Contemporary Challenging Issues and Prospects of Garments Industry of Bangladesh

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Abstract

The purposes of this research are to find out contemporary challenges and prospects of garments industries of Bangladesh. The researchers have revealed that the challenges faced by this industry are market concentration, absence of local raw material, nonexistence of quota system, lack of technology and slower rate to adaptation, lack of market oriented design, lack of prompt banking a service, political unrest and labor unrest. Prospects of this industry have also been found in this research which is low cost producer, low labor cost, diversified market, and China's attention to heavy industry leaving garments.

Keywords: *Challenging issues, prospects, garments industry.*

1. Introduction

The tremendous success of readymade garment exports from Bangladesh over the last two decades has surpassed the most optimistic expectations. Today the apparel export sector is a multi-billion-dollar manufacturing and export industry in the country. The overall impact of the readymade garment exports is certainly one of the most significant social and economic developments in contemporary Bangladesh. With over one and a half million women workers employed in semi-skilled and skilled jobs producing clothing for exports, the development of the apparel export industry has had far-reaching implications for the society and economy of Bangladesh. After the MFA Bangladesh is coping up with the situation very clearly and doing very well. But recently it is suffering from some sort of crucial problems and losing some of the opportunities. But it is sure that if we can solve these problems and take these opportunities then we shall be second to none.

2. Objectives of the Study

Main objectives of this research are as follows:

a) To explore the contemporary challenges of garments industries of Bangladesh.

b) To find out the prospects of garments industries of Bangladesh.

c) Finally, to recommend for policy formulation in facing challenges.

3. Methodology of the Study

The research is fully secondary data based and conceptual in nature. To fulfill the objectives of the research secondary data has been collected from scholarly article, periodicals of financial research institutions, daily newspaper, weekly and monthly reviews, websites, and books. Moreover, in-depth research article published in home and abroad used to design this research.

4. Literature Review

Islam et al. (2012) found twelve categories of disturbing factors as challenges of RMG sector of Bangladesh. Those factors are 1. Shortage of raw materials defective raw materials, equipment failure, absenteeism, machine malfunction, unexpected Work in Process (WIP), defective products, quick changeover in production schedule, stalemate for labor strike, production

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shutdown caused by political action, and power supply problems. But the researchers did not show the appropriate strategic measures to minimize the occurrences of operational disturbances.
Faruky et al. (2011) explored some uncertainty surrounds the challenges and risks that are going to be faced by the RMG industries in Bangladesh. In their research it has been observed that most (90%) of the respondents are anxious about an adverse effect on the cost of production of garment products, which may threat the price competitiveness of Bangladeshi garments in the global market. To mitigate this challenge a large portion (36%) of the respondents are ready to accept decreased profit. A major part (45%) expects financial assistance from the Bangladesh government to cope with the upcoming challenges. And around 68% express their worry that the foreign investment in RMG may decrease due to the issue of changed climate.

Habib (2009) found that with cheap labor advantage, Bangladesh garment industry is still holding competitive position in the global apparel market. Overall percentage of RMG sector growth has been steady although the sector has been affected by the USA market. This industry contributed 78% share of total trade of goods in Bangladesh, compared to the other South Asian countries like India 14%, Pakistan 23%, Sri Lanka 50% and Nepal 40%. Kamal et al. (2010) revealed that the most significantly related factor of labor unrest is the wages and payment. Most of the workers feel that they are not paid even as per wage commission declared pay. It is also not paid within the stipulated time that is within seven days of the following month. The workers felt that the factories they work for don't have any welfare fund for them. Industrial relation is the second most significant variable which contributes to labor unrest. Most of the workers feel that management does not listen to their complaints and problems. Absence of trade union makes it more difficult. Third significant factor is working hour and leave. They have to work more than eight hours a day but are not paid over time at double the rate of their pay as per the provision of the law. Most of the workers do not get sick leave as per law. Other factors that are service and employment conditions, health and hygiene, safety and penalty procedure are not significant factors for the workers.

Sultana et al. (2011) found that in spite of having many positive consequences of post MFA impact in Bangladeshi RMG sector, the country is to face many harsh realities and challenges like severe shortage of backward linkage, raw materials, limited market, political unrest etc. In this position their way of survival may be diversifying of present garments trade, developing infrastructure, establishing strong backward and forward linkage and enhancing the product quality. Handling labor unrest is one the major challenges for the entrepreneurs of this sector. There are many reasons behind the labor unrest in RMG sector especially to the lower wages. Recently a new salary structure of the RMG sector has been introduced in November, 2010. Garment workers have been getting their wages under the new pay scale. Since the growing cost of living in the capital, workers, RMG related non-government organizations, human rights groups sometimes demand for the increase of wages. However, it is also the fact that Bangladesh has placed its position in the competitive market for the cheap labor cost in apparel manufacturing.

Sampath (2007) revealed that firms in the survey attributed their inability to compete efficiently and upgrade to four main factors: (a) inability to create backward linkages in woven fabrics (the country produces less than 10 per cent of cotton that the sector needs); (b) delays in lead time caused by raw material imports (weak physical infrastructure at ports and for transportation) and use of not-so-modern production technologies especially in weaving and dyeing; (c) lack of skills creation that is required to branch out into innovative activities, such as design; (d) lack of interest amongst international buyers to transfer technology, both tacit (through skills training) and codified (machinery and equipment).

5. Overview of Garments Industry

Bangladesh has a glorious history of textile industry from British period though it has started readymade garments (RMG) in early 1970s. Bangladesh had a history of textile manufacturing, though during British colonial rule the industry suffered a brutal repression to facilitate the flourishing of British textile industries in Manchester. It is noted that Muslin and Jamdani cloth once was used for luxurious garments in Europe and other countries. The reputation of muslin textile of Dhaka was worldwide. But the handloom industry of muslin textiles was completely destroyed by British colonial repression (Shikder, Report-2002).

Reaz Garments was established in 1960 as a small tailoring outfit, named Reaz Store in Dhaka, operating within do-mestic markets only (Rahman, Report-2004). In 1973, it changed its name to M/s Reaz Garments Ltd. and expanded its operations into the export market. Reaz was the first direct exporter of garments from Bangladesh. In 1978, the Reaz Garments Ltd. exported 10,000 units of men's shirts to the export value of 13 million French francs to a Paris-based firm (Rahman and Kaiser, Report-1993; Rock, Report-2003).

Baishaki Garments, one of the older export-oriented garment factories, was established in 1977 and in 1979; Nurul Kader, a retired civil servant and entrepreneur established Desh Garments in alliance with the South Korean firm Daewoo (Shikder, Report-2002; Morshed, Report-2007; Rhee, 1990: p.336). As Desh's operations grew, a large number of local entrepreneurs entered the sector with foreign buyers retaining major control in the marketing (Rashid, Report-2006).One of these was a Bangladeshi firm, Trexim Limited, which formed an equity joint venture with a South Korean firm, Youngones Corporation, in 1980. The Bangladeshi partners contributed 51% of the new firm's equity, called Youngones Bangla-desh. Its first consignment of padded and non-padded jackets was exported to Sweden in December 1980 (Siddiqi, Report-1982).

As the demand for RMG products increases, international buyers continue to invest in Bangladesh. The government of Bangladesh has taken numerous initiatives on trade reform to attract foreign direct investment under the guidance of IFM and World Bank and establish EPZ (Rahman, Report-2004). Bangladesh Export Processing Zones Authority (BEPZA) is the only government organization responsible for creation, operation and development of Export Processing Zones (EPZ) in the country. Foreign buyers and Multinational Corporation set up factories to produce goods such as clothing and leather goods used EPZ (Rashid, Report-2006).

Table 1: Comparative Statement on Export RMG and Total Export of Bangladesh.

YEAR	Export of RMG (in Million US$)	Total Export of Bangladesh (in Million US$)	% of RMG'S to Total Export	YEAR	Export of RMG (in Million US$)	Total Export of Bangladesh (in Million US$)	% of RMG'S to Total Export
1983-84	31.57	811.00	3.89	1998-99	4019.98	5312.86	75.67
1984-85	116.2	934.43	12.44	1999-00	4349.41	5752.20	75.61
1985-86	131.48	819.21	16.05	2000-01	4859.83	6467.30	75.14
1986-87	298.67	1076.61	27.74	2001-02	4583.75	5986.09	76.57
1987-88	433.92	1231.2	35.24	2002-03	4912.09	6548.44	75.01
1988-89	471.09	1291.56	36.47	2003-04	5686.09	7602.99	74.79
1989-90	624.16	1923.70	32.45	2004-05	6417.67	8654.52	74.15
1990-91	866.82	1717.55	50.47	2005-06	7900.80	10526.16	75.06
1991-92	1182.57	1993.90	59.31	2006-07	9211.23	12177.86	75.64
1992-93	1445.02	2382.89	60.64	2007-08	10699.80	14110.80	75.83
1993-94	1555.79	2533.90	61.40	2008-09	12347.77	15565.19	79.33
1994-95	2228.35	3472.56	64.17	2009-10	12496.72	16204.65	77.12
1995-96	2547.13	3882.42	65.61	2010-11	17914.46	22924.38	78.15
1996-97	3001.25	4418.28	67.93	2011-12	19089.69	24287.66	78.60
1997-98	3781.94	5161.20	73.28				

Source : Export Promotion Bureau, Compiled by BGMEA (2013)

Table 2: Bangladesh's RMG Exports to World, FY 2011-12 & 2012-13.

Value in Million US$

Month	ALL COUNTRIES								
	Woven Year		Growth Rate	Knit Year		Growth Rate	Total (Woven+Knit)		Growth Rate
	2011/12	2012/13		2011/12	2012/13		2011/12	2012/13	
July	888.00	993.84	11.92	1007.88	1001.07	-0.68	1895.88	1994.91	5.22
August	870.63	997.72	14.60	1052.43	1004.24	-4.58	1923.06	2001.96	4.10
September	475.93	465.30	-2.23	519.21	534.52	2.95	995.14	999.82	0.47
October	704.70	761.48	8.06	796.05	873.16	9.69	1500.75	1634.64	8.92
November	626.91	710.04	13.26	621.73	653.96	5.18	1248.64	1364.00	9.24
December	890.80	1042.68	17.05	794.23	908.94	14.44	1685.03	1951.62	15.82
January	930.81	1147.64	23.29	773.48	944.96	22.17	1704.29	2092.60	22.78
February	873.29	979.71	12.19	732.09	811.24	10.81	1605.38	1790.95	11.56
March	847.52	991.77	17.02	699.16	854.68	22.24	1546.68	1846.45	19.38
April	721.72	835.17	15.72	698.68	795.11	13.80	1420.40	1630.28	14.78
Total	7830.31	8925.35	13.98	7694.94	8381.88	8.93	15525.25	17307.23	11.48

Source: Export Promotion Bureau, Compiled by BGMEA (2013)

Most of the garments units clustered in industrial areas and EPZs around in Dhaka - Gazipur, Savar, Ashulia, Mirpur, Tejgaon, Mohakhali, Uttara, Wari and Tongi, with some situated in the port cities of Chittagong and Khulna (Begum, 1999; Kumar, Report-2003). The numbers of garments factories increased some 632 in 1982 and BGMEA started with only 12 members in 1978 and presently has around 5400 member factories. Around 40% of BGMEA member factories are knitwear and sweater manufactures, and the rest 60% are woven garment manufactures (BGMEA,Report-2013).The RMG industry provides four (4.00) million employment to strengthen the economy of Bangladesh (BGMEA, Report-2013).

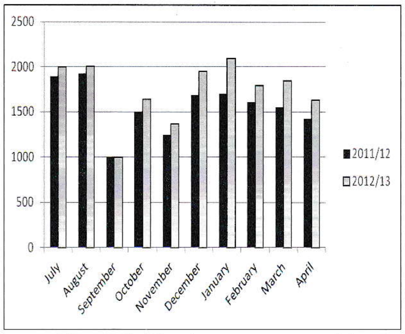

Figure 1: Total exports to world (knit & woven), FY 2011-12 & 2012-13.

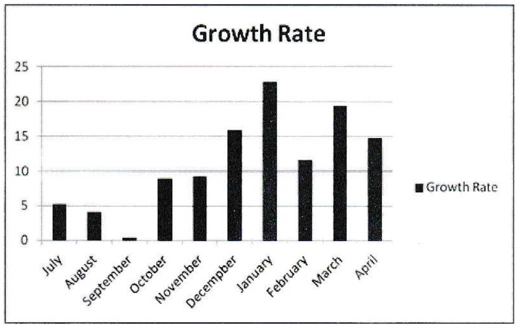

Figure 2: Total export growth rate (knit & woven).

Above figure reveals the comparison of exporting Knit and Woven in 2011-12 and 2012-13. In July-August 2011 & 2012 total export of Knit and Woven was almost similar but in September it was reduced drastically. On the other hand exporting has increased gradually up to January in both the fiscal year. Due to political unrest in Bangladesh total export is diminishing gradually up to April 2013.The figure 2 represents the growth rate of exporting in Knit and Woven. From July to September 2012 the growth rate was very low but from October 2012 to January 2013 the rate gradually increased. On the other hand from February to April 2013 growth rate was fluctuating due to recent political unrest.

6. Contemporary Challenging Issues

After MFA, **market concentration** is a great challenge for Bangladeshi garments producers. India and Pakistan were the only natural comparative advantage in the T&C sector during the MFA era, and the other countries joined the bandwagon much later, taking advantage of the MFA quotas (Adhikari & Weeratunge, 2006) Since the quotas were 'binding' on the labor-intensive, general category of products, it was natural for buyers to source these products from other countries in the region. Therefore, countries like Bangladesh, the Maldives and Nepal, and to some extent Sri Lanka, focused on manufacturing such items as men's and boys' cotton trousers and shorts, women's and girls' cotton trousers and shorts, cotton T-shirts, etc. Since not all these countries have been able to move away from the narrow range of products, their exports are highly concentrated on a limited number of products, with five product categories accounting for a very high percentage of their export portfolio. In addition, there is the problem of market concentration, with two markets accounting for more than 90% in the case of Bangladesh and Nepal.

Absence of local raw material is another challenge for exporting RMG products of Bangladesh. Bangladesh is only capable of knitting, finishing in knitwear sectors far behind in producing yearn, fabrics which is major sector for woven sector (Habib, 2009) Ablution of quota in 2005, RMG sector in Bangladesh is facing stiff competition in global apparel export market. Moreover, increased completion have been felt from neighboring countries including India, Pakistan, China and Thailand from where Bangladesh imports fabrics to meet the fabric demand of its RMG sector. Threats might come not only from marketing but also from outsourcing. More than 95 percent fabrics are imported from direct competitors (Robbani, 2004). Whatever may be the case, Bangladesh will lose some competitive edge in the world market.

Due to nonexistence of quota system, Bangladesh is facing **competition** in products price but also in lead time. At present only 25% - 30% value addition takes place to the RMG products as manufacturer import bulk of the raw materials (Habib, 2009).With the withdrawal of quota restrictions, some of the countries may find it economically advantageous to withdraw their production outlets from this country and export directly from their home countries. Moreover, some of the garment exporting countries from which Bangladesh is currently importing fabrics is expected to increase their supply of garments in the liberalized trading environment to increase their foreign exchange earnings (Begum & Ahamed, 1999).

Market access barrier is a great challenge for Asian countries like Bangladesh. Asian countries in general face higher market access barriers in the OECD market, particularly in the US market (Adhikari & Weeratunge 2006). For example, US tariffs continue to be a major impediment for accessing the apparel market. While an extra cost of up to 22% is added to products from Asia, shipments from other regions are only subject to import duties averaging 0.1% to 3% of their original value.

Lack of technology and slower rate to adapt with it is another challenge for Bangladeshi exporters. As the information provided by the BTMC (Bangladesh Textiles Mills Corporation) now the total demand for fabrics is 8419000 spindles, but our spinning mills produce only 2794000 spindles of fabrics, which can be used as export quality fabrics in the RMG industry. On the other hand, we have to import 5625000 spindles of fabrics from abroad. Within the remaining 6 years of MFA phasing out period it is almost impossible for us to produce 5625000 spindles of fabrics locally.

Though Bangladesh has introduced Labor Code 2006, but in **absence of proper implementation of this law** buyers are not satisfied to the producers of Bangladesh. The SA 8000 is a common global standard seeking to guarantee the basic rights of workers and provides the framework for the independent verification of the ethical production of goods and services (Begum & Ahamed, 1999).It is a set of universal requirements in line with ILO Conventions and has been developed by CEPAA (Council on Economic Priorities Accreditation Agency). The issues included under SA 8000 are Child Labor, Forced Labor, Health and Safety, Freedom of Association and Right to Collective Bargaining, Discrimination, Disciplinary Practices, Working Hours and Management System. The market is open in the world. To face the challenges in this situation Bangladesh needs to **establish own brand**, though it has gained goodwill in world market as quality producer. Every foreign country has its unique culture. In that situation, consumers will have many options and their tastes and preferences may change very rapidly. So, the suppliers will have to be aware of the consumers' tastes and preferences from time to time in the world market, which is a big challenge for the producers and marketers.

At the beginning of the 21s' century we should develop **product diversification** through market oriented design. In this regard for capacity building professional apparel design training based on both theoretical and practical knowledge is required to meet the demands of various potential apparel importing countries (Begum & Ahmed, 1999). Since culture varies across countries international marketers need to acquire required skills in this regard. Unfortunately, in Bangladesh the authors have found only one registered apparel design training institute, Institute of Design and Cultural Studies (IDCS), which has been working for development of skilled manpower to face the new challenges of international or global marketing of apparels. Without such skills, RMG sector will not be able to compete in the global markets.

Prompt banking a service is immensely needed in RMG sector, but recent scandal in banking industry has generated a question to the buyers. Regarding this, Bangladesh Bank has taken some policy regarding L/C and other international transactions which will create barrier in swift transaction.

Political unrest is a common phenomenon in Bangladesh which is not only damaging not only the foreign currency earning but also total economy. Unrest like hartal, non-cooperation programs organized by the opposition parties is one of the major challenges of our economy. RMG sector is highly affected by the political unrest of the country because it has to receive raw materials timely and maintain production schedule, shipment time, and complete other formalities in time. Establishing a backward linkage industry for the RMG sector needs equity and other supports from government which is at present inadequate. Otherwise the buyers will not accept the shipment and it may also loss the customers forever.

The government has identified this sector as the thirst sector of the country and always formulating favorable rules and regulations for the sector. **Frequent alteration of government rules and regulations and tax policies** are major problems of this sector. In our country with the change of the government the new government alters all the policies of the previous government.

In recent years, **labor unrest** in RMG sector of Bangladesh has been a matter of serious concern. There are allegations that a vested group is behind the violence in garments industry (Khan, 2011).Some Human-right-based NGOs are alleged to instigate the work-force in the name of their rights and privileges without knowing the actual capacity of the owners. Very often, agitating workers are aided by outsiders. Nowhere in the world is labor as cheap as in Bangladesh. It is one of the main factors for flourishing of this sector in Bangladesh. Therefore, foreign conspiracies in instigating labor unrest in garment sector of Bangladesh cannot be ruled out as history records hundreds of wars to capture another market.

Bangladesh might face fierce competition in its largest RMG export markets from 2008 onwards as the safeguard restriction on China expired (Ahmed, 1999). China has resource based advantages in cotton, silk, wool, manmade fibers as well as capacity based advantages in the textile spinning and weaving. It is also cost competitive with regard to manufacture of textured yarn, knitted yarn fabric and woven textured fabric. Because of these advantages China's share in the US import market in terms of volume increased by 11 per cent during 2004-0632 in spite of safeguard restrictions. India has also resource based advantages like China as well as cost competitive with regard to manufacture of ring-yarn, O-E yarn, woven O-E yarn fabric, knitted ring yarn fabric and knitted O-E yarn fabric.

7. Prospects of RMG Industry in Bangladesh

Bangladesh is a **low cost producer of garments products.** From this point of view Bangladesh is at the leading position. Many producers are now shifting their production from the high cost producers to the low cost producer countries. So it is a great opportunity for us to take those orders to exploit our competitive advantage at the highest level. Due to cost Japan is trying to shift its apparel sources from China and Korea to different LDCs. If the sector can exploit at least 10 percent of total Japan's apparel worth US$27 billion per year, the RMG export figure will increase by 100%. To meet the requirements of quality of product of Japanese apparel market Bangladesh has launched a project in association with the JETRO, the Japanese trading houses operating in Bangladesh and the Trade and Economic Wing of Japanese Embassy in Bangladesh (Begum & Ahamed 1999).

Bangladesh is weak in case of producing diversified products related to its competitors. So if it can produce diversified products at low cost then it will have the opportunity to capture more market share. Because it has already a competitive advantage of low cost production and with it she has to add diversified products and then the competitive advantage will be stronger. Bangladesh has only a hand full of products items to export market in the international markets. But after 2005 (after the phasing out period of MFA) the market will become very competitive for all the producers. The competitors must have to diversify their product range to survive in the competitive market. So Bangladeshi producers must also be innovative and come up with new designs, which would be accepted in the international market and will give them a new arena to compete in the competitive market in alien cultural environment (Begum & Ahamed 1999). The apparel sector of Bangladesh mainly exports low-cost products to the international market. But she can move into high value added products through diversification. This is not impossible given her two decades of experience, good relationship with buyers, worldwide reputation, and presence in quality-conscious United States and EU markets. Recently it has already penetrated the difficult but lucrative quality-conscious Japanese market (Robbani 2004).

Bangladesh garments industries have a great opportunity to **fill up the market gap.** There are a lot of markets still there where she can export garments goods and can expand the scope of the business as well. As Bangladesh depend on USA and EU majorly. The greatest opportunities lie on the unlimited market outside Bangladesh. In a quota free world, the United Nations Commission for Trade and Development (UNCTAD 1986) estimated that removal of the MFA and tariffs by developed countries will expand exports of clothing by 135 percent and textile by 78 percent. Trela and Whalley (1990), using a global general equilibrium model, estimated that the change will be much larger: the value of imports of textiles and clothing will rise by 305 percent in the US, 200 percent in Canada, and 190 percent in EU. This indicates that phasing out of quota will expand the market tremendously. Asia by far is the largest player in the world textile and clothing market and, industry experts are confident that, overall, Asia still will dominate (Robbani 2004).

Due to the low cost production system we are getting some substantial advantages in some sectors specially, for example in case of **knit-RMG sector.** We are enjoying this opportunity, but we need to explore it more. In the knitting sector, Bangladesh gained substantial competitive advantage over her competitors. According to the Bangladesh Knitwear Manufacturers and Exporters Association (BKMEA), the cost of yarn production per kg in the private sector of Bangladesh is only US$1.48, whereas in India it is $1.78, in Pakistan $1.60, in Japan $2.38, in Korea $1.73 and in Thailand $2.78. Therefore, knit-RMG has a good prospect for Bangladesh in post MFA period (Robbani 2004).

China is moving towards heavy industry leaving production of garments goods. As the market leader China is leaving their market share, Bangladesh has the great prospect to lead this industry in world market.

8. Recommendations

To face the challenges and grasp the prospects in garments industry Bangladeshi producers need to search new market side by side USA and EU. They should not only depend on buyers' design but also generate new design from own research. As the low labor cost in Bangladesh is blessing for the producers, they should keep it by maintaining labor code 2006 which will minimize the labor unrest. BGMEA, BKMEA and other bodies relevant to garments industry should arrange international trade fair in home and abroad frequently to attract new buyers. New and sophisticated technology should be adopted to meet buyers' and ultimate consumers' taste.

As this sector has already been identified as thirst sector, the government should pay attention heavily. Due to lack of power supply production is hampered and government should ensure it uninterrupted. Good relationship and contract with other countries are precondition for exploring new market in this sector. Recent political unrest makes the producers anxious. Both the government and other opposition parties should come forward to stop this unrest for greater interest of this industry.

9. Conclusion

Main limitation of this research work is absence of primary data. Further research might be conducted by using primary data which will be helpful to find out new dimension of challenging issues and prospects. These research shows that right now this booming sector of Bangladesh is suffering from the above mentioned problems and through solving these problems we can grab the above mentioned opportunities. The research will help the government of the country to be aware of the problems and formulate better policies to solve these problems. Because for solving these problems the government have to play the crucial role especially in case of solving political instability, infrastructural development and labor unrest situation. Moreover from this research the government at the same time will be notified about the upcoming opportunities of this industry and can help the industry to take those opportunities as well. The managers of the different organizations will be benefited from this research as well. They can match the problems stated here with their existing problems in their respective organizations and will be able to find out the exact problem in their organizations and if they can find out the problem they will be able to take necessary steps to solve the problem as well. Actually this research will help them to review their problems and solve them as well. They will be also aware of the opportunities and according they will be able to prepare themselves to take those opportunities too. This is how this report will help the government and managers to be aware of the problems and opportunities of the RMG industries of Bangladesh and take steps accordingly.

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