

Impacts of Covid-19 Pandemic on RMG Sector: A Study of Bangladesh

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Abstract

Bangladesh is a lower-middle-income country within South Asia, possessing impressive track records regarding growth and development during the last five decades. In this glorious history of development, the Ready-made Garment (RMG) industries have a good share of contribution. Approximately, 85% of foreign direct investment (FDI) is encouraged by this sector. Due to the drastic spreading of this COVID-19 pandemic in December 2019, the entire world economy had collapsed. Most of the countries had adopted immediate lockdown for survival, as the world had experienced a huge amount of death toll. In this regard, Bangladesh is not an exception. The Bangladesh government decided to lock down all institutional activities like RMG industries, schools, colleges, corporate offices, etc. to deal with this pandemic that is yet to leave the black spots behind in the economic sectors and that will invite difficulties in tackling the post-COVID-19 situation. This paper focuses on examining the existing situation faced by the ready-made garments industries and how it affects the huge number of garment workers. The paper follows the research question- How does the COVID-19 pandemic create a drastic impact on ready-made garment industries in Bangladesh? Furthermore, the paper uses a qualitative research method to build arguments beyond the toxic experiences of the RMG sectors in Bangladesh during this COVID-19 crisis and provides recommendations to overcome those.



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1. Introduction

The COVID-19 had appeared before the Wuhan city of China on 29th December 2019. Gradually it had spread around 213 countries all over the world ([Coronavirus Update, 2020](#)). The World Health Organization (WHO) had declared it as a pandemic on 11th March 2020, while, in Bangladesh, it was first identified on 8th March 2020 ([Corona Pandemic and Bangladesh, 2020](#)). Responding to this situation, the Bangladesh government had declared a countrywide lockdown from 25th March 2020. The Ready-made garment and textile industries of Bangladesh have a toxic experience during this COVID crisis. In Bangladesh, the RMG sector is the backbone of the economy, and the major amount (84%) of foreign direct investment (FDI) is attracted by this sector. As a result, it was really difficult to keep this sector shut down for a longer period ([Mohiuddin, 2020](#)). Though the Bangladesh government had opened RMG industries, corporate offices gradually, but their plan to achieve the export earnings of 50 billion dollars by 2021 is highly interrupted and seemed to be impossible ([Mamun, 2020](#)). Around 8 to 10 percent of their previously selected target will be completed by 2021 worth 34 billion dollars ([Akter, 2020](#)). Alongside different types of socio-economic difficulties have been raised in the RMG sectors in Bangladesh such as order cancellation, reduced export earnings growth and FDI, fall of GDP along with demographic impacts like health, unemployment, and safety-oriented issues, etc. ([Numan, 2020](#)).

2. Literature Review

The RMG sectors have a good amount of contribution to the economy of Bangladesh. Quota system and Multi-fibre Arrangement (MFA) from 1974–2005 was a great source for continual success and by 2002; Bangladesh's export earnings reached 77% of the total exports earnings ([Mishu, 2020](#)). According to the estimation of the World Bank, in 2014, the export earning of Bangladesh was 82% gain from the ready-made garments only and became the second largest RMG exporter after China in 2016 ([Fair Wear, \(2020\)](#)). The Ready-made garments (RMG) sectors had a huge contribution not only to the 11.2% growth of the gross domestic product (GDP) but also identified as a source of employment, foreign reserve, and women empowerment, etc. Above 4,600 RMG factories existing in Bangladesh and during 2018-2019 FY, Bangladesh achieved 84. 21% export earnings worth 34.13 billion dollars. The exported products were t-shirts, polo shirts, jerseys, pull over trousers ([Akter, 2020](#)). As it is known to all that Institutions set the rules and regulations according to institutional theory. 'Who gets what, when and why is the basic question that institutions answer or decide, as per the theory ([Steinmo, 2001](#)). The formal and legal structures of the government, their powers and decision-making procedures are explained by the institutional models. The new institutional theory's proportion enlighten with the rules of the institution as a formal organization form where the rules incorporate as fundamental rules ([Rundall, Shortell, & Alexander, 2004](#)).

In Bangladesh, while COVID-19 affected people were identified, the government decided to ensure the health security of the people, under its formal and legal structure. It possesses a potential threat for the RMG sectors at local, national, and international levels. For example, the main trade partners of Bangladesh are Europe, the UK, the US, and Canada, all of the government as legal institutions had adopted emergency lockdown and gone through the financial crisis badly. As a result, many well-known buyers had to cancel their orders and faced worth USD 17.02 million of order cancellation by 17th March, along with the suspension of orders worth 1.03 million USD. Almost 264 RMG factories had reported cancellation of orders worth USD 607.9 million that is huge in amount for a lower middle-income country like Bangladesh.

On the other hand, during the devastating state of COVID-19, Bangladesh government had opened up the garments sectors intending to compete the economic fall down according to the report “Fair Wear” published on 12 May 2020 (Fair Wear, 2020). Many Scholars identified it as a wrong decision. At first, the government of Bangladesh planned to re-open their work with 30% workforce but many were found operating with 50% capacity and even some had restarted with 70-90% capacity that makes the social distancing along with following the COVID-19 health guidelines merely impossible. According to the institutional theory, it is the failure of the Bangladesh government and other respective authorities like BGMEA, different NGOs and civil societies as institutions to tackle the pandemic of COVID-19. From February 2020 to February 2021, it noticed that a severe lack of concern for the RMG employees' well-being. For years, the fight for adequate pay and other worker rights has been at the forefront of labor leaders' demands, and this fight has intensified during the pandemic. There were reports of 100 incidences of labor unrest relating to wage payment in June 2020 alone. After a tripartite conference with labor leaders, government officials, and factoring companies to provide relief for factories that had order cancellations, suspensions, or no orders at all, salaries for workers who were unable to return to work due to the pandemic were lowered to just 65 percent (Fairouz 2021). The consequences of the COVID-19 pandemic for these RMG workers are dire, including uncertainty about whether they will be entitled to wages during the pandemic, as well as related issues such as a lack of money for basic necessities like food and concerns about factory reopening during peak COVID-19 infection periods (Kabir et al., 2021).

All the above-mentioned literature had addressed the existing problems, future patterns of the problems but none of them could identify a reasonable long term solution to maintain balance in both health and economic security. It is a new experience all over the world, in response to this situation, rather than criticizing one another, humanities demand co-operation.

3. Findings and Analysis

During the COVID-19 pandemic, the economic decline of the RMG sectors of Bangladesh has multiple impacts on the society, economy and health security systems that bear a heavy weightage in lower-middle-income countries like Bangladesh. Now the impacts of the COVID-19 pandemic in the RMG sectors of Bangladesh are represented below.

3.1 Economic Impact

These are country-wide prolonged lockdown, the global slump of economic conditions, and disruption of supply chains and demand (Alam, 2020). The economic status regarding export, import, remittance, and growth percentages had gradually increased from FY 17 to FY 19, but these dramatically decreased at FY 20 due to the COVID-19 pandemic that was depicted on the following table and graphs (Mahmud, Rafi, Noman, Al Shaekh, & Rakibuzzaman, 2020).

Table 1: Projected Exports, Imports and Remittances outcomes from FY 2017 to FY 2020

Projected Exports, Imports and Remittances (USD mn)				
	FY'17	FY'18	FY'19	FY'20
Exports	34019	36668	40535	35086
Imports	43491	58865	59915	52845
Remittances	12769	14982	16420	17405
Projected Exports, Imports and Remittances Growth %				
	FY'17	FY'18	FY'19	FY'20
Exports	1.7%	7.8%	10.5%	-15.4%
Imports	9.5%	35.4%	1.8%	-11.8%
Remittances	-14.55	17.3%	9.6%	6.0%

[Source: EPB & LBAMC Research]

The primary causes of the economic slump were factory lockdown and reduced demand from both consumers and producers. The secondary impacts are decreasing consumer expenditure, consumer confidence. During the pandemic, the companies are not producing a new product, they are selling their stocks products that have created bottleneck problems in terms of pending orders as well as not possible to just in time delivery products, and it also requires transparency. The raw materials sourcing problem has a dangerous impact on timely production (Meeste, & Ooijens, 2020).

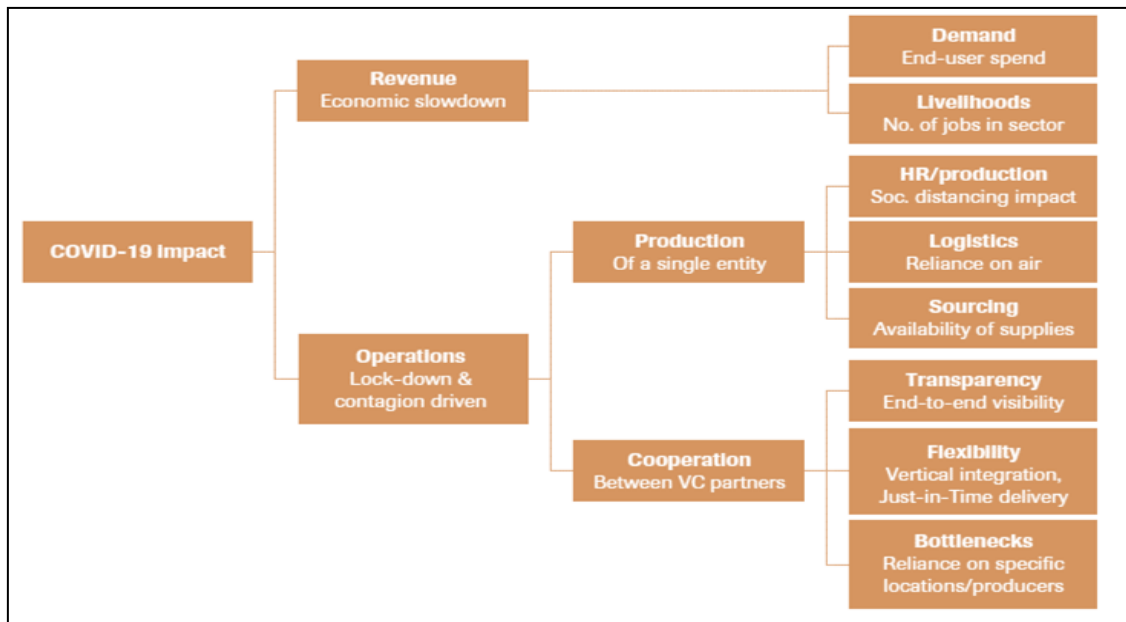


Figure 1: Overall economic impact of COVID-19

3.1.1 Order Cancellation

The readymade garment (RMG) industries of Bangladesh have gone through a plethora of problems due to the COVID-19 crisis. The US and UK brands had cancelled most of the orders. The other reputed brands like H&M, GAP, JC Penney, Primark, etc. had also cancelled their orders. According to the BGMEA reports, the RMG sectors of Bangladesh need to face financial losses worth over 3.15 billion USD worth for the pending work orders. It was a devastating experience for the RMG sectors and the 2 million workers engaged there (Zahir, 2020).

3.1.2 Impact on RMG's supply chain

Worldwide transportation shutdown, work order cancellations, insufficient support of the backward linkage industries, problems with raw materials supply, etc. are responsible for breaking the global supply chain. Bangladesh has 425 yarn manufacturing industries, 796 in the fabric production industry, and 240 in dyeing-printing-finishing factories affected by COVID-19. They fail to meet the schedule that interrupted the whole supply chain (Sarwar, Tarafder, Rahman, Razzak, Bushra, & Rahman, 2020).

3.1.3 Impact on Bangladesh GDP growth

Through an investigation on 9th April 2020 by Kristalina Georgieva, it was notified that over 170 countries' GDP growth rate would reduce, and create an economic disaster all over the world. Bangladesh GDP growth forecast 2020 is indicated in the following table where the IMF, World Bank, and ADP had represented the drastically reduced GDP after the pandemic (Mahmud, Rafi, Noman, Al Shaekh, & Rakibuzzaman, 2020).

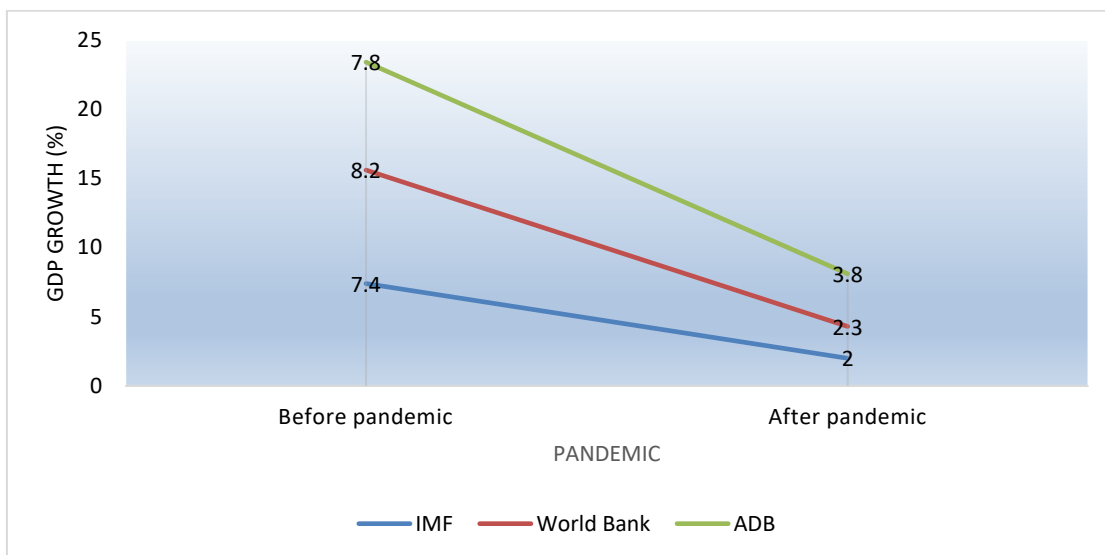


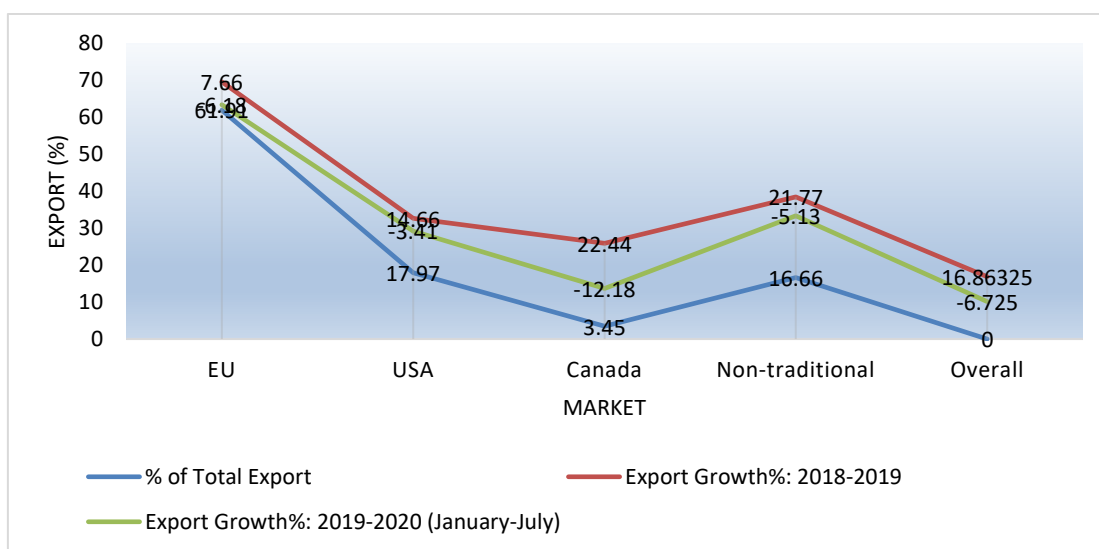
Figure 2: Bangladesh GDP growth forecast 2020

3.1.4 Impact on import

Bangladesh imports from different countries like Africa, India, and the USA, etc. These countries were locked down due to the Corona pandemic. Therefore, Bangladesh is facing great difficulties in raw materials sourcing like fibre, yarn, fabric, etc. The rate of import decreased by 3.87% in the first eight months, while the rate of export decreased by 12% by January only for the disruption of the supply chain. There are many reasons behind it, such as lower domestic demand, the lesser requirement of raw materials from textile and construction sectors, and the falling of oil prices are likely to result in negative (-11.8%) growth in total import payments in FY 2020 (Akter, 2020).

3.1.5 Impact on export growth

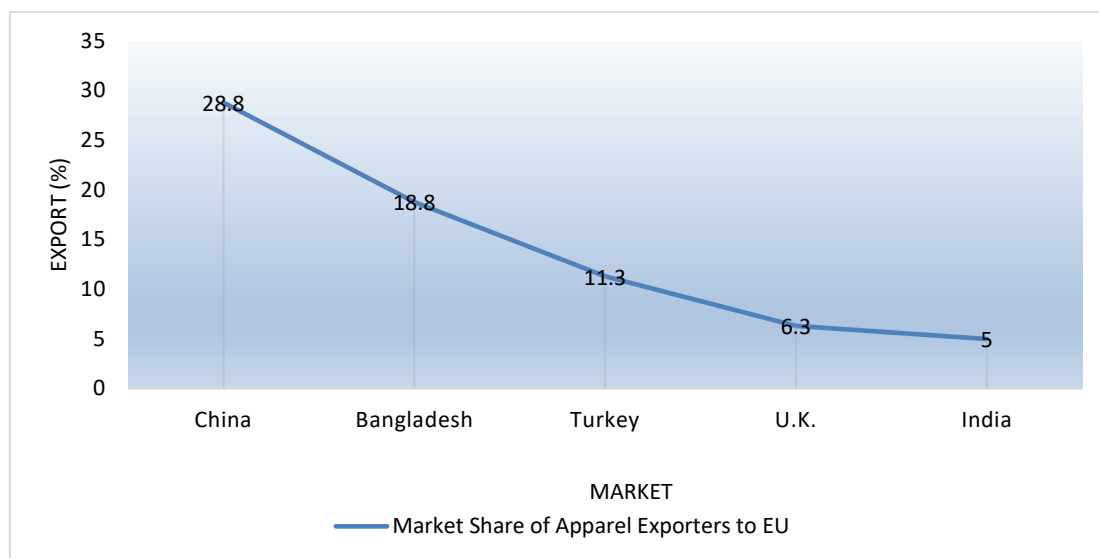
Analyzing the RMG markets of different countries, it's clear that the RMG export noticeably decreased. In FY 2018-2019, market growth percentages were 7.66 % that had been decreased by 1.48% in the current FY 20. The export growth for the USA decreased by 11.25%, for Canada by 10.26%, and for the non-traditional market, it had decreased by 16.64%. Overall export growth of the RMG industry in Bangladesh for the USA decreased by 10.14% (Akter, 2020).



[Source: BGMEA Website]

Figure 3: Export growth chart to different market

3.1.6 Impact on share loss in global market



[Source: Eurostat]

Figure 4: Global market share of Apparel exporter

Bangladesh has lost the Multi-fibre Agreement (MFA) opportunities as a developing country, whereas Vietnam attained a Free Trade Agreement with the EU. Due to the Corona outbreak, Bangladesh would be placed behind Vietnam (Karim, Islam, & Talukder, 2020). There are many reasons such as: i) A major outbreak of the COVID-19 pandemic, ii) Lack of value-added product, iii) Robust management of Corona pandemic, iv) Lack of technological development and v) Longer supply chain. This becomes longer due to COVID-19 (Akter, 2020).

3.1.7 Impact on the indefinite period to execute orders

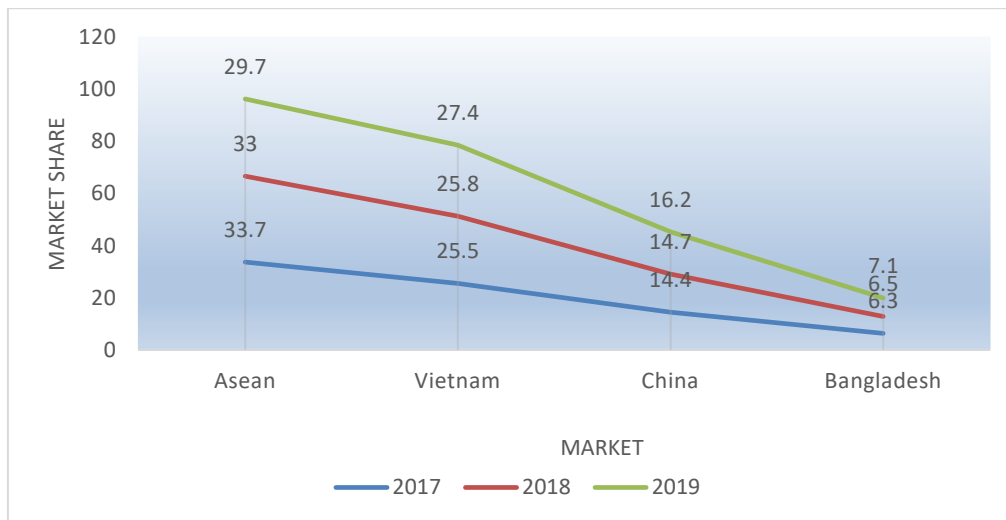
Lockdown for a longer period hampers the normal production flow. The RMG industries of Bangladesh are opened partially and operated through only one shifting work, avoiding overtime or double shifting. As a result, there are huge pending orders that require more time to fulfil with fewer numbers of workers. The RMG industries require more space for maintaining the social distance between workers that hinder placing more work plans (Akter, 2020).

3.1.8 Impacts on-demand slump of RMG industry relative to competitors

In 2019, Bangladesh exported USD 34.1bn apparel, and 73.0% of it came from basic products such as shirts, trousers, t-shirts, jackets, and sweaters. In response to this pandemic, the RMG sectors of Bangladesh should move on to producing value-added products like Personal Protective Equipment (PPE-Current demand of the whole world), fireproof cloth, etc. Bangladesh has recently exported 6.5 million PPE products to the U.S. It's a good initiative for growing demand (Akter, 2020).

3.1.9 Impact on the creation of new market

The US and China had a strong trade relationship that has become weaker due to the outbreak of COVID-19 from China. The USA considers it as a trade policy of China. As a result, the tariff war has become stronger between them, and apparel exports of China to the US market have deteriorated. The export rate has decreased from 33.0% in 2018 to 18.3% in March 2020. Recently, the USA has shown interest in importing apparel from Bangladesh (9.4% YTD in 2020 vs.7.1% in 2019), and Vietnam (18.9% YTD in 2020 vs. 16.2% in 2019).



[Source: OTEXA]

Figure 5: Market share of apparel to the U.S

3.1.10 Impact on the reduction of the product cost

These are the main impacts on the reduction of the product cost: i) Worldwide economic conditions fell drastically as an effect of COVID-19 and all types of commercial activities had been stopped. As a result, the RMG importers fail to pay their order amount, cancel orders, or request a cost reduction, ii) At the same time, cancelled orders block the cost of the capital. To return the cost of the capital in the business, the RMG manufacturer has to sell their goods at a low cost and iii) Another reason for the reduction in product cost is the falling demand for RMG worldwide (Kabir, Maple, & Usher, 2020).

3.1.11 Impacts on backward linkage industries of RMG

RMG industries largely depend on the supply chain of backward linkages industries like washing, printing, embroidery, etc. (Leitheiser, Hossain, Sen, Tasnim, Moon, Knudsen, et al., 2020). According to BTMA, the followings are the number and ranges of manufacturing mills that constitute their membership registrar.

Table 2: Textile related industries in Bangladesh

Yarn Manufacturing	425
Fabric Manufacturing	796
Dyeing-Printing Finishing	240
Knitting Manufacturing	2,800 (not BTMA member)

All backward linkage factories are largely suffered by COVID-19. They faced a lot of problems in raw material sourcing like dyes, chemicals, fibres, etc. and for these, the RMG sectors of Bangladesh depend on foreign suppliers (Shaminnta, Gope, & Sumaiya, 2020). As it is not possible to get the material sources from abroad, they fail to meet the schedule of the given supply chain.

3.2 Social Impact

3.2.1 Impact on women empowerment

Among the 4.2 million workers in the RMG industry of Bangladesh, the majority are women (around 61%). Women have become self-dependent by the blessing of RMG industries, but,

due to COVID-19, women are losing their job since sometimes industries select the male workers rather than the female (Imran, & Ahmed, 2020). Therefore, women empowerment and gender equity is hampered by this pandemic ([The Daily Star, 2020](#); [Hosen, Nafiujjaman, & Biswas, 2020](#)).

3.2.2 Impacts on unemployment

The COVID-19 outbreak is also responsible for enhancing unemployment. Many reputed buyers have cancelled their orders during this period, and that brings financial sufferings for the RMG industries. They need to sack some workers to sustain themselves in the market. As a result, poor workers become poorer that increases different crimes like theft, rape, robbery, etc. Many scholars have identified their frustration as well as advantage seeking attitudes are enhancing these sorts of crime when all the security instruments of a lower middle-income country of Bangladesh are struggling to ensure health security, these people are utilizing their diverted focus and serving their illegal purposes at the back ([World Economic Forum, 2020](#); [Amit, 2020](#)). Moreover, the foreign remittances had fallen by 22 percent, from \$18.32 billion in 2019 to \$14 billion in 2020 that are directly threatening the economic security in the battle of post-COVID Survival ([Ramachandran, 2020](#); [Das & Sutradhar, 2020](#)).

3.2.3 Impact on livelihood

Garment workers are paid very less amount around 95 US\$ per month that is not enough for handling the daily needs of their families. So, they have to stay 3-4 people in a small room using the same kitchen and washroom. It had become more difficult when they did not get their wages in the lockdown period. Sometimes they need to go through a financial crisis and live in a small tiny room with two or three families together. They have a health risk of coronavirus ([Elven, 2018](#); [Carlson & Bitsch, 2018](#)). Thus, we can assume that over 200 million people (if we count an average of 4 members in a garment worker's family) who are related to the garment industry have a high risk of being affected by the COVID-19 pandemic in Bangladesh ([Uddin, 2015](#)).

3.3 Health Security Factor

3.3.1 Impacts on RMG workers health and safety

Some questionable decisions of BGMEA and the Bangladesh Government have threatened the health and safety of the RMG workers. With the re-opening decision of the RMG industry, the workers have returned to their workplace and are affected more by COVID-19. Due to the opening of the RMG industry, the workers fail to follow the safety rules properly. They do not



use personal protective equipment (PPE), only face masks which are made of cloth and cheap in quality. It cannot protect the virus. Moreover, the majority of the RMG factories are operated within limited space where it is difficult to implement the social distancing norms ([Express, 2020](#)).

Figure 6: Garment workers were washing their hands without social distance after reopening garment factories in Bangladesh despite COVID-19 concerns. [Photo Courtesy: Peoples dispatch, 29th April 2020].



Figure 7: Garment workers were travelling in local transport without social distance (Elven, 2018).

4. Conclusion

The COVID-19 infection spread all over the world, but still, there is no vaccine or anti-viral drug invented yet. The review findings revealed a significant economic, social and health security impact on the RMG industry such as descending import & export, GDP growth, health and safety and ascending unemployment, order cancellation etc. This pandemic has created devastating impacts on the health and economic sectors all over the world. The RMG workers of lower-middle-income countries like Bangladesh have been greatly affected by it due to a lack of awareness and sometimes by misinformation (Sen, Antara, Sen, & Chowdhury, 2020). Most often, due to coping up with the economic disaster, the RMG sectors of Bangladesh need to overlook the security issues that may prove as a threat to thousands of workers (Sen, Ahmed, Shahriar, Antara, Sen, Edeh, & Chowdhury, 2020). We are certified that this paper has been entirely done by us where we have given fully documented references and materials of this paper have not previously been submitted for assessment in any formal case study.

4.1 Recommendations

During the post COVID response, it is too early to determine the future pattern of the challenges, but challenges will certainly be there where all the fighters need to work together and build up a strong economic background by applying effective and innovative techniques such as the production of value-added products, apply advanced technology, create skilled manpower by providing training, etc. to tackle this global crisis. In response to the probable future challenges which may be faced by the RMG sector of Bangladesh, the government along with the RMG sector head and its subordinates must be represented as the world's best RMG exporter. By no means, health security issues can be neglected. In this regard, government, RMG sector heads may address some nudges to ensure the Health security issues where stronger surveillance must be there. The workers who will maintain proper health guidelines and social distances, will be awarded incentives that will not only encourage them to maintain health security but also inspire others to participate in ensuring security and attain the nudges.

Conflict of Interest:

None.

Funding:

None.

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