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The Apparel Story

May-June 2023



Cover Story

H&M Group Collaborates with BGMEA

Creating a climate-neutral
and circular garment
sector in Bangladesh

In Focus

TECH-TEX— From where to start?

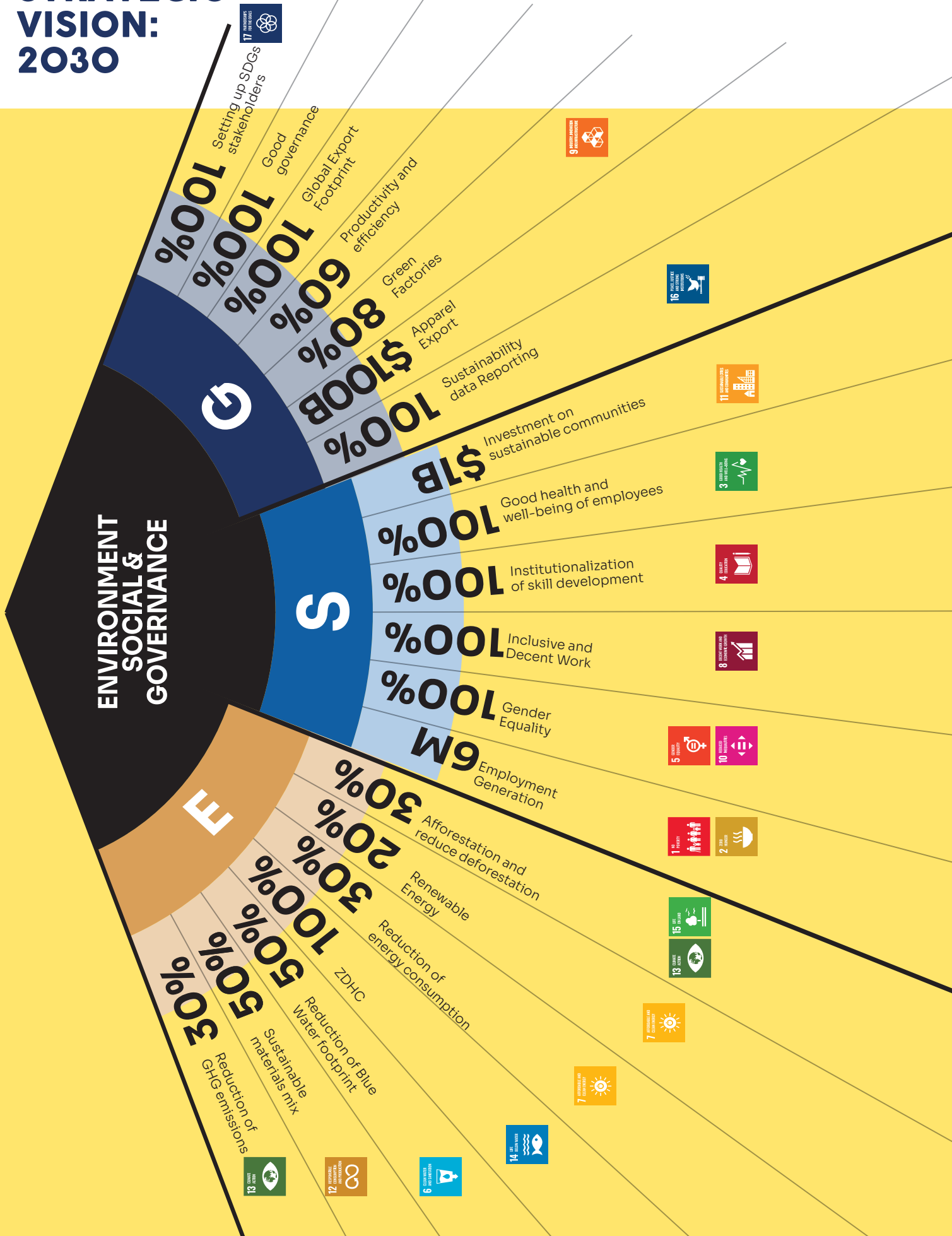


BANGLADESH GARMENT MANUFACTURERS & EXPORTERS ASSOCIATION (BGMEA)

বাংলাদেশ পোশাক প্রস্তুতকারক ও রপ্তানীকারক সমিতি

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EDITORIAL

The tell-tale signs and impacts of climate change are becoming more vivid day by day, posing a serious threat to the earth and its inhabitants. Changes in rainfall already experienced by many places has resulted in more floods, droughts, and frequent and severe heat waves. Climate change is happening globally although its impacts can differ locally. Hence, some regions are more vulnerable to climate change, and Bangladesh is one of them despite being one of the lowest carbon emitters in the world.

Since climate change is not limited to any geographical or political boundary, it will impact you no matter how little you may emit. So concerted efforts and real actions are needed to protect the planet from peril. And this is the very urge felt by the BGMEA as the largest trade association of Bangladesh's readymade garment industry. And this has led BGMEA to formulate a Sustainability Strategic Vision 2030. The vision aims to pursue the growth of the industry in way that is sustainable and positively impacts the environment, people and the economy. In order to translate the vision into a reality, BGMEA and the industry is working with various stakeholders including the government, brands, and international partners. Among the initiatives around sustainability, the recent partnership between BGMEA and global fashion giant H&M is mentionable and significant. The partnership aims to accelerate the transition towards a circular and climate neutral garment industry in Bangladesh. The cover story of this issue details the scope of the collaboration.

While we are happy that the garment industry of Bangladesh has made significant strides in terms of environmental sustainability, we have more to do in this area. As in our vision we aim to reduce 30% carbon emission, 50% use of sustainable raw materials, 100% use of ZDHC chemical usage, 30% reduction of energy usage, and 20% use of renewable energy, it requires collective efforts from all sides including suppliers, brands and buyers. It's a shared responsibility that has to be taken by all. Let's join our hands together to protect the planet and the people.

The Editorial Board
The Apparel Story



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The Apparel Story

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H&M Group Collaborates with BGMEA

Creating a climate-neutral and circular garment sector in Bangladesh



The BGMEA President and the CEO of H&M group signed an MoU in presence of other board members of BGMEA and H&M officials.

Bangladesh is one of the most vulnerable countries to climate change. The effects of climate change have become increasingly evident in Bangladesh, posing a grave threat to the country's ecosystems, agricultural productivity, and overall socio-economic stability. The frequency of extreme climatic conditions, including devastating floods, powerful storms, heavy rainfall, and scorching heat waves, has been on the rise. The consequences of these climatic shifts are not confined to Bangladesh alone; they resonate globally, impacting every corner of the planet and every living being, transcending borders and making it an urgent and critical challenge that demands immediate attention from all sectors,

including the fashion industry. Globally, the fashion industry's contribution to greenhouse gas (GHG) emissions and pollution is significant, given the very nature of its operations. A staggering 60% of a garment's climate impact occurs during its manufacturing process. It is vital for the industry to embrace sustainable practices and innovations to reduce its carbon footprint significantly. From the production of fibers to material processing, dyeing, and finishing, these activities demand substantial energy consumption and heavily rely on various natural resources. To what extent climate change will change the world is still unclear, but one thing is certain: businesses can no longer grow at the cost of the

environment. The decisions taken now and in the coming years will affect the planet. The present level of carbon emissions will determine the severity of climate change in future. Despite the formidable challenges posed by climate change, Bangladesh's readymade garments (RMG) industry has shown remarkable resilience and determination in adopting sustainable practices. The industry has undergone a transformative shift towards sustainability and has emerged as a beacon of hope in the global fight against climate change. The industry now has the highest number of LEED Green factories in the world certified by US Green Building Council USGBC. These eco-friendly factories have embraced

cutting-edge technology and are equipped with all the necessary features to minimize their carbon footprint, emitting an impressive 40% less carbon compared to conventional factories. It is crucial to embrace innovation and technology to drive sustainability further. Research and development in eco-friendly materials, sustainable manufacturing processes, and waste reduction techniques can revolutionize the fashion industry, allowing it to thrive while minimizing its ecological impact. A driving force behind the sustainable revolution in Bangladesh's garment industry is the Bangladesh Garment Manufacturers and Exporters Association (BGMEA). As the apex association of the garment industry in Bangladesh, BGMEA has taken a series of initiatives for protecting environment under its Sustainability Vision 2030 which aims to reduce 30% carbon emission, 50% use of sustainable raw materials, 50% reduction of groundwater usage, 100% use of



Bangladesh's garment industry is making continuous strides towards going green and is already a global leader with the highest number of green garment factories in the world. As the largest trade association for the garment industry, BGMEA is committed to make every possible effort to promote sustainability in the sector and carry forward its achievements. "H&M Group, being one of the leading brands sourcing from Bangladesh, contributes immensely toward environmental, social and economic matters. I hope this collaboration will add pace to our journey toward sustainability. This partnership also reflects the strong commitment of Bangladesh's apparel industry to grow in a sustainable manner to have positive impacts on the industry, the economy and climate."

- Faruque Hassan, President, BGMEA



The President of BGMEA is handing over a token of gratitude to the CEO of H&M.



We know that over 60-70% of our greenhouse gas emission comes from production of garments. So of course this is where all brands in the industry wanted to make an impact, making sure that the value chain become more carbon neutral. I am looking into

H&M, we have taken a goal to decrease our greenhouse gas emissions to half during this decade. To achieve this target we need all these partnerships, that's why we also need commitments from the other stakeholders to work on both energy efficiency and transition to renewable energy. "We need to collaborate and take joint responsibility of our industry. By joining forces and building strong partnerships like this, we will be able to accelerate the well-needed change of the industry and together tackle shared challenges connected to circularity and decarbonisation."

- Ms. Helena Helmersson, CEO H&M Group

To pursue that vision, BGMEA has collaborated with one of the largest fashion retailers in the world, H&M Group. On 31 May 2023, both organizations signed an MoU to accelerate the transition towards a circular and climate neutral garment industry in Bangladesh.

ZDHC chemical usage, 30% reduction of energy usage, 20% use of renewable energy and 30% reduction of deforestation. Such proactive initiatives serve as a model for other countries and industries worldwide, inspiring a global movement towards a greener and more sustainable future.

To pursue that vision, BGMEA has collaborated with one of the largest fashion retailers in the world, H&M Group. On 31 May 2023, both organizations signed an MoU to accelerate the transition towards a circular and climate neutral garment industry in Bangladesh.

Both parties are committed to collaborating in mitigating some of the challenges faced by the garment industry in Bangladesh, in

transforming into more circular and climate neutral practices.


The main objectives of the MoU are – Developing joint advocacy initiatives to create a conducive policy environment in support of a green transition. Conducive policy is essential for GHG reduction and for scaling circularity.

Developing and implementing a strategic roadmap for industry transformation into circular and climate neutral practices, including action plan, financing instruments, training, and necessary tools to reduce GHG emissions in the industry.

Committing to jointly mobilize relevant stakeholders and resources to support circular and climate neutral practices at scale.

Supporting conducive industry-wide policies and practices to scale the recycling of pre-consumer textile waste in Bangladesh.

Undertaking research on pertinent issues within the scope and context of the MoU to complement the policy advocacy and capacity building initiatives.

Sharing knowledge and information on best practice and technology that can accelerate renewable energy, energy efficiency, and circularity performance. 

Scoping Out the Potential of Circularity

BGMEA goes an extra mile



The representatives of BUFT and the University of Borås, Sweden during a MoU signing ceremony.

Circular Fashion is a new concept to the world and rather newer to Bangladesh. Every year, tons of pre-consumer waste generated from the RMG industry of Bangladesh goes into landfill or burning – both are hazardous for the environment. However, aligning with the trend of the world and from consciousness for the world, BGMEA is continuously trying to find out scopes to mitigate the challenges and turn this huge pile of garbage into a resource. In continuation of that, a group of delegation led by Tipu Munishi, MP, Honorable Commerce Minister of the Government of Bangladesh, Faruque Hassan, President of BGMEA and others visited some of the European universities and facilities- who are the most concerned entities to take

the circular fashion seriously. The idea behind this visit was multidimensional -- scoping out the opportunities to collaborate, learn from the best and most importantly, giving a buzz to the fashion world that Bangladesh may be lagging behind but not sitting idly when it comes to the concept of circular fashion.

The delegation team visits Renewcell

So far, the RMG industry of Bangladesh is following a linear model from cradle to grave. It produces around 400,000 tonnes of pre-consumer / post-industrial textile waste annually, of which only 5% is recycled locally. In the majority of the cases, this waste remains

non-segregated; the producers sell it at the lowest value just to get rid of the burden. Currently Bangladesh exports a fraction of its textile waste worth US\$400 million per year which can be reclaimed and turned into other finished goods worth 2 billion dollars.

Renewcell is a fast-growing Swedish textile recycling company with a unique technology. They are planning to recycle the equivalent of more than 1.4 billion t-shirts every year by 2030. Currently they have the expert team at the Renewcell, who are producing Circulose®, which is made out of 100% textile waste. Since BGMEA has also taken a sustainability oath where Circularity is at the core of its Strategic Vision 2030, the delegation team paid a strategic visit to Renewcell. BGMEA



CEO of H&M Group Helena Helmersson, BGMEA President Faruque Hassan, Vice President Miran Ali and H&M Group Country Manager for Bangladesh Ziaur Rahman pose for photograph during the Global Change Award program.

has pledged to increase the sustainable material mix by 50%, in line with SDG 12 and this visit will indeed add value in achieving that goal.

MoU Signing with University of Borås

During the trip, the delegation team also took part in an important task, which was the MoU signing ceremony between BGMEA University of Fashion and Technology and University of Borås, Sweden. Since the very beginning, BGMEA has been trying to drive its fashion university BUFT uniquely, maintaining the updated curriculum and creating a link with the developed world, and this MoU sets another milestone in that journey. Tipu Munshi MP, Honorable Commerce Minister and Board of

Trustees of BUFT; Md. Shafiul Islam Mohiuddin MP, Former President of FBCCI, Chairman of BUFT Board of Trustees; Faruque Hassan, President of BGMEA; Prof. Dr. Engr. Ayub Nabi Khan, Pro Vice Chancellor of BUFT; Md. Moshikul Azam Sajal, member of the BUFT Trustee Board and others were present during the ceremony. The MoU has strengthened the collaboration scope between two universities and opened up possibilities to take part in joint research activities, exchange programs, and most importantly the said universities will share resources to further upgrade and enhance their knowledge.

Global Change Award by H&M Foundation

The main agenda behind the GCA by H&M is to transform the textile

industry into a planet positive one.

Through this initiative, the foundation found and awarded disruptive ideas, with a common trait which involves transforming waste into resources. After selecting the winners, they venture into the year-long GCA Impact Accelerator programme which includes invaluable coaching and support from the H&M Foundation and its partners Accenture, KTH Royal Institute of Technology and The Mills Fabrica. The program is tailored to support each team in developing and scaling their innovation for impact. The BGMEA delegation attended the award ceremony and learned more about recycling ideas. **A**



Opening up a Bright Future for Textile and Garment Cooperation

H. E. Yao Wen
Ambassador of China to Bangladesh

China and Bangladesh have long been enjoying friendly bilateral relations that has grown stronger over the years. The trade horizon between the two countries have been widening while scope of development cooperation is also expanding. H. E. Yao Wen, Ambassador of China to Bangladesh, has exclusively written for *The Apparel Story*, focusing on the opportunity to further deepen the friendship and partnership between two countries. He also sheds light on the potential of collaboration in the area of textile and garment industry.

It is my pleasure to be invited for a written interview of The Apparel Story by BGMEA. Since I landed in Dhaka at the end of last year, I have conducted deep and delightful communication with friends from all walks of life, from which I have fully felt their sincerity and affection towards China, as well as their eager desires for promoting exchanges and cooperation between two countries. I would like to use three key words to describe the prospects of cooperation between China and Bangladesh, especially in the textile and garment industry. The first key word is friendship. China-Bangladesh friendship was forged by the older generation of leaders and has been blessed with care and guidance from the leaders of the two countries. The Chinese government is committed to help Bangladesh to achieve economic development and encouraging Chinese enterprises to invest and start business in Bangladesh. So far, nearly 1000 Chinese enterprises operated here have driven approximately 550 thousand employment opportunities. Furthermore, more and more Bangladeshis have become technical experts by participating in education and training programmes, innovation growth programmes, and environmental protection programmes provided by Chinese enterprises. The second key word is opportunity. According to Chinese Customs Data, last year, China-Bangladesh textiles and garment trade volume was 9.8 billion USD, of which 9.2 billion USD is imported by Bangladesh from China. China has provided a large amount of raw materials and accessories for Bangladesh's RMG exports. From the policy perspective, Bangladesh enjoys zero-tariff treatment for all garment products exported to China. Now China and Bangladesh are jointly working hard on the Free Trade Agreement (FTA),

Now we are working together closely to promote more and more man-made fiber factories to invest in Bangladesh, and encourage Chinese enterprises to build Chinese economic zones. I believe this will help Bangladesh to achieve industrial upgrading and enhance the vitality and resilience of its economy.

which can help Bangladesh continue to achieve stable and sustainable economic growth after graduating from the UN LDC in 2026. From the Chinese market perspective, China will not shut its door of opening-up, it will embrace the world with more open arms. China has a population of more than 1.4 billion and a middle-income group of more than 400 million. China is willing to share its vast market with Bangladesh and welcomes more and more Bangladeshi products to enter China. From the Bangladesh market perspective, Bangladesh will become an upper-middle-income country by 2031. According to a HSBC Global Research, Bangladesh is expected to become the world's ninth-largest consumer market globally by 2030. More and more Chinese enterprises are optimistic about the market opportunities in Bangladesh and are willing to increase their investment here. From the RMG perspective, Mr. Faruque Hassan, president of BGMEA told me that he had been committed to promoting the development of the entire industrial chain of Bangladesh's garment

industry, and hope Chinese enterprises to set up man-made fiber factories in Bangladesh. That's exactly what I thought. Now we are working together closely to promote more and more man-made fiber factories to invest in Bangladesh, and encourage Chinese enterprises to build Chinese economic zones. I believe this will help Bangladesh to achieve industrial upgrading and enhance the vitality and resilience of its economy. The last key word is future. China has entered the new phase of development for building a modern socialist country in all respects, while Bangladesh is striving with no effort to realize the dream of "Sonar Bangla" and "Vision 2041". The two countries share the same goals and vision. I am fully convinced that China-Bangladesh relations will set a good example for developing countries to understand, trust and support each other. An old saying in China goes as "Kindness to neighbors is the treasure of the country". China has been always ready to explore more opportunities with Bangladesh, thereby uplifting our strategic partnership of cooperation to a higher level. 

Reviving the Heritage Material of Bangladesh

A timely initiative by BGMEA



The greater Bengal has been praised for its rich and authentic textile tradition throughout centuries. In the world of threads, this part of the continent has always been in discussion, as it's written in history books that even the wife of Napoleon Bonaparte wore the Muslin fabric, which was considered as the golden thread of Bengal. Not only that, Jamdani's exceptional craftsmanship and cultural significance led to its recognition as a UNESCO Intangible Cultural Heritage. Its unique weaving techniques and regional identity have been safeguarded through the

Geographical Indication (GI) status.

However, with passing time, the charm was lost and instead we focused on the volume-based industry. Even though the volume driven RMG industry has shaped the social and economic transformation of Bangladesh, time has come to move upward in the direction of value added design based fashion. With that aim, BGMEA has taken several initiatives to promote the rich heritage and culture of Bangladesh- such as Jamdani, Muslin, Taant, Khadi, Nakhshi stitch and etc.

Creating High End Fashion with Local Heritage Material of Bangladesh

One of the recent initiatives that BGMEA executed was the titled one. This has been done in association with the Ministry of Commerce, Government of Bangladesh and the project has been funded by the Enhanced Integrated Framework of WTO. Under this project, the workflow followed two streams – on one hand, trainees from fashion universities, trade organization,

associations, fashion designers were selected and got two days training program on how to fusion local heritage material with the international export market, the viability of the products, keeping in mind the sustainability of that and so on. On the other hand, experts formed a team and under the supervision of an international fashion designer, prepared dresses made of local heritage of Bangladesh.

Some of the exquisite product prepared under this program are illustrated below-



"Cotton Candy," - a mesmerizing creation by Crony Group

Each delicate detail whispers the story of a girl reminiscing about her past, from childhood innocence to the anticipation of the present moment. At the heart of this magnificent creation lies jamdani, an exquisite fabric representing the

ancient cloth-making techniques of Bengal. Celebrating this rich heritage, the designer envelops the gown in a nurturing and playful pink hue, capturing the essence of treasured memories. Drawing inspiration from Eastern and Western traditions, the gown harmoniously blends elegance with innovation. "Cotton Candy" is more than a wedding gown; it symbolizes heritage, love, and the enduring power of storytelling through fashion.



Mustard Wedding Corset Gown

A sophisticated modern wedding gown that wraps the figure in pure goddess vibes. The heritage woven Jamdani paneled skirt adds a touch of heritage and radiates elegance. From the strap sweetheart neckline bodice to the clean seams and minimalist aesthetic, every detail is impeccably tailored, creating a chic and romantic look. Designed by Shubhangi Rajput and crafted by the skilled hands of Elias, Sparrow embodies exquisite craftsmanship and impeccable attention to detail.



Sleek and sexy Mermaid gown

Perfect for brides wanting to flaunt their curves, designed with the finest Jamdani textile. Usage of materials like pearls and eye-catching details has distinct this dress from the others. The Dynamic Duo from Shanto Mariam University of Creative Technology- Layla Anzuman and Bishwajit Mazumder, talented 4th-year students have designed this dress of pure beauty.

Objective:

- The COVID-19 pandemic has highlighted the RMG industry's vulnerabilities and need for diversification into the high-end luxury fashion market in order to sustain growth.
- Bangladesh's rich cultural heritage is exhibited in the crafts of skilled artisans producing Muslin, Jamdani, Kantha stitching, natural Indigo dye, etc. This is an invaluable resource for elevating the country's image in the global fashion market.

Overview:

- Total participants: 160 (8 batches), each batch containing 20 trainees
- Participants from: RMG factories,



The President of BGMEA is giving certificate to a Trainee

SMUFT, BUFT, BAFD, Weaver community of Sonargaon and Rupgonj, BKMEA and others

- Training place: Centre of Innovation, Efficiency and Occupational Safety and Health (CIEOSH)
- Training period: 24th May 2023- 19th June 2023
- Tenure: Each batch participated in 2 days training program with a gap of 7-10 days.

Apart from this initiative, BGMEA is also working with other renowned fashion designers to promote heritage materials of Bangladesh. The idea of fusion fashion is brand new in Bangladesh. Even though many other countries in the world are using their heritage materials to create something suitable for the international market, Bangladesh is very inexperienced in this case. However, with time and more initiatives there is hope that one day, just as we have earned triumph in the area of safety and sustainability, our name will also be pronounced in the global market of high end fashion.



Jamdani making is not an ordinary task by any means. We, the weavers do not follow any written pattern or formula rather we create the design from our heart. The younger generation is becoming less interested in taking part in this matter, as the industry is yet not formalized. If this keeps happening, the tales of Jamdani will be thrown away just like Muslin. So, we need cooperation and assistance from everyone to keep this industry breathing.”

—Md. Jamal Hossain,
Weaver and Owner of Pakhi
Jamdani Weaving Factory



“ The world of fashion is changing and so are we. In addition to producing the traditional volume based garments, we are now focusing on the high end market. In that journey, we believe, tagging our heritage material will not only give us a competitive advantage but also will elevate our image in the global market”

—Faruque Hassan,
President, BGMEA



U.S.-Bangladesh Partnership

The Future is Bright



Nate Herman

The American Apparel & Footwear Association and Bangladeshi ready-made garment (RMG) industry have forged a strong partnership over the past three decades. This partnership flourished despite significant challenges facing the industry over the last few years and continues today despite the strong headwinds facing both the U.S. and global economy.

Let's look at the numbers. Today, Bangladesh – as the #3 supplier to the U.S. – supplies more than 10 percent of all garments sold in the United States. During the course of the pandemic, Bangladesh's RMG exports to the United States grew by more than half. Even with the softening American economy, paired with the Bangladesh RMG exports

to the United States down in the first quarter of 2023, the data illustrates that Bangladesh RMG exports for all of 2023 will still show double digit gains over pre-COVID (2019) levels.

Why? The Bangladesh RMG industry is one of the most versatile, responsible, and vertical industries in the world and keeps pushing forward with resiliency. In the face of multiple lockdowns, the industry kept going, while protecting their workers and supporting their workers' families. Despite the pandemic, the industry put worker safety first, through the RMG Sustainability Council (RSC) and organizations like the Accord and Nirapon. This ongoing commitment is critical as we recently marked the 10th anniversary of the Rana Plaza disaster.



The Bangladesh RMG industry is one of the most versatile, responsible, and vertical industries in the world and keeps pushing forward with resiliency. In the face of multiple lockdowns, the industry kept going, while protecting their workers and supporting their workers' families.

During this time, the Bangladesh RMG industry even expanded its commitment to become one of the most sustainable RMG industries globally. Today, the industry can proudly say, for example, that it has the most LEED-certified factories of any RMG industry in the world. For all of these reasons, and many more, Bangladesh remains (and continues to grow as) a critical partner for American brands. Not only is this exhibited in the statistics listed above, but in the fact that many American brands are now testing and sourcing from Bangladesh for related products, like footwear, as well as leather goods and other accessories.

There is growing recognition on the behalf of American brands that this is a two-way street, built on mutual trust and accountability. That means that many American brands are attempting to improve their purchasing practices to reflect the realities involved with manufacturing garments. More American brands are working to avoid changing existing contracts midstream. American brands increasingly recognize that the short-term decisions they make could create negative, long-term impacts on the Bangladesh RMG industry and their workers. American brands are also watching closely areas of concern that could

impact the future of this partnership. American brands hope that the deliberations of the RMG Minimum Wage Review Board truly reflect the views of all stakeholders – the government, the employers, and the workers alike – and acknowledge how economic conditions have changed significantly since the last minimum wage increase on January 1, 2018. There are also growing concerns with increasing barriers to freedom of association, including the threshold to form a union, limited access to worker registries, the long timeline for union registration, and mounting harassment of union leaders.

And, finally, brands are increasingly concerned about the growing number of counterfeit garments coming out of Bangladesh. We should not let our longstanding relationship be tarnished by the scourge of counterfeits. We urge the Bangladesh RMG industry to address these concerns as part of our ongoing partnership. The bottom line is that the future is bright. Our partnership is strong. And by tackling the issues and concerns laid out above, we can work together – both the Bangladesh RMG industry and the American brands – to make this partnership even stronger. **A**

Nate Herman leads the industry's policy work as Senior Vice President, Policy at the American Apparel & Footwear Association (AAFA). Follow with @HermanNate and connect on LinkedIn.



**There is a lot of room for
diversification in our economic
and trade partnership**

H. E. Francisco de Asís Benítez Salas
Ambassador of Spain to Bangladesh

Bangladesh and Spain have long been sharing friendly relations that have become stronger over the years. The bilateral trade between the two countries is growing and there is more potential that can be explored. In an exclusive interview with *The Apparel Story*, H. E. Francisco de Asís Benítez Salas, Ambassador of Spain to Bangladesh, shares his thoughts on the progress and prospects of trade between the two countries, particularly within the scope of textile and clothing.

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

It is true that our bilateral trade has been growing significantly over the years. As a single country, Spain is now the fourth largest customer of Bangladesh, importing around three billion euro worth from Bangladesh, mainly RMG. However, bilateral trade, mainly due to tariff and non tariff barriers, is deeply imbalanced because we only export around 200 million euro worth to Bangladesh. Spain is a very competitive country and our companies and products, very much appreciated globally for their quality, are present in all world markets. There is a lot of room for diversification in our economic and trade partnership. Spanish companies are world leaders in many sectors: infrastructures, highly productive agriculture, fisheries and fishing industry, railways, air traffic management, agro - food processing, to name only a few. In all these fields, our relations could be further extended.

While the global market had recovered from the pandemic, it has once again been hit by the ongoing geo-political tension. Due to the record high inflation, consumer spending on clothing has declined. Retailers are also struggling to adapt to an increasingly inflationary global market. In your opinion, what is the current scenario of the retail clothing market in Spain?

Spain has not been spared by the fallout of the current international situation. Inflation is also high and, therefore, consumers have to adapt their spending patterns. In these adverse circumstances, the retail clothing market in Spain continues to be strong and the different companies in that sector are, to

The evolution and transformation of the RMG industry in Bangladesh over the last 30 years has been astonishing. Today, Bangladesh is the home of many of the most advanced RMG factories and of the highest number of green and environmentally friendly factories in the world. That is a great asset that the industry has and a reason of great pride for Bangladesh.

date, keeping the momentum. Tourism has recovered and this is an important element, since Spanish fashion design and RMG brands are extremely popular among tourists who visit our country.

How would you evaluate the transformation of the RMG industry of Bangladesh in terms of progress in responsible manufacturing, sustainability and the business/economic capability of the industry? Do you think the transformation in the industry will boost the confidence of customers on "Made in Bangladesh" apparel?

The evolution and transformation of the RMG industry in Bangladesh over the last 30 years has been astonishing. Today, Bangladesh is the home of many of the most advanced RMG factories and of the highest number of green and environmentally friendly factories in the world. That is a great asset that the industry has and a reason of great pride for Bangladesh. There are still certain aspects that require attention, improvement and action by the industry leaders and the Government, with a view to the forthcoming LDC graduation in 2026 and in preparation for GSP+ . But I believe the sector is in the right path.

Since Bangladesh has graduated from LDC, how do you think our country and apparel industry should prepare? What should be our strategy towards a smoother transition?

The apparel industry has been growing steadily for a long time and is today the flagship of Bangladesh economic and social progress. The industry leaders are well aware of the challenges ahead and of the growing interest of their customers in foreign markets in matters such as environmental concerns or labour standards. The industry leaders are best suited to assess and decide strategies and course of action.

Anything else you would like to add?

Bangladesh has achieved, in the short span of only 50 years, what no other countries have achieved in terms of economic and social development. The apparel industry is playing a leading role in this process and has given opportunities to millions of people, especially women. This example could be followed by other industries and sectors in the country, with great growth and export potential, in order to diversify the economy and make it more open to competition. **A**

An Encouraging Example of Sustainability

Tarasima Apparels



In the heart of Manikganj, a remarkable and pioneering force in the fashion industry is making waves - Tarasima Apparels Ltd. Established in 2007, this LEED Platinum rated green factory certified by the USGBC has earned a stellar reputation for its unwavering commitment to sustainable practices and production of high-quality apparel. With an impressive area spanning 717,317 square feet, Tarasima Apparels has been a consistent performer since its inception, specializing in Denim, Non-Denim bottoms, and outerwear,

equipped with state-of-the-art wet and dry processing capabilities. Operating with remarkable efficiency, the factory boasts an annual capacity of approximately 19.2 million pieces and this efficiency is made possible by an impressive workforce of 8,200 dedicated individuals operating across 67 production lines. The factory's reputation for high-quality products and reliable service has garnered the attention of prominent buyers such as H&M, Decathlon, Kontoor, Benetton, Primark, Kmart, Inditex, Ralph

Lauren, Target USA, Carter's, and many more, making it a true industry leader. At the core of Tarasima Apparels' mission lies the pursuit of sustainability, embodied through its innovative and conscious initiatives. Among them is the installation of a 3.57 MW Rooftop solar system, occupying a vast 19,680 square meter rooftop space. This trailblazing project has achieved a remarkable 30% reduction in CO2 emissions compared to the base year of 2019, delivering a resounding impact on the factory's carbon footprint.

The adoption of renewable energy sources, primarily harnessed from the sun, has led to a substantial target of annual saving of US\$ 294,000 per year. During regular operations, the solar panels efficiently power the factory, and any surplus electricity is seamlessly integrated into the national grid in the course of the holidays. Embracing sustainability in the fashion industry has become a moral imperative, and Tarasima Apparels Ltd. stands proudly at the forefront of this essential transformation. Tarasima Apparels Ltd. receives a government-determined price for the electricity supplied to the national grid, further enhancing the economic benefits of this sustainable initiative. Mr. Eranga Silva, Sr. GM-Industrial Engineering, Tarasima Apparels Ltd., shares, "Renewable energy is the thread that weaves together sustainability and growth in the RMG sector, empowering us to fashion a brighter future for both our industry and the planet." Implemented as a project of Omera Solar for a period of twenty years with an approximate investment of 26 crores, the primary objective of Tarasima Apparels Ltd. is to contribute to the net-zero approach, actively reduce CO2 emissions, and address the energy crisis. Moreover, this endeavor aligns with the growing demand for sustainability in the fashion industry, ensuring a more environmentally friendly and responsible manufacturing practice. Mohammad Azmul Huda, GM-Admin, HR & Sustainability, Tarasima Apparels Ltd., shares, "Embracing renewable energy in the RMG sector is not just an investment in sustainability; it is an investment in the future of our planet and the prosperity of our industry." A comprehensive approach to sustainability entails the responsible management of resources, especially water. Tarasima Apparels Ltd. has made substantial strides in its Effluent



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Treatment Plant (ETP) processes, recognizing the importance of efficient wastewater management. Shifting from the electrocatalytic oxidation technique, which incurred higher costs, the factory has embraced a biological ETP with a capacity of 150 cubic meters per hour, significantly reducing treatment expenses from 30 taka to approximately 10 taka per cubic meter. Emphasizing water conservation, the factory has implemented an admirable 30% water recycling

system. Treated water from the ETP finds valuable reuse in the washing unit during the production process, promoting a circular and sustainable approach to resource utilization. In an impressive collaboration, Tarasima Apparels Ltd. responsibly manages the sludge produced by the ETP by partnering with Lafarge Holcim, a cement company located in Sylhet, ensuring proper handling and disposal. These actions collectively underscore the company's unwavering commitment to



sustainable water management, reaffirming its dedication to environmental stewardship. Tarasima Apparels Ltd. goes beyond conventional sustainability practices by closing the loop on waste through effective recycling systems. Nearly all cotton fabric scraps generated during the manufacturing process (98-100%) undergo recycling and find renewed purpose in collaboration with Reverse Resources. A robust recycling process involves careful collection, sorting, and processing of fabric scraps, converting them

into usable materials. This approach significantly reduces waste, minimizes environmental impact, and conserves valuable resources. With this circular approach to fashion manufacturing, Tarasima Apparels Ltd. sets a powerful example for the industry. The company not only plays a pivotal role in protecting the environment but also champions the concept of sustainability throughout the supply chain. By recycling and reusing fabric scraps, Tarasima Apparels Ltd. demonstrates its

profound commitment to reducing its carbon footprint and embracing a more eco-friendly and responsible fashion industry. In addition to its formidable efforts towards sustainability, Tarasima Apparels Ltd. implements various good practices to ensure the well-being of its workers and enhance operational efficiency. Some noteworthy initiatives include the practices of providing an on-site fair price shop where workers can purchase groceries and essential items at affordable rates. This thoughtful provision eliminates the



need for workers to visit distant shops or markets, ensuring convenience and accessibility while enhancing their quality of life. Demonstrating a commitment to environmental safety, Tarasima Apparels Ltd. employs 100% ZDHC certified chemicals. Nearly 90% of the chemicals used are at level 3, with the remaining 10% certified at level 1 and level 2. Additionally, 20% of the chemicals are green screen certified, underscoring the company's dedication to environmentally friendly practices. Efficiency and seamless operations

are paramount at Tarasima Apparels Ltd. The factory employs an innovative phone app to streamline maintenance processes. When a machine experiences a malfunction, workers can instantly alert the mechanical team by scanning a QR code using the app. This swift communication allows for immediate repairs, minimizing downtime and optimizing productivity. Tarasima Apparels Ltd. stands as a beacon of sustainability, leading the way for the fashion industry with its green factory practices,

renewable energy initiatives, water conservation efforts, recycling practices, and dedication to worker welfare. With an unwavering commitment to environmental stewardship and responsible manufacturing, the company sets an example for others to follow. As the world embraces the importance of sustainability, Tarasima Apparels Ltd. remains at the forefront, creating a brighter and more eco-friendly future for the fashion industry and the planet. **A**



**The fashion industry needs to
decarbonize and accelerate its
transformation towards circularity**

Helena Helmersson
CEO, H&M Group

Ms. Helena Helmersson is the CEO of H&M Group. In an exclusive interview with The Apparel Story, she shares her thoughts on different issues of the apparel industry, including global market scenario, vision of H&M in Bangladesh, collaboration with the industry in the area of sustainability.

Bangladesh is the country with one of the world's largest shares of pre-consumer textile waste readily available for recycling, which gives the country a great competitive advantage to create a circular model and attract investments from local and foreign investors to scale up the production of high-value recycled fibers from pre-consumer waste.

Bangladesh is the largest supplier country for H&M. Both the partners have been working for a long time. Please share your future vision regarding this partnership and how do you see this growing, going forward?

In the early 80s, we partnered with our first suppliers in Bangladesh and since then the country has become one of our largest production countries. We have over the years established long-term partnerships with suppliers and other local stakeholders and as we look ahead, we look forward to deepening those relationships even further and to continuously develop the industry together.

The overall economy of Bangladesh, particularly the ready-made garment industry has been through a paradigm shift in recent years. How do you evaluate the progress and improvement?

In the recent years we can see a major shift due to digitalization, changing customer behaviors and increased awareness of the environmental impact of the industry. While the industry is adapting to a wide set of challenges, we see a lot of

opportunities that comes with the change. A big part of our efforts is put in shifting towards more sustainable practices when it comes to the environmental footprint. As a company, we are continuously working hard to make progress towards our company goal to half our emissions every decade to reach net-zero by 2040.

BGMEA, as the leading trade body representing the Bangladesh RMG industry, has committed to reach 100BN USD export by 2030. Please share your opinion regarding what should be the top priorities for Bangladesh RMG industry in order to achieve that goal?

For many large fashion brands, including ourselves, climate and circularity are becoming major factors for purchasing decisions. To be an attractive sourcing destination for products destined to markets like the European Union and the US, reducing dependence on fossil fuels and increasing the share of recycled materials are key. Bangladesh has a great potential to build a circular model as the country with one of the world's largest shares of pre-consumer textile waste readily available for recycling.

In addition to a better use of resources, we believe that advancing

the transformation of the renewable energy market towards systemic solutions and mechanisms, such as Corporate Power Purchase Agreements, to increase the generation of renewable electricity in the garment industry, should be another priority for Bangladesh.

After the havoc caused by Covid-19, the global fashion industry has been trying to turn around. How do you see the overall scenario of retail business, particularly in the European markets?

Although the world around us remains challenging, we do see signs of recovery in several areas where developments are going into the right direction. We kindly refer you to our latest financial performance report for more details.

You were previously the Chief Sustainability Officer of H&M, which indicates you have been working with the Sustainability agenda for a long time. You have also shared that as the CEO of H&M Group, your ultimate goal is moving to a 100% circular model. Please share some of the initiatives that've been taken by the group to ensure that? How as the largest sourcing partner, Bangladesh RMG industry can collaborate in this issue?

Taking responsibility of how our products are made and our impact on climate and nature has always been fundamental to us. The work we are doing to shift our business model from being linear to circular lays very close to my heart and as a company, we believe this is the only way forward. In a circular system, products are made by renewable materials and have a considerably longer lifespan before being recycled

or regenerated into new products. Resource use is optimized, and waste is not seen as trash but as a valuable resource, which drastically decreases the current dependency on virgin resources. Our circularity ambition includes, for example, investing in new materials, increasing our use of recycled fibers for our products and providing garment collecting programmes to our customers, to mention a few. Bangladesh is the country with one of the world's largest shares of pre-consumer textile waste readily available for recycling, which gives the country a great competitive advantage to create a circular model and attract investments from local and foreign investors to scale up the production of high-value recycled fibers from pre-consumer waste.

H&M group has shared a corporate commitment to reduce absolute greenhouse gas (GHG) emissions across its value chain by 56% by 2030 and by at least 90% by 2040. BGMEA, being the largest trade body of Bangladesh RMG industry has also committed to facilitate a 30% reduction of GHG emissions at the industry level by 2030. How do you think the signed MoU between BGMEA & H&M group will accelerate the transition towards a circular and climate neutral RMG industry?

This Memorandum of Understanding is a partnership between H&M Group and the Bangladesh Garment Manufacturers and Exporters Association towards a circular and climate neutral garment sector in Bangladesh. We recognize the challenges in our industry and that we need to collaborate and tackle them together. By joining hands in this initiative, we will jointly mobilize resources, engage in joint

While we remain committed to use our size and scale to push the development forward, we acknowledge that a systemic change in the industry is not a task a single brand can solve alone. Therefore, collaboration will be key to achieve positive change at a faster pace. We need to take the responsibility together and it's only by joining forces we can create real change.

advocacy to create a favorable policy environment for the green transition and share knowledge and best practices across.

H&M Group has committed to the Science Based Targets initiative (SBTi) that has standardized what is required of companies to set net-zero targets. What measures are being taken by H&M so that a collaborative approach between manufacturers and brand can be followed to make the supply chain cleaner and greener?

One of our main priorities on our way to achieve net-zero by 2040 is to reduce our absolute greenhouse gas emissions by 56% by 2030, from a 2019 baseline. Given the fact that most of our emissions take place in our scope 3 (e.g. when sourcing raw materials, fabric and garment manufacturing), we are actively focusing on this scope by decreasing our dependency on virgin materials for our products and decarbonizing our supply chain.

Not onboarding new suppliers with onsite coal boilers in their factories was one of the first decisions we

took in January 2022 and moving forward, our next steps are focused on helping the transition towards renewable alternatives. The Green Fashion Initiative or the Sustainable Supplier Facility are some examples of it, where we are making funding available to our supplying factories to invest in the technology and processes needed to reduce energy demand and replace fossil fuels.

Looking ahead, what are H&M's future sustainability goals and ambitions? How does the company plan to stay at the forefront of sustainable fashion and inspire positive change within the industry?

The fashion industry needs to decarbonize and accelerate its transformation towards circularity. While we remain committed to use our size and scale to push the development forward, we acknowledge that a systemic change in the industry is not a task a single brand can solve alone. Therefore, collaboration will be key to achieve positive change at a faster pace. We need to take the responsibility together and it's only by joining forces we can create real change. **A**

TECH- TEX – From where to start?



**Barrister Shehrin
Salam Oishee**

When the whole world echoes development in various sectors, the RMG in Bangladesh is looming around the uncertain or rather confusing arena of what to invest in, in the path following to the future regime of development. The answer many shall voice is Technical Textile. A question may lure in everyone's mind as to why invest in a sector so diverse and different from that which Bangladesh has been specialising in, but the answer lies in the simplest statistical data - the global technical textile market was appraised at \$201.2 billion in 2019, and is

estimated to reach \$274.1 billion by 2027, growing at a CAGR of 5.1% from 2020 to 2027, where the share has seen to rise drastically over the last decade and is expected to rise further.

Many may ask what technical textile is and the answer is definitely not the easiest. Basically these are engineered products with a definite functionality and are manufactured using natural as well as man-made fibres such as Nomex, Kevlar, Spandex, that exhibit enhanced functional properties such as higher tenacity, excellent insulation, improved thermal resistance, user



friendly, etc. The futuristic technical textiles to be used in various places, i.e. planes, cars and fire-fighters' uniforms and other protective gears. We shall be shifting from dressing just humans to dressing objects, especially for safety and security reasons and usage purposes. As drastically different as it sounds, with the world pacing its development to a diverse means of packaging and or usage, we often have to produce items in different forms and uses to encapsulate the lurking need for viability. Technical textiles, a sunrise sector, has become even more relevant

during the Covid-19 crisis when the global manufacturing have come to a grinding halt and the ban on export of critical medical equipment including N95 face masks and protective gears, have made imports to Bangladesh nearly impossible. Bangladesh was entirely import dependent for PPE kits. From manufacturing zero PPE kits in March, it soon rose to manufacturing a wholesome number during the peak of COVID spread. By transforming a Covid-19 crisis to an opportunity, Bangladesh has proven its ability to innovate and rise to the challenge with limited resources and

time. Therefore, it is even more essential for the government and industry to collaborate to boost technical textiles, a high value segment of this sector. Bangladesh is the 2nd largest textile producer in the world, after China. But in the market share for technical textile, we are so far from the dominant chart. The Asia Pacific dominated the technical textile market with a share of 45.9% in 2019. China is the largest exporter of technical textile products with a share of 24%. This is followed by USA, Germany and Republic of Korea with a share of 10%, 9%, and



4% respectively. Penetration into this market set up will only be possible if this next shift in sector is done with the most modernised and fluent set up of factories in the shortest possible time. Bangladesh is a very pleasant destination for brands across the world luring them by our green and safe industry practices and set-ups. So it shall not be difficult to get the brands to take from us technical textile only if we can possibly move from the traditional clothing production to these newer items in a fast track basis.

To initiate the production of

technical textile we need to know the nearest competitors that we shall face in order to establish our share in the market. China and India are more dominant countries in the technical textile sector around us. India is the world's second largest polyester producer and its market size is 19\$ billion. India has set up a scheme within an average growth rate of 15-20% to increase their domestic market size of technical textiles to 40-50 billion at 2024; through market development, technological development, international technical collaborations, market and investment promotion. These nearly shortlists the necessities for the Bangladesh to atrium in technical textile production.

The first hurdle for this new sector shall be the unwillingness for the many old school pioneers of the RMG sector in Bangladesh to change their mind-set from clothing production to technical textile production. It is not just a different set of industry but also a new set of expertise, worker development, client base, etc. Hence being fearful might be a normal reaction. Many RMGs had resorted to production of medical protection kits and other similar items in large scale during COVID has now seen a halt when they wanted to shift to the production of various other technical textiles besides those during that period.

During the production process, Bangladesh realised it lacks the infrastructure, research facilities and skilled labour to compete significantly in the global market. Hence it was time to do the crucial research before the set-up. The first question was, what to produce? There are 12 segments of technical textile:

1. Meditech (Diapers, Sanitary Napkins etc.),
2. Mobiltech (Airbags, Helmets, etc.),
3. Oekotech (Recycling, waste disposal, etc),
4. Packtech (wrapping fabrics, jute sacks, etc.),

5. Protech (bullet proof jackets, fire retardant, etc.)
6. Sportech (sports net, artificial turf, etc.),
7. Agrotech (fishing nets, etc.),
8. Buildtech (cotton canvas, canopies, etc.),
9. Clothtech (zip fasteners, umbrella cloth, etc.),
10. Geotech (geogrids, etc.),
11. Homech (mattress and pillow fillings, carpets, etc.),
12. Other Geotechs (conveyor belts, vehicle seat belts, etc.).

It is fair to say that Bangladesh has the potential to feed a large portion of the global demand for technical textile. Manufacturers of technical textiles use both natural and man-made raw materials. The beautiful part is, one need not have to look outside the country for business initially, the country has a continued requirement also. There is a correlation between prosperity and consumption of Technical Textiles as witnessed in the US and Europe. This is precisely what is happening with Bangladesh's steady growth in recent years. It is little wonder that the US and Europe should look at Bangladesh as the market to enter as they reckon that after China, Bangladesh can dominate this sector, as in the RMG exports globally within the next decade. There are, however, two backdrops that have a direct bearing on the growth and development of Technical Textiles in Bangladesh: the absence of an Evolved Eco System and the absence of a mechanism that would allow for easy entry of SMEs into this segment

The first back drop is the absence of a technical textile ecosystem. It is not as evolved as the ecosystem that supports the well settled RMG Industry for the past 4 decades. The technical textiles ecosystem may take time to evolve and consolidate because it is Capital Intensive, Knowledge Intensive, Skill Intensive and Innovation Intensive, and it shall be no less than a steep challenge to avail all around the same time and place to initiate the

new sector.

Innovation is an outcome of Capital, Knowledge and Skill (CKS) together, and unless the grades of CKS are really high the question of innovation will never arise and unless innovation is possible, the Eco System is as good as dummy. To explain it in a simple language, one may want to argue that Technical Textiles too does substantial business but what one has to bear in mind is that of the total business it is expected to do in Bangladesh, a large proportion will be component or in rolled goods form that shall be converted and assembled in Bangladesh, with the rest of the domestic production, barring few exceptions, is largely confined to very low end commodity type products. To manage assembling and manufacturing low grade products, an eco system that is technical textile specific is not required, as a matter of fact if the industry fails to go above the business of importing and converting, the question of an Eco System forming in Bangladesh does not arise at all. Hence it's crucial to start investing to ensure bottom-up production technique and adopt progressive and futuristic method of technical textile production. A huge support, logistical and financial, shall be required from the Government for these developments to realise.

The second backdrop is the absence of a mechanism that will enable millions of the enthusiastic SMEs and freshers to enter Technical Textiles. The new sector shall be for all types of industries. It has to be borne in mind that the success of Technical Textiles in Bangladesh will totally and absolutely depend on SMEs entry. Currently we do not have a mechanism that will enable the early entrants to make their progress right up the business entrance line. There are awareness and training programmes being conducted by several institutions. When these groups arrive at the final destination which is commercial operation, there may not

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exist an Eco System to support them which will delay and in several cases weather away these enthusiastic new-comers ready to invest in the technical textile sector. Besides this, lack of skilled personnel, technological development, research limitation and many other problems also hinder our faith being established in technical textile production. We are highly depended for procuring raw material to China and India. In value terms, China (\$9.5M) the largest supplier of technical textiles to Bangladesh, comprising 41% of total imports. We need to be self-dependent on these raw materials for effective and on-time production and also keep to stable our market price. The collaboration of industry and institution-based technology training can make an affordable

result. It could meet the increasing demands of skilled personnel and by developing our indigenous textiles can also expand our technical textile market. Education based training courses providing expertise in technical textile shall further the future in this industry.

With the strong marketing leadership, we need to highlight our manufactured technical textile products to the world with their benefits. We have recently developed the Sonali bag and glass fiber from jute, both are biodegradable and eco-friendly. Our capability and innovation knows no bounds, but our hands are tied by fear and uncertainty. The government of Bangladesh has launched various conduct schemes and policies for textile and apparel manufacturers to make them globally competitive. But we need technology up-gradation, infrastructure development, export promotion etc. for technical textile now. Various countries have also proclaimed their textile policies aimed at attracting investments in their states. Bangladesh must step up the public investment to attract, attain and develop the much profitable sector of technical textile production.

Impossible is nothing, is not just a notion, but a belief. Hard work, dedication and self-faith have brought Bangladesh to becoming a role model of development across the world. So with a little more challenge accepted, a few steps of cooperation by the government itself, some futuristic innovative ideas from the freshers and support from the global buyers, the Bangladeshi workers can yet again show a glimpse of their dainty perfectionist hand work in producing technical textiles finer than any other nation across the globe. 

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

HOME TO WORLD'S HIGHEST NUMBER OF GREEN READYMADE GARMENT FACTORY

200

LEED Green
Readymade garment
factories certified
by the U.S. Green
Building Council
(USGBC)

13 OUT OF
THE WORLD'S
TOP 15

readymade
garment
factories are
in Bangladesh



73
PLATINUM



113
GOLD



10
SILVER



Best Practices in RMG Factory



High Volume Low Speed Fan

Quality air control within factories has multifarious benefits. It greatly enriches the working environment by circulating cleaner air, helps employees be more alert and enhance their concentration that assures better results and increases their level of productivity. Not surprisingly, an increasing number of factories are setting up High Volume Low Speed (HVLS) fans to maximize air ventilation in their factories.

Technically advanced HVLS fans move large volumes of air over an area of up to 22,000 square feet. A single HVLS fan can replace as many as 20 floor fans, reducing noise and clutter on the ground and substantially lowering the chances of accidents. The fans are not only safer, cooler and less noisy, but also more cost-effective in lowering energy bills.



Daylight simulation excluding UV ray

More and more factories are now in partnership with nature and making the best use of daylight that nature provides. Instead of using electric lights incessantly, they are constructing the roofs in such a way they permit the maximum daylight to enter, reduce the necessity of electric lighting and save energy. Some factories also use technology that prevents the harmful UV rays from entering. ^A



Solar PV in Bangladesh RMG Sector

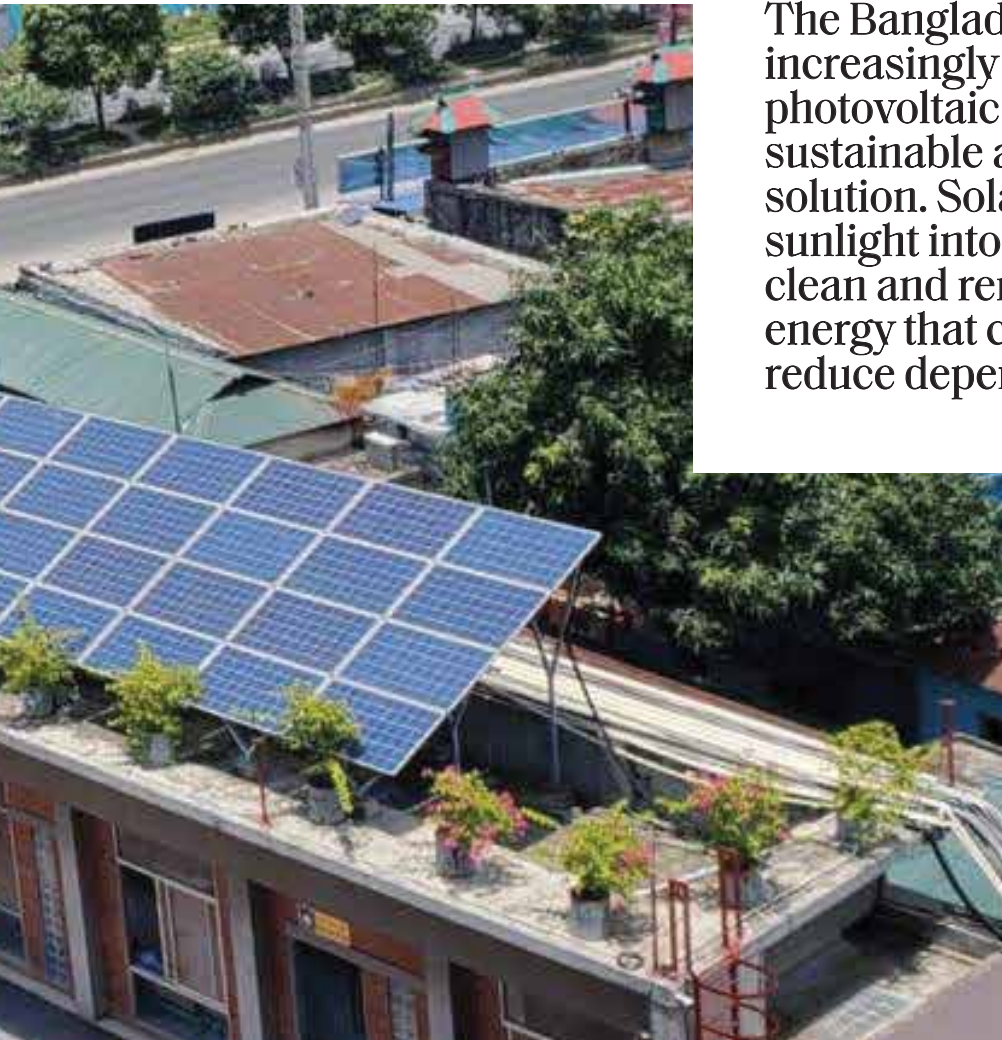
A Sustainable Solution

The readymade garments (RMG) industry in Bangladesh is one of the largest contributors to the country's economy, employing millions of workers and generating significant export revenues. However, the industry is also known for its heavy reliance on fossil fuels, particularly for electricity generation, which not only contributes to environmental pollution but also increases production costs.

To address these challenges, the Bangladeshi RMG industry is increasingly turning to solar photovoltaic (PV) technology as a sustainable and cost-effective solution. Solar PV systems convert sunlight into electricity, providing a

clean and renewable source of energy that can power factories and reduce dependence on fossil fuels. One of the main reasons why solar PV is gaining popularity in the RMG industry is its potential for significant cost savings. Solar energy is abundant in Bangladesh, with the country receiving an average of 5.5 kWh of solar radiation per square meter per day. By installing solar PV systems, garment factories can generate their own electricity and reduce their reliance on expensive grid power or diesel generators, resulting in substantial savings on energy bills. Moreover, solar PV systems have a long lifespan and require minimal

maintenance, making them a reliable and low-maintenance energy solution for garment factories. This is particularly important in Bangladesh, where frequent power outages and voltage fluctuations are common. With solar PV, factories can ensure a stable and uninterrupted power supply, minimizing disruptions to production and improving overall efficiency. Additionally, solar PV systems contribute to environmental sustainability and help reduce carbon emissions. Bangladesh, being one of the most vulnerable countries to climate change, has been taking steps to reduce its carbon footprint. The RMG industry,



The Bangladeshi RMG industry is increasingly turning to solar photovoltaic (PV) technology as a sustainable and cost-effective solution. Solar PV systems convert sunlight into electricity, providing a clean and renewable source of energy that can power factories and reduce dependence on fossil fuels.

However, despite the numerous benefits, the adoption of solar PV in the RMG industry still faces certain challenges. The initial cost of installing solar panels can be high, making it difficult for small and medium-sized garment factories to afford. Moreover, the lack of awareness and technical expertise among garment manufacturers about solar PV systems poses a barrier to its widespread adoption. To overcome these challenges, stakeholders, including the government, development partners, and industry associations, need to work together to create an enabling environment for solar PV in the RMG industry. This can be done through providing financial support, technical assistance, and capacity building programs. Additionally, awareness campaigns and knowledge-sharing platforms can help educate garment manufacturers about the benefits and process of installing solar PV systems. In conclusion, solar PV has the potential to revolutionize the RMG industry in Bangladesh by providing a sustainable solution to the challenges of high energy costs and environmental concerns. By adopting solar PV systems, garment manufacturers can reduce their dependence on the national grid, save on electricity bills, and contribute to environmental sustainability. However, addressing the challenges and creating an enabling environment for solar PV adoption requires collective efforts from all stakeholders involved. **A**

being one of the major contributors to greenhouse gas emissions, can play a crucial role in achieving the country's climate goals by adopting renewable energy solutions like solar PV.

The government of Bangladesh has also recognized the potential of solar PV in the RMG industry and has implemented various initiatives to promote its adoption. The government launched programs with financial incentives, such as low-interest loans and tax benefits, to facilitate the installation of solar panels. Additionally, international organizations and development partners have also been actively involved in promoting solar PV in the RMG industry. For instance, the International Finance Corporation (IFC) has been working with

garment manufacturers to help them adopt renewable energy solutions, including solar PV. Through its initiatives, the IFC has provided technical assistance, financing, and capacity building to help garment factories install solar panels. The adoption of solar PV in the RMG industry not only benefits individual garment manufacturers but also contributes to the overall sustainability of the sector. The RMG industry in Bangladesh has been under scrutiny in recent years due to concerns about worker safety and environmental sustainability. By embracing solar PV, garment manufacturers can improve their environmental performance and enhance their reputation as responsible and sustainable businesses.



Moving Towards a Green Garment Sector in Bangladesh



Shafiqul Alam

American author Neale Donald Walsch said, “The era of the Single Savior is over. What is needed now is joint action, combined effort, collective co-creation.” Walsch’s quote, taken in the context of Bangladesh’s readymade garment (RMG) sector, reflects the elements that are the need of the hour for a green energy transition. The RMG sector, which makes up more than 84% of the country’s export earnings, needs to spearhead ambitious greening efforts amid the growing sustainability measures pursued by international garment buyers. Together with international buyers and support from the government, the RMG sector needs

to create a strong strategy for an effective and just transition to green energy.

The sector has already pledged to cut down 30% of its greenhouse gas (GHG) emissions by 2030. However, this is an ambitious goal and may require meeting incremental mitigation targets set by buyers in the foreseeable future.

The imperative for incremental efforts

Although rooftop solar plants appear to be low-hanging fruit to reduce fossil fuel-based electricity consumption, discussions with stakeholders reveal that capping



The Bangladesh RMG industry is one of the most versatile, responsible, and vertical industries in the world and keeps pushing forward with resiliency. In the face of multiple lockdowns, the industry kept going, while protecting their workers and supporting their workers' families.

rooftop solar energy installation to 70% of the sanctioned load may limit the use of clean energy by many industries to 5%. This is because industries, which also include drying, washing and other units, have significant energy consumption. Many old industries cannot accommodate rooftop solar systems of 70% of the sanctioned load as their roofs lack weight-bearing capacity. Some factories have already been pursuing energy efficiency measures as part of their continuous improvement process. A combination of energy efficiency and conservation measures and rooftop solar intervention might still fall

significantly short of the 30% GHG mitigation goal. The international buyer, for example, multinational clothing company H&M, has a more ambitious GHG mitigation goal to reach by 2030. Notably, manufacturing units in host countries produce a significant part of the overall GHG emissions of an international buyer. This will posit the need for additional green interventions in the RMG sector.

Corporate PPAs may help

While buying carbon credits from voluntary carbon markets is an option to offset part of the

emissions, RMG factories will not find this viable. Instead, they will prefer buying renewable energy generated by independent power producers (IPPs), riding on corporate power purchase agreements (PPAs). Seminars broach similar discussions for several reasons. For instance, IPPs dominate Bangladesh's renewable energy sector, and this trend will continue in the foreseeable future. The contribution of renewable energy to the national grid is also limited, and the energy consumption need of the RMG industry is unique in relation to its emission reduction goal. With long-term corporate PPAs, the RMG sector can decarbonise its production process at an accelerated rate while paving the way for increasing the share of renewable energy to the national grid and contributing to the country's Nationally Determined Contributions under the Paris Agreement. The private sector may build on the experience of renewable energy IPP projects. However, distribution utilities may not appreciate corporate PPAs owing to the concern over revenue loss from electricity sales. Distribution utilities can still generate revenue by charging a transmission cost. Industries must confirm that they have used the available rooftop space for solar systems before purchasing additional electricity from IPPs. Land-starved Bangladesh does not have the luxury of relying solely on ground-mounted solar systems.



While more stakeholder discussions are expected on the demand for corporate PPAs in the coming days, such agreements are complex, with potential grounds for future disputes. Therefore, for the sustainability of corporate PPA as an instrument, the government's regulatory guidelines shall consider future challenges along with mediation.

Globally, contracted corporate PPAs were more than 10% of the total renewable energy capacity addition in 2021. Corporate PPAs have also created significant interest among Indian consumers in light of the climate goals of business entities. Project developers in India expect corporate PPA volume to grow by 10 gigawatts (GW) annually soon. Bangladesh can take lessons from India's experience regarding the challenges and the way forward.

No impetus for green energy

As of 8 March 2023, Bangladesh had 192 green RMG factories,

certified by the United States Green Building Council (USGBC) under the Leadership in Energy and Environment Design (LEED). The Bangladesh Garment Manufacturers and Exporters Association (BGMEA), the RMG sector's apex body, received the USGBC leadership award in 2021 for making strides towards green energy in the sector.

However, garment exporters feel they do not get any impetus for the additional cost they incur on their greening efforts. The absence of incentives may hinder them from furthering their green ambitions. Greening efforts, which come at a cost, should not adversely affect around 5 million people, employed in the sector.

Since international buyers and local garment manufacturers have a common vision of reducing emissions, having a premium price for products could provide relief to the factory management. However, local garment manufacturers should do this, considering the price competitiveness of their products in

the international market.

Factories need other support as well. They may be informed of recent technology trends and told about the different approaches they can adopt for a smooth transition to green energy. International buyers may enhance capacity development programmes for factories. The recently signed Memorandum of Understanding (MOU) between BGMEA and H&M for cooperation on GHG mitigation is a step in the right direction.

A policy landscape that offers a clear pathway to procure competitive solar energy is a necessary pre-condition as the export-oriented garment industry of Bangladesh competes in the international market, which is now more aware of climate change. Besides this, support from the international buyer will help create a green and just energy transition in Bangladesh's RMG sector. **A**

Shafiqul Alam is an energy analyst at the Institute for Energy Economics and Financial Analysis (IEEFA).

A Shining Example of Responsible and Sustainable Business Practices in Garment Sector

Pacific Jeans Group



Anwarul Islam

As the global community faces the challenges of climate change, the fashion industry, including garment manufacturers, has come together to take collective action. Pacific Jeans Group, a pioneer in premium jeans manufacturing, is at the forefront of this movement, spearheading sustainable practices and renewable energy adoption. With a commitment to reducing carbon emissions and promoting renewable energy, Pacific Jeans Group stands as a shining example of responsible and environmentally-conscious business practices in the garment sector.

The Necessity of Renewable Energy

Renewable energy adoption is a critical necessity in today's world. The burning of fossil fuels for energy production releases vast amounts of greenhouse gases, contributing to climate change and environmental degradation. The fashion industry, being a significant player in global manufacturing, has a substantial carbon footprint. By embracing renewable energy, companies like Pacific Jeans Group can significantly reduce their environmental impact and contribute to global efforts in mitigating climate change.



The Field of Using Renewable Energy in the Garment Sector

Pacific Jeans Group has taken a pioneering approach to adopting renewable energy in the garment sector. The group's green energy transition includes the installation of rooftop solar power plants in its factories. These solar power plants harness clean and sustainable energy from the sun, enabling the factories to reduce their dependency on traditional energy sources and lower their carbon emissions.

"The transition to clean, affordable renewable energy is inevitable for combating climate challenges and sustainable future."

Syed M. Tanvir
Managing Director
Pacific Jeans Group

Commercial Viability of Renewable Energy-Based Power for Industrial Use

The adoption of grid-tie rooftop solar power plants without storage media proves to be highly viable for industrial use due to its cost-effectiveness, space efficiency, and immediate utilization of solar-generated electricity in production processes. With shorter return on investment (ROI) periods and potential savings on maintenance costs, this approach presents a compelling case for other industries to follow suit.



Opportunities and Challenges for the Fashion Industry

While embracing renewable energy presents immense opportunities for the fashion industry, challenges such as high capital investment, technological considerations, and reliable vendor selection need to be addressed. However, the potential to generate low-cost sustainable energy, reduce environmental impact, and contribute to national energy security far outweigh these challenges.

Large-Scale Rooftop Solar Power Plants Implemented by Pacific Jeans Group:

Pacific Jeans Group has installed rooftop solar plants in multiple factories, including Pacific Jeans Ltd, Universal Jeans Ltd., and NHT Fashions Ltd. These solar power plants utilize Tier-1 PV modules with high efficiency, ensuring reliable and sustainable energy generation.

Green Energy Transition Plan of Pacific Jeans:

Pacific Jeans Group has set an ambitious target to install rooftop solar power plants in all of its manufacturing units by 2025 aiming to source at least 20% of its energy requirements from renewable sources. This expansion plan also aims to maximize clean and sustainable energy generation, further reducing the group's carbon footprint.

Furthermore, Pacific Jeans Group plans to advocate for green energy transition within the garment industry, encouraging stakeholders to adopt sustainable practices. Pacific Jeans Group envision generating approximately 40,980 MWh of green energy annually, resulting in a substantial reduction of 27,461 tons of CO2 emissions each year. This will help us to achieve our target of 65% GHG emissions reduction by 2030 [FY2018] in accordance with SBTi [Science Based Targets] guidelines and Paris Agreement.

Energy Performance Monitoring and Optimization:

The group is committed to continuously monitoring and optimizing the energy performance of its solar power plants. Real-time generation data, collected through integrated weather stations with

irradiance sensors, will be analyzed to ensure maximum efficiency and output from the solar installations.

Skill Development and Collaboration with the stakeholders:

Recognizing the need for expertise in renewable energy integration and management, Pacific Jeans Group plans to collaborate with leading experts and organizations in the field like USAID, GIZ, IDCOL etc. This collaboration aims to facilitate skill development and knowledge sharing, enabling the group to stay at the forefront of renewable energy practices.

Advocacy for Green Energy Transition:

Pacific Jeans Group engaged with industry associations, such as BGMEA, OXFAM UK to advocate for the adoption of renewable energy practices across the garment sector. By sharing its success stories and best practices, the group aims to inspire other manufacturers to follow suit and work collectively towards a greener future.

Pacific Jeans Group's comprehensive plan for renewable energy adoption exemplifies its unwavering commitment to sustainability and environmental responsibility. By implementing large-scale rooftop solar power plants, establishing an IPP project, and actively involving stakeholders, the group is well on its way to achieving its carbon emissions reduction targets. As a trailblazer in the garment sector, Pacific Jeans Group sets a powerful example for others to follow. Through collaborative efforts and collective action, the industry can transition towards a more sustainable future, making a significant contribution to combating climate change and preserving the planet for generations to come.

Anwarul Islam is the General Manager and Group Head of Sustainability at Pacific Jeans Group.

Shalban Bihar an Archaeological Wonder

Idyllically located between Lalmai and Mainamati in Cumilla, this Buddhist Bihar (monastery) is the remains of an ancient Bengal and proudly stands tall in testimony to the region's golden past. A fascinating history engulfs this eight-century religious institute. It is one of the earliest institutions in the region used for acquiring knowledge.

Founded by Bhaba Deva, 4th ruler of the Deva dynasty, the monastery has four wings each having a length of 550 ft. (168m). There are 115 monastic-cells, where once the Buddhist monks slept, studied, meditated and prayed in private.


This great monastery, made of thin brick, has all the appearance of a fort on approach. Excavations have unearthed countless archaeological treasures, including 8 copperplate inscriptions, 18 gold and 350 silver coins, gold ornaments, statues of various sizes, terracotta plaques, seals, and everyday objects. These are now housed and on public display in a museum beside the Salban Bihar.



Panam Nagar: An abandoned city

Once a thriving economic and political center of Bengal, Panam City, stands today as an abandoned city. Located in Sonargaon upazila of Narayangaj district, now stands deserted, protected by Bangladesh's Department of Archaeology. It served as Bengal's former capital, playing crucial roles in administration, commerce, and maritime activities under various empires, including Sultan Fakhruddin Mubarak Shah, Isa Khan, and the Baro-Bhuyan Confederacy. The architectural remnants reflect influences from the Sultanate, Mughal, and British colonial eras.

During the British colonial period, Panam flourished as a hub for Muslim trade, resulting in luxurious residential houses reflecting Indo-European architecture. However, the Indo-Pak war in 1965 forced Hindu cloth merchants to abandon the city, leading to its current state of decay.

Today, it is a major attraction for archaeologists and tourists alike. Despite its current state of abandonment, Panam continues to serve as a testament to the grandeur it once held in the past. 



Redefining Bangladeshi Fashion with Style and Global Vision



Step into the vibrant world of Yellow, a Bangladeshi fashion brand that has taken the nation's fashion scene by storm. Established in 2004, Yellow has swiftly risen to popularity, offering stylish and affordable clothing tailored to the dynamic Bangladeshi market. With a sharp focus on the young, urban audience, Yellow captures the essence of global trends and infuses them with a unique Bangladeshi touch. As the brand expands its horizons beyond national borders, let's explore what sets Yellow apart as a rising star in the Bangladeshi fashion industry and how it is poised to become a global fashion leader.



Stylish and On-Trend:

At the core of Yellow's appeal lies its commitment to staying abreast of the latest fashion trends. With their designers jet-setting across the globe, the brand ensures that its designs reflect the pulse of contemporary fashion while staying true to Bangladeshi sensibilities. By blending international trends with local aesthetics, Yellow crafts clothing that resonates with fashion-conscious individuals seeking to make a statement without breaking the bank.



Affordable Luxury:

Yellow has won the hearts of budget-conscious shoppers with its emphasis on affordability without compromising on quality. The brand's high-quality materials and expert craftsmanship make its clothing a compelling choice for those seeking value for their money. Yellow's dedication to making fashion accessible has solidified its position as a go-to destination for style-savvy individuals looking for an exceptional shopping experience.

A Strong Marketing Presence:

Yellow's success can also be attributed to its strategic marketing efforts. With a strong presence on television and in magazines, the brand has skillfully promoted its identity, products, and values. By captivating the imagination of its target audience through engaging advertising campaigns, Yellow has created a strong brand identity that resonates with customers across the nation.

Global Ambitions:

As Yellow continues to flourish in the local market, the brand has set its sights on broader horizons. By establishing stores in Pakistan, Dubai, and New York City, Yellow has laid the foundation for its global expansion. With a focus on tapping into international markets, the brand aspires to become a prominent player in the global fashion arena, representing the creativity and craftsmanship of Bangladesh to the world.

Challenges and the Path Forward:

While Yellow enjoys a meteoric rise, it faces competition from other well-established Bangladeshi fashion brands. Staying ahead in the fiercely competitive market will require continuous innovation, astute marketing, and the ability to anticipate and cater to evolving consumer demands. Additionally, the uncertain global economic

climate poses challenges that Yellow must navigate with resilience and adaptability.

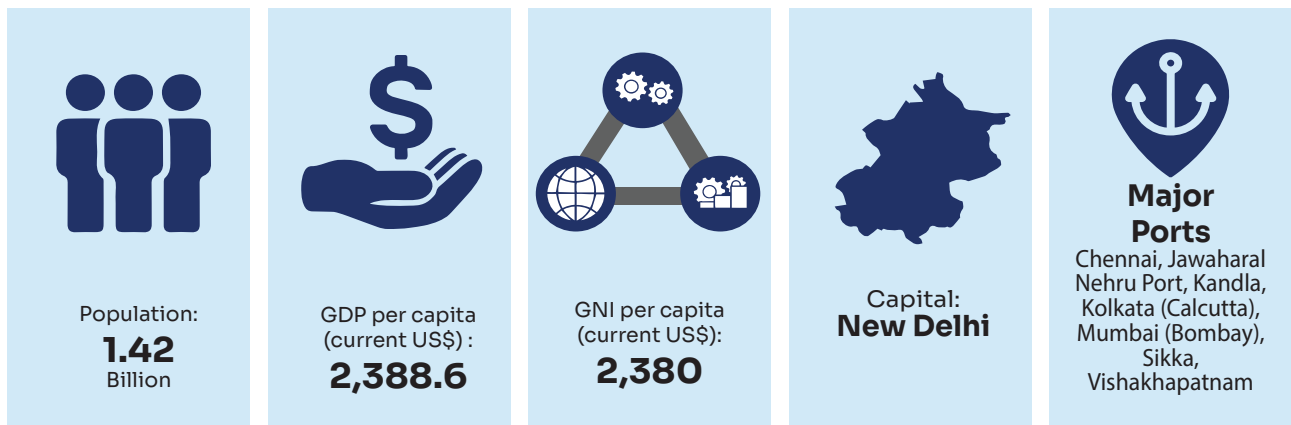
Yellow's journey is a testament to its unwavering commitment to style, affordability, and global vision. As the brand blazes a trail in the Bangladeshi fashion landscape and beyond, its emphasis on innovation, sustainability, and customer-centricity sets it apart as a trendsetter in the industry. With a loyal customer base, a keen eye on international markets, and a determination to overcome challenges, Yellow is well-poised to emerge as a true global fashion leader. As we eagerly await the unfolding chapters of Yellow's success story, there's no doubt that this Bangladeshi fashion brand is destined for greatness on the world stage. **A**



Tapping the Emerging Market: India

India is the third largest economy in Asia after China and Japan. It is also one of the important players in the world market. Characterized by an abundant supply of natural resources and large and well-developed financial, legal, communications, energy, and transport sectors and a rapidly expanding middle class, India's economy almost outweighs that of all other African countries. The country's modern infrastructure supports a relatively efficient distribution of goods to major urban centers throughout the region. India is one of the five emerging (BRICS) economies in the world. India continues to pursue industrial and agricultural growth and development of its interior. It is expanding its presence in world markets. India's daily necessity is growing high as a nation resulting in a growth of import every year. There are significant value chain linkages between India and Bangladesh, particularly in the textile and apparel sector. India specializes in the upstream segment, supplying such intermediate inputs as silk, cotton, yarn, and fabrics to Bangladesh. Bangladesh specializes in the downstream final apparel segment, exporting worldwide as well as to India.

Demographic and Economic Overview of India



Source: The World Factbook – CIA & World Bank

Bilateral Trade:

Table -1: Bilateral trade between Bangladesh and India
(Value in million USD)

Year	BD's Export to India	BD's Import from India	Trade Balance
2017-18	873.27	8621.50	-7748.23
2018-19	1248.05	7647.52	-6399.47
2019-20	1096.38	5793.00	-4696.62
2020-21	1279.67	8593.54	-7313.87
2021-22	1991.39	13689.95	-11698.56

Source: Bangladesh Bank and Export Promotion Bureau (EPB)



India's Clothing Import from the World:

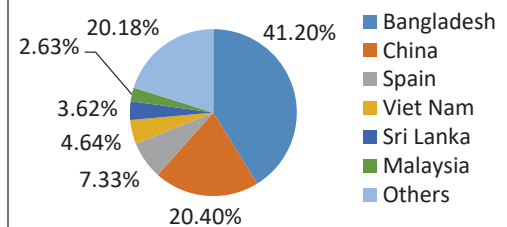
Bangladesh is the largest apparel import source for India. In 2022, India imported US\$ 1.72 billion worth of apparel from the world whereas the share of Bangladesh was 41.20%.

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

Exporters	2020	2021	2022	Share in 2022
World	889.27	1158.31	1725.57	
Bangladesh	297.70	474.29	710.96	41.20%
China	303.50	279.73	351.98	20.40%
Spain	68.39	103.42	126.53	7.33%
Viet Nam	34.09	49.81	80.00	4.64%
Sri Lanka	27.21	43.88	62.43	3.62%
Malaysia	2.45	2.40	45.40	2.63%
Others	155.93	204.77	348.28	20.18%

Source: ITC Trademap

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



Bangladesh's Clothing Export to India:

In past 10 years, Bangladesh's apparel export to India has been increased annually by 29.70% CAGR. In last fiscal year 2022-23 Bangladesh crossed one billion dollars milestone to India. Bangladesh mostly export trousers, t-shirts & knitted shirts, blouses and shirts ,undergarments & sweater to India. In aggregate, these major 5 products account for almost 84% of Bangladesh's total apparel export to India.

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

Year	Knit	Woven	Total	Growth
2012-13	14.34	60.87	75.21	36.70%
2013-14	19.81	76.44	96.25	27.98%
2014-15	22.32	81.93	104.25	8.31%
2015-16	34.25	102.17	136.42	30.86%
2016-17	37.45	92.36	129.81	-4.85%
2017-18	71.06	207.62	278.68	114.68%
2018-19	129.66	369.43	499.09	79.09%
2019-20	148.51	272.21	420.73	-15.70%
2020-21	168.37	253.49	421.86	0.27%
2021-22	315.57	399.84	715.41	69.58%
2022-23	432.15	580.70	1012.85	41.58%

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

India's cotton & non-cotton clothing import share in 2022

India imported USD 1.72 billion worth of apparel from the world where the share of cotton made items was 43.68%. On the other hand, the share of non-cotton items by India from Bangladesh was 38.79% only of total apparel imports while the share of cotton items was 61.21 %.

Figure-2: Share of India's cotton & non-cotton clothing import from world

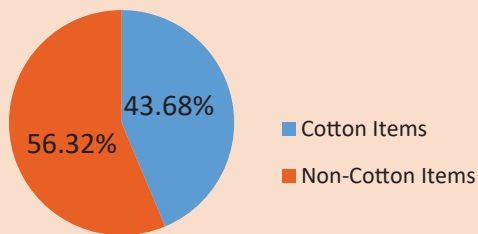
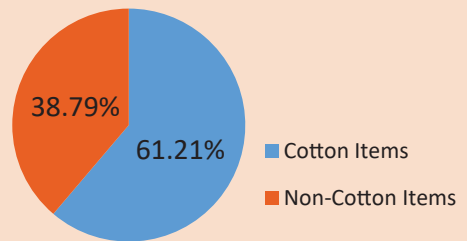


Figure-3: Share of India's cotton & non-cotton clothing import from BD



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

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

HS Code	Items	World	BD	China	Spain	Viet Nam	Sri Lanka	Malaysia	Hong Kong	CAGR of India's import from world (2017-2022)
'620342	M/B cotton woven trousers	156.31	118.51	2.61	3.13	2.05	5.92	0.14	1.96	14.19%
'610910	Cotton knitted T-shirts	117.01	69.54	14.27	8.48	3.28	0.87	0.28	3.41	30.46%
'620520	M/B cotton woven shirts	91.69	59.73	10.58	3.00	2.68	1.34	0.47	2.47	20.23%
'620462	W/G cotton woven trousers	88.22	52.39	11.04	9.50	0.67	3.97	0.16	1.07	22.26%
'621210	Non cotton woven Brassieres	79.66	43.33	8.98	0.04	4.89	6.87	5.05	0.26	27.89%
'611020	Cotton knitted Jerseys & pullovers	61.61	18.37	11.30	7.08	3.51	0.24	0.25	1.68	34.60%
'610990	Non cotton knitted T-shirts	60.91	22.55	15.84	2.11	6.59	1.70	0.25	1.04	21.98%
'611030	MMF Knitted Jerseys & pullovers	60.13	23.61	14.73	9.05	4.23	1.08	0.80	0.56	20.33%
'610510	M/B cotton knitted shirts	54.01	30.74	4.88	1.12	2.32	0.34	0.02	2.94	31.40%
'621590	Non cotton woven ties, bow ties & cravats	43.02	0.00	0.34	0.00	0.00	0.00	25.87	0.00	155.12%
'620140	M/B MMF woven overcoats, car-coats, capes	41.82	12.38	10.70	1.47	7.63	0.08	0.00	2.70	#DIV/0!
'620349	M/B non cotton woven trousers	32.43	27.34	0.41	0.95	2.40	0.37	0.04	0.01	41.06%
'620333	M/B synthetic woven jackets & blazers	31.96	23.02	4.33	0.91	0.39	0.02	1.18	0.55	18.79%
'610342	M/B cotton knitted trousers	30.14	10.89	7.92	1.14	1.61	0.20	0.05	0.46	44.69%
'610462	W/G cotton knitted trousers	29.44	21.21	3.20	0.85	0.72	0.68	0.05	0.17	53.71%
'620343	M/B synthetic woven trousers	27.08	9.54	3.07	1.25	4.92	0.71	0.17	0.15	27.15%
'610343	M/B synthetic knitted trousers	26.48	7.36	3.90	0.70	3.10	0.93	0.01	0.14	35.77%
'610463	W/G synthetic knitted trousers	26.36	5.28	8.15	1.39	3.57	2.47	0.26	0.58	27.98%
'620443	W/G synthetic woven dresses	24.80	0.25	13.76	4.63	0.06	0.47	0.42	1.56	28.46%
'620640	W/G MMF woven blouses & shirts	21.06	2.06	3.89	9.17	0.08	1.16	0.73	0.44	6.96%

Source: ITC Trademap

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

HS code	Items	India's import from world	India's import from BD	BD's share in India's total import	CAGR of India's import from world during 2017-22*
'611020	Cotton knitted Jerseys & pullovers	61.61	18.37	29.81%	34.60%
'610990	Non cotton knitted T-shirts	60.91	22.55	37.02%	21.98%
'611030	MMF Knitted Jerseys & pullovers	60.13	23.61	39.26%	20.33%
'610342	M/B cotton knitted trousers	30.14	10.89	36.15%	44.69%
'620343	M/B synthetic woven trousers	27.08	9.54	35.21%	27.15%
'610343	M/B synthetic knitted trousers	26.48	7.36	27.79%	35.77%
'610463	W/G synthetic knitted trousers	26.36	5.28	20.01%	27.98%
'620640	W/G MMF woven blouses & shirts	21.06	2.06	9.80%	6.96%
'620463	W/G synthetic woven trousers	19.90	3.36	16.88%	22.94%
'611596	Knitted Full or knee-length stockings	14.73	0.72	4.89%	57.42%

Market Access

Bangladesh as a Least Developed Country (LDC) enjoys duty free market access while export apparel to India under the South Asian Free Trade Agreement (SAFTA)

Potentials

- The size of India's apparel retail market is around US\$ 96.47 billion which is projected to grow by 3.34% (CAGR 2023-2027). India's RMG import from world in 2021 was US\$ 1158 million, and import from Bangladesh was US\$ 474.29 million, meaning that Bangladesh have 40.95 % share in India's total RMG import.
- India has a population of 1.40 billion, with per capita income US\$ 2,150. India is a country having an emerging economy under the BRICS. The buying capacity of the middle-class and interests on the western culture is increasing there. Bangladesh being a neighboring country of India, consumption of lead time and cost is less.
- The Government of India allowed 100% FDI facility for Single Brand Retailers, through which western brands have been able to retail garments in India, making Bangladesh a prominent place for sourcing garment to meet the retail demand in India.
- India is the second largest textile fibre producer in the world. It is the largest producer of Cotton in the world and second largest producer of Manmade Fibre and Filament. India has world's second largest installed spindle capacity and highest installed weaving capacity. As Bangladesh is pursuing a higher growth vision our strategy is to produce high-end items through diversifying textile material from cotton to other man-made fibres. The capacity of fabric designing, dyeing and processing is much less in Bangladesh where more investments are required not only to meet the need for basic apparel items but also to support the transformation to higher-value segments. This could be one important area of our strategic collaboration with India through FDIs / JVs in the high-end textile sector in Bangladesh.

Some of the recent developments:

- Inauguration of Padma Bridge reduced the time and cost for transporting goods to Dhaka and other destinations from Benapole and Naoapara land ports.
- Government has allowed the apparel importer to import yarns from India through four more land ports such as Bhomra of Satkhira, Sonamasjid of Chapainawabganj, Darshana of Chuadanga, and Banglabandha of Panchagarh.
- Recently, the National Board of Revenue (NBR) issued an order where the government has allowed RMG exporters to import raw materials including cotton, yarn and fabrics yarn from India in partial shipment through four landports such as Benapole, Bhomra, Sonamasjid and Banglabandha. ^A

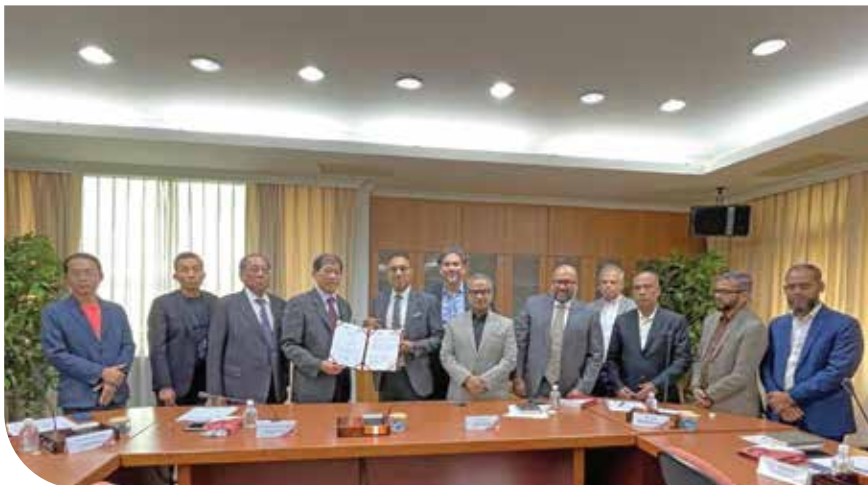


News in Pictures



U.S. Ambassador to Bangladesh H.E. Peter Haas paid a courtesy call on BGMEA President Faruque Hassan at BGMEA Complex in Uttara, Dhaka. BGMEA First Vice President Syed Nazrul Islam, Senior Vice President S.M. Mannan (Kochi), Vice President Shahidullah Azim, Vice President (Finance) Khandoker Rafiqul Islam, Vice President Md. Nasir Uddin, Vice President Rakibul Alam Chowdhury, Directors Abdullah Hil Rakib, Navidul Huq, Rajiv Chowdhury, Barrister Vidiya Amrit Khan, Md. Imranur Rahman, Mijanur Rahman and Neela Hosna Ara were also present at the meeting. Their discussions focused on various issues of mutual interest aimed at strengthening trade ties between the USA and Bangladesh, particularly how the US could support Bangladesh in increasing apparel exports including high-end garments to the US market.

A delegation comprising senior officials of the Organisation for Economic Co-operation and Development (OECD) and the Asian Development Bank (ADB) paid a visit to BGMEA and held a meeting with BGMEA President Faruque Hassan at the latter's office in Dhaka.



The Bangladesh Garment Manufacturers and Exporters Association (BGMEA) and the Taiwan Textile Research Institute (TTRI) signed a MoU to collaborate on enhancing capacity of Bangladesh's readymade garment industry in the areas of product development, especially in manufacturing high-end products made of manmade fiber (MMF). BGMEA Director Asif Ashraf and Vice President of TTRI Sheng-fu Chu inked the MoU on behalf of their respective sides. BGMEA Directors Faisal Samad and Abdullah Hil Rakib, and President of Taiwan Textile Federation Justin Huang, among others were present at the MoU signing ceremony held in Taipei, Taiwan.



A delegation from the National Defence College (NDC), led by Air Vice Marshal Muhammad Kamrul Islam along with three senior Directing staffs of the rank of Major General visited BGMEA Complex in Uttara, Dhaka. BGMEA President Faruque Hassan welcomed the NDC delegation. BGMEA Vice President Shahidullah Azim, Vice President Miran Ali and Director Inamul Haq Khan (Bablu) were also present on the occasion.

BGMEA President Faruque Hassan addressed the grand finale and prize distribution ceremony of BUFT Inter College National Debate (BIND) on the campus of BGMEA University of Fashion and Technology (BUFT) in Dhaka.



The Bangladesh Garment Manufacturers and Exporters Association (BGMEA) has partnered with Mitro Fintech Ltd. to promote financial wellness among Ready-Made Garments (RMG) workers. The partnership aims to offer digital financial solutions to workers through a MoU. BGMEA President Faruque Hassan, Director Neela Hosna Ara, Mitro Fintech Ltd. CEO Kishwar Hashemee were present at the MoU signing ceremony held at BGMEA Complex.



BGMEA launched a weeklong campaign to raise awareness about healthcare and safety so that each individual is equipped with the knowledge of essential hygiene protocols both at home, at work, and everywhere else. BGMEA President Faruque Hassan along with Bangladesh Fire Service and Civil Defense Director Lieutenant Colonel Tajul Islam Chowdhury inaugurated the weeklong program at BGMEA Complex.

BGMEA President Faruque Hassan, Chairman of the Board of Trustees of BUFT Md. Shafiqul Islam Mohiuddin, MP, and Pro-Vice Chancellor of BUFT Prof Dr. Engr Ayub Nabi Khan handed over prizes to the winners of the 5th BUFT Intra Batch Football Tournament-2023 held on the playground of BGMEA University of Fashion and Technology (BUFT).



BGMEA President Faruque Hassan, Director Neela Hosna Ara along with the participants at the opening ceremony of a training session on 'creating high-end fashion heritage materials from Bangladesh' held at BGMEA Complex in Uttara.



A delegation comprising textile manufacturers from China met with BGMEA President Faruque Hassan to discuss potential areas of collaboration to reap mutual trade benefits in apparel and textile sector.

BGMEA in collaboration with Manabik Shahajya Sangstha (MSS) organized an eye care program for its employees at BGMEA Complex in Uttara, Dhaka. BGMEA President Faruque Hassan inaugurated the two-day eye care program which provided free eye care services including diagnosis of eye conditions, and prescriptions for various eye diseases. The inaugural ceremony was also attended by President of MSS Feroz M. Hassan and adviser of MSS Tarikul Ghani.



BGMEA donated an ambulance to Manabik Shahajya Sangstha (MSS) to support emergency health services to people including underprivileged people in society. BGMEA President Faruque Hassan handed over the key of the ambulance to President of MSS Feroz M. Hassan at a program held at BGMEA Complex. BGMEA Director Neela Hosna Ara and adviser of MSS Tarikul Ghani were also present on the occasion.



BGMEA President Faruque Hassan addressed a workshop and award-giving ceremony held in Dhaka, where he said BGMEA would continue support for garment factories in establishing Model Enterprise Clinics.

A delegation from Cotton USA met with BGMEA President Faruque Hassan to discuss potential collaboration on creating trade opportunities that would be beneficial for both sides. The team included William R. Bettendorf, Director, Supply Chain Marketing and South Asia; Stephanie Thiers-Ratcliffe, Director, European Brands and Retailers; and Ali Arsalan, Bangladesh Consultant, Cotton USA. BGMEA Director Tanvir Ahmed was also present at the meeting held at BGME Complex.



BGMEA hosted a closing ceremony of the project titled "Creating High-End Fashion Product Using Local Heritage Material" which started two years back with an aim to develop high-end western apparel items by utilizing centuries-old local heritage material of the country. Faruque Hassan, President of BGMEA; Dr. Mohammad Ilias Mia, Deputy Secretary, WTO Cell, Ministry of Commerce(MOC); Dr. Engr. Ayub Nabi Khan, Pro Vice Chancellor of BGMEA University of Fashion and Technology (BUFT), Neela Hosna Ara, Director of BGMEA were present during the closing event.



Ms. Helena Helmersson, CEO, H&M Group, and Faruque Hassan, President of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) held a meeting in Dhaka to discuss potential areas of collaboration to further strengthen long-term partnership and expand H&M's business base in Bangladesh. The meeting was also attended by Shahidullah Azim, Vice President, BGMEA; Miran Ali, Vice President, BGMEA; Ziaur Rahman, H&M Group Country Manager for Bangladesh; Faisal Rabbi, Stakeholder Engagement and Public Affairs Manager, H&M Group; and Karin Lind, Global Head of Production H&M Group.

The Responsible Business Hub (RBH), set up by BGMEA with the support of GIZ, has started its journey with an aim to strengthen human rights and environmental due diligence in the readymade garments (RMG) industry of Bangladesh. The RBH will serve as an information centre, raising awareness and providing guidance to manufacturing companies on the standards and requirements of Human Rights and Environmental Due Diligence (HREDD).

Shahidullah Azim, Vice President of BGMEA; Jan Janowski, Deputy Head of Mission, Embassy of Germany in Dhaka; Fazlee Shamim Ehsan, Vice President of BKMEA; Abdullah Hil Rakib, Director, BGMEA were present at the inauguration ceremony.



The Ministry of Commerce of the Government of Bangladesh and the Bangladesh Garment Manufacturers and Exporters Association (BGMEA) signed a MoU to create a pool of skilled fashion professionals and designers who will work on developing high-value fashionable garments using homegrown fabrics and materials. Neela Hosna Ara, Director, BGMEA, and Mohammad Ilias Mia, Deputy Secretary, and Project Director, Export Diversification and Diversification Project (Tier- 2), WTO wing, Ministry of Commerce, Bangladesh signed the MoU on behalf of the respective sides.



Bangladesh Garments Manufacturers and Exporters Association (BGMEA) in collaboration with Bangladesh Red Crescent Society organized a blood donation program at BGMEA Complex. BGMEA President Faruque Hassan inaugurated the week-long program and a number of BGMEA officials have donated their blood voluntarily.

BGMEA President Mr. Faruque Hassan signed an agreement with the eight garment factories with regard to their enlistment in the RMG Sustainability Council (RSC). From now on, any export-oriented garment factory who are the members of BGMEA can also be enlisted under RSC with the nomination of BGMEA.



BGMEA President Faruque Hassan spoke at the opening ceremony of the 11th Intex Bangladesh Trade Expo organized by Worldex India in Dhaka. **A**

Statistics

Bangladesh's RMG export to world

Value in Million USD

Month	2020/21	2021/22	2022/23	2022-23 VS 2021-22	2022-23 VS 2020-21
July	3244.94	2887.22	3366.91	16.61%	3.76%
August	2468.02	2753.38	3745.76	36.04%	51.77%
September	2413.42	3418.84	3161.67	-7.52%	31.00%
October	2323.72	3561.71	3678.00	3.27%	58.28%
November	2444.59	3235.05	4378.94	35.36%	79.13%
December	2650.87	4044.50	4665.41	15.35%	76.00%
January	2862.16	4084.58	4421.33	8.24%	54.48%
February	2625.29	3511.72	3943.87	12.31%	50.23%
March	2454.91	3931.40	3890.55	-1.04%	58.48%
April	2516.98	3934.18	3325.07	-15.48%	32.11%
May	2556.95	3158.58	4053.28	28.33%	58.52%
June	2894.88	4092.00	4360.82	6.57%	50.64%
Total	31456.73	42613.16	46991.61	10.27%	49.38%

Source: EPB

Knitwear

Value in Million USD

Month	2020/21	2021/22	2022/23	2022-23 VS 2021-22	2022-23 VS 2020-21
July	1750.28	1658.45	1854.15	11.80%	5.93%
August	1364.50	1600.44	2061.53	28.81%	51.08%
September	1348.88	1905.29	1733.78	-9.00%	28.53%
October	1338.22	2045.89	2075.66	1.46%	55.11%
November	1334.47	1775.50	2388.53	34.53%	78.99%
December	1389.82	2176.06	2546.03	17.00%	83.19%
January	1462.94	2112.41	2300.70	8.91%	57.27%
February	1352.64	1795.68	2099.95	16.94%	55.25%
March	1312.43	2050.18	2077.15	1.32%	58.27%
April	1341.77	2122.69	1830.25	-13.78%	36.41%
May	1366.37	1743.29	2310.38	32.53%	69.09%
June	1597.71	2228.44	2460.09	10.40%	53.98%
Total	16960.03	23214.32	25738.20	10.87%	51.76%

Source: EPB

Wovenwear

Value in Million USD

Month	2020/21	2021/22	2022/23	2022-23 VS 2021-22	2022-23 VS 2020-21
July	1494.66	1228.77	1512.76	23.11%	1.21%
August	1103.52	1152.94	1684.23	46.08%	52.62%
September	1064.54	1513.55	1427.89	-5.66%	34.13%
October	985.50	1515.82	1602.34	5.71%	62.59%
November	1110.12	1459.55	1990.41	36.37%	79.30%
December	1261.05	1868.44	2119.38	13.43%	68.06%
January	1399.22	1972.17	2120.63	7.53%	51.56%
February	1272.65	1716.04	1843.92	7.45%	44.89%
March	1142.48	1881.22	1813.40	-3.61%	58.72%
April	1175.21	1811.49	1494.82	-17.48%	27.20%
May	1190.58	1415.29	1742.90	23.15%	46.39%
June	1297.17	1863.56	1900.73	1.99%	46.53%
Total	14496.70	19398.84	21253.41	9.56%	46.61%

Source: EPB

Bangladesh's top 30 apparel items export to world

Value in Million USD

SL	HS Code	Products Description	FY 2021-22	FY 2022-23	Growth
1	610910	Cotton T-shirts	8446.56	8,689.38	2.87%
2	620342	M/B cotton woven trousers	5640.84	5,742.13	1.80%
3	611020	Cotton Jerseys & pullovers	3250.97	3,597.54	10.66%
4	620462	W/G cotton woven trousers	3596.63	3,456.75	-3.89%
5	611030	MMF Jerseys & pullovers	1968.02	1,895.13	-3.70%
6	620520	M/B cotton woven shirts	1513.81	1,875.35	23.88%
7	610462	W/G cotton knitted trousers	1609.86	1,681.94	4.48%
8	620343	M/B synthetic woven trousers	1589.28	1,497.00	-5.81%
9	610510	M/B cotton knitted shirts	844.15	1,424.10	68.70%
10	611120	Cotton knitted Babies' garments	644.50	913.99	41.81%
11	610342	M/B cotton knitted trousers	700.97	892.43	27.31%
12	610821	W/G cotton briefs & panties	682.32	702.17	2.91%
13	610711	M/B cotton underpants	604.33	668.27	10.58%
14	621210	Woven Brassieres	645.70	609.43	-5.62%
15	610990	Non cotton T-shirts	444.27	590.79	32.98%
16	620463	W/G synthetic woven trousers	377.88	538.64	42.54%
17	610442	Cotton knitted Dresses	413.31	497.68	20.42%
18	620530	M/B MMF woven shirts	237.78	418.64	76.06%
19	611090	Non cotton Jerseys & pullovers	346.32	371.61	7.30%
20	610831	W/G cotton knitted nighties	308.21	325.69	5.67%
21	620333	M/B synthetic woven jackets & blazers	156.68	310.77	98.35%
22	620630	W/G cotton woven blouses	271.04	309.76	14.29%
23	620469	W/G non cotton woven trousers	240.40	301.12	25.26%
24	610463	W/G synthetic knitted trousers	267.03	283.29	6.09%
25	620920	Cotton woven Babies' garments	250.96	279.15	11.23%
26	620640	W/G MMF woven blouses	228.19	278.21	21.92%
27	620590	M/B non cotton woven shirts	164.38	254.33	54.72%
28	610610	W/G cotton knitted blouses	164.31	244.75	48.96%
29	620442	Cotton woven Dresses	255.62	233.40	-8.70%
30	620332	M/B cotton jackets & blazers	125.54	226.41	80.34%
Total			35989.85	39109.84	8.67%

Source: EPB

Note: M/B= Men's or boys

W/G= Women's or girls

EU Apparel Import Growth

Growth: 2023 VS 2022					
Country	Jan	Feb	Mar	April	Jan-Apr
World	3.63%	-5.29%	-10.72%	-18.38%	-7.62%
China	-7.62%	-18.63%	-27.05%	-15.41%	-17.07%
Bangladesh	12.13%	3.44%	-2.94%	-31.97%	-6.25%
Turkey	-7.70%	-17.85%	-15.54%	-13.49%	-13.68%
India	14.28%	16.80%	-8.14%	-15.22%	0.45%
Cambodia	2.69%	4.74%	-4.27%	-23.22%	-5.59%
Viet Nam	15.53%	8.91%	2.11%	-13.76%	3.41%
Pakistan	7.08%	-0.16%	-11.78%	-24.86%	-7.52%
Morocco	-11.87%	-25.88%	-19.50%	-8.44%	-16.61%
Sri Lanka	-6.79%	-18.86%	-11.59%	-31.57%	-17.16%
Indonesia	7.60%	-10.57%	-9.09%	-18.78%	-7.99%

Growth: 2023 VS 2021					
Country	Jan	Feb	Mar	April	Jan-Apr
World	29.45%	14.33%	10.15%	-0.45%	13.42%
China	12.26%	0.19%	-14.41%	-0.69%	-0.48%
Bangladesh	65.08%	33.05%	48.24%	-7.03%	32.32%
Turkey	8.40%	1.47%	2.05%	5.58%	4.35%
India	41.00%	19.98%	9.34%	0.09%	16.02%
Cambodia	19.09%	40.29%	29.04%	4.29%	22.59%
Viet Nam	45.47%	32.42%	21.17%	4.74%	25.98%
Pakistan	39.75%	24.66%	13.88%	-3.82%	18.55%
Morocco	13.03%	-9.34%	-3.13%	-0.92%	-0.64%
Sri Lanka	9.90%	-4.25%	-1.33%	-29.60%	-7.00%
Indonesia	41.31%	21.54%	11.01%	-15.61%	12.18%

Growth: 2023 VS 2020					
Country	Jan	Feb	Mar	April	Jan-Apr
World	3.48%	11.34%	29.59%	61.40%	21.09%
China	-4.89%	4.21%	44.44%	44.31%	14.03%
Bangladesh	28.20%	29.04%	30.40%	32.09%	29.80%
Turkey	2.80%	9.35%	40.63%	148.14%	32.41%
India	10.55%	16.99%	27.28%	85.06%	28.60%
Cambodia	-4.87%	19.82%	19.25%	23.95%	12.89%
Viet Nam	17.30%	30.06%	61.20%	78.90%	40.48%
Pakistan	25.43%	41.09%	17.30%	60.18%	32.77%
Morocco	-8.77%	-5.90%	18.36%	810.87%	33.02%
Sri Lanka	-2.57%	12.65%	17.13%	20.83%	10.44%
Indonesia	-3.58%	13.36%	4.25%	17.24%	6.56%


Source: eurostat

U.S. Apparel Import Growth

Growth: 2023 VS 2022						
Country	January	February	March	April	May	Jan-May
World	-3.76%	-19.95%	-32.48%	-29.41%	-25.86%	-22.92%
China	-24.62%	-35.39%	-45.71%	-23.02%	-22.00%	-30.44%
Viet Nam	-0.43%	-19.98%	-44.25%	-36.11%	-30.77%	-28.07%
Bangladesh	15.34%	-11.76%	-35.36%	-31.39%	-24.41%	-19.16%
Indonesia	4.62%	-19.04%	-33.71%	-44.54%	-35.66%	-27.57%
India	9.89%	-9.14%	-27.20%	-30.52%	-35.61%	-20.80%
Mexico	-0.72%	-3.78%	-7.87%	-14.10%	-9.67%	-7.50%
Honduras	-20.38%	-3.76%	-22.29%	-34.15%	-14.17%	-19.02%
Cambodia	-12.85%	-44.17%	-38.52%	-40.23%	-33.88%	-34.42%
Pakistan	-3.40%	-37.17%	-37.40%	-37.52%	-39.17%	-31.98%
Korea	1.06%	-32.67%	-16.65%	-1.37%	-20.40%	-13.96%

Growth: 2023 VS 2021						
Country	January	February	March	April	May	Jan-May
World	31.10%	10.85%	-3.61%	1.20%	2.67%	7.87%
China	10.96%	-5.61%	-24.20%	7.38%	7.32%	-1.11%
Viet Nam	18.03%	7.12%	-24.49%	-11.58%	-5.19%	-4.40%
Bangladesh	66.79%	25.35%	26.23%	19.44%	4.36%	28.00%
Indonesia	64.35%	24.45%	13.99%	-14.55%	2.30%	15.45%
India	68.60%	29.13%	17.78%	13.73%	-2.37%	22.81%
Mexico	26.05%	15.20%	8.44%	9.37%	13.16%	13.91%
Honduras	-10.39%	11.56%	-0.05%	-17.59%	6.02%	-1.24%
Cambodia	23.22%	-14.09%	-21.66%	-10.82%	12.12%	-3.97%
Pakistan	37.77%	13.90%	-10.67%	6.79%	-7.26%	6.27%
Korea	97.78%	13.57%	41.96%	39.64%	36.48%	45.33%

Growth: 2023 VS 2020						
Country	January	February	March	April	May	Jan-May
World	7.13%	1.15%	20.74%	68.16%	137.88%	31.81%
China	-11.10%	0.76%	63.84%	69.31%	71.75%	24.76%
Viet Nam	-3.90%	2.85%	0.85%	24.21%	80.64%	14.23%
Bangladesh	39.15%	14.05%	27.01%	40.58%	268.74%	47.70%
Indonesia	9.83%	-7.59%	7.51%	13.65%	74.69%	13.43%
India	30.95%	1.40%	18.29%	90.93%	507.98%	49.76%
Mexico	9.71%	-0.33%	16.83%	238.72%	170.57%	45.45%
Honduras	-18.82%	-3.33%	18.49%	767.89%	825.34%	57.56%
Cambodia	1.89%	-23.05%	4.45%	26.04%	84.44%	10.77%
Pakistan	54.26%	31.30%	34.74%	51.23%	375.79%	68.45%
Korea	50.42%	-18.15%	50.69%	112.32%	101.36%	49.87%

Source: otexa 

DIFFERENTLY ABLED, NOT DISABLED



Priority
Entry
and
Exit



Create a disable friendly
workplace including ramps
instead of stairs for those who
have walking difficulties and
arrange high tools for dwarfs.



Properly
marked seats
and designated
toilet



Avoid risky
occupations and
equipment/tools

Physically
challenged
people are the
part of our family
and society. Be
empathetic than
being
sympathetic to
them.

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নেতিবাচক
মানসিকতা পরিহার
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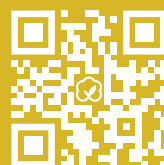
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| **critical assurances** they need to
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| sustainably grown with **lower**
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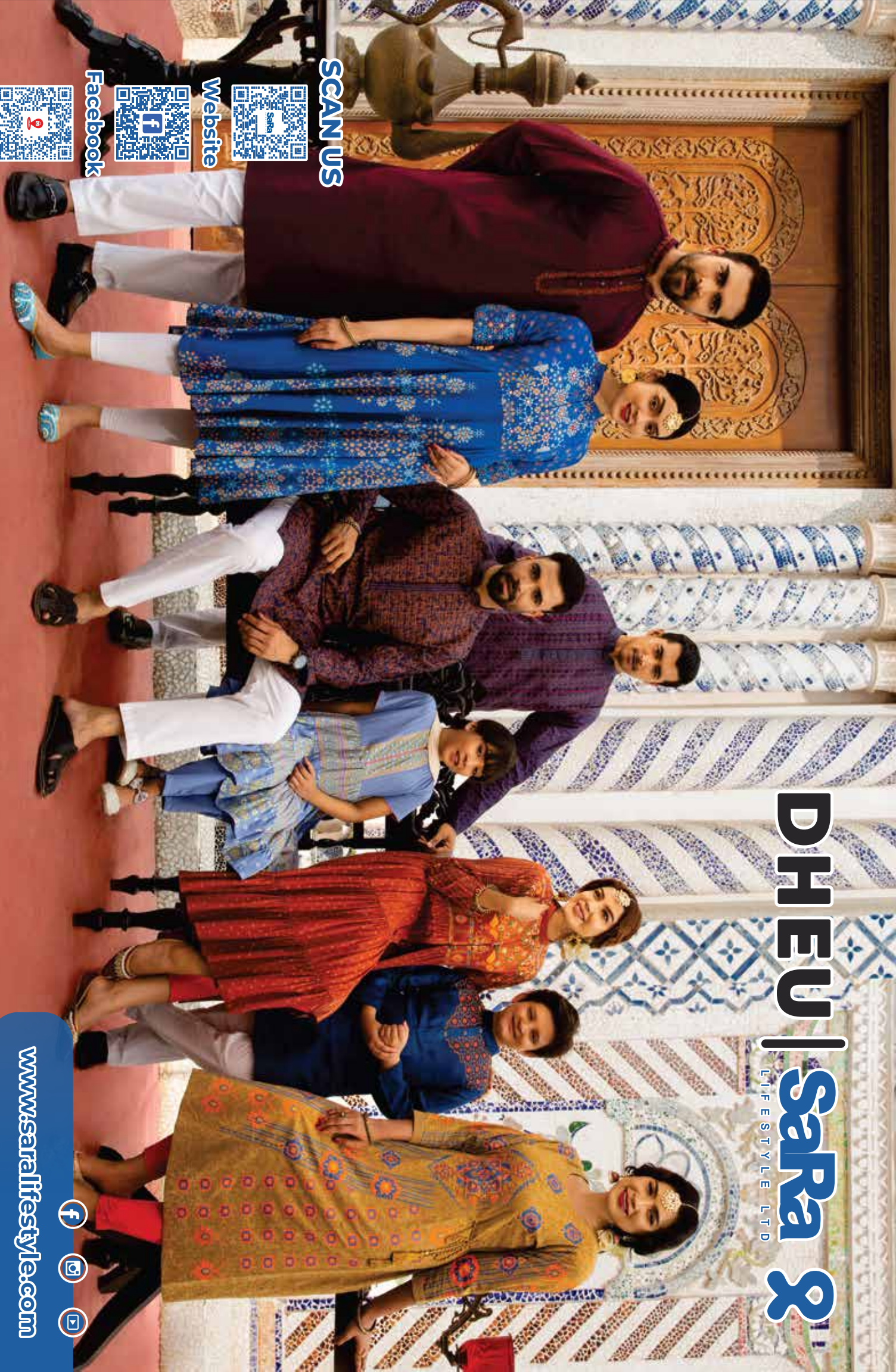
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