



Daffodil
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University

Faculty of Engineering
Department of Textile Engineering

Report on

“Sustainability of the RMG Industry of Bangladesh in context of Global Competition”

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Submitted By

Md. Munem Shahriar Suvo (191-23-5518)

Nahida Sharmin (191-23-5649)

Supervised By

Abdullah Al Mamun

Associate Professor

Department of Textile Engineering

Daffodil International University

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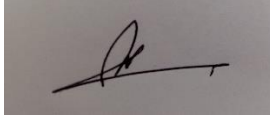
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Advance in Apparel Manufacturing Technology

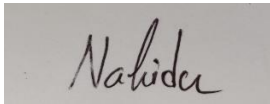
June- 2023

DECLARATION

We hereby declare that the work which is being presented in this thesis entitled, “Study on Problems of sample development” is original work by us, has not been presented for a degree of any other university and all the resource of materials used for this thesis have been duly acknowledged.



Name: Md. Munem Shahriar Suvo
Id:191-23-5518



Name: Nahida Sharmin
Id:191-23-5649

This is to certify that the above declaration made by the candidate is correct to the best of my knowledge.

Supervisor:



Abdullah Al Mamun

Associate Professor

Department of Textile Engineering

Sustainability of RMG

by Suvo
Nahida

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Abstract

The aim of the present study is to examine the “**Sustainability of the RMG Industry of Bangladesh in context of global competition**”. This research process reinforces and implements the sustainable development of workers in compliance issues to ensure the sustainability of the RMG industry in Bangladesh.

The health and safety of workers is a very important issue to reduce absenteeism in the workplace and structure the production flow properly. As we know, the delivery time is a big challenge for our country to make the production time and send the products for the shipping process. In this regard, all the factories are very strict with the workers' sickness and problem of absenteeism.

The Bangladesh garment industry is a very challenging and promising sector. In this sector, Bangladesh has many competitors. In this sense, we must be very concerned about the sustainable development of factory workplaces and the health and safety status of workers. By working to upgrade garment workers, our industry will be on the right track for global competition.

The current condition of workers is that they suffer from inadequate and absent medical and medical facilities in various compliance industries. The meal nutrition situation of workers in the garment industry is insufficient to compare human needs. In this study, we focused on proper nutrition for workers and medical facilities at the level of the garment industry. So that they can live long and contribute to the sustainability of the RMG industry in Bangladesh.

Keywords: Sustainability, Worker, Safety, Global Competition.

Undertaking / Declaration of independence of Project work:

Herewith I assure that project work “**Sustainability of the RMG Industry of Bangladesh in context of Global Competition**” is our own work. The Work has not been presented or published elsewhere for assessment. Where material has been used from other sources it has been properly acknowledged / referred.

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Chapter- 1

1.1 Introduction

The RMG sector has experienced exponential growth since 1980. The sector contributes significantly to GDP. It also provides jobs for approximately 4.2 million Bangladeshis, mostly women from low-income families. The sector contributes significantly to GDP. Bangladesh remains one of the top clothing exporters due to its competitive advantage in terms of low wages. Since the country's wages are so low, buyers are interested in the clothing sector in Bangladesh. A comparison by the Institute for Global Labor and Human Rights shows that the labor cost of making a denim shirt is \$ 1.30 in Bangladesh, while it is \$ 7. 7 in the United States, but this salary advantage can have negative effects on efficiency. Compared to other competitors in the market, Bangladesh faces significant supply constraints due to poor infrastructure, weak back links, organizational corruption, and high levels of bad debt. This devalues employees and reduces productivity.

1.2 Facing obstacles in Research:

Worldwide attention is now focused on the Bangladeshi garment industry. It is still unclear to what extent the fatal accidents will negatively impact the Bangladeshi Garment (RMG) industry as a whole. Concerned about issues relating to labor standards in Bangladesh, US apparel buyers are now lobbying manufacturers of RMG to ensure proper compliance with those standards in the industry. The buyers in overseas markets are now more concerned about the issue; asked the Bangladeshi government to monitor this situation in units of RMG. The new US Congress has given it a priority. The ministry of Foreign Affairs (MOFA) recently received complaints from some of the major buyers of US apparel about a significant number of RMG units that "violate" labor and other related standards. Most of RMG's workers birth registration and worker pay systems are not accurate. They objected to the account structure in garment factories in Bangladesh, saying that RMG manufacturers show false in most cases. They also expressed concern about large gaps in the compliance system in the textile sector in Bangladesh.

1.3 Reasons of research problem:

- Lack of meeting compliance issues factory level.
- Lack of capacity building and fire safety.
- Weak and inadequate government apparatus.

1.4 Findings in the Literature:

In this existing literature part we found a research on, “**The Readymade Garments (RMG) Sector of Bangladesh: Exploring Sustainability Dimensions.**” Dissertation by **Khan Md. Nurul Amin**, Master of Arts in Governance and Development, Batch number: MAGD-6, BRAC Institute of Governance and Development, **BRAC UNIVERSITY**, Dhaka, Bangladesh. In their research, they discuss about the ACCORD, ALLIANCE and fire safety issues.

We know that, ACCORD, ALLIANCE, fire safety issues are very important with the sustainability of the RMG of Bangladesh. We also know that maximum factories are now infrastructural developed and factories are now trying maintaining the rules of ACCORD and ALLIANCE.

In this research, we will enforce the foreign buyer’s first requirement issue now days, which is, Compliance.” **Compliance** is complying with the laws of the land and the code of conduct (COC) of the buyers. Compliance cares about the Ethical Labor Practice, Health, safety, and Environment. It is a natural consequence of good management, it encourages management to come up with more difficult yet cost effective solutions and improve productivity. Compliance is phenomenal issue to protect sustainability of Bangladesh RMG industry.

1.5 Research Question:

- How do factory owners facilitate the health, medical safety issues of workers?
- How do factory owners feel about the nutritional status of workers?
- What is the current state of ethical work practices?

1.6 Research aim:

- Promotion of a better work environment in the clothing Industry.
- For reduce absenteeism of workers from factory work place.
- For ensure better medical care in the event of illness.
- For provide adequate nutritious food to workers.

1.7 Methodology of the study:

Our research was conducted based only on the compliance practices of the factory. All the data was collected through various visits to the factory workers. In their houses after their work finished at this work places. In our research, all the information was collected by asking questions of various amount of group of workers, statistical report are based on primary data from workers in various garment factories. Approximately pieces of information were collected from secondary data, online, case studies and Journals.

1.8 Boundary and limitation:

In our research work several limitation emerged during the data collection. The main limitation when preparing this research was finding information from the factory's primary data. They are not allowing us to collect the data's from the floor during the working hour. They are assuring us that they are properly completing compliance rules for worker health and safety issue, as well as fire safety issues. Worker were denied to speak in front of their superior. It can be because of fear of losing their job.

Chapter-2

2.1 Literature review:

Syed Mahmud-Ul-Islam student of Royal Institute of Technology (KTH), Emphasizing innovations of the researcher, manufacturing environment friendly products in a sustainable way, Eco-dyeing and Cleaner Production, Cotton Processing and Effluent Treatment. They try to influence, re-use of dyeing wastage water by treatment. In terms of eco-friendly product, they try to focus on using poly bags, plastics materials to make manmade fiber and making final product. Therefore, that can save our environmental pollution. Making garments product in sustainable way to save the earth . In order save the earth from pollution, we need to produce organic cotton because we know organic cotton needs less fertilizer. As we know H&M is world second largest retailer as well as a major buyer of Bangladesh, they always pay attention for fair labor practice and environmental working condition in garments industry. In terms of green distribution, they always recommend to use new transport, which has been use not more than 10 years to reduce carbon dioxide. Steps towards Sustainability in Fashion: The Centre for Sustainable Fashion at London College of Fashion takes a holistic, interdisciplinary, multi-leveled approach towards design for sustainability, relating to the fashion sector. It places faith in the cooperative abilities of people and nature to solve ecological issues. Materials and manufacturing environmental sustainability evaluation of apparel product: T-shirts used high-impact garment finish, namely traditional bleach and acid chemical with stone wash, and scored lower. Besides, marker efficiency has great impact on product sustainability and lower marker efficiency indicates its direct impact on supply chain, including more wastage of material, fabrics, dyes, chemicals, process loss and landfill so on. Tina Müller, The latter have an even stronger influence on environmental apparel consumption, yet by far less well known than the Nordic labels. Perceived barriers for ethical trade are positively related to environmental apparel consumption, which is surprising to some extent. Possibly, increased environmental apparel consumption is accompanied by a rising awareness of potential difficulties and hassles.

Sources of our Literature Review: Internet, Google Scholar.

Chapter-3

3.1 Research Materials and method:

- **Sample selection:** Ready Made garments industry worker, works in several RMG industries. At the very beginning of interview, workers are not interested to give us the answer of our question paper during working hour 8 am to 5pm. We took their interview after the finishing of their working hour by visiting their home, lunch space through verbal communication we have collected the group data from them in Gazipur garments area, Dhaka, Bangladesh.
- **Sample size:** 100 workers. They were from different working levels of different ready-made garments factory.
- **Questionnaires' preparation:** Questionnaires “ for RMG workers given below:

Part-a

Health and safety status:

1. Doctor provided by the factory, do they come every working day?
a. Yes b. No
2. The medical facilities provided by the factory, it is sufficient enough?
a. Yes b. No
3. If you feel sick, do you get medical help from factory doctor right away?
a. Yes b. No
4. When you feel sick, Do you get adequate medical facilities?

- a. Yes b. No
- 5. Due to an illness during working hours, Does the factory allows you to go home for rest?
 - a. Yes b. No
- 6. The medical facility provided by the factory, Do you think, It is helpful or not?
 - a. Yes b. No
- 7. Is there any forced labor during your illness?
 - a. Yes b. No

Part-b

Food and nutrition status:

- 8. Does your factory provide lunch during your lunch time?
 - a. Yes b. No
- 9. What types of Food does they provide?
 - a. Junk food b. Rice with vegetable.
- 10. How much does the meal nutrition cost you per month?

.....TK.
- 11. If the factory provide you lunch facility during lunch time is it helpful for you?
 - a. Yes b. No
- 12. Does your factory provide pure drinking water?
 - a. Yes b. No
- 13. Do you take meat or vegetable food in your daily meal?
 - a. Yes b. No
- 14. In your weekly meal, do you take meat or vegetable food?
 - a. Yes b. No
- 15. What is the source of your lunch?
 - a. Homemade by yourself b. Factory provides
- 16. The food provided by your factory, is it free or you have to pay for it?
 - a. Yes b. No
- 17. The food your factory provide, do you think it is hygienic or unhealthy?
 - a. Hygienic b. Unhealthy

In this study, we collect all information's on worker health and safety by asking all of the questions above, thus it can give insight in to the medical & health problem faced by the workers as well as nutritional status of food & meals.

Chapter- 4

4.1 Result and discussion:

The result and discussion has conducted with answer review of 100 workers. Here we can know what actually the present status of workers.

All question answer from health and safety issue:

Question answer:

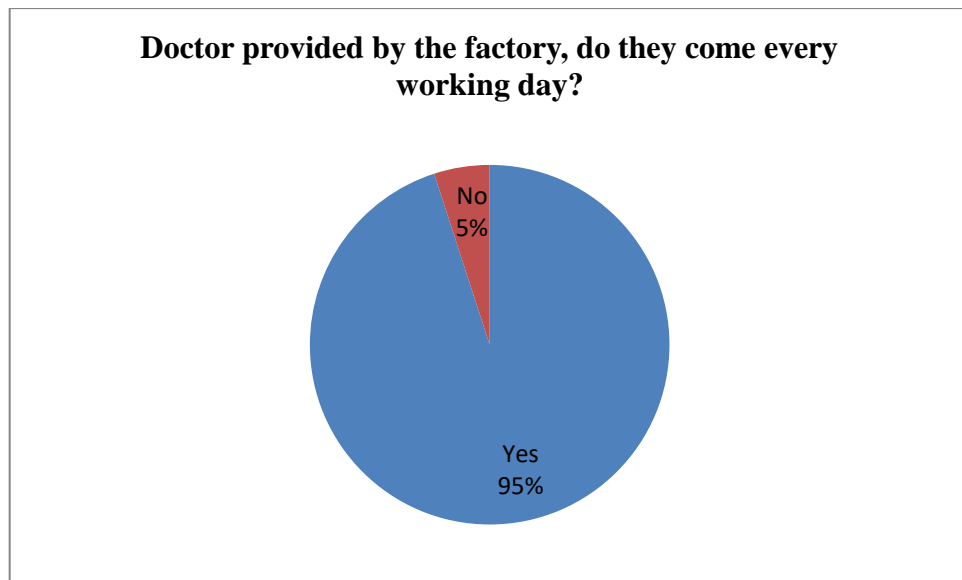


Figure: 01: Pie chart Health and safety concern.

From the result of this pie chart, we can understand that on doctors on not 100% present in all compliance factories, However the proportion is very small, but we still have to make sure the doctors on call is 100% present.

Question answer:

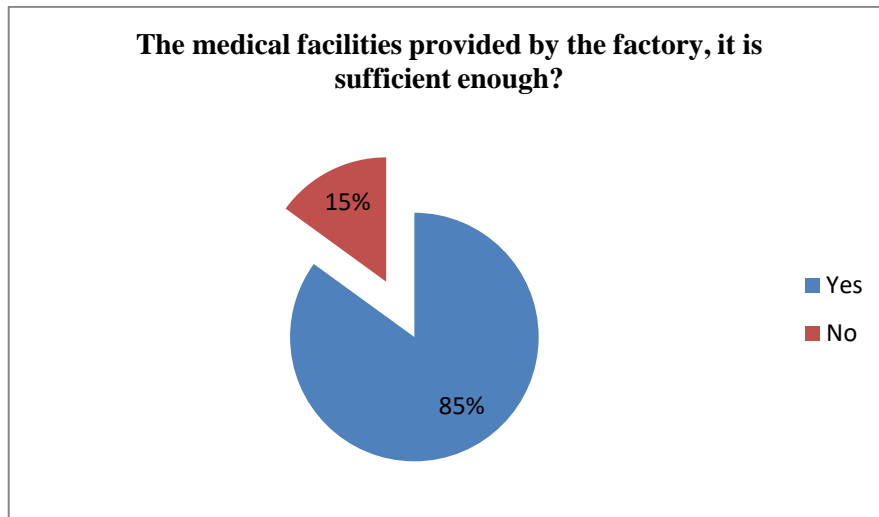


Figure: 02 Health and safety

Here we can see 15% of worker suffer from lack of medical facility.

Question answer:

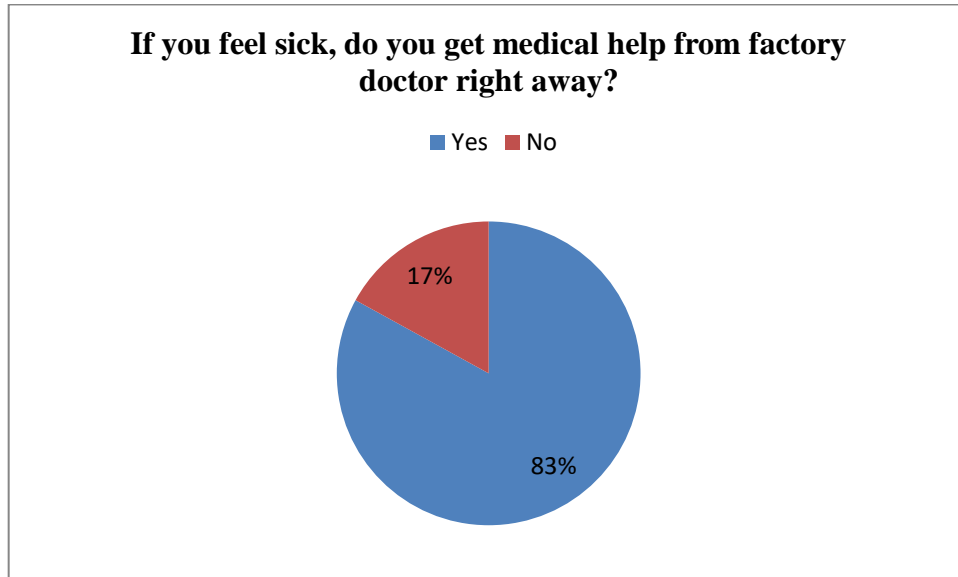


Figure: 03: Instant medical support.

- Approximately 17% workers do not receive immediate medical assistance, resulting in absences from work.

Question answer:

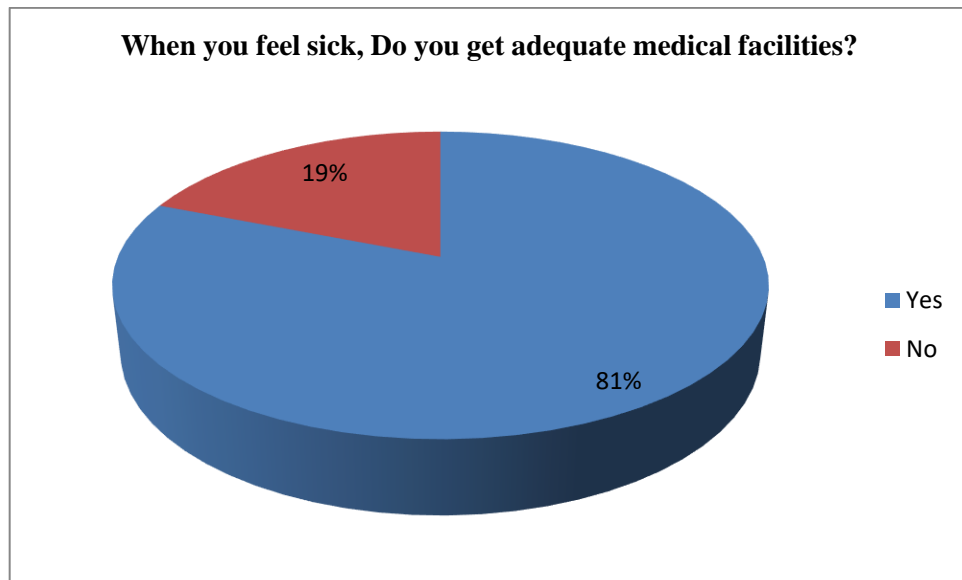


Figure: 04: Health and safety, medicine facility ratio.

- Factory doctors only provide general fever or stomach problem medicine. Example: Paracetamol, ORS etc.

Question answer:

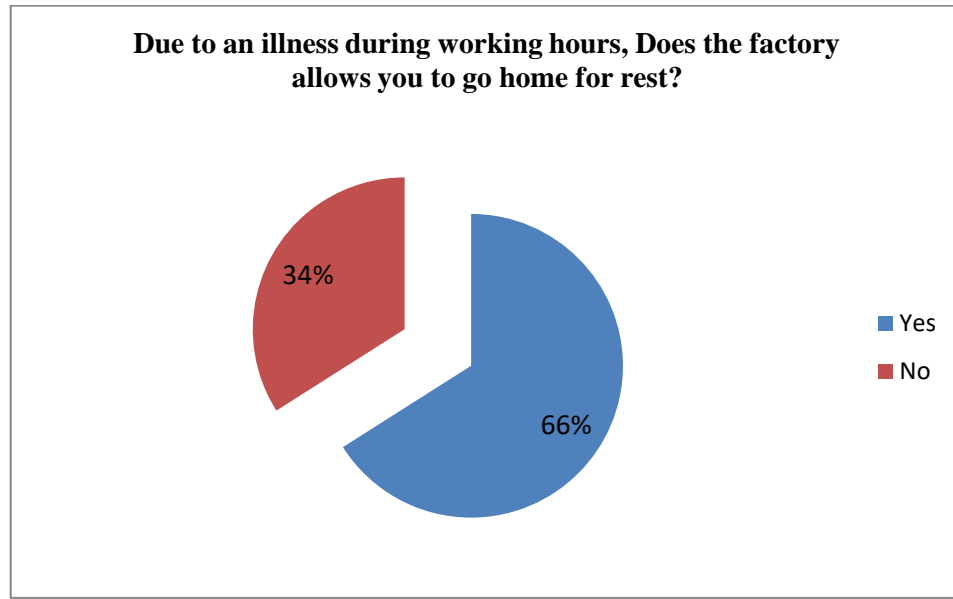


Figure: 05, Health and safety concern.

- To maintain lead-time and in time shipment concern absenteeism is not allowed.

Question answer:

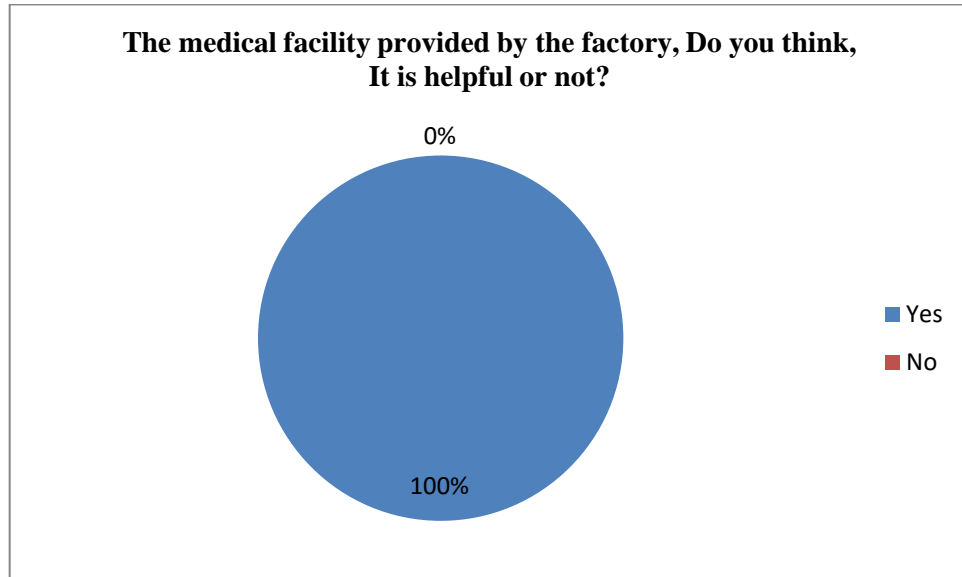


Figure: 06: Health and safety issue.

As we know a garments worker wages is very minimum. Free medical facility in factory always helpful for them.

Question answer:

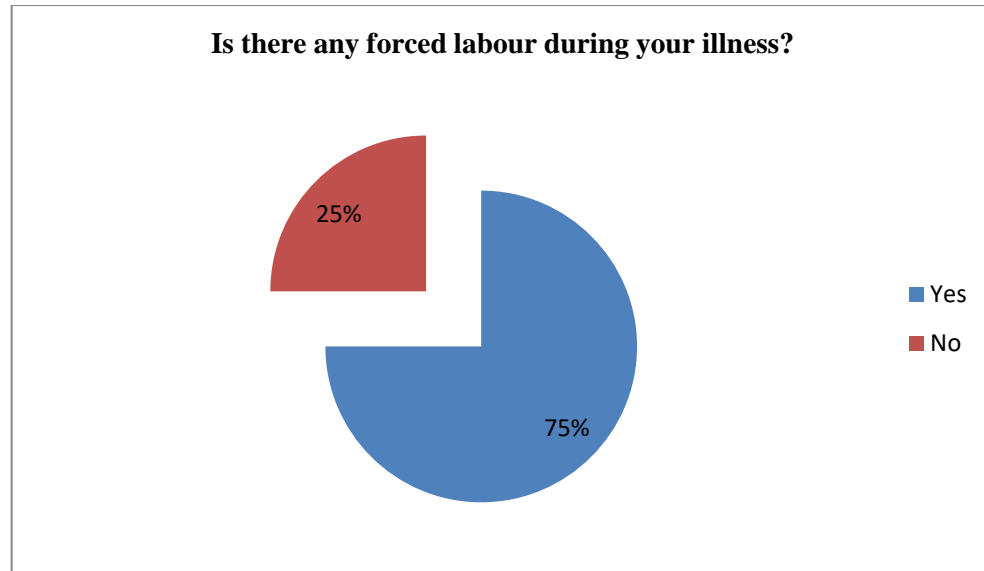


Figure: 07: Health and safety concern.

To maintain lead-time and in time shipment concern absenteeism is not allowed.

Food and nutrition status:

The result of the study conducted with the present food and nutrition status of 100 garments workers. Pie chart result given bellow:

Question answer:

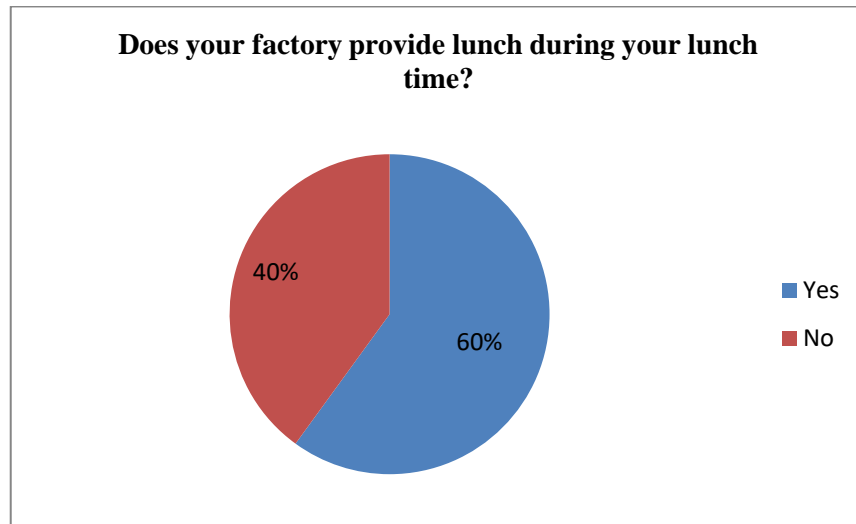


Figure: 01: Food and Nutrition status.

Half of factories have a lunch facility during lunch time. However, some factories recommend carrying tiff in for lunch.

Question answer:

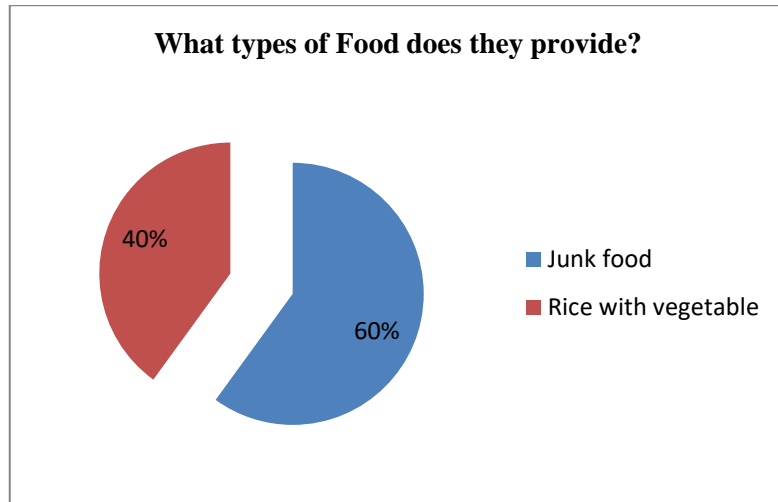


Figure: 02: Food and nutrition status

In lunch factory always prefer snacks or junk food.

Question answer:

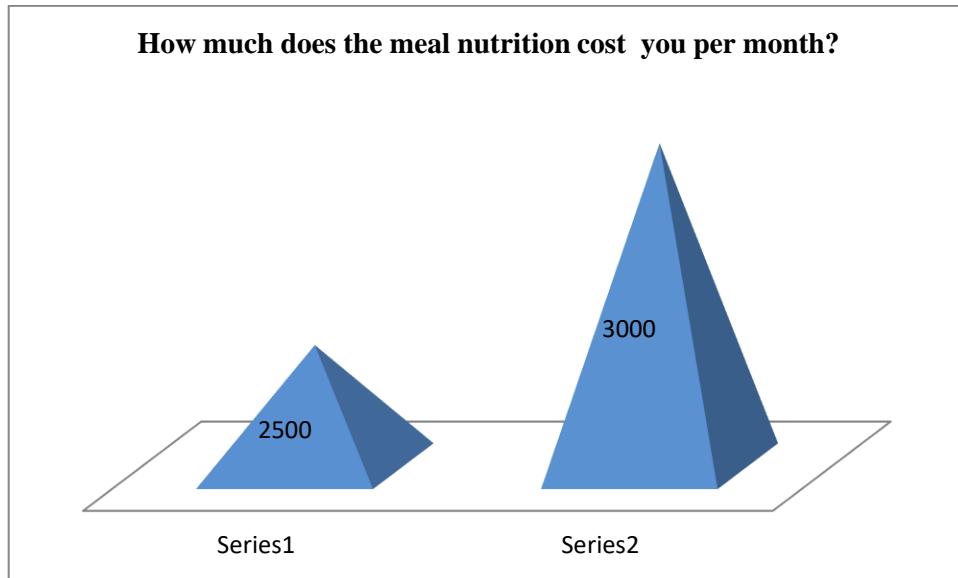


Figure: 03: Food and nutrition status.

Maximum workers cost for lunch is 2500- 3000 TK. Per month.

Question answer:

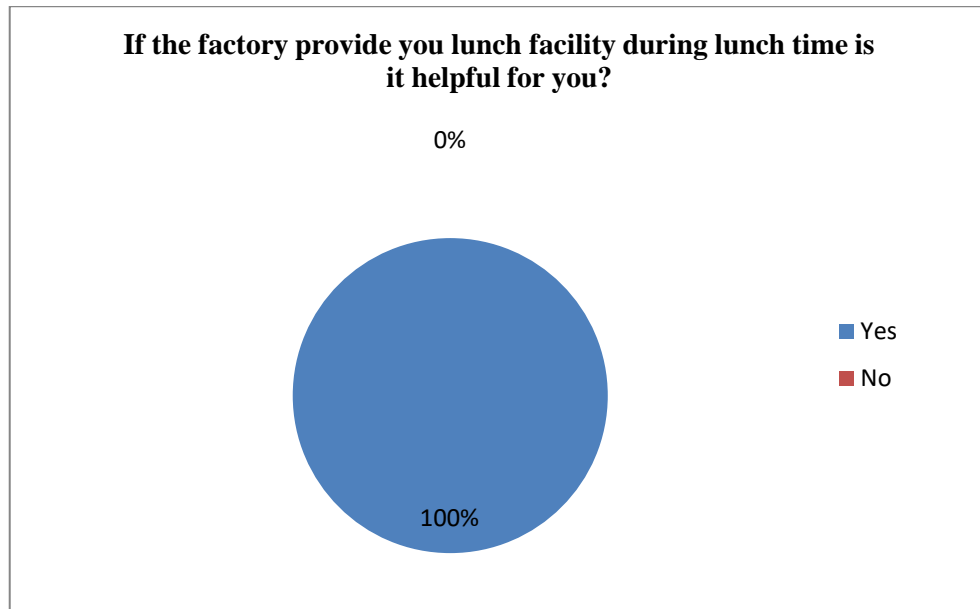


Figure: 04: Food and nutrition status.

As we know, the salary of a worker is very minimums. They cannot afford nutritious food.

Question answer:

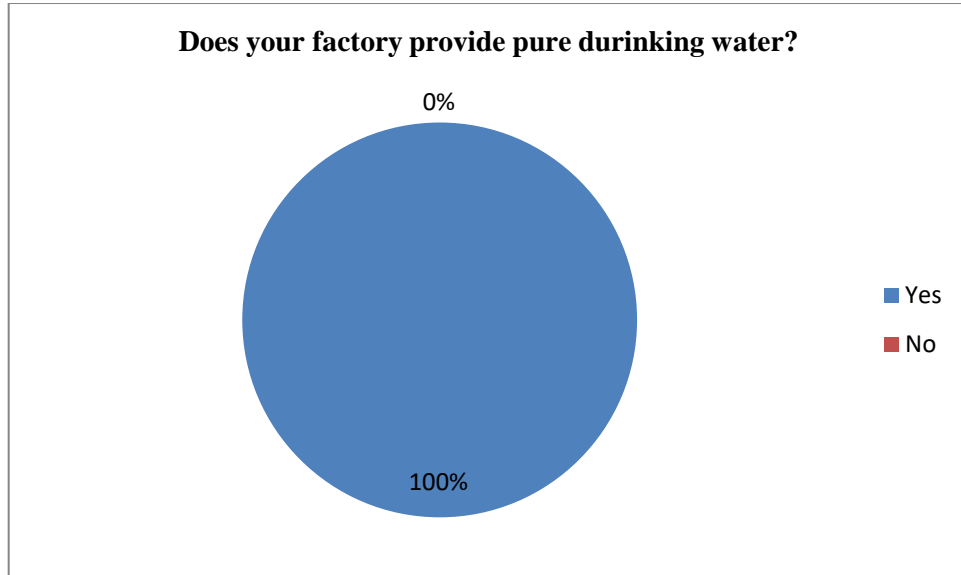


Figure: 05: Food and Nutrition status.

Question answer:

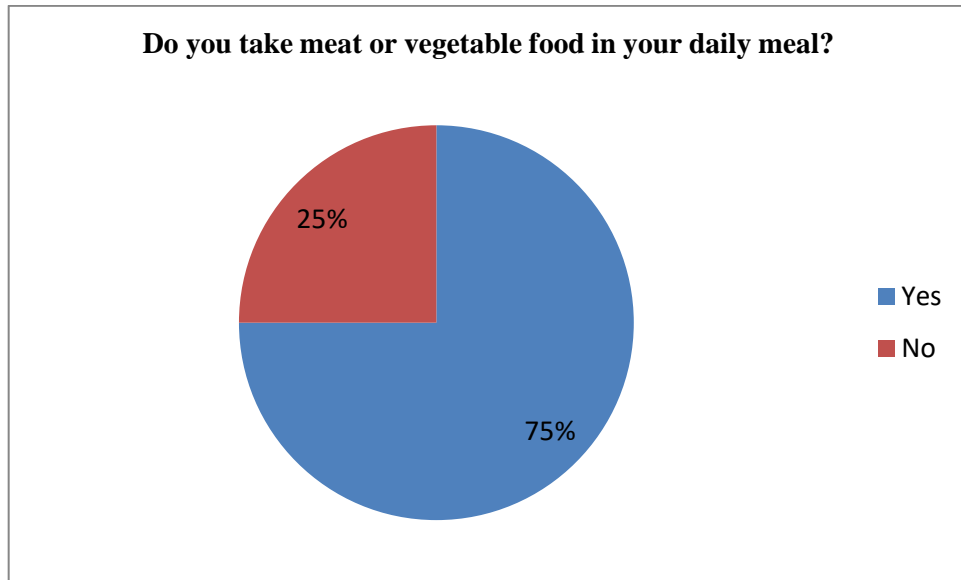


Figure: 06: Food and Nutrition Status.

As we know, meat and fish are very costly in Bangladesh that is why workers can afford vegetable and rice easily.

Question answer:

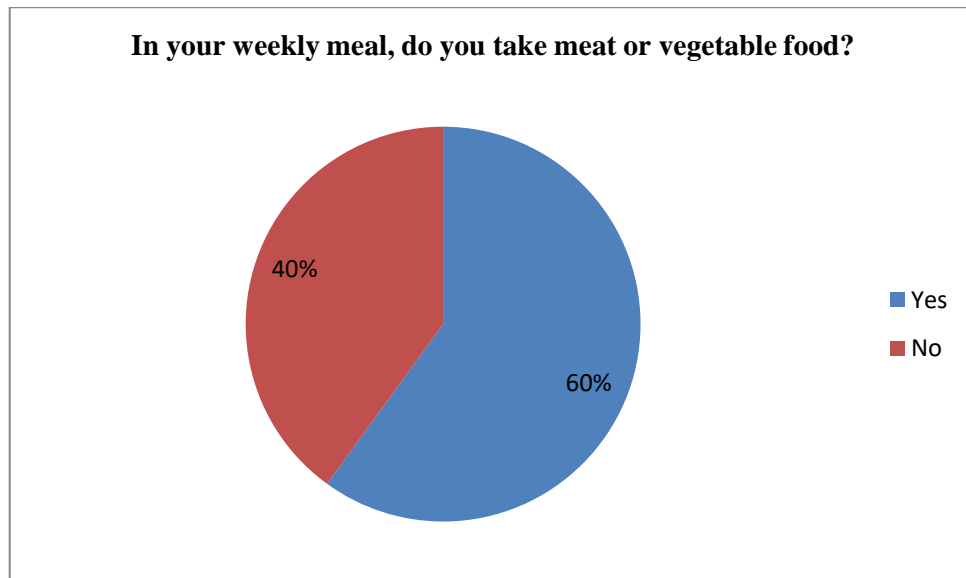


Figure: 07: Food and nutrition status.

Question answer:

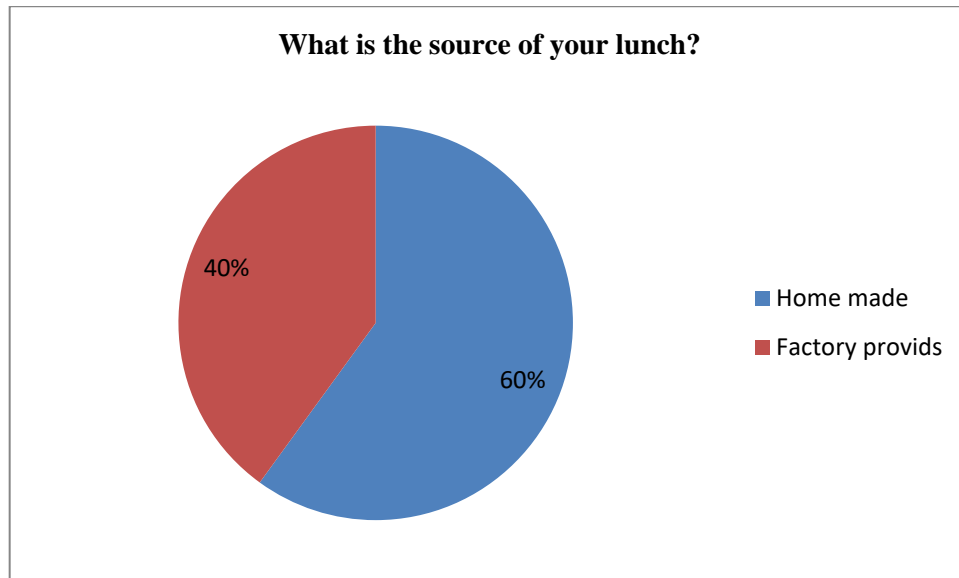


Figure: 08: Food and Nutrition status.

Maximum workers bring their lunch from home cause some factory cant facilities worker lunch.

Question answer:

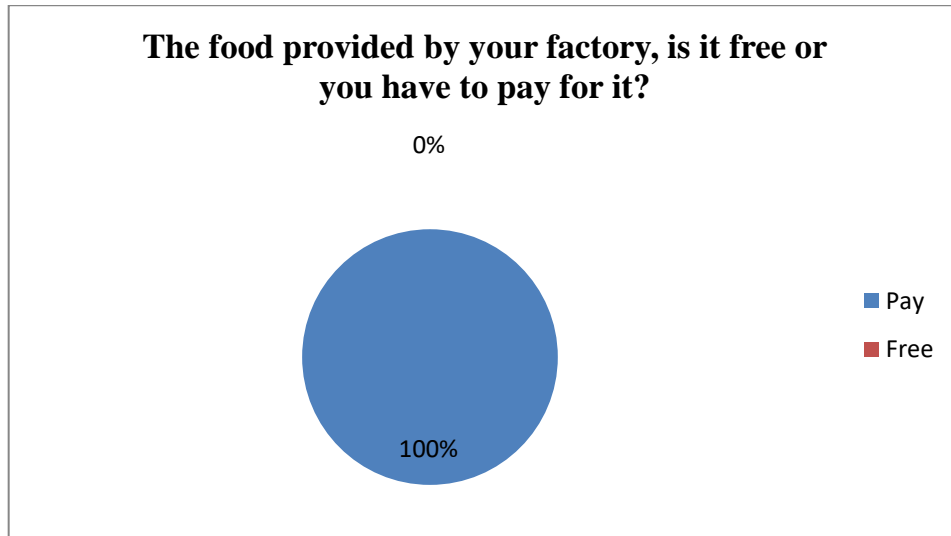


Figure: 09: Food and Nutrition status.

Those factory who provide lunch must have to pay for that food.

Question answer:

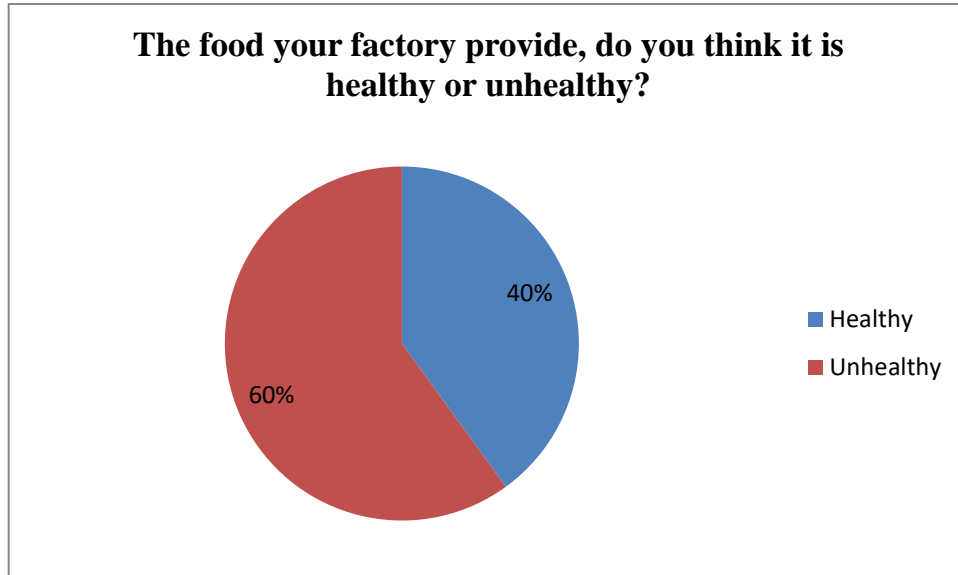


Figure: 10: Food and nutrition status.

Majority of workers them that the food is unhealthy.

4.2 Present scenario of RMG sector:

After the first wave of pandemic of covid-19 factories start to reopen on 26th April. Instantly many buyers reversed their initial order cancellation decisions and agreed to accept products already in production, suppliers were pressed to finish and ship the orders and Bangladesh's fear of lost competitiveness to other countries like China and Vietnam which also resumed manufacturing lines pushed to re-open factories. Another major cause for reopening factories was to produce personal protective equipment (PPE), and inner garments for more hygienic issues an urgent need locally and globally. In the May 2020 the rate started to turn back gradually and in June 2020 the export of RMG growth rate became - 6.63%. From August 2020 it has been positive which raised to 3.09% in September 2020 from where it can be predicted that the upcoming days will be shining for the economy of the country. "I have enough work orders to run my factory for at least the next six months" said SM Khaled, managing director of Snowtex Group." The company has plan to hire 2000 to 3000 workers this year. If there isn't another wave of covid19, we are hoping for a recovery in orders" SM khalad added. (RMG Bangladesh, February22,2021)

Mohammad Hasan, managing director of cotton group said that "like in the previous months, the order trend is not fluctuating an unusual – the present tread is to normal. (RMG Bangladesh, February 22,2021)

Fortunately, things have been going positive for Bangladesh's RMG so far after re-opening factories. Bangladesh overall economy has not faced that devastating situation as expected.

Bangladesh holds the second position in RMG exports

Despite some sustainability issues in our country's rmg sector, we hold the second position in the world in terms of Bangladesh rmg exports.

According to the latest statistics of the World Trade Organization (WTO), Bangladesh's global clothing export market share has increased to 6.50 percent in 2021 which was 6.30 percent in 2020.

At the same time, Vietnam's clothing export share has dropped at 5.70 percent in exports in 2021 which was 6.50 percent in 2020.

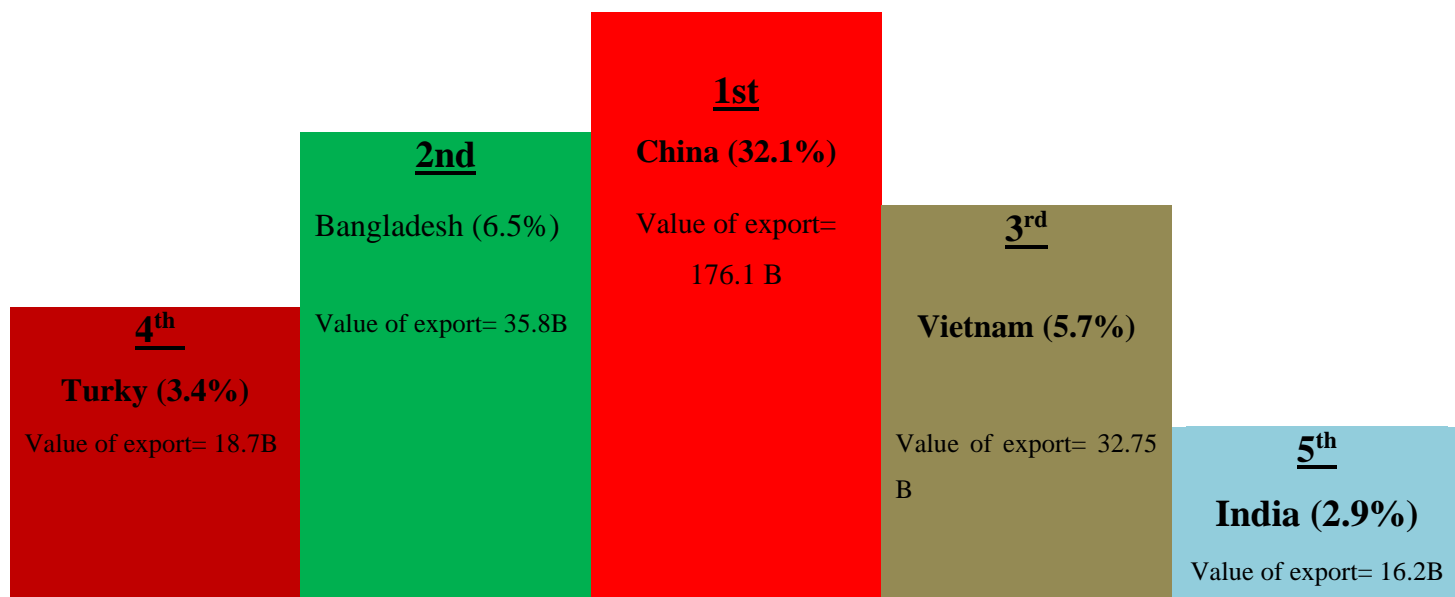


Figure 4.1: Showing global apparel export market shares of the top five countries.

Last week WTO unveiled the figures releasing the World Trade Statistical Review 2022. It also showed that the annual export of clothing or readymade garments from Bangladesh was around \$35.8 billion in 2021. According to the data, China remained the top clothing exporter in the world with 32.1 percent share.

As per the WTO publication, Bangladesh remained the third-largest exporter of clothing after China and the European Union (EU), while Vietnam, India, and Turkey ranked fourth, fifth and sixth respectively.

Bangladesh is back to being the world's second-largest apparel exporter. Latest Export Promotion Bureau (EPB) Statistics show Bangladesh's apparel exports surged 30.30 percent to \$23.99 billion from July to January 2021-22. Knitwear exports surged 32.89 percent to 13.27 billion. On the other hand, the export of woven garments surged 27.23 percent to \$10.71 billion.

In 2021, Bangladesh's apparel export earnings grow 30.36 percent to \$ 35.81 billion. The country's earnings from apparel exports surpassed Vietnam's export earnings of \$32.75 billion, reveals the General Statistics Office. The

surge in apparel export earnings was dominated by knitwear exports that rose 37.72 percent to \$19.59 billion compared to \$ 14.22 billion in the same period last year. During the year, Bangladesh's exports of woven products also surged 22.46 percent to \$ 16.21 billion, says Faruque Hassan, President, BGMEA.

4.4 Findings:

- At many compliance apparel factories doctors on call are some times unavailable for working day's. In case of emergency situation, workers are unable to receive medical guidance or adequate treatment.
- Some factory do not provide adequate medical care and facilities. When workers feels sick or incase of emergency.
- We all know that delivery time is a very important issue in the garment factory. The responsible factory authority never allow the absence of workers during the working day's.
- Factory authority don't concern or bother to provide protein on nutritious food for workers during their lunchtime.
- Every cities, Village the cost of living increasing day by day compared to the level of income. At some point it is pretty much hard for them to eat rich good food.
- When factory responsible are not face-lifting proper medicine or food that requires for a worker they suffer a lot.
- In terms of proper medical facilities, factory responsible has lot of lacking or carelessness to provide proper medical treatment.
- In some factory the lunch facility is provided but paid, the worker must have to pay for their food.
- Some factories provided food is not hygienic which can cause health issue for workers.

4.5 Recommendation:

- Factory authority need to concern more about worker health and safety issue as well as food and nutrition status. If workers are physically and mentally fit, they can work for betterment of the RMG industry.
- All compliance factory need to increase their medical and medicine facility. Therefore, a sick worker can get proper treatment in to the factory.
- In the sense of emergency, All doctors at the factory must be available in their offices every working day.
- Due to the workers lack of nutrition status, factory authority can provide better lunch facilities to their workers within minimum cost.
- To increase productivity of the garments, factory responsible need to ensure for zero absenteeism of workers in working place.
- If the factory is providing lunch than the quality of the food should be hygienic and healthy.

Chapter- 5

Conclusion:

According to the most authoritative research to date, \$26 trillion is the amount of money humanity could save through a global shift to sustainable development by 2030. That might come as a surprise since for decades, human thinks with conventional wisdom that becoming sustainable is expensive. The whole world has understood that we need to live differently for future generations to have the quality of life that we have enjoyed. And, we need to account for the improvements and multiple benefits in our decisions.

Accurate work performs and a good work situation can make a huge difference to the enormous productivity of the apparel industry. Workers are the ultimate souls to support our industry. We can achieve the level of productivity and efficiency up to the mark through the correct use of the workforce. If the whole workforce works together, we will be able to achieve the sustainability of Bangladesh's RMG industry and global competition will be easier for us. 68% of export revenue comes from Bangladesh's RMG industry, which was \$ 35.8 billion in the year 2021-2022. This huge profit comes from the participation of 4 .8 million workers every working day from morning to evening. Our workers are the main hero of our industry. Therefore, we need to think about its improvement, it means that we are thinking about the sustainable development of our RMG industry. Therefore, we must pay more attention to the health and safety of workers.

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Sustainability of RMG

ORIGINALITY REPORT

29%
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