



ASIAN CENTER FOR
DEVELOPMENT

THE SURVEY OF GARMENT WORKERS 2020

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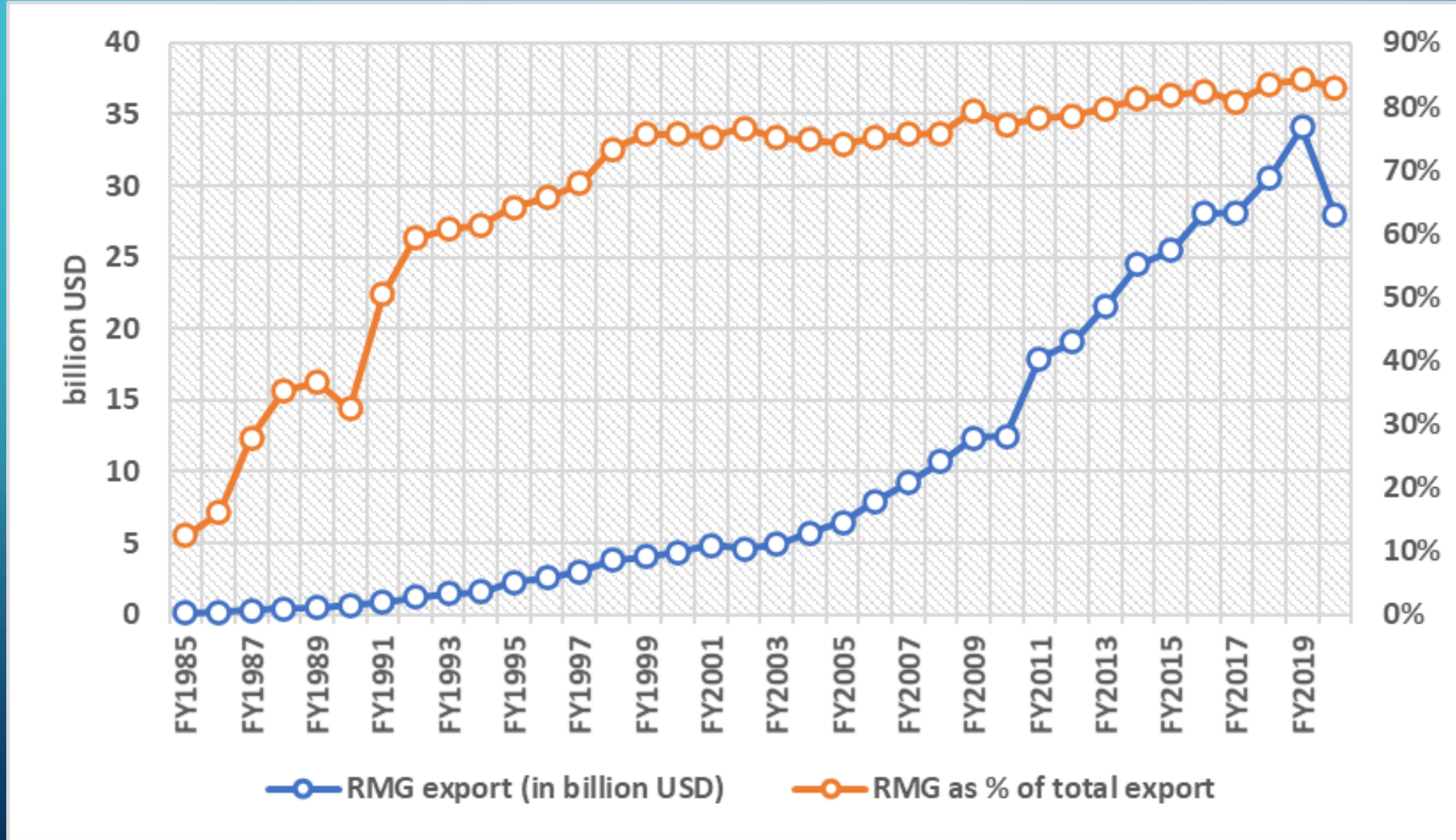


INTRODUCTION

- GDP of Bangladesh is nearly 317 billion USD and
- It is the 41st largest economies of the world
- Bangladesh is also the world's second largest exporter of apparel products with an export value of 34 billion USD in 2019
- China is nearly USD 137 billion in terms of apparel products which is nearly 4 times the export of Bangladesh



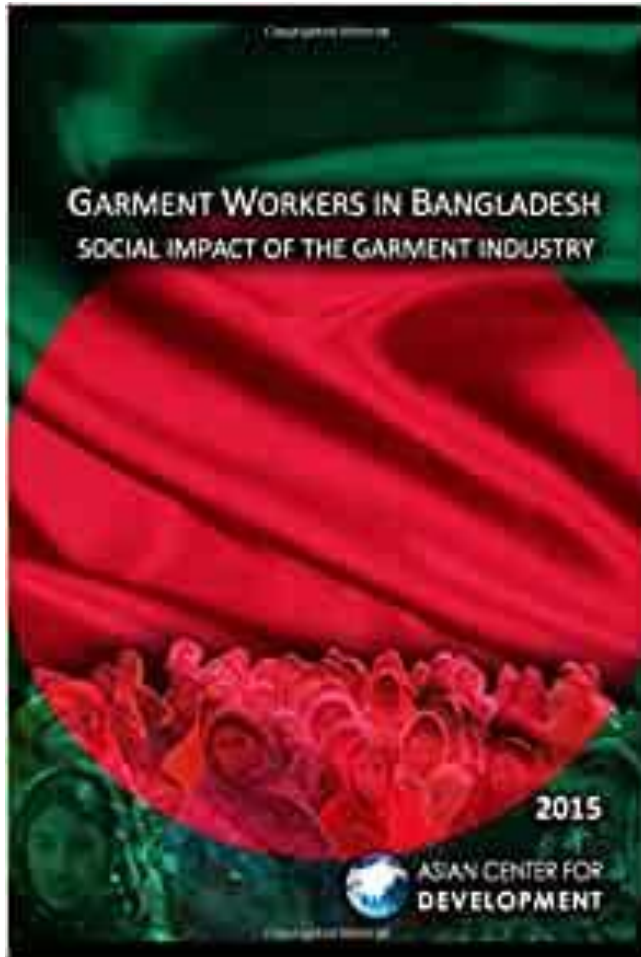
FIGURE 1: RMG EXPORT AND ITS SHARE IN EXPORT OF BANGLADESH (1985-2019)





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HISTORY OF THE SURVEY

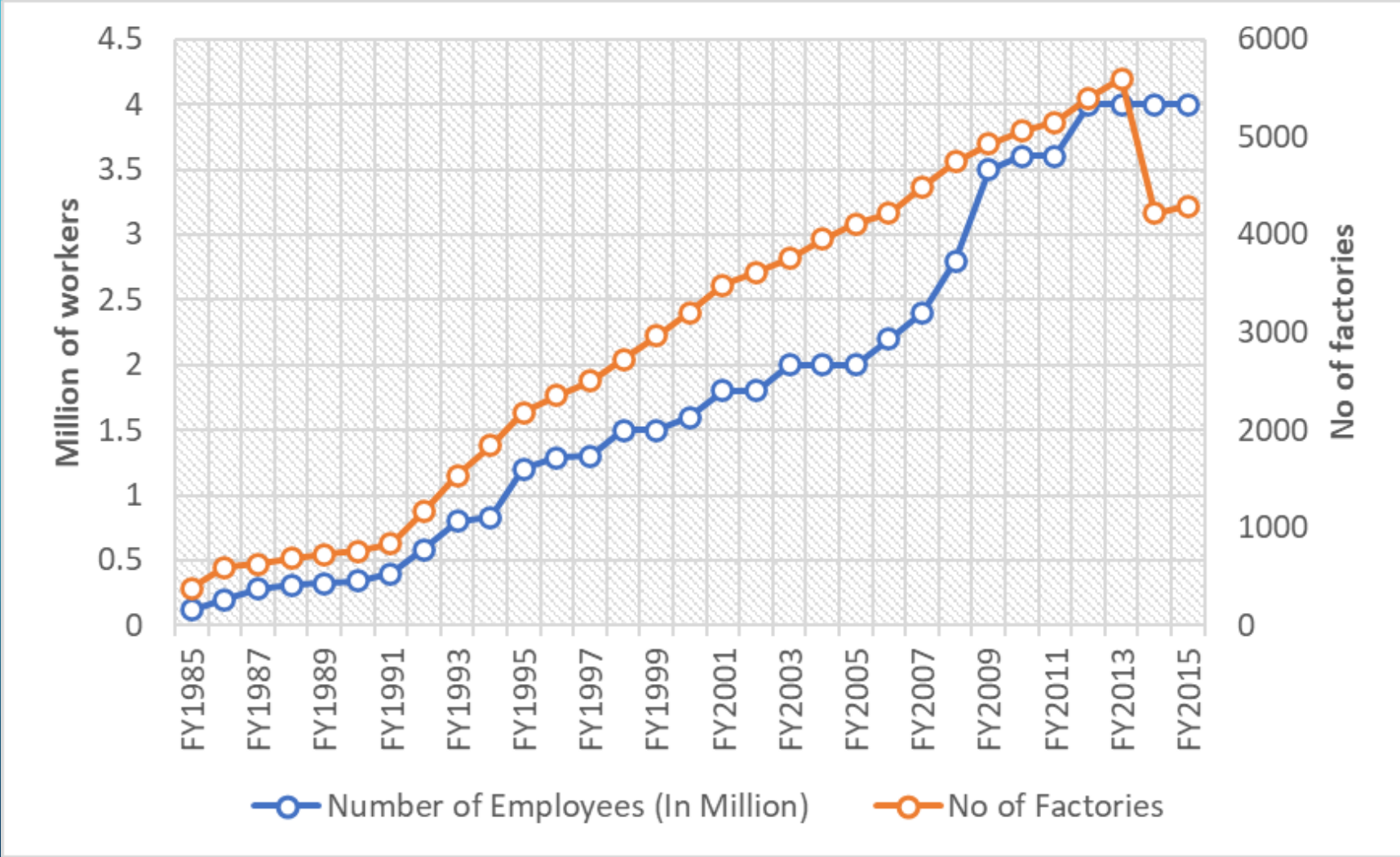


Amazon.com

- Asian Center for Development completed the first comprehensive survey on workers of the garment industries in Bangladesh in 2014
- 7 out of worlds' 10 most green RMG factories are in Bangladesh (New Age: March 1, 2018) .
- 15% of the factories were either closed or merged with others to comply with the regulations (CPD)



EMPLOYMENT AND FACTORIES





OBJECTIVES

- (i) The status of employment in the sector
- (ii) The status of living standards
- (iii) The status of environment in the workplace
- (iv) The status of wages, income, asset, and expenditure
- (v) The status of women empowerment



NO OF FACTORIES IN THE SURVEY

| Industries | Dhaka | Chattogram | Total |
|----------------|-------|------------|-------|
| Knit | 36 | 5 | 41 |
| Woven | 58 | 12 | 70 |
| Sweater | 25 | 2 | 27 |
| Other | 10 | 12 | 22 |
| All | 129 | 31 | 160 |

NO OF WORKERS IN THE SURVEY

| Industries | Grade 1 | Grade 2 | Grade 3 | Grade 4 | Grade 5 | Grade 6 | Grade 7 | Total |
|------------|---------|---------|---------|---------|---------|---------|---------|-------|
| Knit | 3 | 5 | 32 | 80 | 43 | 55 | 66 | 284 |
| Woven | 9 | 8 | 54 | 142 | 70 | 89 | 123 | 495 |
| Sweater | 2 | 4 | 18 | 50 | 23 | 45 | 43 | 185 |
| Other | 0 | 1 | 19 | 48 | 24 | 29 | 34 | 155 |
| All | 14 | 18 | 123 | 320 | 160 | 218 | 266 | 1,119 |



MODULES IN THE SURVEY

- **Module A:** Information on Work and Workplace
- **Module B:** Information on Women Empowerment
- **Module D:** Information on Other Members in the Family
- **Module E:** Information on Family Income and Assets
- **Section F:** Information Living Standards and expenses
- **Module G:** Information on Health and Food Intake
- **Section H:** Information on Child Health
- **Module I:** Information on Food Habit



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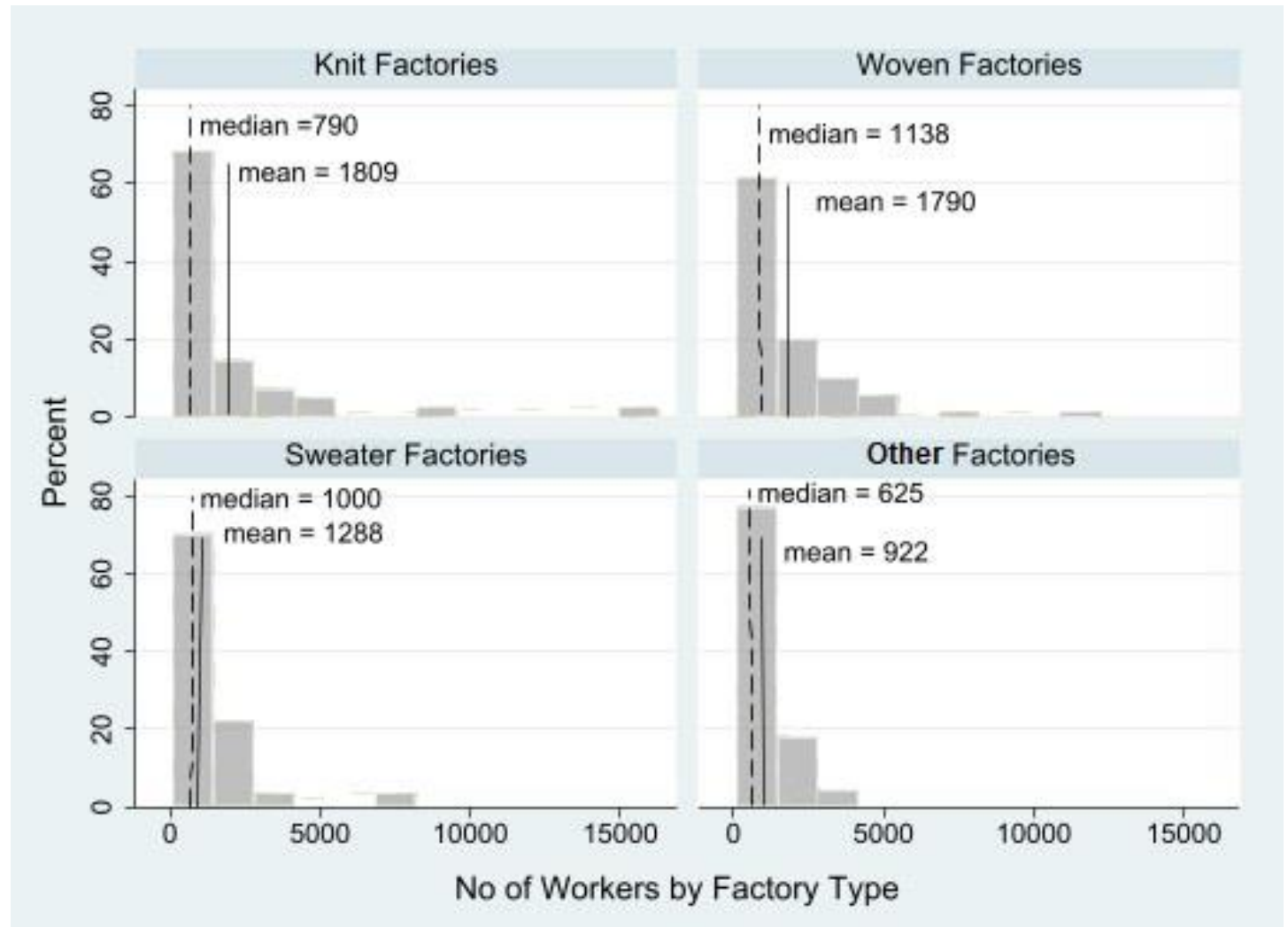
RESULTS



AVERAGE SIZE OF FACTORIES

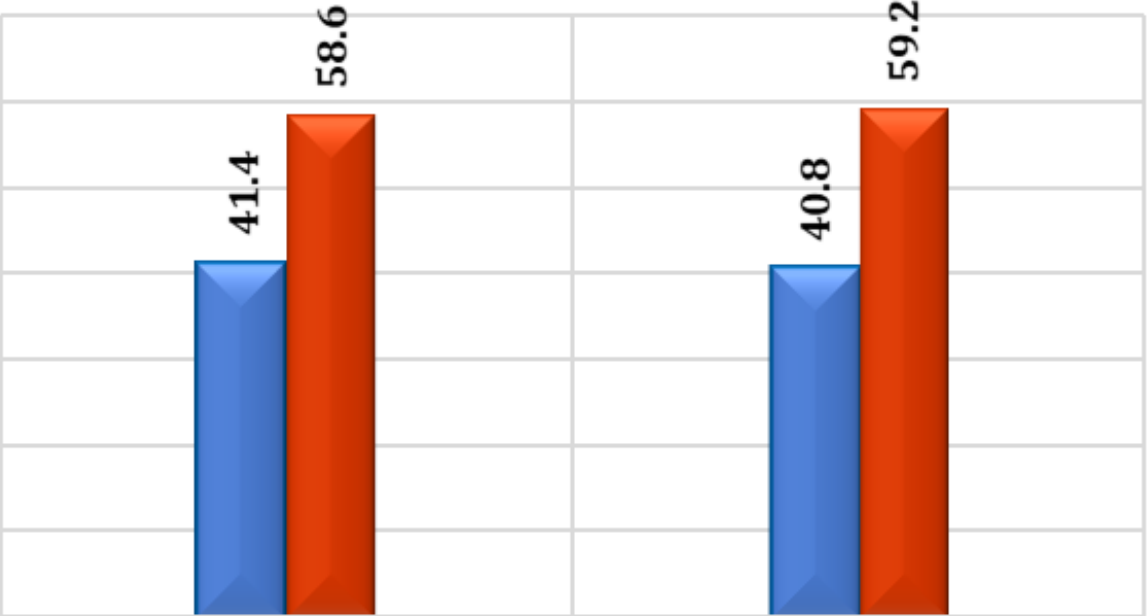
| | Male Workers | | Female Workers | | All Workers | |
|------------|--------------|--------|----------------|--------|-------------|--------|
| Industries | Mean | Median | Mean | Median | Mean | Median |
| Knit | 743 | 382 | 1,000 | 425 | 1,809 | 790 |
| Woven | 637 | 380 | 1,109 | 705 | 1,790 | 1,138 |
| Sweater | 668 | 470 | 516 | 440 | 1,288 | 1,000 |
| Other | 348 | 215 | 608 | 450 | 922 | 625 |
| All | 628 | 380 | 911 | 560 | 1,591 | 1,000 |

FACTORY SIZE BY TYPE





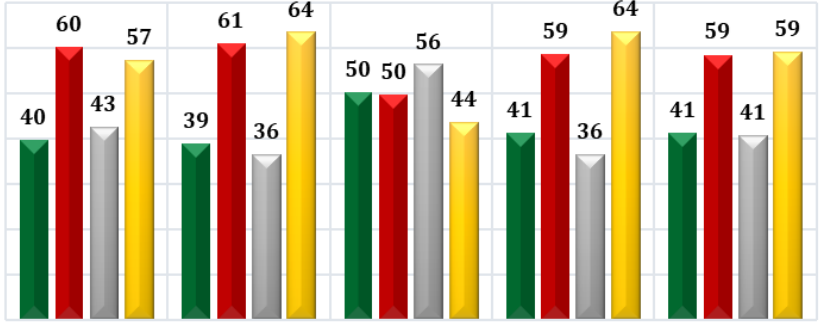
WORKERS BY GENDER



SAMPLE

ALL FACTORIES

Male Female



Woven

Knit

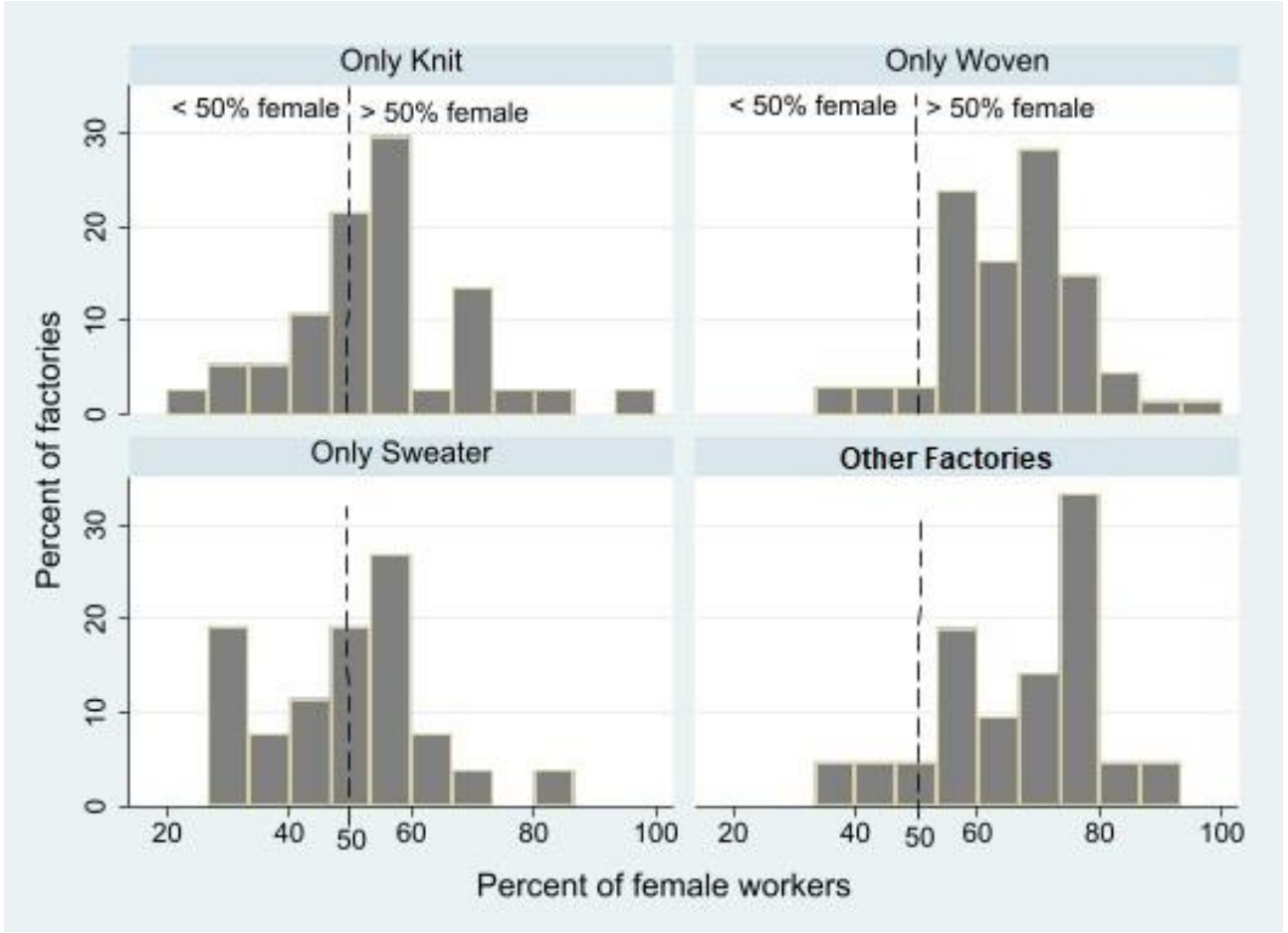
Sweater

Mixed

All

Male (Sample) Female (Sample)

WORKER RATIO BY FACTORY TYPE

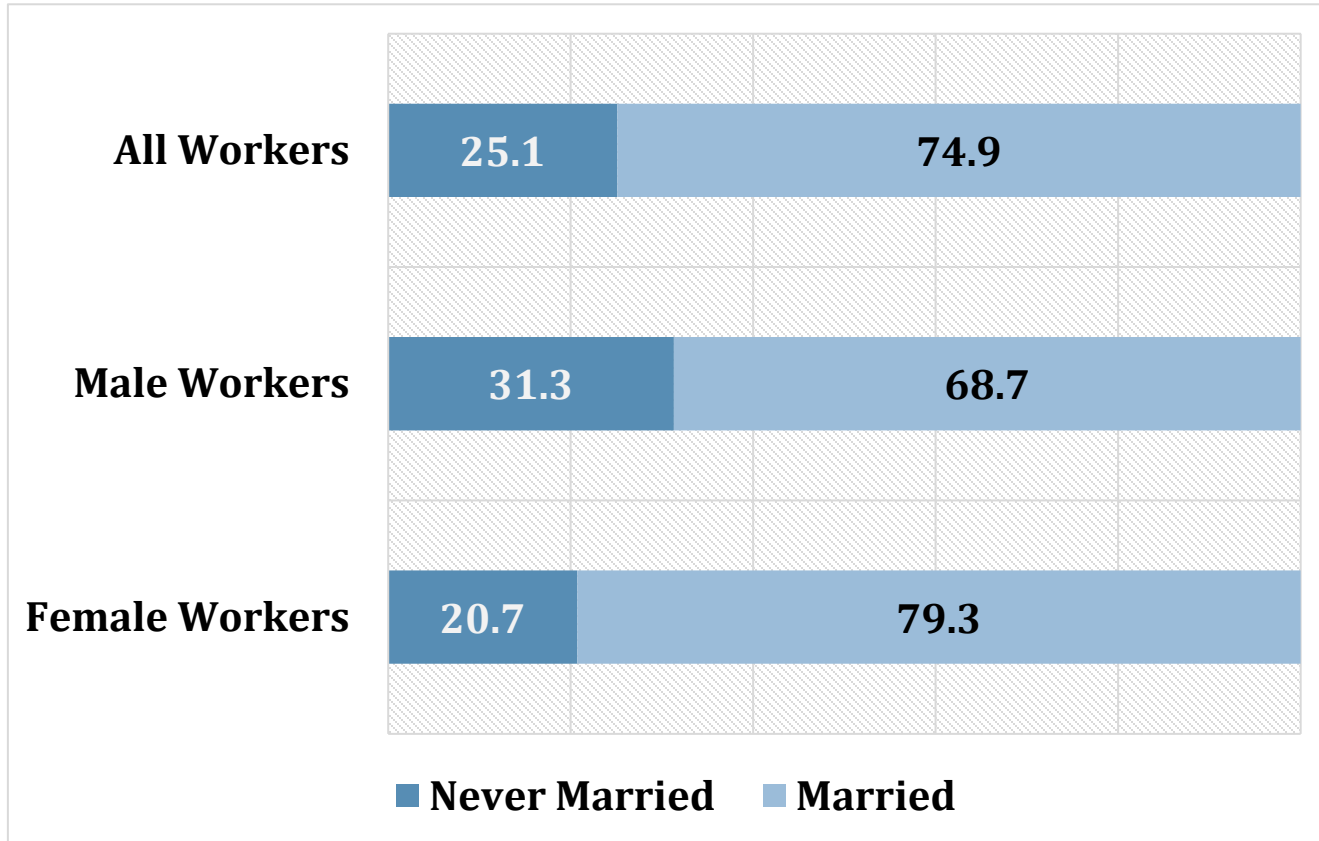




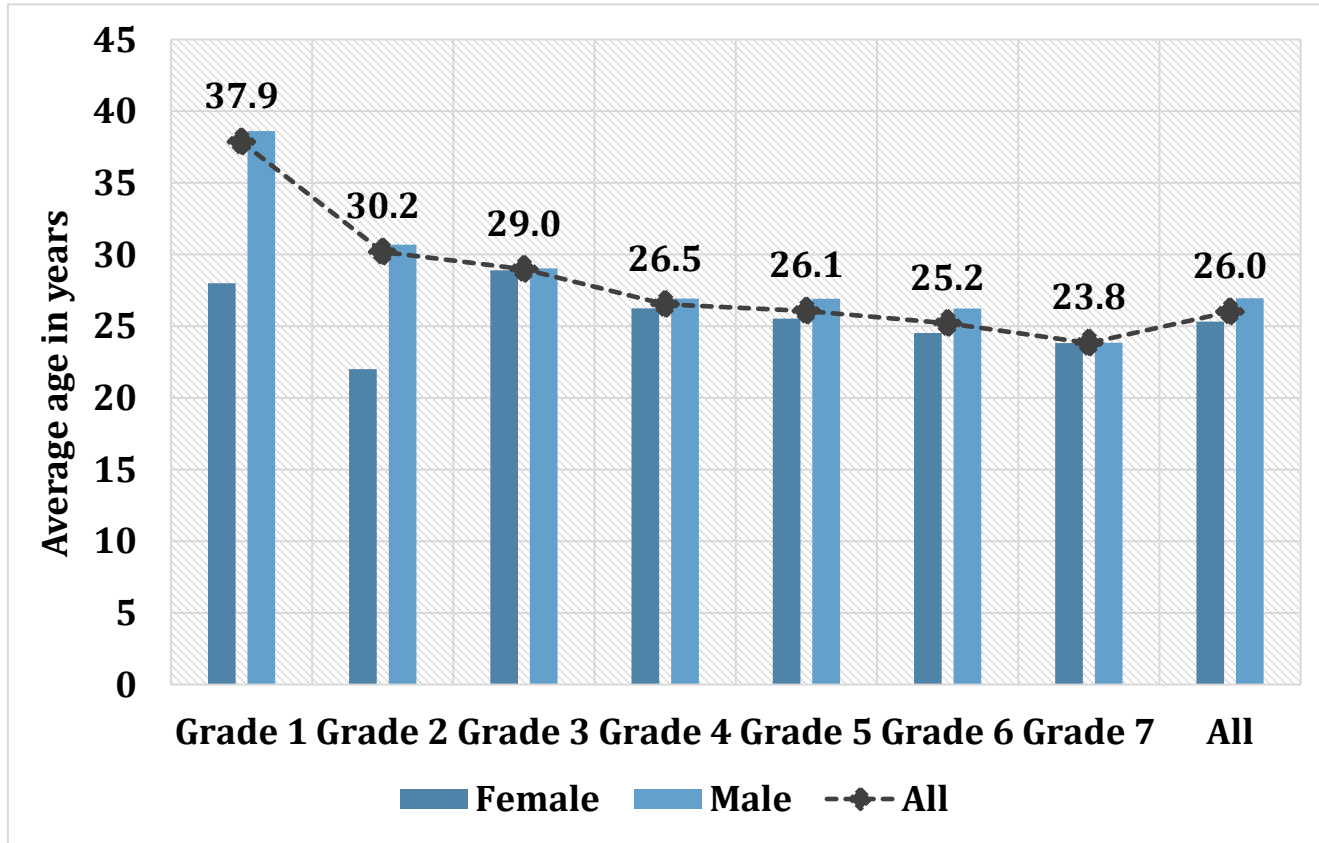
NO OF TOTAL WORKERS

| Industries | Male Workers | | Female Workers | | All Workers | | 2014 | | |
|----------------|--------------|-----------|----------------|-----------|-------------|-----------|-----------|-----------|-----------|
| | High | Low | High | Low | High | Low | Men | Women | All |
| Knit | 840,000 | 714,000 | 1,130,000 | 961,000 | 1,970,000 | 1,675,000 | 445,000 | 620,000 | 1,065,000 |
| Woven | 1,140,000 | 969,000 | 1,984,000 | 1,687,000 | 3,124,000 | 2,656,000 | 565,000 | 1,355,000 | 1,920,000 |
| Sweater | 498,000 | 424,000 | 385,000 | 327,000 | 883,000 | 751,000 | 241,000 | 278,000 | 519,000 |
| Other | 236,000 | 200,000 | 412,000 | 350,000 | 648,000 | 550,000 | 110,000 | 254,000 | 364,000 |
| All | 2,714,000 | 2,307,000 | 3,911,000 | 3,325,000 | 6,625,000 | 5,632,000 | 1,410,000 | 2,591,000 | 4,001,000 |

MARITAL STATUS OF WORKERS

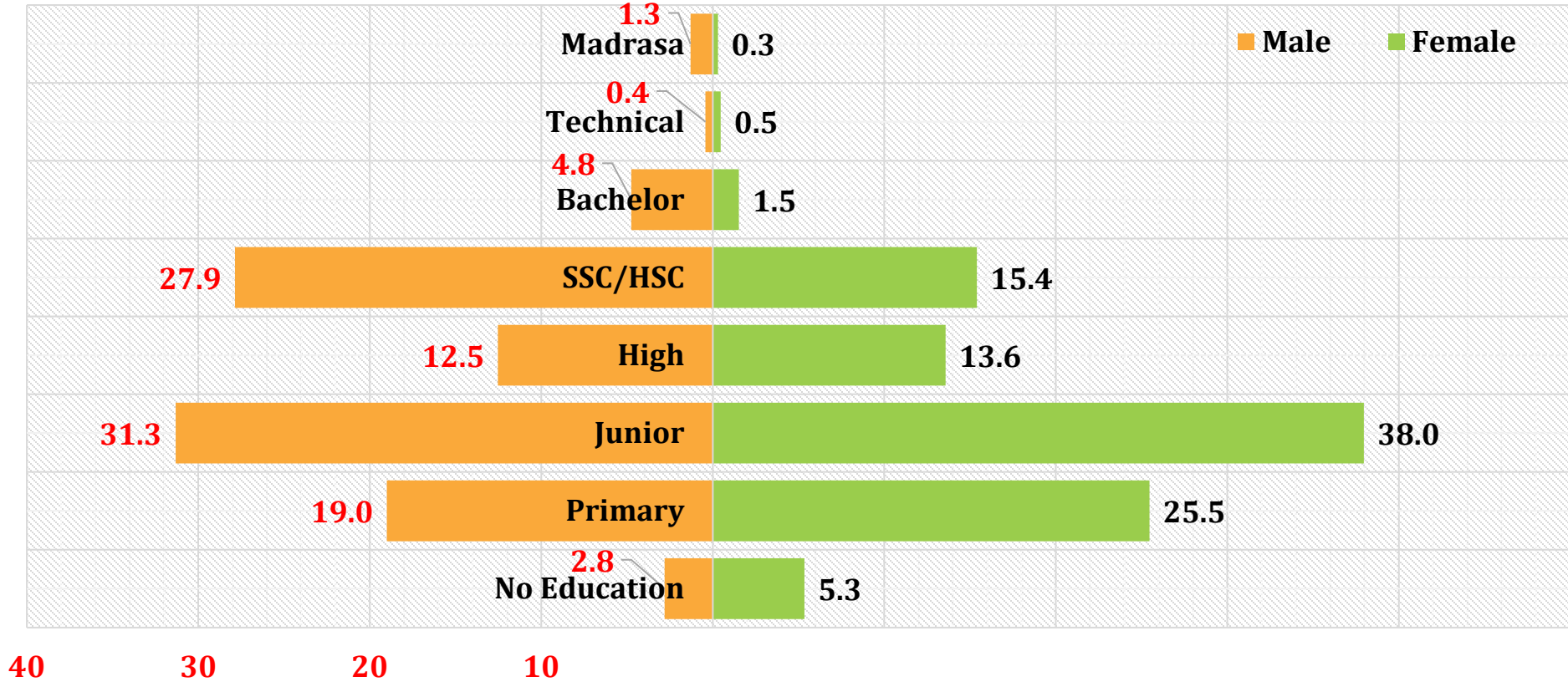


AGE BY GRADES

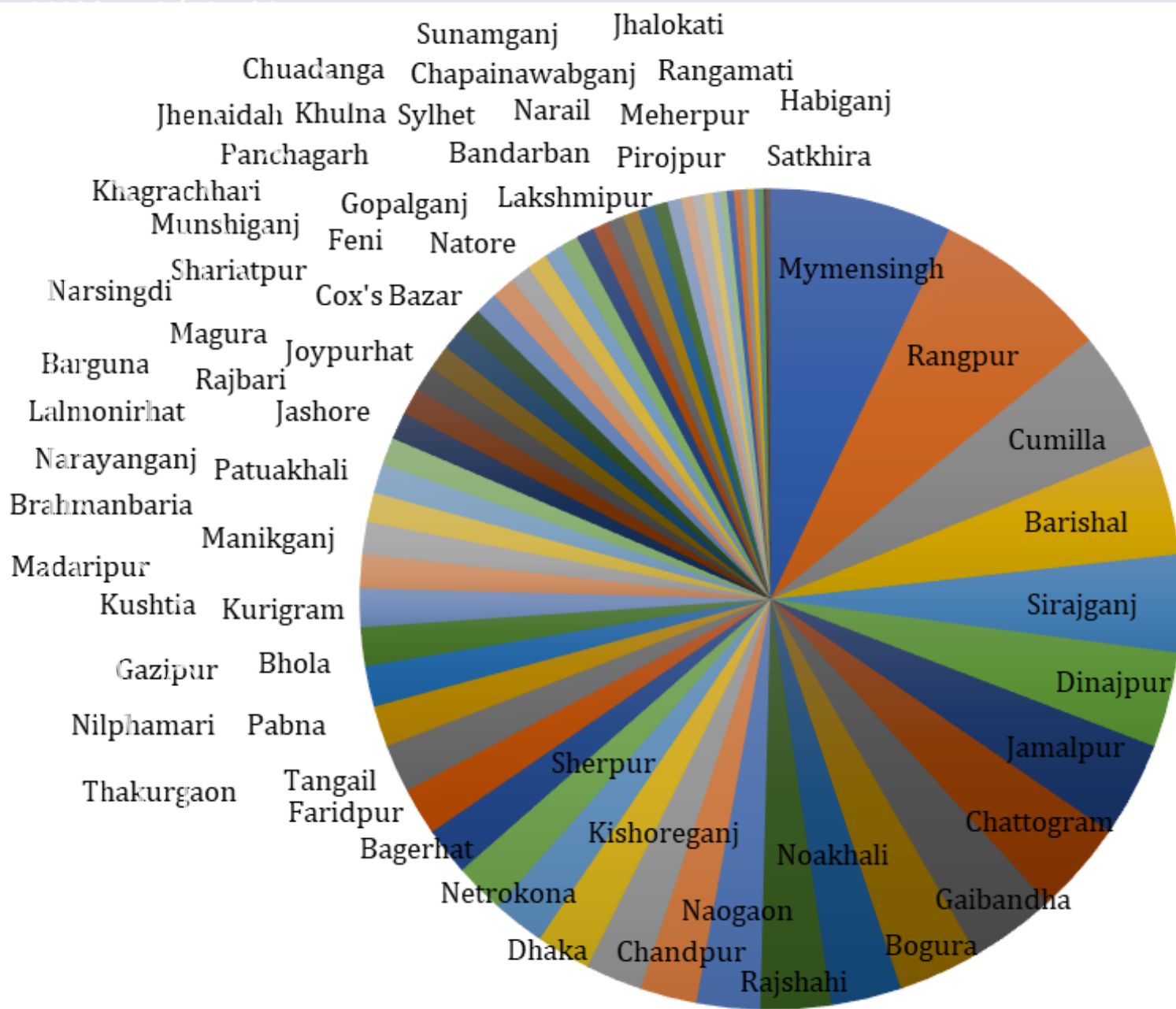




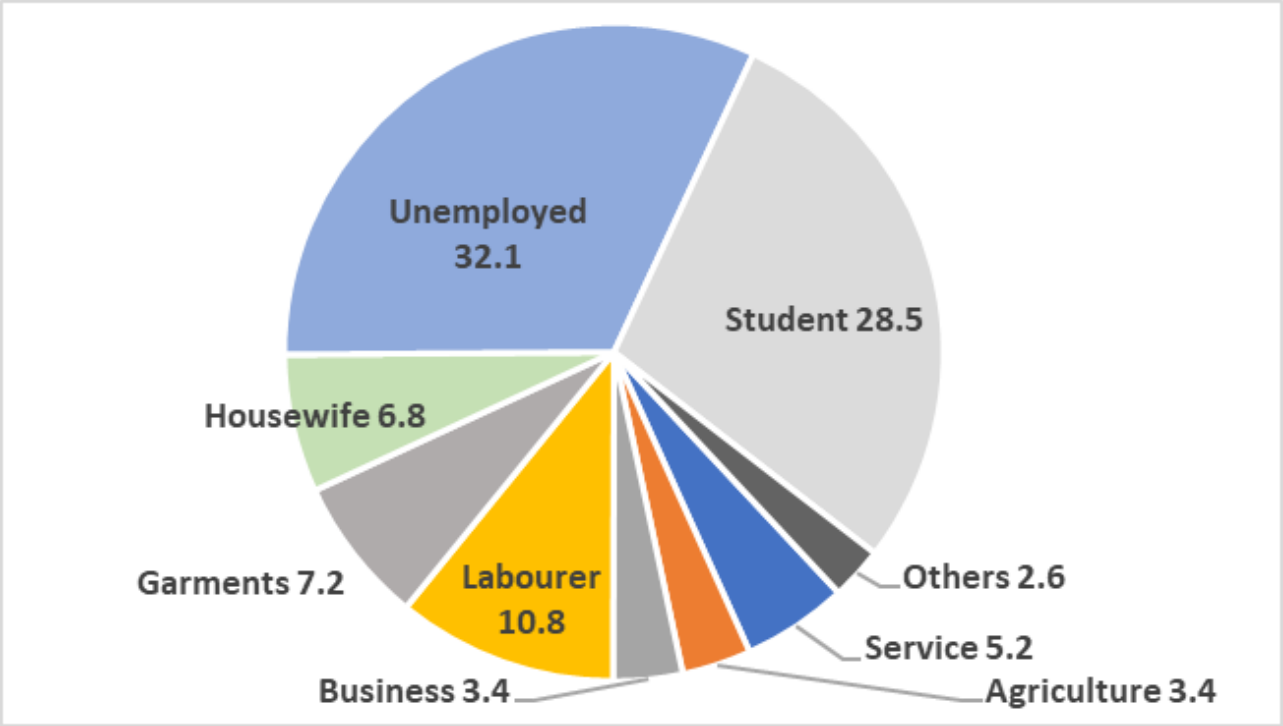
EDUCATION BY GENDER



LABOR MIGRATION



EMPLOYMENT CREATION





WORKING DAYS, HOURS, OVERTIME

| Grade | Female workers | Male workers | All workers | Working hours /day | Overtime hours / week | % of workers doing overtime |
|-------------------|-----------------------|---------------------|--------------------|---------------------------|------------------------------|------------------------------------|
| Grade 1 | 6.0 | 5.8 | 5.8 | 8.7 | 7.0 | 36% |
| Grade 2 | 6.0 | 6.1 | 6.1 | 8.8 | 5.5 | 11% |
| Grade 3 | 6.0 | 5.9 | 6.0 | 8.5 | 8.3 | 64% |
| Grade 4 | 5.9 | 5.9 | 5.9 | 8.7 | 8.6 | 78% |
| Grade 5 | 5.9 | 5.8 | 5.9 | 8.5 | 8.7 | 73% |
| Grade 6 | 6.0 | 5.9 | 5.9 | 8.6 | 8.7 | 75% |
| Grade 7 | 5.9 | 5.9 | 5.9 | 8.6 | 8.4 | 77% |
| All Grades | 5.9 | 5.9 | 5.9 | 8.6 | 8.5 | 73% |

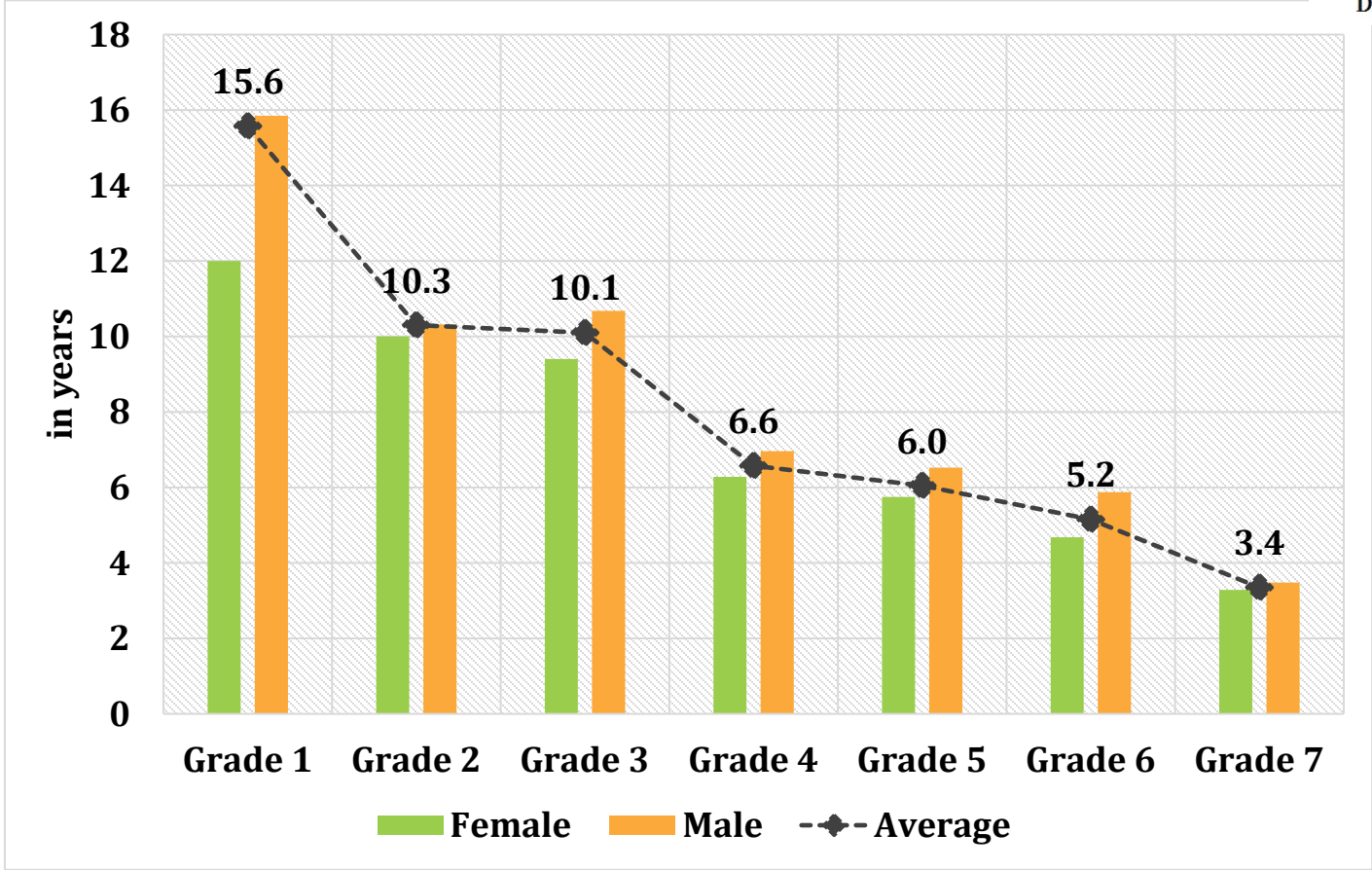


LEAVE AND BENEFITS

| Description | Female workers | Male workers | All workers |
|---|----------------|---|-------------|
| Personal leave (days/year) | 4.6 | 4.8 | 4.7 |
| Percent of workers | 98.8% | 97.8% | 98.4% |
| Full compensation (percent) | 90.1 | 93.2 | 91.4 |
| Partial compensation (percent) | 4.8 | 4.4 | 4.6 |
| No compensation (percent) | 5.1 | 2.4 | 4.0 |
| Eid Bonus (percent) | 98.04 | 98.18 | 98.1 |
| Percent became mother (in past 12 months) | 8.3% | | |
| Percent of female workers legally eligible to avail maternity leave | 3.1% | [with continuous 12 months of work prior to taking maternity leave] | |
| Percent of workers received maternity leave with pay | 100% | | |
| Maternity leave (months) | 3.69 | | |



EXPERIENCE BY GRADES



RETIREMENT WISHES



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PERCEPTION ON WORKPLACE FACILITIES

| Perception on | Very Bad | Bad | Satisfactory | Good | Very Good |
|---------------------|----------|------|--------------|-------|-----------|
| Working Condition | 1.17 | 1.9 | 1.62 | 21.48 | 73.83 |
| Lighting/Brightness | 1.44 | 1.44 | 1.26 | 20.77 | 75.09 |
| Emergency Exit | 0.54 | 2.43 | 1.35 | 24.62 | 71.07 |
| Toilet Facilities | 0.9 | 2.15 | 3.14 | 29.33 | 64.48 |
| Water Supplies | 0.81 | 2.51 | 1.44 | 26.21 | 69.03 |
| Canteen Facilities | 1.29 | 1.85 | 3.97 | 28.56 | 64.33 |



PERCEPTION ON WORKPLACE FACILITIES

| Perception on | Very Bad | Bad | Satisfactory | Good | Very Good |
|------------------------------------|----------|------|--------------|-------|-----------|
| Health Care Facilities | 0.46 | 3.01 | 3.1 | 27.1 | 66.33 |
| Doctor's Services | 0.55 | 2.57 | 3.4 | 27 | 66.48 |
| Child Care Facilities | 1.71 | 3.74 | 6.2 | 25.35 | 62.99 |
| Transport Services | 8.11 | 7.9 | 14.14 | 18.3 | 51.56 |
| Salary Disbursement Process | 1.08 | 2.52 | 3.24 | 23.96 | 69.19 |
| Internal Relationship with Seniors | 0.63 | 2.35 | 2.62 | 26.56 | 67.84 |



USE OF CANTEENS AND COMMUTING

| Other facilities | Female | Male | All workers |
|---|---------------|-------------|--------------------|
| Use of canteens by workers | 84% | 83% | 84% |
| Availability of food in canteens | 73% | 73% | 73% |
| Buying of food from canteens | 25% | 24% | 25% |
| Commuting to work | | | |
| Walking | 79.88 | 80.35 | 80.07 |
| Non-motorised vehicles | 6.55 | 4.32 | 5.63 |
| Bus | 7.93 | 6.48 | 7.33 |
| Other motorized vehicles | 5.64 | 8.86 | 6.97 |
| Time to walk from home (mins) | 20 | 18 | 19 |
| Commuting cost per day | 25.27 | 31.52 | 27.83 |

FAMILY SIZE

| | Female | Male | All workers |
|------------------------|--------|------|-------------|
| Family Size | 3.83 | 4.27 | 4.02 |
| Female members | 1.89 | 2.03 | 1.95 |
| Male members | 1.95 | 2.27 | 2.08 |
| Living with families | 91% | 75% | 84% |
| Earning Members | 2.20 | 1.95 | 2.09 |
| Female earning members | 1.18 | 0.62 | 0.99 |
| Male earning members | 1.10 | 1.79 | 1.33 |
| No of Children | 0.99 | 0.96 | 0.98 |
| Percent of boys | 51% | 55% | 52% |



MONTHLY INCOME

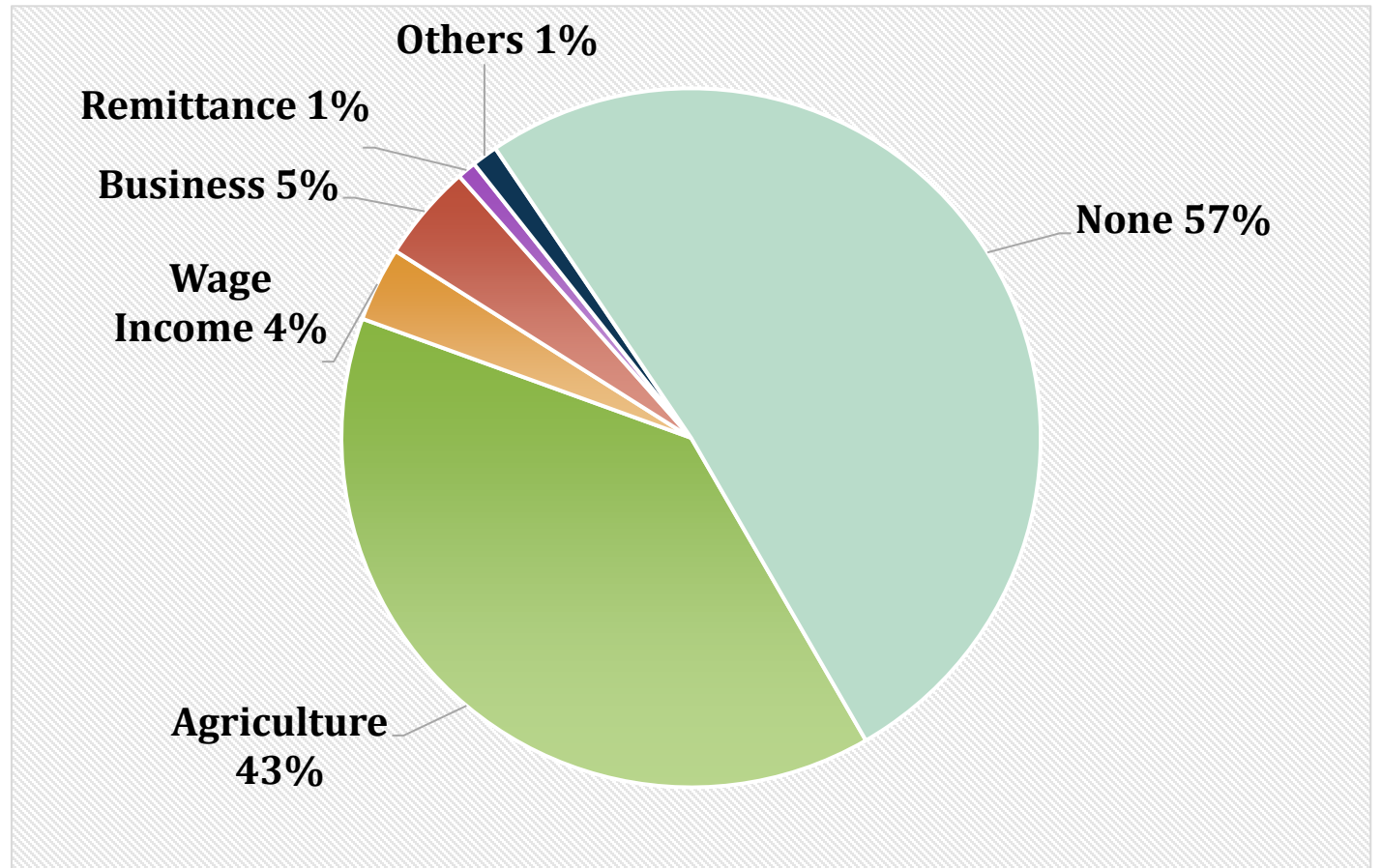
| | Family Income per month | | | | Workers' Own Income per month | | | |
|-------------------------|-------------------------|--------|-------------|--------|-------------------------------|--------|-------------|--------|
| Family Income (monthly) | Female | Male | All workers | 2014 | Female | Male | All workers | 2014 |
| Grade 1 | 27,500 | 37,654 | 36,929 | 19,923 | 18,000 | 31,077 | 30,143 | 19,044 |
| Grade 2 | 32,500 | 30,941 | 31,028 | 16,308 | 13,500 | 21,401 | 20,962 | 12,687 |
| Grade 3 | 26,450 | 22,865 | 25,224 | 16,364 | 12,192 | 13,121 | 12,668 | 7,729 |
| Grade 4 | 24,530 | 22,624 | 24,339 | 15,424 | 11,395 | 12,216 | 11,747 | 6,581 |
| Grade 5 | 24,070 | 21,025 | 23,397 | 15,426 | 10,790 | 11,258 | 10,965 | 6,494 |
| Grade 6 | 23,489 | 23,699 | 24,085 | 15,685 | 10,568 | 11,149 | 10,790 | 6,329 |
| Grade 7 | 22,284 | 23,311 | 23,195 | 15,500 | 9,355 | 9,841 | 9,519 | 5,625 |
| Total | 23,835 | 23,503 | 23,699 | 15,719 | 10,672 | 12,434 | 11,402 | 6,820 |

SPOUSE'S WORKPLACE

| Industry | Female workers | Male workers | All workers |
|----------------------|-----------------------|---------------------|--------------------|
| Garments | 65.64 | 64.19 | 65.07 |
| Transport | 7.49 | 12.16 | 9.33 |
| Day Laborer | 4.85 | 4.05 | 4.53 |
| Construction | 7.49 | 2.7 | 5.6 |
| Salaried Jobs | 2.2 | 5.41 | 3.47 |
| Business | 7.93 | 9.46 | 8.53 |
| Industries | 4.41 | 2.03 | 3.47 |



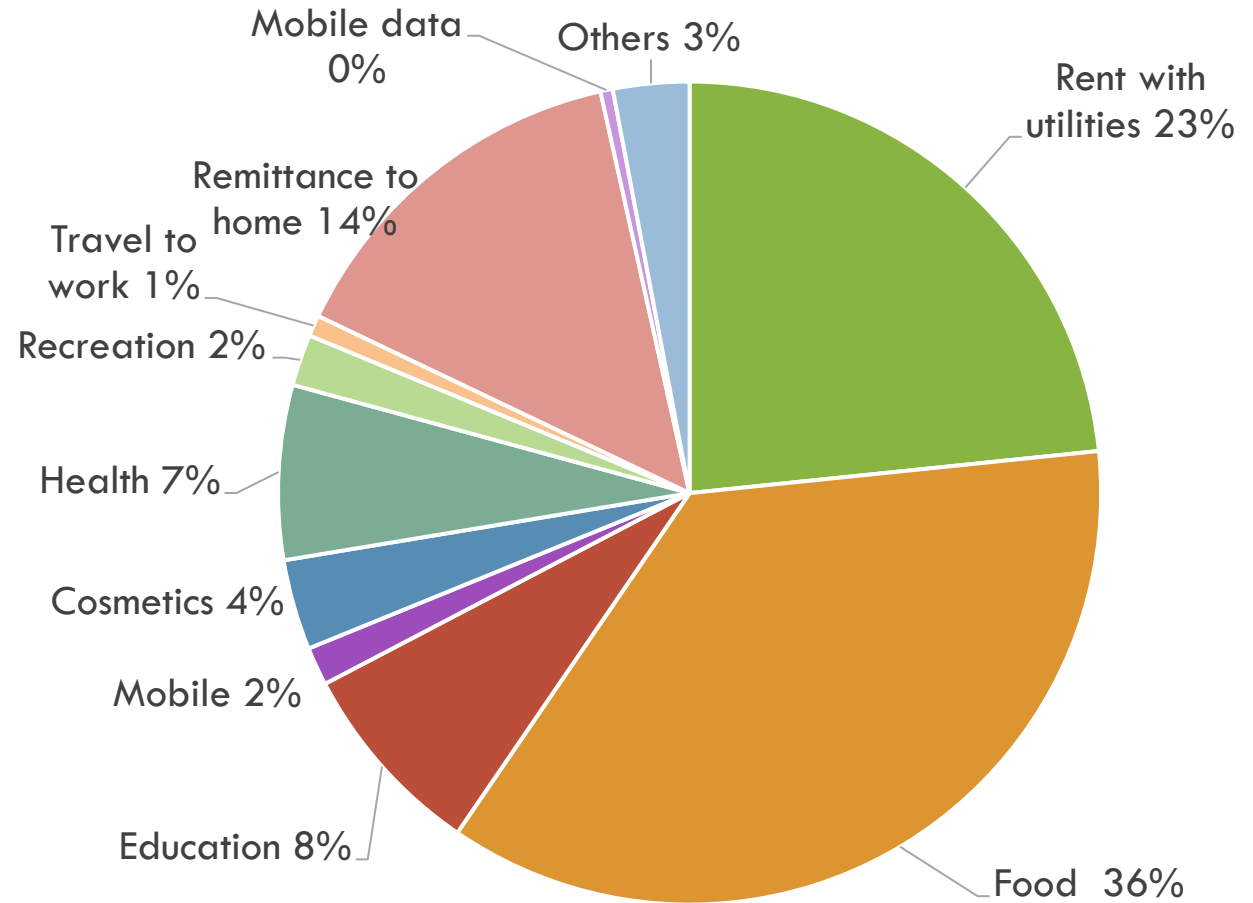
OTHER SOURCES OF INCOME



ACCESS TO FINANCIAL SERVICES

| Financial Access | Female workers | Male workers | All workers |
|-------------------------|-----------------------|---------------------|--------------------|
| Bank Account | 65.2 | 70.0 | 67.2 |
| General Bank | 57.0 | 57.4 | 57.2 |
| Mobile bank | 29.2 | 34.9 | 31.7 |
| Bkash | 39.5 | 46.6 | 42.6 |
| Nogod | 2.1 | 4.3 | 3.1 |
| Others | 1.4 | 0.3 | 0.9 |

HOUSEHOLD EXPENSES



DISTRIBUTION OF EXPENSES

| | Female | Male | All workers |
|----------|---------------|-------------|------------------------|
| Food | 38% | 34% | 36% |
| Housing | 25% | 22% | 23% |
| Non-Food | 37% | 45% | 40% |
| Total | 100% | 100% | 100% |

INCOME, EXPENDITURE AND SAVINGS

| | Female | Male | All | 2014 | Growth rate |
|------------------|--------|--------|--------|--------|-------------|
| Monthly expenses | 16,600 | 16,590 | 16,596 | 11,320 | 7% |
| Monthly income | 23,835 | 23,503 | 23,699 | 15,719 | 7% |
| Savings | 7,236 | 6,913 | 7,104 | 4,399 | 8% |



HOUSEHOLD EXPENDITURE

| | Female | Male | All workers | 2014 | growth rate |
|----------|--------|--------|----------------|--------|----------------|
| Food | 6,300 | 5,583 | 6,004 | 4782 | 4% |
| Housing | 4,088 | 3,581 | 3,878 | 3410 | 2% |
| Non-Food | 6,212 | 7,426 | 6,714 | 3,128 | 14% |
| Total | 16,600 | 16,590 | 16,596 | 11,320 | 7% |



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CARBOHYDRATE SOURCES

| | In percent | | |
|------------------------------------|-----------------|------|------|
| | Workers' family | | |
| | Female | Male | All |
| Carbohydrate | | | |
| Rice | 100 | 100 | 100 |
| Wheat | 18 | 14 | 16 |
| Potato | 60 | 61 | 61 |
| Maize | 3 | 2 | 3 |
| Millet | 1 | 2 | 1 |
| No of items in carbohydrate | 1.80 | 1.76 | 1.79 |

PROTEIN AND VITAMIN SOURCES

| | Female | Male | All |
|---------------------------------|--------|------|------|
| Protein and Vitamin | | | |
| Egg | 25 | 24 | 25 |
| Chicken | 24 | 21 | 22 |
| Beef | 12 | 10 | 11 |
| Fish | 68 | 65 | 67 |
| Vegetable | 76 | 71 | 74 |
| No of itermis in protein | 2.02 | 1.89 | 1.97 |

OTHER FOODS

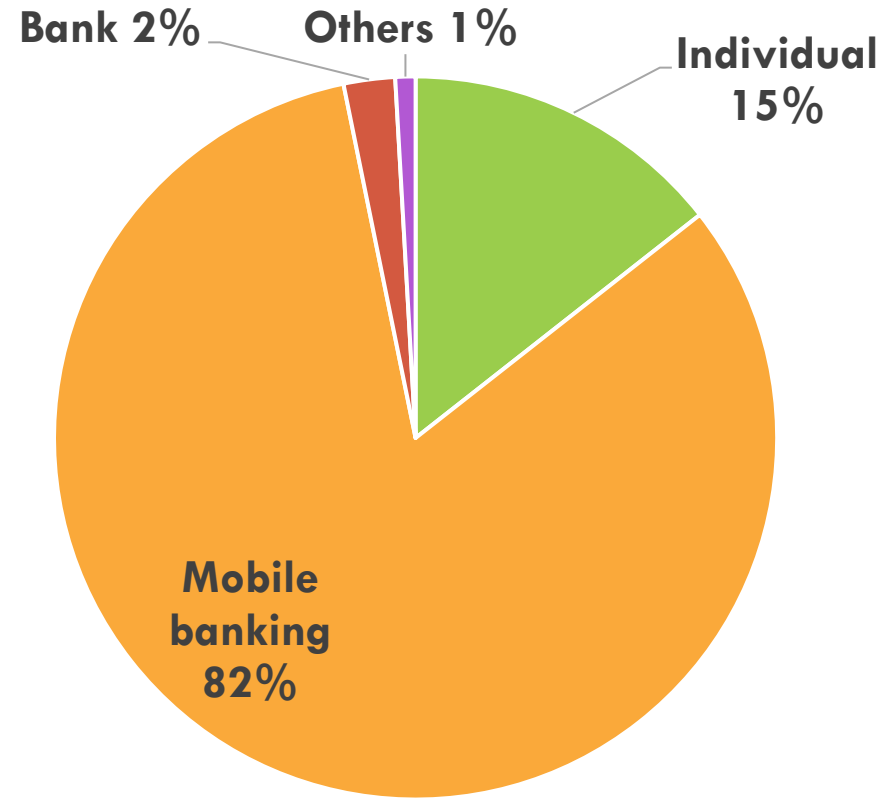
| | Female | Male | All |
|-----------------|--------|------|-----|
| Misc Food items | | | |
| Milk | 29 | 25 | 27 |
| Fruits | 41 | 33 | 38 |
| Soft Drinks | 3 | 8 | 5 |
| Juice | 3 | 2 | 3 |
| Street food | 8 | 12 | 9 |
| Pita | 7 | 3 | 5 |
| None | 38 | 42 | 39 |



REMITTANCE TO HOME

| Grade | Female | Male | All Workers | Percent |
|------------|--------|------|----------------|---------|
| Grade 1 | 7500 | 6222 | 6350 | 71% |
| Grade 2 | 6000 | 7000 | 6938 | 89% |
| Grade 3 | 3339 | 4151 | 3786 | 56% |
| Grade 4 | 3690 | 4230 | 3969 | 62% |
| Grade 5 | 3780 | 3982 | 3863 | 63% |
| Grade 6 | 3926 | 4012 | 3966 | 61% |
| Grade 7 | 3220 | 3353 | 3265 | 63% |
| All Grades | 3597 | 4179 | 3869 | 62% |

MONEY TRANSFER MODES



INTERNET USE AND APPS

| | | | |
|---------------------|-------------|-------------|-------------|
| Internet use | 26.7 | 59.2 | 40.1 |
| IMO | 23.0 | 47.1 | 33.0 |
| YouTube | 20.9 | 49.0 | 32.5 |
| WhatsApp | 2.3 | 8.0 | 4.7 |
| Viber | 1.4 | 3.2 | 2.1 |
| Facebook | 19.5 | 52.9 | 33.3 |



PERCEPTION OF PARTICIPATION IN DECISIONS

| Decisions | Never | Very few times | Sometimes | Most of the time | Always |
|----------------------|-------|----------------|-----------|------------------|--------|
| Assets and Savings | 14.1 | 6.2 | 11.6 | 23.0 | 45.1 |
| Health | 3.1 | 4.6 | 10.9 | 27.4 | 53.9 |
| Education | 0.6 | 1.7 | 6.9 | 21.0 | 69.7 |
| Employment | 7.3 | 3.9 | 9.9 | 26.3 | 52.6 |
| Recreation | 2.5 | 6.0 | 15.3 | 29.5 | 46.7 |
| Personal choices | 4.0 | 4.5 | 8.2 | 24.0 | 59.3 |
| Household expenses | 4.0 | 4.5 | 10.1 | 26.4 | 55.0 |
| Other family choices | 8.8 | 7.3 | 15.1 | 24.9 | 43.9 |
| Average | 5.6 | 4.8 | 11.0 | 25.3 | 53.3 |