

Bangladeshi Ready Made Garments Industry: Past and Future

(The concept of Brand Loyalty among RMG Customers)

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Abstract: This paper has two phases; in first phase highlights as, Bangladeshi Ready Made Garments (RMG) has passed through a number of domestic as well as international challenges. Few of those challenges are traced out in this study from industrial development point of view. The second phase is related to the brand loyalty of customers buying ready made garments, Strategic Literature Review (SLR) has been drawn on the concept of brand loyalty and related influencing factors. This paper suggests that firms need to pay attention towards the brand loyalty of the customers by mapping their expectations from the brands otherwise they may not be able to move towards the international markets and compete among international brands.

KEYWORDS: Ready Made Garments, Technology, Brand Loyalty, Brand trust and Empowerment.

I. Introduction and Background of the study

The RMG sector of Bangladesh has been a very important sector which has been playing its important and significant role in improving the economy of the country. There are almost 4 million people employed in the RMG sector in BD and there are more than 90 percent employees who are females (BGMEA, 2014). The RMG sector played a key role in BD to give employments to the females which made a way in social transformation in Bangladesh (Masum, 2016).

Although the RMG sector has a positive contribution towards the economy of the country; this sector is still behind as compared to the other developing countries. The sector of RMGs has comparatively low income firms and don't have much resources also to compete with the other sectors at a larger level. Not only these firms are physically small, but their growth is also affected by different factors e.g. financial poverty and manpower (Muhammad et al., 2010). These factors resulted into created the lack of capacity among RMFs to compete with tangible assets which included market intelligence, intangible asset and advanced technologies (Rejionen et al., 2012; Silver & Berggren, 2010).

Keeping in mind the above facts, some of the researchers had tried to explore the competitive strategy for the RMG sector to boost its performance. Merrilees et al., (2011) conducted a research in this aspect and they revealed that there is a huge impact of branding capability on Australian industry. Likewise a study was conducted by Rejionen et al., (2012) who suggested that profitability of any business can be improved by brand orientation which has a significant impact on business. Accordingly different researchers (e.g. Mi & Baharun, 2013; Ng & Kee, 2012) proposed that there should be a much more focus in the RMG industry on branding which is a very important competitive tool in any organization setup to enhance its performance. Though, the situation in the competitive environment of world explores that brands of RMGs are don't having much success in market and are struggling to sustain their position in the market.

Furthermore, many of the brands of RMGs are still new in the market (SME Corp, 2015). Likewise, some RMGs brands have been recognized due to their successful branding and also awarded the Best Brand Award of SMEs (The Brand Laureate, 2015; Farrukh et al., 2019; Farrukh, Alzubi, et al., 2018; Farrukh, Lee, & Shahzad, 2019; Farrukh, Meng, Sajid, & Shahzad, 2020; Farrukh, Ting, et al., 2018). Regardless of that, there are still so many challenges for these RMGs to

compete in the industry. Especially in context of international markets where the share of RMGs is declining and there is need for further investigation in this regard (Euromonitor, 2014). That is why; this research is focusing on to investigate the branding strategies that have a positive impact on sustainable RMG brand in the sector of textile.

II. Background of the country and the industry

The RMG sector of BD has very significant and important position in BD's economy and also played a vital role in country's development. Bangladesh should take pride in the industry that has been recruiting billions of dollars as export earnings and generating jobs for the country's millions. The "Made in Bangladesh" tag also brought fame to Bangladesh, making it a globally renowned brand. Bangladesh's Ready Made Garments industry has undergone a dramatic emergence in the last 40 years as one of the world's top manufacturing hubs for clothing shopping.

Most well-known clothing brands around the world purchase Bangladesh apparel and market it as their goods. While Bangladesh earns considerable amounts of foreign money from overseas and has all the resources to build personal international brands, it could not develop any renowned international clothing brands in the records of its RMG sector for forty years. Yet the time has come to introduce Bangladesh's own foreign producers, as both the international business climate is slowly evolving and competition is also growing. This thesis describes specific aspects of branding that may prove to be instrumental in Bangladesh's that foreign clothing brands. To analyze the Bangladeshi brand created, worldwide.

Bangladesh started the industry of RMG in the country in 1980s. Nurool Quader Khan (Late) was the pioneer of RMG sector in the country who was regarded as a very good civil servant during his starting career as the civil servant. It was his aim to bring a constructive change in this sector in BD. He sent 150 internees in South Korea in 1978 to learn the making of readymade garments. The Desh Garments was the first RMG factory in the country which was set up by him with the help of foresaid internees for making RMG goods for the purpose of export. Meanwhile, different other people started to establish the RMG factories in the country along with Nurool Quader Khan. Those first apparel factories were Aristocrat Limited (founded by AM Subid Ali), Stylecraft Limited (founded by M. Shamsur Rahman), Sunman Group (founded by Major Abdul Manan), Azim Group (founded by Engg. M. Fzlul Azim), Paris Garments (founded by yMd Humayun), Reaz Garments (founded by M. Reazuddin) and Bond Garments (founded by Akhter M. Musa) (Masum, 2016).

On the other hand, the the post-multi fiber arrangement age is the other success story. All the predictions were proven to be wrong by Bangladesh as the country dominated the challenges of post-MFA. Currently, the Bangladeshi RMG industry is earning most of the exporting money as compare to the other sectors of the country. Regardless of this fact, the inspiring growth level of this industry, and the amazing prospects of this industry there are some challenges which still exists and need to be addressed. The safety at workplace and better conditions for work is the biggest challenge which the RMG industry of Bangladeshi still facing. The introduction of new products in the market is the real time necessity. Socio-political stability ensurity is the premium necessity to get sustainable environment for RMGs in BD.

III. Ready Made Garments (RMG) Industry

The export-oriented readymade garments (RMG) sector in Bangladesh started its journey in late 1970s as a small non-traditional sector of export. At that time there were only nine exporting garments industries in the country. The three largest industries in that time were Riaz Garments, Jewel Garments, and Paris Garments.

Among those, Riaz Garments was the most famous and oldest industry in that time. In the earlier stage, Riaz Garments of Mohammad Reaz Uddin started its business with some tailoring shop in the name of Riaz store. Later on, the name turned into Riaz Garments in 1973, and from 1978 the company started exporting with one million pieces of shirts in the South Korean Company named 'Olanda'. Desh Garments is another pioneer of Bangladesh RMG sector. In 1979, Desh Garments started a joint project with South Korean company "Daiyuu". At the same time, several garments factories were established such as Stylecraft Limited, AristocraftLimitd, Azim Group, and Sunman Group. Following the beginners of RMG sector, some others discreet and hard-working entrepreneurs started their RMG business in the country(Noor and Khan, 2016). Since then, RMG sector of Bangladesh has been developing day by day through various critical stages.

Different authors have provided different opinions on the issue of phasing out of 115 MFA and their possible impacts on the competitiveness of Bangladesh RMG industry (J. Hasan2013). Nordas (2004) concluded the four possible

consequences of phasing out of MFA. Chowdhury, Ali and Rahman (2006) depicted that due to the rules and regulations of World Trade Organization 118 most adverse affected country will be the LDCs like Bangladesh.

IV. Contribution of RMG Industry in Bangladesh Economy

The Ready Made Garments (RMG) industry contributes to the Bangladesh economy in a distinctive manner. The industry plays a significant role in terms of employment and income generation of millions of people especially the poor. More than five million workers are directly and more than twelve million inhabitants are indirectly associated with the industry. In addition to its economic contribution, the expansion of RMG industry has caused noticeable changes by bringing more than 3.2 million women into the workforce. Hence it is quite apparent that this sector has played a massive role in the income generation of a large portion of our population. RMG's contribution in terms of GDP is highly remarkable; it has reached at 13 percent of GDP which was only about 3 percent in 1991 (Noor and Khan, 2016).

The RMG sector has overwhelmingly high backward linkage with textile sector providing fabrics, yarn and other ancillaries. It has also important backward linkage with utility sectors such as electricity and gas. It has forward linkage with transport, communication, banking and insurance and trade services. Besides, there is a considerable subcontracting linkage within the sector. The buying houses also play important role towards bringing the manufacturers and buyers of RMG products closer. The RMG value-added ratio to output stood at 19 percent in 1993-94. Since then the RMG sector has undergone important changes, with substantial movements in terms of enhanced value addition.

V. Challenges of RMG Sector in Bangladesh

It is evident from the theoretical and historical evident that BD needs to continue the export-oriented development in the country. The Bangladesh is going through the demographic transition and as a result there is a vast number of labor force which needs the employment opportunities. So, there is need to focus on the export markets instead of focusing on the limited market at domestic level and this could create employment opportunities for most of the unemployed people in the country and also can eradicate the poverty issue in Bangladesh. However, with the passage of time the patterns of trade are changing at a rapid growth which is creating challenges as well as the employment opportunities in Bangladeshi RMG sector (Noor & Khan, 2016). The sector of RMG is very important for BD's national development because this sector has low fixed costs and also it emphasizes on labor intensive manufacturing in the country. Even though, there are still so many challenges which this industry has to be faced. Some of these challenges are discussed as;

The prolonged unrest of political system of Bangladesh is the biggest challenge for the RMG industry in BD which is seriously threatening the productivity along with marketing issues of the RMG sector in BD. There was a decline in the export rate of BD in January 2015 as compare to the exports in January 2014 to the America and the declined rate was 7.16 percent. The goods exported in January 2015 by BD to America were 8.38 percent lesser as compare with exported goods in January 2014 as BD exported 15200000 sm garments in January 2015 (Haider, 2007). There are most of RMG factories which are export oriented in BD. The North America and European Union countries are the major markets for the RMG sector of BD. Bangladesh to compete with the international RMG market by making developments in its structural hierarchy. But there are numerous structural issues which are linked with the BD's RMG sector e.g. poor transport facilities, poor roads, low gas pressure, inadequate supplies of energy and uninterrupted supplies of energy, etc.

All the garments in the country who has taken charge failed to facilitate this industry with the required infrastructure along with other facilities like uninterrupted supply of energy which made the cost of RMGs more high as compare to the other competitors in this sector. There are numerous associated consequences and compliance related challenges which the BD's RMG industry is facing. The Rana Plaza tragedy and Tazin Garments tragedy forced BD to comply with the some international standards and the country was also pressurized by the America and EU countries to improve this sector. Furthermore, the Bangladesh also failed to get the GSP facilities. The BD's RMG industry is also facing the challenge to get the GSP facilities back.

These issues are rising at the time when the most transformed export system of China is being developed while the China is the major competitor of BD in the sector of RMGs. Whereas the China shift could give advantage to the RMG sector of BD in the medium to long run, the sector deals with some challenges at short term largely owing to economic difficulties in the economies which are already advanced. Whereas, there was a way for the emerging markets to return

to high growth level after 2008-09 great recessions, the economic outlook of the advanced countries remained gloomy. The continuous job losses overshadowed the optimism of economic recovery in America and independent debt problem on both sides of Atlantic countries. Moreover, numerous EU's countries announced austeritious measures which could reduce their demands for importing goods and services to a great extent (Noor and Khan, 2016).

Though, the current strict measures can have adverse effects on apparel sector of Bangladesh. In recent past, numerous researchers revealed that the RMG industry of BD is going through difficult situation as the country is lacking to produce high quality professionals in the RMG sector and this industry is relying on foreigner experts to improve the industry and the foreigner personnels are expensive as compare to the local experts.

VI. Competitiveness in the RMG Industry

The United States was the main export destination for Bangladeshi RMG products in the early 1990s followed by the European Union, but the European Union has surpassed the United States over time. These two destinations generate more than 90 per cent of the total RMG export earnings of Bangladesh (BGMEA, 2018). The shares of other importers, such as Australia, Canada, China, Japan and the Russian Federation as well as countries in the Middle East, in the total RMG export earnings of Bangladesh are minimal. This section of the paper focuses on surface-level competitive performance of the Bangladesh RMG industry in the United States and the European Union markets only. In addition, the performance of China and India along with Bangladesh as RMG suppliers to international markets is also considered for comparative analysis (Haider, 2007).

VII. Export competitiveness in the European Union market

Bangladesh has experienced both quantitative and qualitative changes in exporting garment products to the European Union market during the period 1996-2005. The textile and garment export earnings of Bangladesh from the European Union increased from 1.2 billion euro in 1996 to 3.7 billion euro in 2005. For India and China, the corresponding earnings increased from 3 billion and 5.3 billion euro in 1996 to 5.3 billion and 21.1 billion euro in 2005 respectively. Garment products generate the major share of Bangladesh's export earnings from the European Union (Yunus, 2010). However, both textile and garment products in China and India contribute to the export earnings from the European Union. For example, garment products on average generated more than a 95 per cent share of the total textile and garment exports to the European Union from Bangladesh during the period 1996-2005. The corresponding shares for India and China stand at below 75 per cent and 80-90 per cent respectively (Uddin and Rahman, 2015).

VIII. Empowering Women by RMG industry in Bangladesh

Women in the labor force have been at the forefront of Bangladesh's recent successful economic growth, making up the majority of workers in the ready-made garment sector (RMGs), The country's flagship export oriented industry. The creation of a large microfinance system focused on women, a subject of much study and emulation around the world, has also changed the economic position of women (Absar, 2015). Further participation of women in measured economic activity outside the home has the potential to make a substantial additional contribution to economic growth, and to improve the status of women in many other ways (Bhattacharya and Rahman, 2002).

The 1972 Constitution of Bangladesh enshrined equal rights for women and paved the way for remarkable measurable progress in their status. Measure of gender inequality, the ratio of male HDI to female HDI, Bangladesh is ranked 105th in the world, with women having an HDI of 91% of that of men (Absar, 2015). While that rank is relatively low, the ratios are much lower in India and Pakistan at 83% and 75%, respectively. Thus, outcomes for women are generally poor, but to a substantial extent that reflects the overall level of development. In comparisons to men, Bangladeshi women are doing somewhat better than women in other countries in the region (Noor and Khan, 2016).

Despite the remaining hurdles, the status of Bangladeshi women has improved in many ways over the last 40 years in Bangladesh. In 1974, the total fertility rate was a remarkably high 7.3, while by 2013 it had fallen to 2.2 (World Bank Report, 2013). This in itself reflects an enormous change in the lives that women live and tremendously increases the potential scope of women's participation in the economy. Maternal mortality rates have also fallen dramatically: from 650 per 100,000 live births in 1986 to 216 in 2010. Much of this fall has been accounted for by improved access to health care.

Parity for primary school had already been achieved by 2000 (BBS, 2017). The successes in educational parity have been due, at least in part, to substantial cash-based programs to support the families of girls attending secondary school. Improved education for girls has, naturally enough, improved literacy rates; while in 1974 the adult literacy rate was 20 percentage points higher for men than for women, by 2011 the gap had fallen to less than 4 percentage points, and this gap was on the basis of a much higher average literacy rate (Bhattacharya and Rahman, 2002).

IX. Technology Adoption and Adaptation

The garment industry operates on three basic operations in the developing world: cutting, sewing, and pressing / finishing. Typical manufacturing is a combined cycle of different specialized and/or general machines powered by manual/mechanical/electronic equipment by skilled and unqualified operation of various organizational development activities (Yunus and Yamagata, 2012; Shahzad & Bhatti, 2008; Shahzad, I. A., Raju, V., et al., 2018; Shahzad, Farrukh, Yasmin, 2020). High-tech and R&D operations in the textile manufacturing industry have historically been less prioritised. Because the materials need proper feed through the machines, there is minimal automation (Bailey, 1993). At apparel executives agree that success in the industry depends on the ability to adapt rapidly to demand across a range of strategies and better technical strategies (Bailey, 1993). By introducing modern technologies and techniques, the desired levels of output and quality can be achieved. Apparel manufacturers are trying to cope with ever-changing trends of fashion by reducing the time it takes to design, manufacture and deliver the products by 19.

Typically, a firm's size has been a traditional factor assessing the firm's level of innovation and performance: firm size positively affects a firm's degree of innovation and acceptance of technology. While small firms have some advantages over larger firms in terms of versatility, informality, adoptability, and pace of operation (Fiegenbaun and Karnani, 1991), the size has a positive impact on the company's adoption of technologies. Insofar as most of Bangladesh's companies are small-scale informal, and adoptability defines the operating speed in the primary. Considering that R&D is a unusual practice in small businesses, technology adoption remains gradual or even imitative for them.

The orientation towards exports can be conceptualized as the degree to which a business is encouraged to export and various export activities are carried out. So the export focus of a organization will affect technology adoption. In the same way, the adoption of advanced production technology by a company is found to be positively associated with the company's export orientation (Mottaleb and Sonobe, 2011). A company may adopt or borrow technology already in use within the industry but at high cost associated with the adoption of advanced technology. In today's technology-based manufacturing, appropriate and effective employee skills and practices are becoming ever more important. Many types of technological 20 implementations need to be followed by changes in ability requirements, particularly the adoption of new manufacturing technologies.

Table 1:
Studies on brand management and findings

Researches	Category	nature of the study	Industry	Respondents	Findings
Rode & Vallaster (2005)	Internal branding	Qualitative	Tourism	Owners/Managers	Entrepreneur play vital role in shaping brandmanagement for RMG.
Wong & Merrilees (2005)	Brand strategy	Qualitative case study	Various – service Australia	Owners/Managers	Brand orientation play vital role impacting brand performance
Holverson & Revaz (2006)	Internal branding	Quantitative	Hotels	Owners/Managers	Hard or soft brand strategy depends on issues to tackle.
Merrilees (2007)	Internal	Qualitative	Various service,	-	Branding helps to boost RMG performance for new venture

	branding	case study	manufacturer		
Opoku et al. (2007)	Brand strategy	Qualitative	Service - textiles	-	Brand personality helps RMGs in textiles to position itself against competitors.
Berthon et al. (2008)	Internal branding	Quantitative	Various service, manufacturer	Owners/Managers	RMGs practice different brand management to boost performance and have different branding issue compared to large company.
Wong & Merrilees (2008)	Internal branding	Quantitative	Various service, manufacturer Australia	Owners/Managers	Brand orientation improves brand performance (awareness, image, reputation, loyalty). Brand performance improve financial performance (market share, profit)
Tuominen et al. (2009)	Internal branding	Quantitative	Finland	Owners/Managers	Brand orientation improves brand performance (awareness, image, reputation, loyalty)
Spence & Essoussi (2010)	Internal branding	Qualitative case study	Manufacturer - Monaco	Owners/Managers	Branding contribute to RMG growth
Steenkamp & Kashyap (2010)	Internal branding	Quantitative	Various New Zealand	Owners/Managers	Intangible asset (loyalty, reputation) important for RMG success
Eggers et al. (2013)	Internal branding	Quantitative	Various Germany	Owners/Managers	Brand trust leads to RMG growth (market share, profit)
Vlahvei et al. (2013)	Brand strategy	Quantitative	Various - foodservice Greece	Owners/Managers	RMGs lack focus on market communication to differentiate offerings from competitors.
Agosstini et al. (2014)	Brand strategy	Quantitative	Fashion Italy	Owners/Managers	Corporate trademark plays more important role to enhance brand performance (revenue) compared to product trademark.

However, most of these studies are mainly focus on internal branding which merely gain insight from owners/managers perspective. According to Baumsgarth (2010) and Centeno, Hart, and Dinnie (2013), it is also important to understand the perceptions of customers because branding is not just an internal concept and the success of branding is measured through profits contributed by repeated purchases from loyal customers (Aaker, 1996). In other word, a success branding requires solid internal branding which contributes toward the success outcome measured by repeated purchase of loyal customer. Following this, there is still a need to cover this gap in the literature.

Brand loyalty is the ultimate goal to measure the success of a company's branding strategy (Aaker, 1996; Chaudhuri & Holbrook, 2001; Russell-Bennett, McColl-Kennedy, & Coote, 2007; Sahin, Zehir, & Kitapci, 2011; Zehir, Sahin, Kitapci, & Ozsahin, 2011). Additionally, there are two techniques to investigate brand loyalty. The composite approach includes both the attitudinal and behavioral aspects as a single unit of brand loyalty (e.g., Brakus, Schmitt, & Zarantonello, 2009; Erdogmus & Budeyri-Turan, 2012; Ha, John, Janda, & Muthaly, 2011).

The second approach involves measuring attitudinal loyalty and behavioral loyalty separately (e.g., Chaudhuri & Holbrook, 2001; Kuikka & Laukkanen, 2012; Lin, 2010; Matzler et al., 2008; Rauyruen et al., 2009; Shahzad, Bhatti & Khalid, 2007; Shahzad et al., 2018). Marketing literature agrees that both attitudinal and behavioral loyalty affects brand equity differently. Attitudinal loyalty is related to the willingness of a customer to pay extra for a particular brand

compared to the alternative and increased of customer base through referral, but behavioral loyalty manifests in increased market shares and profits (Chaudhuri & Holbrook, 2001; Rauyruen et al., 2009; Sethuraman & Gielens, 2014). Hence, this study is interested to investigate brand loyalty from both attitudinal and behavioral loyalty in order to tackle the research issue which is to help RMGs in the textiles industry to increase its market share and increase its customer base as mentioned earlier in problem statement.

A call was raised to examine the important factors in driving loyalty toward successful RMG brands (Agostini et al., 2014; Asamoah, 2014; Krake, 2005; Mi & Baharun, 2013; Ng & Kee, 2012). In fact, RMGs have been strongly urged to learn from the successful RMG brands in the country (RMG Masterplan, 2013). Following this, the focus of this study is on RMG brands within the textiles industry in Bangladesh because RMGs in the textiles industry play more important role in contributing toward Bangladeshi economic as compared to food manufacturer (RMG Corp, 2015, 2012). Particularly, textiles industry is part of the largest sub-sector in the service industry namely the wholesale and retail trade as well as textiles and accommodation (62%). In addition, there has been lack of quantitative RMGs branding study in the context of textiles. Only few studies has been done in the context of textiles for RMGs branding literature (Opoku et al., 2007; Vlahvei et al., 2013). The findings of such research will shed more light on the RMGs branding literature in the context of textiles.

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