	-7.22%	-23.44%	-16.98%	-9.28%	-6.64%	12.89%	49.43%	25.59%	-5.78%
India	-24.25%	-17.57%	-5.42%	-9.22%	0.83%	-4.39%	-20.96%	6.53%	24.66%	36.53%	43.07%	47.03%	3.37%
Mexico	-25.92%	-20.79%	-12.22%	-23.38%	-19.21%	-7.95%	-6.97%	-8.90%	2.73%	-2.88%	8.61%	11.84%	-9.25%
Honduras	-9.15%	-7.37%	-5.60%	-14.83%	-4.70%	-1.17%	-9.61%	1.63%	-1.06%	-6.39%	5.04%	-7.05%	-4.83%
Cambodia	-0.54%	17.26%	60.62%	35.75%	6.49%	-8.38%	-3.77%	25.64%	33.15%	57.30%	53.45%	39.90%	26.60%
Pakistan	12.51%	14.76%	53.36%	27.09%	59.30%	55.77%	35.84%	59.48%	52.51%	58.26%	129.50%	69.24%	51.63%
Korea	-47.77%	-27.27%	-7.89%	-7.83%	-22.34%	-0.54%	-14.84%	-6.23%	-10.51%	14.54%	31.85%	6.36%	-7.93%

Source: otexa

EU Apparel Import Growth

Growth: 2021 VS 2020													
Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	JanDec, 2021
World	-20.00%	-1.84%	17.78%	62.48%	45.94%	20.91%	-6.32%	-7.10%	1.06%	2.79%	28.91%	20.80%	8.81%
China	-15.27%	5.33%	69.06%	45.59%	-3.49%	-11.23%	-18.88%	-5.07%	11.12%	18.35%	46.64%	29.04%	9.14%
Bangladesh	-22.17%	-2.29%	-12.08%	42.07%	106.20%	105.51%	21.45%	-4.96%	16.31%	7.20%	59.74%	51.82%	19.99%
Turkey	-5.17%	8.80%	37.86%	134.99%	72.34%	42.09%	2.02%	4.55%	-2.11%	3.21%	19.72%	17.42%	18.18%
India	-21.54%	-2.11%	16.59%	85.80%	128.44%	60.55%	3.66%	-3.76%	6.89%	4.80%	43.71%	40.81%	19.87%
Cambodia	-20.18%	-14.19%	-7.69%	18.82%	27.04%	-18.95%	-27.81%	-22.00%	17.51%	19.70%	53.01%	29.62%	1.13%
Vietnam	-19.56%	-1.75%	32.64%	70.56%	64.62%	27.55%	6.90%	-2.35%	-7.77%	-10.81%	2.64%	2.09%	7.05%
Pakistan	-10.25%	13.93%	2.99%	69.10%	126.79%	46.10%	38.75%	9.74%	26.86%	17.81%	47.06%	31.13%	26.87%
Morocco	-19.32%	3.80%	22.09%	818.28%	409.43%	56.21%	-5.68%	25.66%	-9.32%	9.00%	43.35%	26.95%	28.16%
Sri Lanka	-11.35%	17.69%	18.69%	71.60%	207.14%	53.13%	2.04%	-7.24%	-1.21%	-11.06%	7.48%	49.86%	18.60%
Indonesia	-31.78%	-4.37%	-5.78%	38.87%	33.41%	-6.83%	-10.82%	-6.59%	-5.15%	8.88%	45.23%	30.13%	4.24%
Growth: 2021 VS 2019													
Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	JanDec, 2021
World	-23.96%	-10.09%	-1.88%	-3.98%	-11.33%	-0.58%	-23.38%	-11.39%	6.12%	-1.05%	20.37%	18.84%	-4.60%
China	-21.85%	-9.76%	17.91%	11.71%	-4.55%	-7.37%	-32.10%	-13.76%	11.85%	10.50%	40.43%	28.98%	-0.28%
Bangladesh	-27.09%	-10.92%	-16.66%	-0.43%	-3.45%	4.55%	-14.53%	-4.31%	14.43%	11.09%	38.77%	42.95%	0.70%
Turkey	-6.26%	6.89%	10.18%	-0.26%	-8.52%	38.42%	-3.47%	11.57%	21.25%	10.48%	24.98%	35.24%	10.47%
India	-27.18%	-9.01%	-7.78%	-10.95%	-17.55%	-10.71%	-30.85%	-15.55%	16.27%	13.02%	17.88%	14.42%	-8.53%
Cambodia	-27.72%	-32.15%	-25.38%	-25.43%	-20.34%	-37.72%	-39.83%	-32.24%	-17.18%	-22.90%	4.98%	3.74%	-23.25%
Vietnam	-22.87%	-4.75%	19.99%	6.13%	1.25%	9.09%	-9.25%	-5.89%	-0.86%	-19.52%	-2.90%	10.19%	-3.05%
Pakistan	-4.65%	5.29%	-1.49%	23.05%	-4.41%	-0.84%	11.70%	14.06%	26.65%	31.74%	30.75%	35.03%	13.33%
Morocco	-25.28%	-8.33%	-0.26%	-16.56%	-25.27%	35.16%	-20.15%	15.21%	31.69%	1.34%	17.59%	12.99%	-0.92%
Sri Lanka	-5.62%	22.91%	4.01%	5.82%	14.50%	-7.68%	4.08%	-6.48%	8.30%	-15.77%	13.56%	25.71%	4.59%
Indonesia	-39.44%	-20.90%	-12.30%	-15.82%	-10.42%	-12.76%	-26.07%	-25.78%	-15.33%	-11.45%	14.53%	19.91%	-14.27%

Source: eurostat

US's Apparel Import Last 10 Years

Values in MN US\$


Country	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	CAGR 2021 VS 2011	Growth in 2021	Share in 2021
World	77659.13	76811.15	79797.34	81781.13	85164.73	80683.96	80171.98	82880.76	83704.75	64062.05	81589.92	0.49%	27.36%	
China	29392.00	29060.16	29783.09	29793.77	30541.02	27915.36	27009.44	27371.07	24911.09	15154.06	19610.08	-3.97%	29.40%	24.03%
Vietnam	6643.98	7101.13	8126.28	9268.66	10563.85	10802.62	11551.03	12219.09	13552.22	12569.10	14370.23	8.02%	14.33%	17.61%
Bangladesh	4509.86	4469.98	4947.54	4834.11	5401.43	5304.61	5064.24	5401.04	5924.33	5228.14	7146.15	4.71%	36.69%	8.76%
India	3316.04	3041.16	3211.63	3400.90	3665.39	3638.89	3679.83	3805.59	4058.36	3019.81	4195.20	2.38%	38.92%	5.14%
Indonesia	5051.72	4935.40	4975.25	4832.78	4937.51	4705.60	4558.93	4475.34	4398.91	3514.98	4144.86	-1.96%	17.92%	5.08%
Cambodia	2592.32	2533.91	2555.41	2478.75	2481.98	2143.41	2146.68	2408.27	2677.79	2823.80	3390.01	2.72%	20.05%	4.15%
Mexico	3803.54	3695.77	3681.52	3732.35	3556.80	3401.07	3568.03	3362.63	3124.44	2202.54	2835.52	-2.89%	28.74%	3.48%
Honduras	2615.44	2559.44	2497.66	2582.43	2673.53	2553.59	2460.95	2568.89	2792.86	1825.22	2657.98	0.16%	45.63%	3.26%
Pakistan	1654.89	1471.85	1476.09	1459.53	1433.38	1261.57	1274.55	1364.66	1461.48	1400.55	2216.06	2.96%	58.23%	2.72%
South Korea	243.25	218.78	233.84	243.02	251.06	243.41	228.12	222.83	198.41	148.82	182.68	-2.82%	22.75%	0.22%

Source: otexa

EU Apparel Import Last 10 Years

Value in Million US\$

Country	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	CAGR 2021 VS 2011	Growth in 2021	Share in 2021
World	85549.87	75450.07	77852.23	85593.67	78854.52	79890.19	83494.16	90539.58	89455.44	78641.53	85323.81	-0.03%	8.50%	
China	36124.62	30049.11	29532.07	31513.05	27871.79	25897.88	26034.47	27301.30	25866.76	23603.12	25772.59	-3.32%	9.19%	30.21%
Bangladesh	9450.14	9538.03	10904.94	12446.11	12809.96	13932.50	14595.59	16440.18	16748.05	14181.89	16874.48	5.97%	18.99%	19.78%
Turkey	10073.07	9312.27	9733.76	10103.22	8646.80	8852.61	9232.15	9927.42	9858.30	9302.95	10890.39	0.78%	17.06%	12.76%
India	5239.81	4079.86	4242.73	4745.04	4335.72	4412.64	4465.28	4601.64	4388.08	3390.18	4021.07	-2.61%	18.61%	4.71%
Cambodia	1147.36	1381.43	1686.74	2200.06	2499.70	2997.98	3365.02	3832.21	3680.39	2802.66	2822.31	9.42%	0.70%	3.31%
Viet Nam	1942.01	1876.28	1994.18	2485.32	2575.01	2742.23	2957.03	3332.77	3490.39	3160.92	3381.59	5.70%	6.98%	3.96%
Pakistan	1433.77	1262.56	1392.75	1844.29	1953.98	2143.06	2416.16	2550.46	2725.83	2450.86	3089.76	7.98%	26.07%	3.62%
Morocco	2839.63	2570.09	2570.59	2830.83	2361.49	2615.52	2830.95	3057.89	2950.30	2315.65	2923.25	0.29%	26.24%	3.43%
Sri Lanka	979.45	948.62	903.72	1107.24	1008.15	971.57	1091.86	1252.21	1349.58	1188.05	1411.03	3.72%	18.77%	1.65%
Indonesia	1534.25	1380.91	1316.29	1389.55	1290.09	1305.72	1259.91	1268.67	1276.18	1043.22	1094.00	-3.33%	4.87%	1.28%

Source: eurostat (27) 

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You Shouldn't Ignore



Symptoms of Dehydration:

- ◆ Thirstiness
- ◆ A dry mouth, lips and tongue
- ◆ Headache
- ◆ Have urine that is a darker yellow than usual
- ◆ Dizziness
- ◆ Have a fast heart rate
- ◆ Fainting

**Drink plenty of water
throughout the day to
avoid dehydration**



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