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Garment Production Country Guide

2022



Introduction

We're all familiar with the 'Made In...' tag we find on clothing items. You might have given it a cursory glance, or even paused to notice how far that item travelled to reach you. When there's so much distance between us and the people who made our clothes, it can be hard to picture what their life looks like. While the tag itself is only small, knowing an item's country of manufacture can open the door to consider the conditions it was made in.

The garment industry has huge potential to contribute to development indicators such as reducing poverty. But factors like labour regulations, minimum wages, corruption, and government policies vary between countries which means that garment production is often a source of worker exploitation and environmental degradation.

Taking the time to dig deeper into these global challenges helps us to slow down our purchasing and start bridging the gap between our lives and the reality for garment workers. The following country risk profiles help to paint a picture of issues facing workers in some of the largest garment producing countries around the world.



China

China is the largest textiles exporter in the world largely due to low labour costs, full package production systems, fast production and shipment to key export markets. They're also the largest global cotton producer, with crops grown predominantly in the Xinjiang region.



KEY WORKER RIGHTS CONCERNS:

Forced Labour in Xinjiang Province

Muslim minority groups in the Xinjiang region are subject to government-enforced arbitrary detention with between 800,000 – 2 million Uighurs, ethnic Kazakhs, and other Muslims being detained. Roughly another million Muslims in the region are subject to mass surveillance. Detainees of current and former mass internment camps are forced to work in industries including manufacturing, textile production, and cotton fields.

Freedom of Association

Freedom of association is illegal in China. Workers are not free to organize or join unions of their own choosing, and there is only one union recognised by law - The All China Federation of Trade Unions (ACFTU). Independent unions are illegal and there are no protections for the right to strike, which was removed from the Constitution in 1982.

Minimum Wages

There is no national minimum wage, with local and provincial governments advised to set their own minimum wage rates. Wages in the garment sector have been identified as lower than in other manufacturing industries in China. Non-payment of wages is another problem in many areas, particularly in the construction sector due to the high presence of subcontracted migrant workers and informal hiring practices.

Social Insurance

The lack of social insurance coverage is a key concern for the majority of workers across China. During Covid-19 there was a reported temporary reduction to social security payments, with benefits in certain regions being temporarily reduced or waived entirely for up to five months.

Protection for Older Workers

The number of elderly workers in China has increased, with those above the legal retirement age lacking certain legal protections under Chinese labour laws. Once a worker reaches retirement age, their contracts will be terminated which leads to a significant percentage of informal employment within this age bracket. Not only will the worker face termination of employment but they are also not legally required to receive severance pay.

Unreliable Data

It is largely accepted that official labour rights statistics reported from China are unreliable. The Congressional-Executive Commission on China highlights the concealment of the true levels of unemployment, labour protests, and worker safety concerns, with the number of labour strikes for example not being publicly reported.

Bangladesh

Bangladesh is the world's second largest textile exporter. It employs over 4 million garment workers, at least 80 percent of whom are women.



KEY WORKER RIGHTS CONCERNS

Occupational Health and Safety in Factories

Between 2013 and 2021, more than 100 industrial accidents have occurred. At least 35 of these were textile factory incidents in which 491 workers were injured and 27 lost their lives. Government oversight and enforcement of garment factories remains limited outside of the Accord.

Low Wages

The minimum wage for female garment workers in Bangladesh is 39 cents per hour. This is one of the lowest rates in the region, and does not meet a living wage standard. Many workers rely on overtime or bonuses to make ends meet.

Gender Inequality and Employment Discrimination

Despite making up the majority of the textiles workforce, women are drastically underrepresented in supervisory and management roles.

Whilst there are labour laws in place to protect against wage discrimination on the basis of gender or disability, there are no protections against other forms of discrimination on the basis of sex, disability, social status, caste or sexual orientation.

Excessive Working Hours

73 percent of men and 47 percent of women work more than 48 hours per week.¹ Overtime hours are often expected when deadlines are approaching.

Migrant Workers

Migrant workers in particular face exploitative labour practices, sexual exploitation, child labour and unsafe

working conditions. Within the garment sector this is particularly prevalent in the informal sector. Dhaka and other peri urban areas have been identified as a particular risk.²

Historically, the region between Cox's Bazar and the Myanmar border has been a hotspot for high levels of modern slavery for both local and displaced communities. Trafficking is also of particular concern in this region. A high likelihood has also been identified of Rohingya being trafficked internally – to Dhaka and Chittagong – or abroad – to Malaysia, India, Pakistan and Nepal.

Union Busting

A significant number of unions in the garment sector cease to be active due to factory closures or alleged unfair labour practices from employers.³

The law includes provisions for protecting unions from employer interference in organizing activities; however, employers often interfere with this right, which has resulted in continued reports of intimidation and abuse, and the termination of employees.

Child Labour

Overseas Development Institute reported in 2016 that 15 percent of 6-14 year-olds from Dhaka's slums were out of school and engaged in full-time work. Bangladesh's law has a number of exceptions permitting children ages 12/13 to perform restricted forms of light work. Minors may work up to 5 hours per day and 30 hours per week in factories and mines or up to seven hours per day and 42 per week in other types of workplaces.

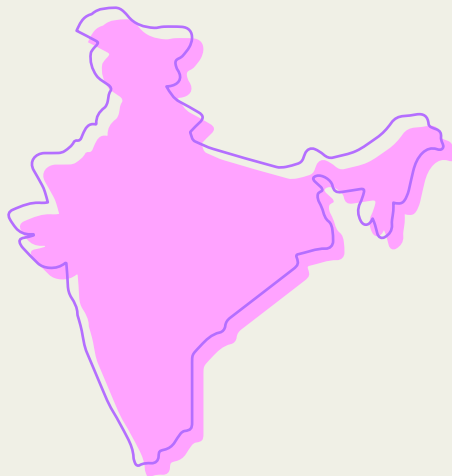
¹ https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/documents/publication/wcms_466268.pdf

² https://assets.publishing.service.gov.uk/media/5e56a40d86650c539ff3f20/DFID_Study_on_Modern_Slavery_in_Bangladesh_.pdf

³ <https://www.state.gov/reports/2018-country-reports-on-human-rights-practices/bangladesh/>

India

India's textile industry is the third largest employer in the country, employing around 45 million people. India also produces 23% of the world's cotton, a volume second only to China.



KEY WORKER RIGHTS CONCERNS:

Wage Inequality

There is a stark wage disparity based on gender, location and social groups (castes). This wage gap can be seen particularly in the gender pay gap which is particularly evident in India (53.2%), Pakistan (42.2%) and Indonesia (21.8%).⁴

Child Labour

The ILO estimates there are 10 million child workers aged 5-14 in India, with the majority of child labour occurring in the agricultural industry.

Migrant Workers and Informal Employment

One of the key concerns for the garment industry in India is the increased employment of inter-state migrant workers, and the rise in contract and subcontract work. This informalisation of the workforce has allowed for significant wage gap and a lack of job protection.

Displacement of Factories

The displacement of factories from urban to rural areas in both the south and the north such as Rajasthan and Jharkhand, has been led by the incentive to reduce real estate and labour costs. These rural areas have lower rental rates, and lower minimum wages.

Caste Discrimination

Workers from low-castes such as the Dalit and the Arunthathiyar often face discrimination. Workers from these backgrounds have little to no chance of promotion or supervisory positions. Dalit women are more vulnerable to workplace abuse such as overtime, more labour-intensive work, extra night shifts, denial of leave, and verbal and physical harassment.

Labour Law Exemptions

Garment factories in Delhi are mostly located in Okhla, Gurgaon, Faridabad, and Noida, where the only Special Economic Zone (SEZ) with garment factories is located. SEZ's are exempt from compliance to several labour laws and are known for their failure to enforce labour laws. Trade unions are banned and the right to strike is limited to 45 day's notice.

⁴ ILO, 2016. https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/documents/publication/wcms_466268.pdf

Cambodia

Garment and footwear production accounts for 80% of Cambodia's exports. Nearly 80% of these workers are women, mostly occupying lower paid and lower skilled jobs.⁵ In 2020, the European Commission cited concerns over serious human rights violations Cambodia.



KEY WORKER RIGHTS CONCERNS:

Minimum Wage

The minimum wage in Cambodia is just 25% of what the Asia Floor Wage calculate to be a living wage. As of January 2021, the monthly minimum wage has risen to \$192 from \$190 in 2020, the lowest increase since 2013 attributed to the impacts of COVID-19 and the withdrawal of the European Union's trade agreement.

Forced Labour

Laws against forced labour are poorly enforced. The US Department of State reports that third-party debt remains a key issue driving forced labour.⁶

Unions

The law forbids unregistered unions from operating. Civil servants, teachers, workers employed by state-owned enterprises, and workers in the banking, health-care, and informal sectors may form only "associations," not trade unions.

Working Hours

The US state department reports that forced overtime is a problem in factories making products for export with 95% of factories having excessive overtime.

Child Labour

Child labour is most prevalent in rubber, brick making and agricultural work, but is also present in the textile industry.

Child labour has reportedly declined in garment factories in recent years, through Better Factory Cambodia's (BFC) mandatory remediation program, however the BFC has expressed concern over factories making footwear and travel goods for export and with subcontractors to export-sector garment factories as these areas are outside of BFC's monitoring programs.

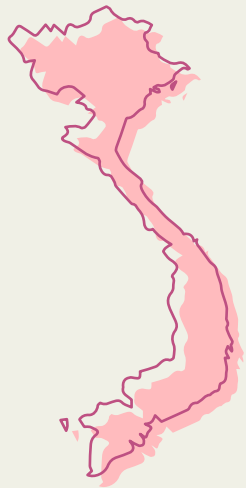
Children are also subject to human trafficking domestically, from rural to urban areas, as well as internationally.

⁵ ILO, 2018. https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/documents/publication/wcms_663043.pdf

⁶ US Department of State, 2021. <https://www.state.gov/reports/2020-country-reports-on-human-rights-practices/cambodia/>

Vietnam

Vietnam's textile and garment industry contributes up to 16% of national GDP, totalling around US \$39 billion. It employs approximately 2.7 million people, over 75% of whom are women.



KEY WORKER RIGHTS CONCERNS:

Child Labour

Children between 13 and 15 years of age can be hired to perform light work only with a maximum of 4 hours per day, 20 hours a week. The US List of Goods Produced by Child Labor or Forced Labor reported evidence of children ages 10-18, some as young as 6, who work under conditions of forced labour producing garments in Vietnam. This is mostly found in small privately-owned factories and informal workshops. Many of these children have migrated, or have been trafficked, from the countryside and from central or northern provinces.

Unions

Similar to China, currently there is only one legally recognised trade union organisation in Vietnam; the Vietnam General Confederation of Labour (VGCL). The labour code which came into effect in 2021 allows workers to form or join an independent employee representative organization of their choosing that does not have to be affiliated with VGCL. Only citizens may form or join labour unions, which leaves migrant workers unprotected.

Collective Bargaining

There is a shortage of genuine collective bargaining in Vietnam. Collective bargaining is widely regarded as a formality rather than the outcome of real negotiations between workers and employers, with suggestions that most workers do not know the contents of the active CBAs at their companies. 41% of factories fail to comply in some manner with the legal requirements for collective bargaining and most do not make the CBAs publicly available for workers.⁷

Working Hours

Excessive overtime is one of the biggest issues in the garment sector in Vietnam. A Better Work assessment showed that there is a failure to meet monthly limits (30 hours) among 77% of factories, the national legal limit of 300 overtime hours per year is exceeded by 69% of factories, and 40% of factories do not provide workers with at least four days of rest per month.⁸

⁷ Better Work, 2019. https://betterwork.org/wp-content/uploads/2019/06/BWV_Annual-Report-2019_EN_v4.pdf

⁸ Fairwear, 2020. <https://api.fairwear.org/wp-content/uploads/2021/04/Vietnam-Country-Study-2020.pdf>

Uzbekistan

Uzbekistan ranks 6th in the world's largest producers of cotton. All agricultural land in Uzbekistan is owned by the state, with cotton harvesting also a wholly state-controlled system.



KEY WORKER RIGHTS CONCERNS:

Child and Forced Labour

Until 2022, Uzbekistan was the focus of global efforts against state-enforced child and adult labour. Up to 2012, the government mobilized school children aged 11-15 to pick cotton, leaving schools throughout much of the country closed during the harvest season. In 2015 and 2016 after losing the child workforce, the Uzbek government forced more than a million adults into cotton harvests. This included students, teachers, doctors, nurses, and employees of government agencies and private businesses. This was against their will and under threat of penalty, especially of losing their jobs.

Boycott Success

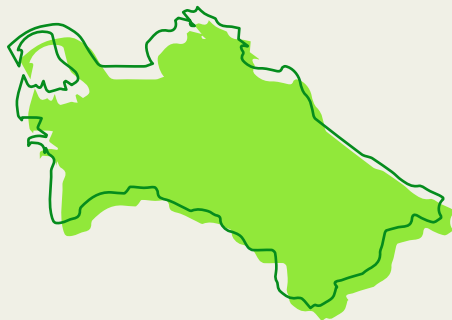
A global boycott on Uzbek cotton was first established in 2006, with over 300 global brands and retailers signing a pledge against sourcing Uzbek cotton. Global advocacy efforts saw Uzbekistan cotton fields officially declared free of forced labour in March 2022 by the ILO.

Forced Labour in Silk Production

Silk cocoon production is another industry of particular concern for farmers in Uzbekistan. It's suggested that the majority of the roughly 45,000 farmers in Uzbekistan involved in silk cocoon production are under forced labour, compelled by the government. Furthermore, farmers are required to sell their silk cocoons back to the government at an official procurement price, which often does not cover the cost of cultivating the cocoons. Workers in this industry often experience underpayment, delayed payment, or receive no payment at all.

Turkmenistan

Turkmenistan has been largely hidden from the eyes of the world and much remains unknown. Cotton is one of the main crops in Turkmenistan's agriculture and is fully controlled by the state's autocratic government.



KEY WORKER RIGHTS CONCERNS:

Forced Labour

In order to reach and maintain government-imposed quotas for the cotton harvest, government officials require some employees at private-sector institutions, soldiers, and public-sector workers including teachers, doctors, nurses, and others to pick cotton without payment and under the threat of administrative penalties, such as dismissal, reduced work hours, or salary deductions, for refusal to comply. It has been reported that such workers are compelled to sign declarations that state their involvement is a part of voluntary work. Farmers are also threatened with land seizures for not meeting harvest quotas.

The use of harassment, arbitrary imprisonment, torture and ill-treatment against independent monitors and reporters is also suspected in the cotton industry.

Child Labour

The Turkmen law specifically states that children cannot participate in the cotton harvest. Students between the ages of 14-30 are prohibited from working during the educational process, however are permitted to work in voluntary collective production in their free time. There is evidence that some schools have two shifts of attendance during the day, which can facilitate children's engagement in child labour in the cotton harvest by accommodating this work within the school schedule. There have been further reports that summer educational camps for school children in Lebap Province and Darganatinsky District were engaging in child labour in cotton and potato fields, under threat of academic penalty.

More Resources

If you want to dig a little deeper, or find out more about countries not listed in this guide, use the following resources to guide you.

- Fair Wear Foundation – [Taking Action in Production Countries](#)
- ITUC - [Global Rights Index](#)
- Verisk Maplecroft - [Human Rights Outlook](#)

