

BUILDING BLOCKS FOR GOVERNING THE GARMENT INDUSTRY

ANNEX TO WORKING PAPER 3: TRADE REALITIES

**COUNTRY-BY-COUNTRY TRADE INFOGRAPHICS
FOR THE 'GROUP OF 30' LARGEST GARMENT EXPORTERS**

**KATALYST
INITIATIVE**

ABOUT THE SERIES: BUILDING BLOCKS FOR GOVERNING THE GARMENT INDUSTRY

This series aims to assist policymakers, trade unions, NGOs, investors, funders and anyone else interested in designing the new forms of governance needed to improve protection of human rights and the environment in transnational supply chains. Using the global garment industry as a test case, we hope to help 'catalyse' new, multi-disciplinary strategies to make 21st century supply chains fairer and more sustainable.

Our work helps to replace anecdotes and guesswork about the power and financial dynamics in industries like garments with an evidence base, and guidance on what the data means for policy development. In doing so, we aim to help policymakers and civil society to identify where to focus limited governance resources in order to achieve the maximum benefits for garment workers and the environment.

[Working Paper 1: Sizing Up the Garment Industry: Large Brands, Supply Chain Labour Market Share and Lessons for Governance Design](#)

Based on original research, we look at how many garment brands would need to change their behaviour to reach a 'critical mass' for widespread improvements in human rights and environmental protections. We then explore how governance and regulatory efforts aimed at brands could be designed to benefit the largest number of workers.

[Working Paper 2: Garment Industry Structure: Observations, Challenges and Recommendations for Human Rights Governance Designers](#)

A companion to 'Sizing Up the Garment Industry', we outline five governance challenges created by the industry's complex structure. If new laws, regulations, collective bargaining systems and other governance tools can overcome these challenges, they will be far more effective in the years to come. We offer some recommendations to support these new governance initiatives.

[Working Paper 3: Trade Realities: Using Trade Data to Strengthen the Design of Supply Chain Governance](#)

We use trade data to explore how the effectiveness of new forms of supply chain governance - like mandatory due diligence laws or enforceable brand agreements - may be influenced by trade flows, now and in the future. We then identify several options for strengthening the design of governance efforts so they can compensate for trade flow effects.

[Working Paper 3 Annex: 'Group of 30' Garment Export Infographics](#)

In this companion to 'Trade Realities', we present country-by-country garment export trade data for the 30 major non-EU garment-exporting economies.

The graphics and analysis presented in this paper are offered under a Creative Commons license (see [Acknowledgements](#) for details). We invite civil society organisations to use the graphics in presentations or publications on a non-commercial basis. The visuals can be downloaded as a graphics pack from the Katalyst Initiative [website](#).

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INTRODUCTION



This paper is an Annex to Katalyst Initiative's **Working Paper 3: Trade Realities: Using trade data to strengthen the design of supply chain governance.**

We reproduce here a few paragraphs of that report directly related to the data, however the main working paper contains a full explanation of the analysis and policy relevance of these graphics for developing supply chain governance.

**PLEASE CONSULT THE MAIN PAPER
[WORKING PAPER 3: TRADE REALITIES](#)
FOR ADDITIONAL INFORMATION REGARDING THE DATA
PRESENTED IN THIS ANNEX.**

ABOUT THE DATA

The trade data in this report is drawn from the [Atlas of Economic Complexity](#), developed by the [Harvard Growth Lab](#) at Harvard University. At time of writing the 2019 data was the last year available from the Atlas, and we would argue is a more typical year than pandemic-impacted 2020.

The raw data is based on the UN Comtrade database. Since trade data is not always reported consistently or accurately, the Atlas of Economic Complexity team has taken steps to address some of the common issues and to create estimates where data is weak or suspect.

Nonetheless, trade data should be treated with caution; it provides a sense of scale in trade between two countries, but even when cleaned, as the Atlas data is, there is a margin of error in how accurately it represents reality, due to errors or gaps in the underlying data reported by governments. The graphics we present here should be interpreted as approximations.

ABOUT THE 'GROUP OF 30' GARMENT-EXPORTING COUNTRIES

Garment exporting countries shipped around \$650,000,000,000 (\$650 Billion) worth of garments in 2019.

The term 'Group of 30' is our effort to describe an extremely diverse group of around 30 countries spread over Asia, Africa and the Americas who together dominate global garment exports.

Setting aside the EU/EFTA/UK and the US, the Group of 30 are responsible for more than 90% of the remaining global garment exports – \$425,000,000,000 worth in 2019.

THE EU/UK/EFTA CLUSTER AND THE US ARE THE LARGEST GARMENT-IMPORTING ECONOMIES

The EU/UK/EFTA cluster and the US remain the largest garment importers, accounting for around 55% of total imports, and they remain the primary focus of the graphics presented here.

HOW ARE GARMENTS DEFINED FOR THIS PAPER

For the purposes of this paper, we have included five groups of products that make up most of what is traditionally referred to as the 'Garment Industry':

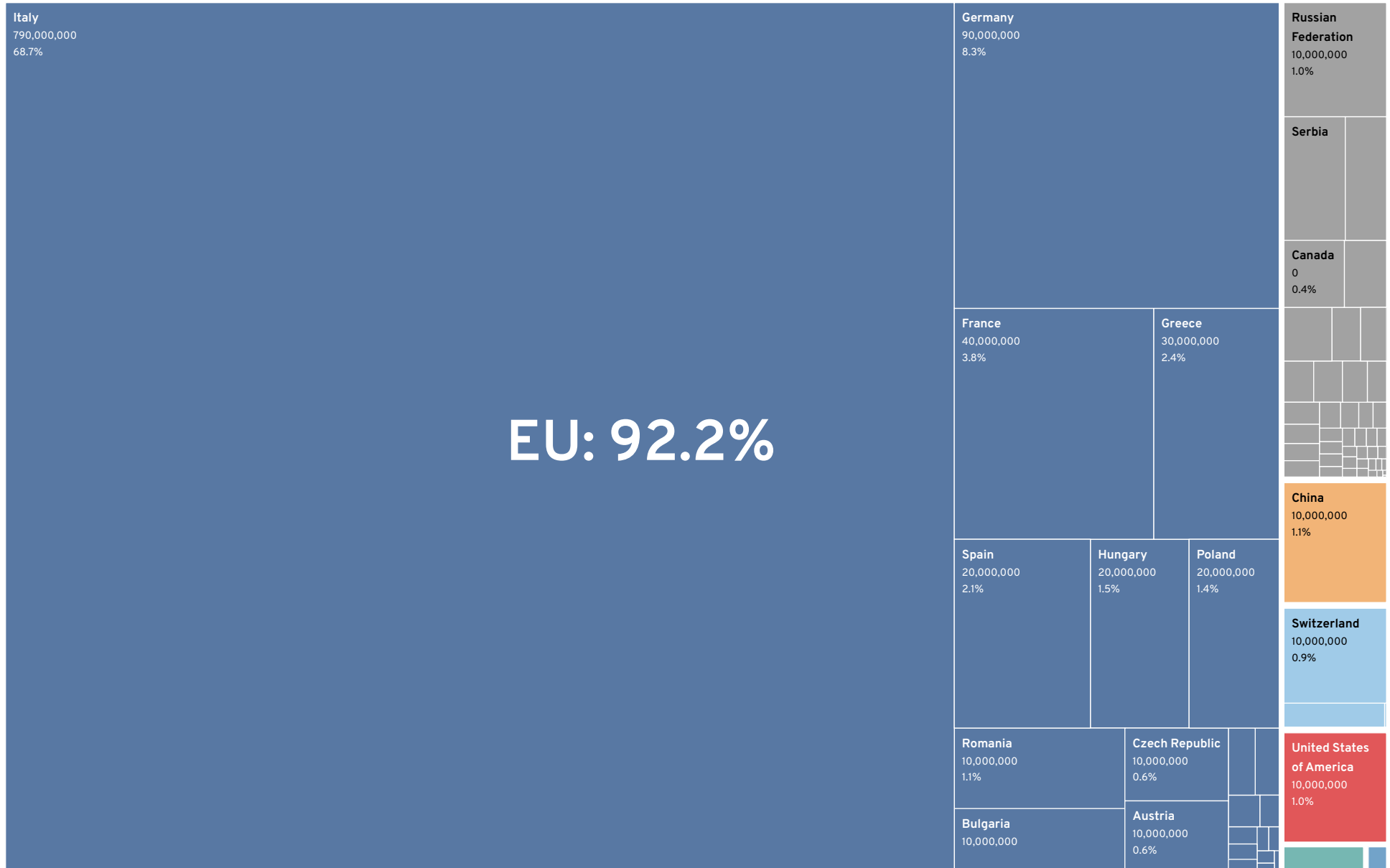
- 1. Knit clothing**
- 2. Non-knit clothing**
- 3. Footwear**
- 4. Headwear**
- 5. Accessories**

Knit/non-knit refer to the production process used in a garment's fabric. Accessories include leather goods and bags.

All product types follow the [Harmonized System](#) (HS) which is the basis for international customs, and can be used to identify nearly any type of product

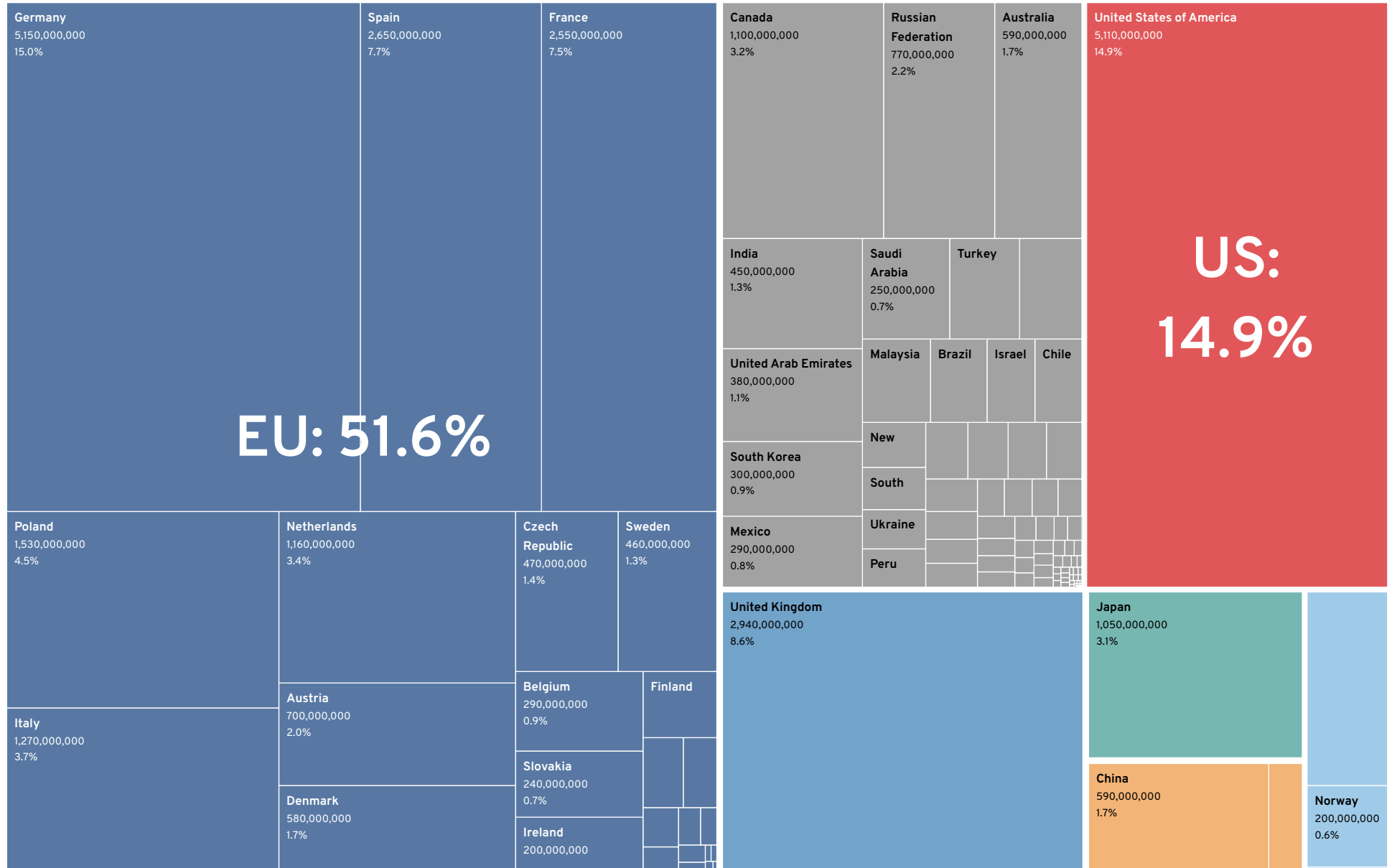
For more on the specific HS codes included in this research, please see Appendix 1 of the main working paper.

Albania Garment Exports 2019: \$1,140,000,000



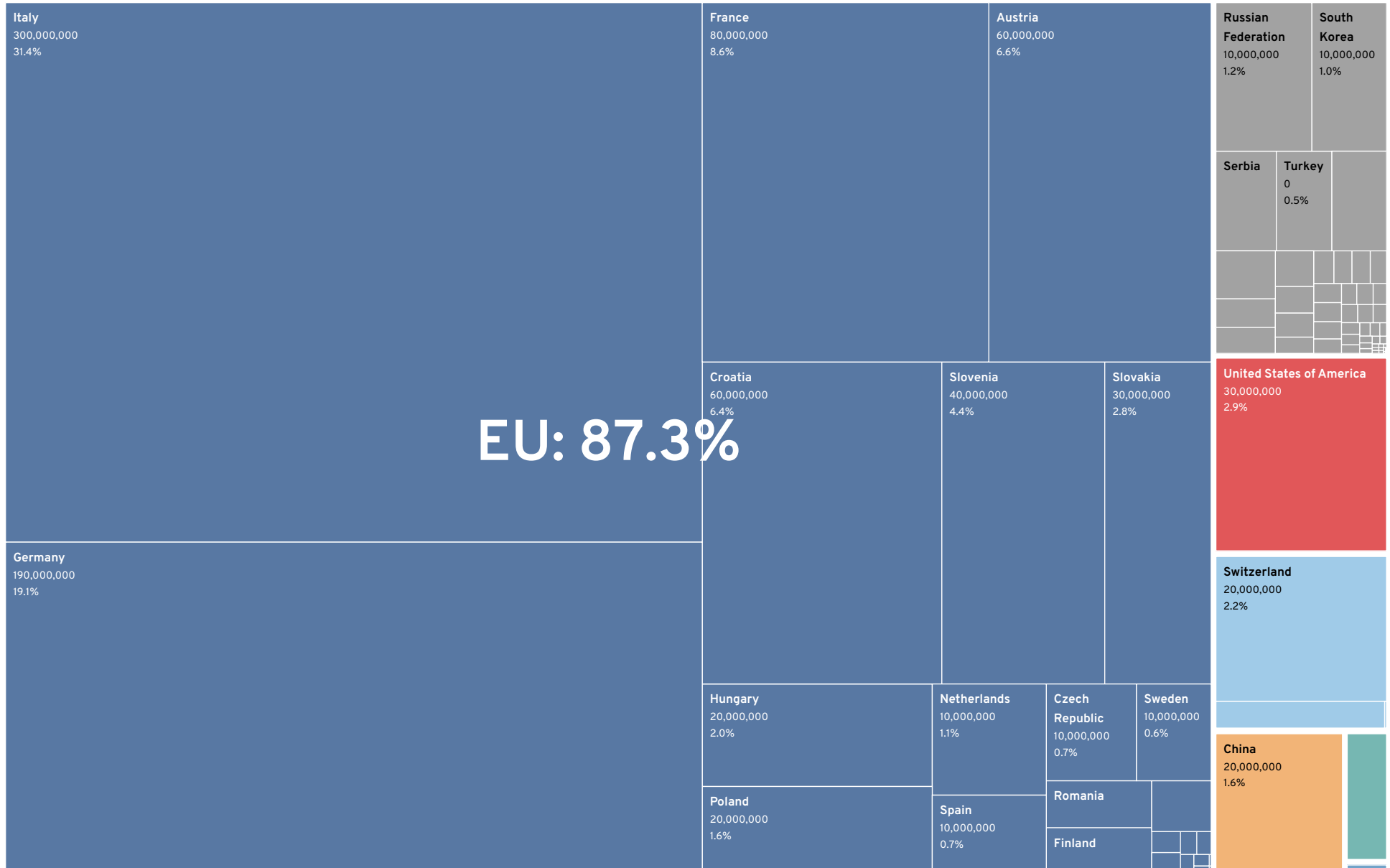
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Bangladesh Garment Exports 2019: \$34,240,000,000



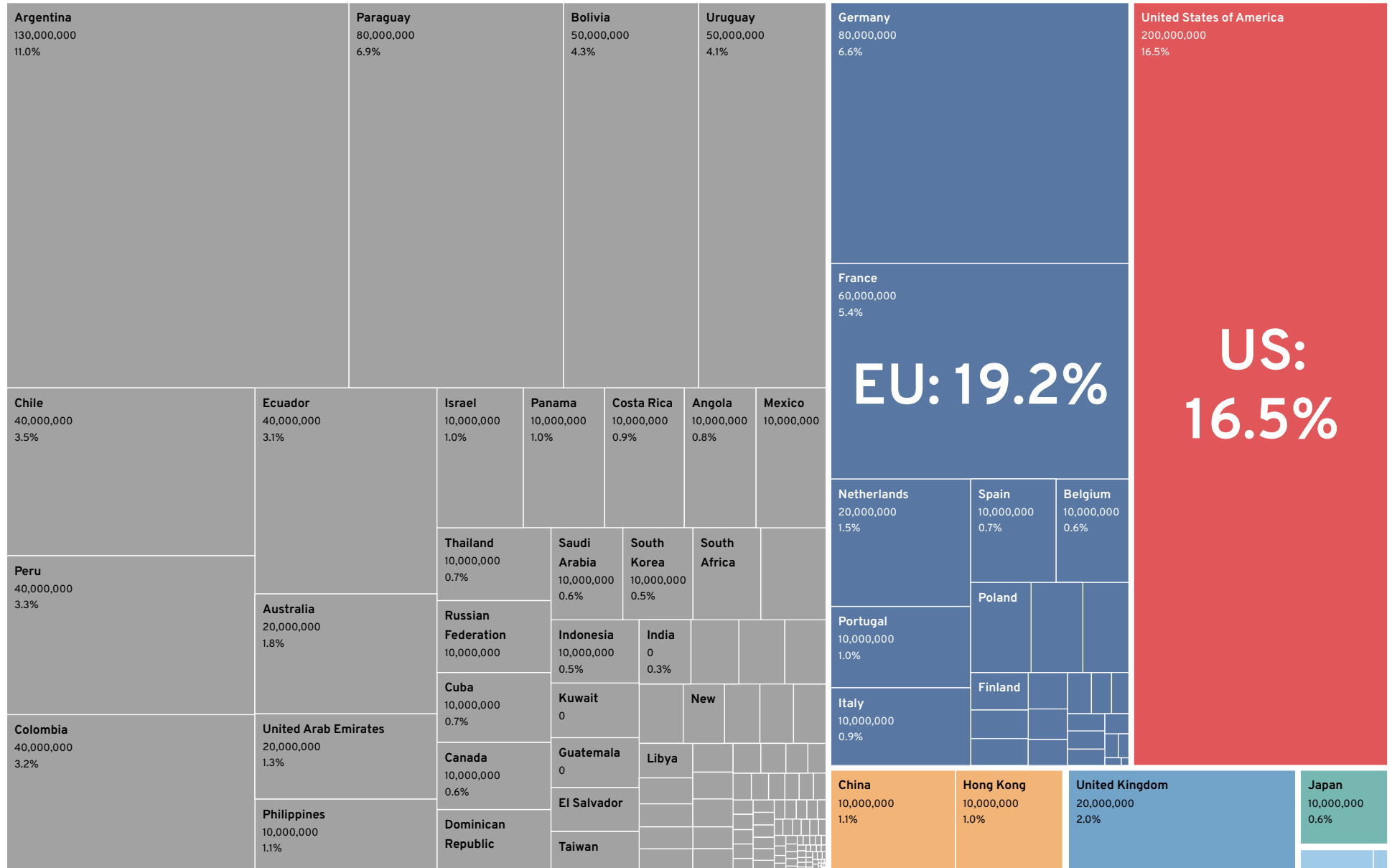
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Bosnia and Herzegovina Garment Exports 2019: \$970,000,000



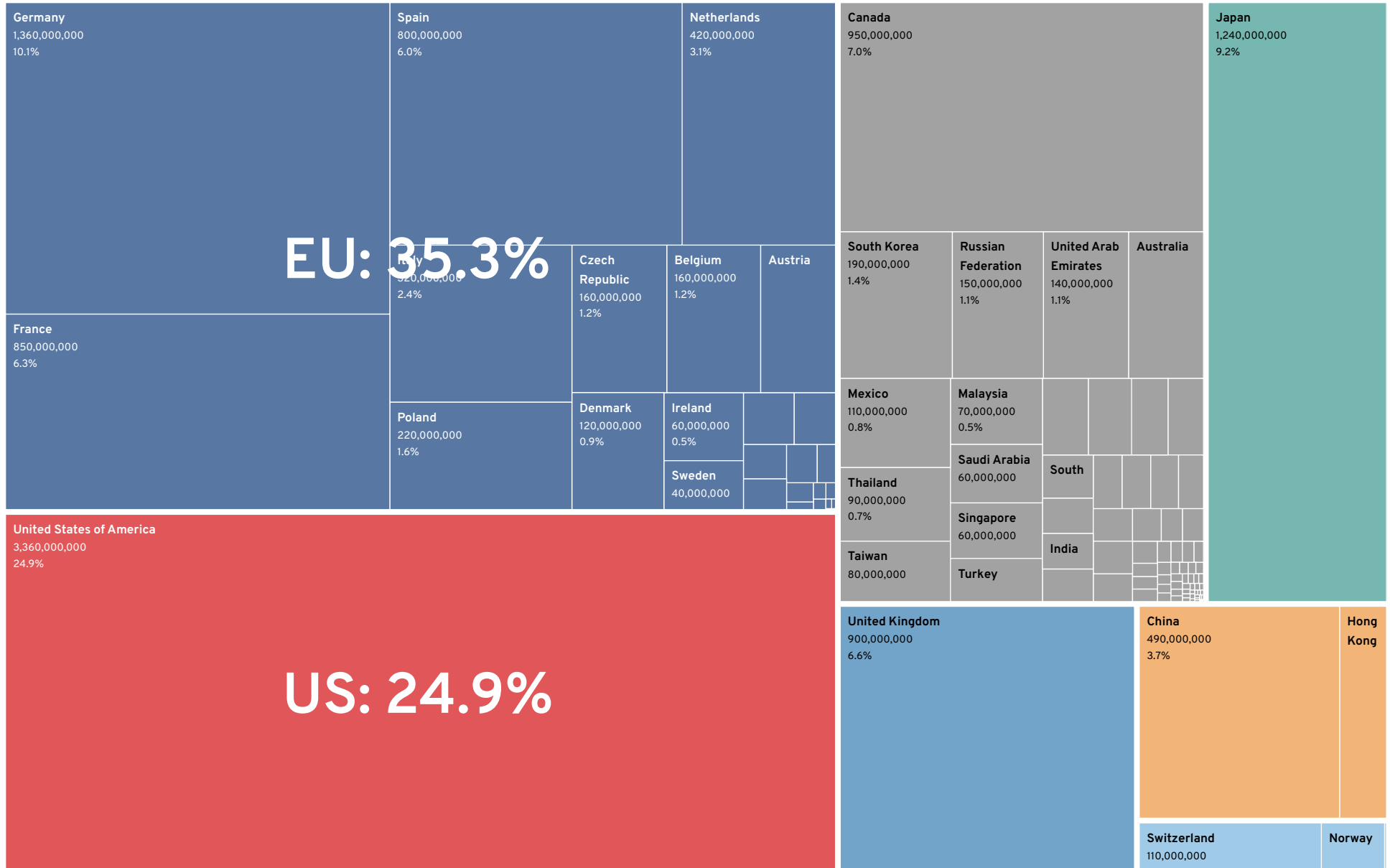
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Brazil Garment Exports 2019: \$1,190,000,000



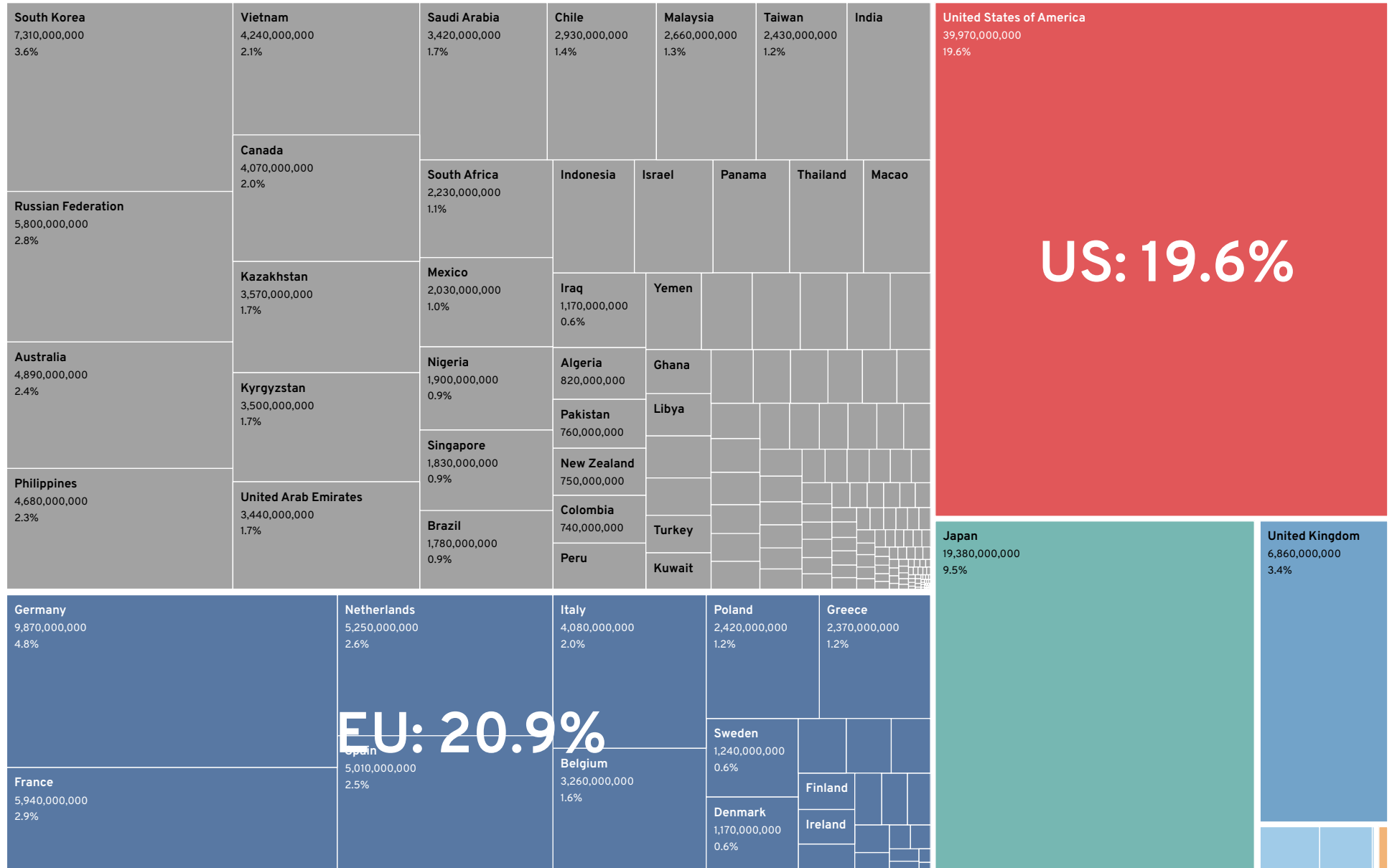
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Cambodia Garment Exports 2019: \$13,480,000,000



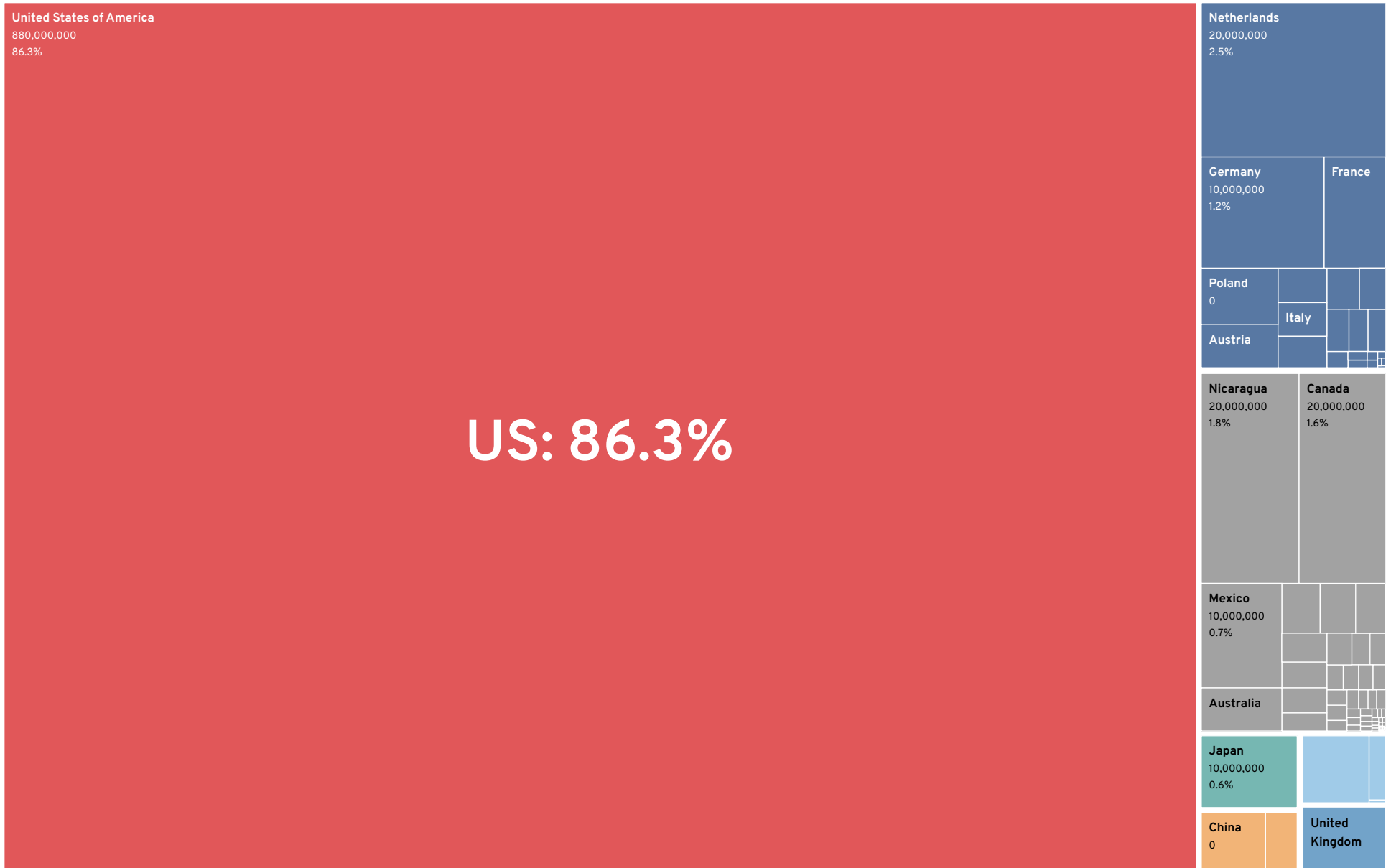
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

China & Hong Kong Garment Exports 2019: \$204,070,000,000



Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

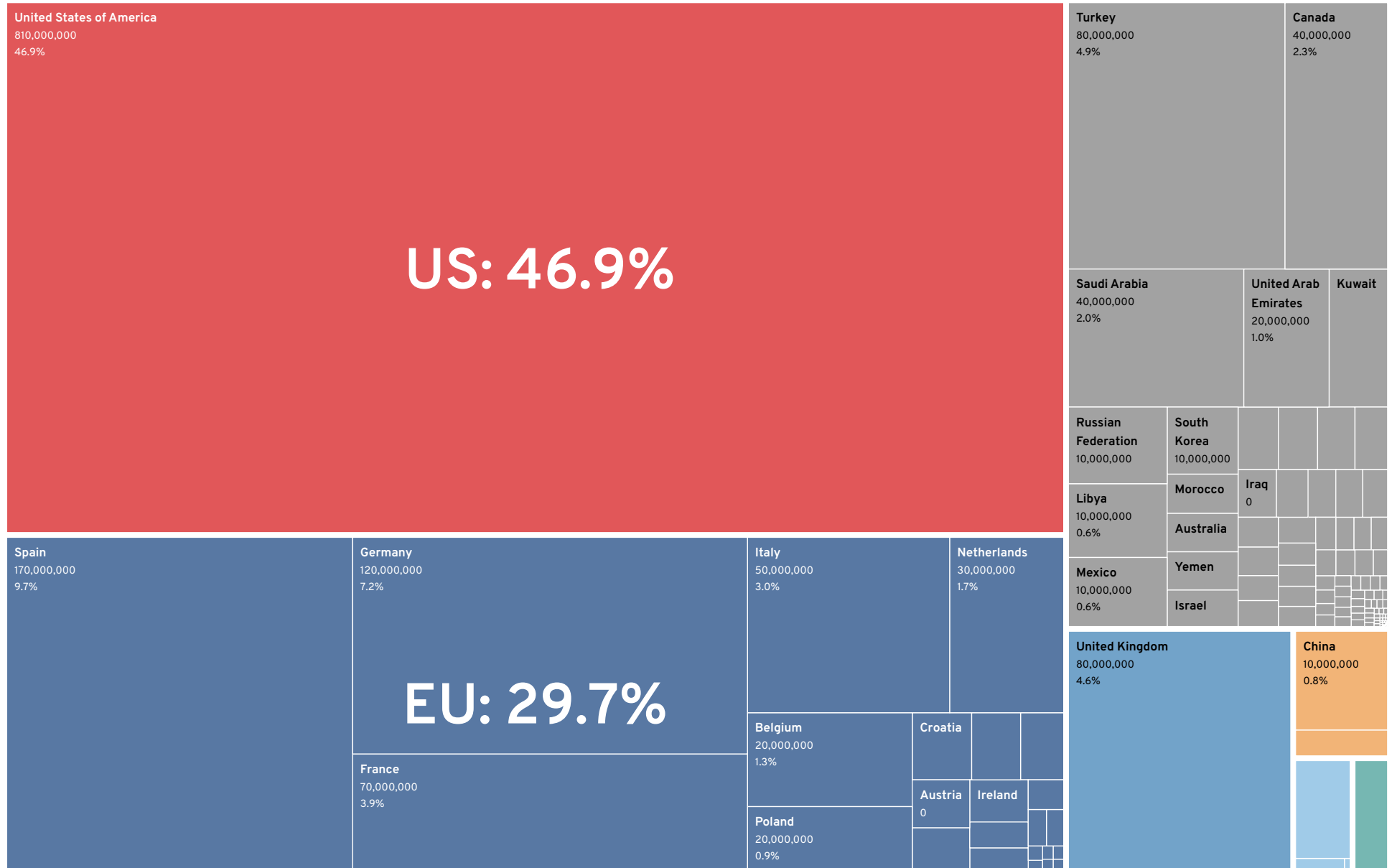
Dominican Republic Garment Exports 2019: \$1,020,000,000



US: 86.3%

Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Egypt Garment Exports 2019: \$1,730,000,000



Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

EI Salvador Garment Exports 2019: \$2,220,000,000



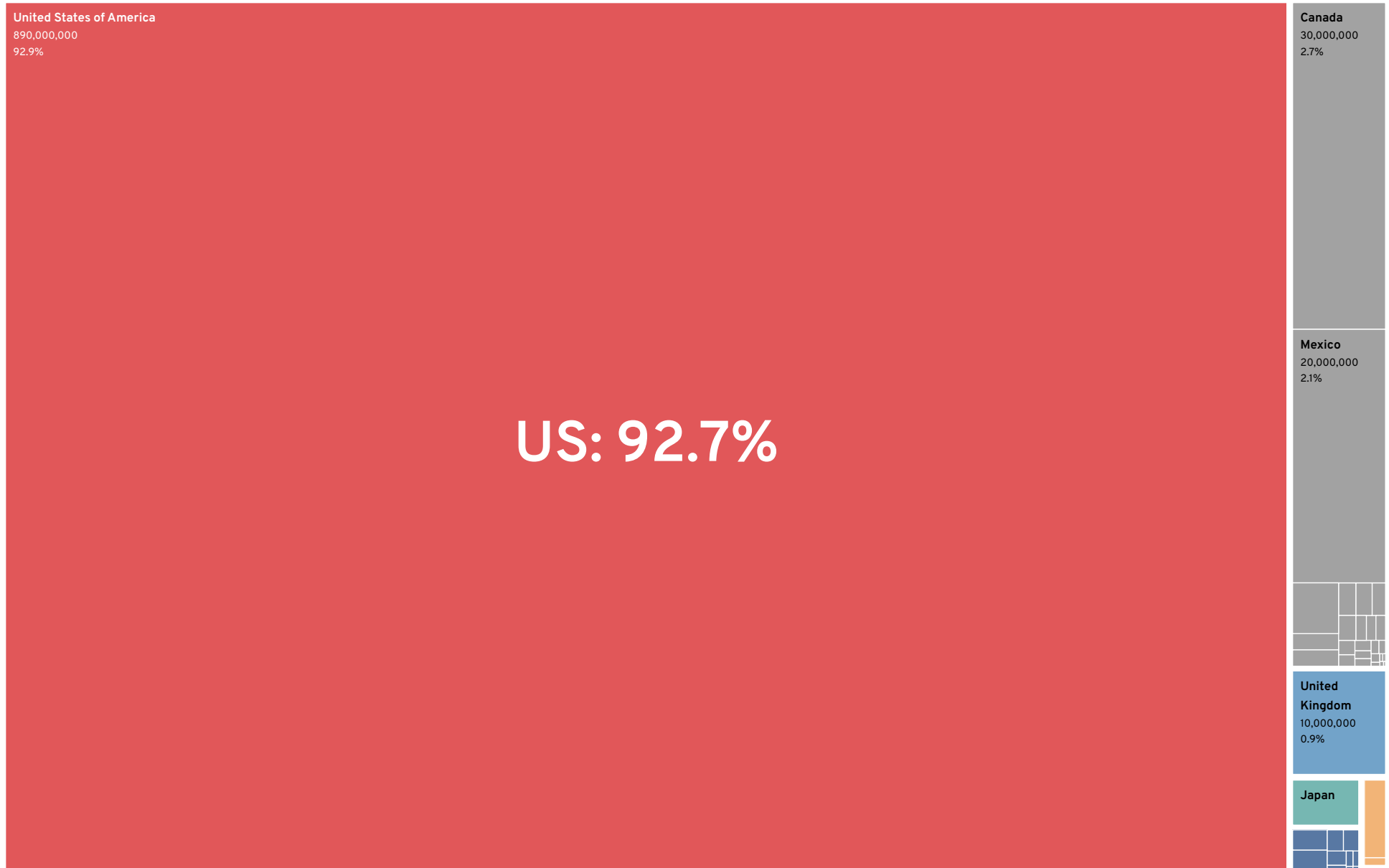
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Guatemala Garment Exports 2019: \$1,470,000,000



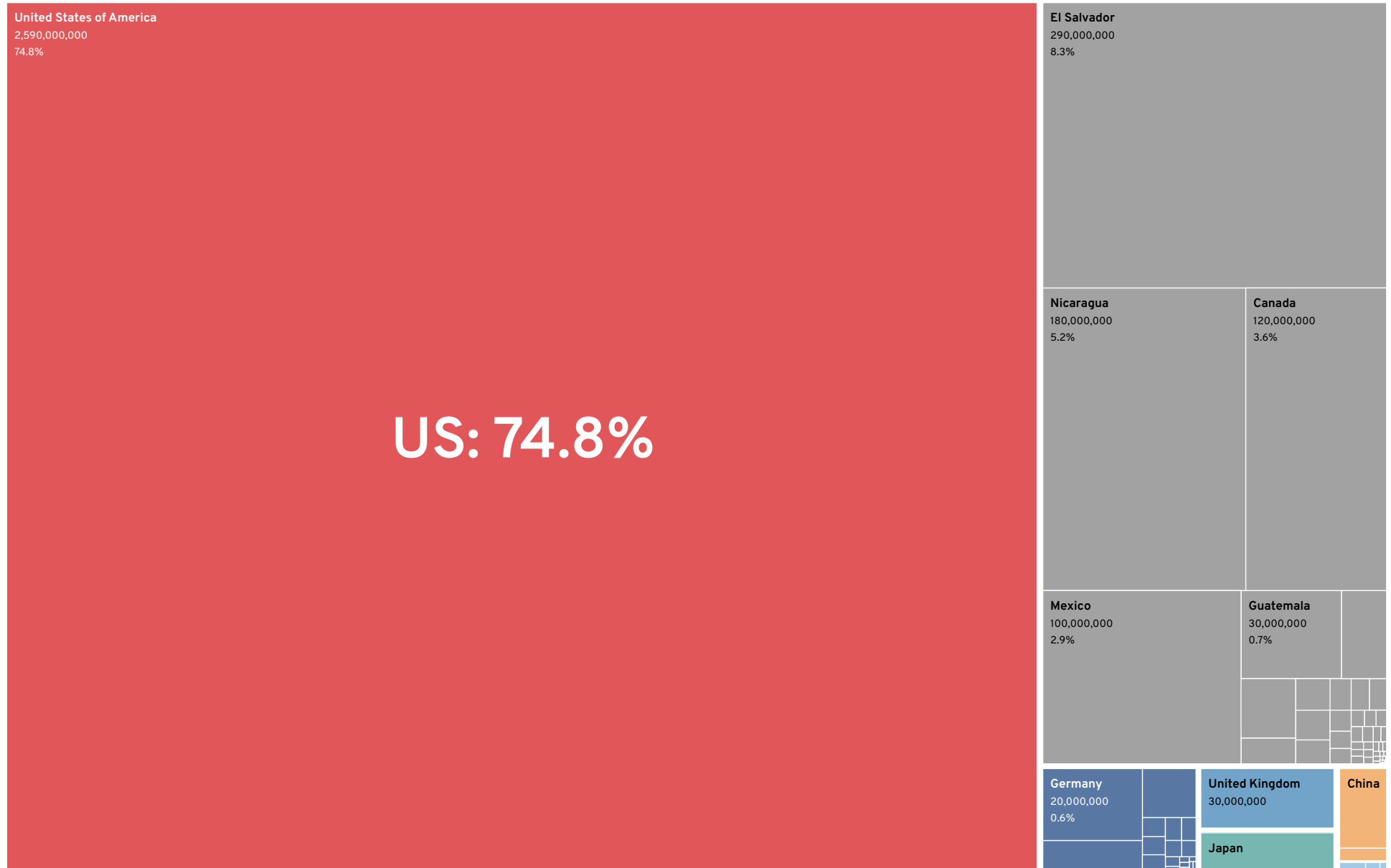
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Haiti Garment Exports 2019: \$960,000,000



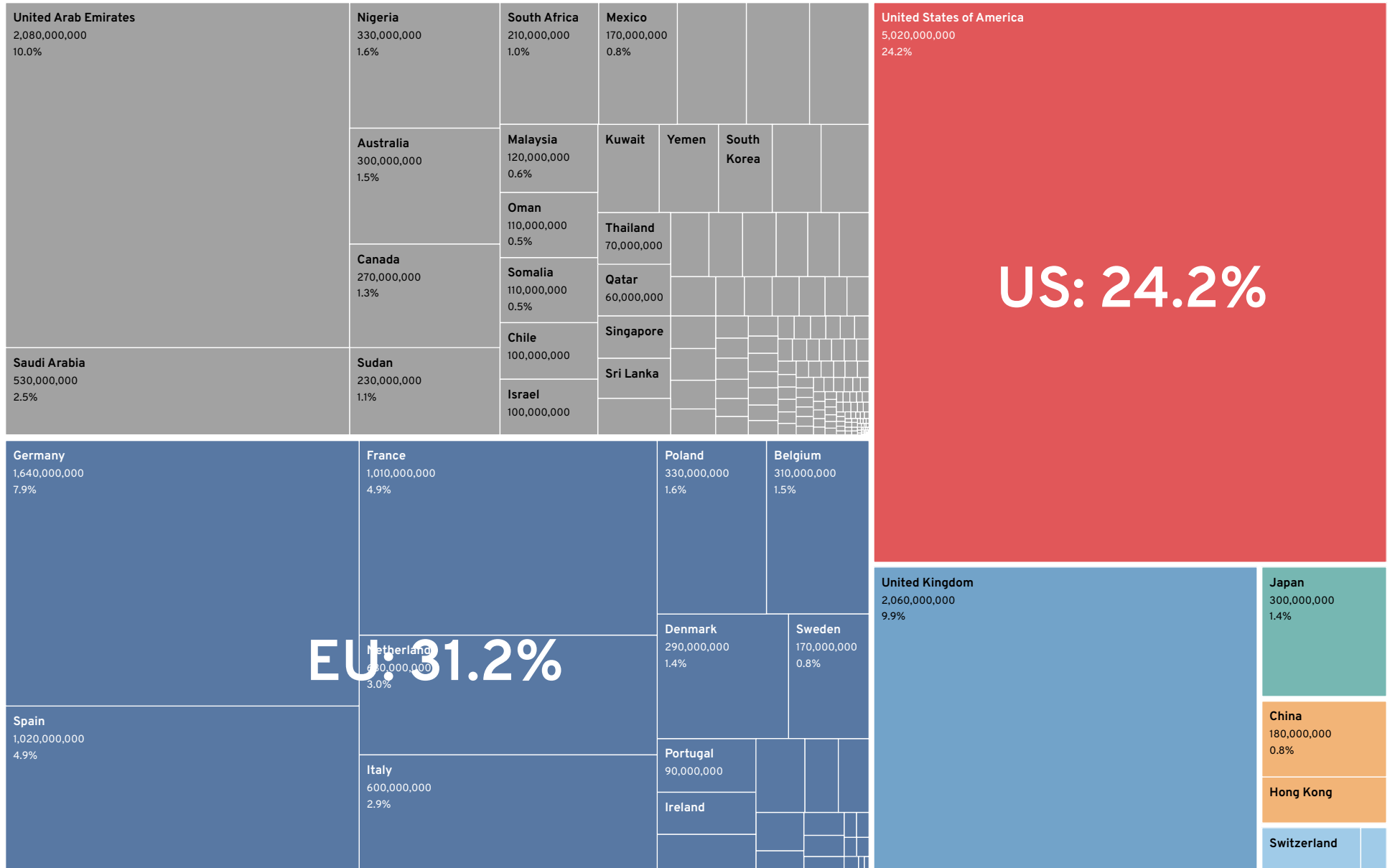
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Honduras Garment Exports 2019: \$3,460,000,000



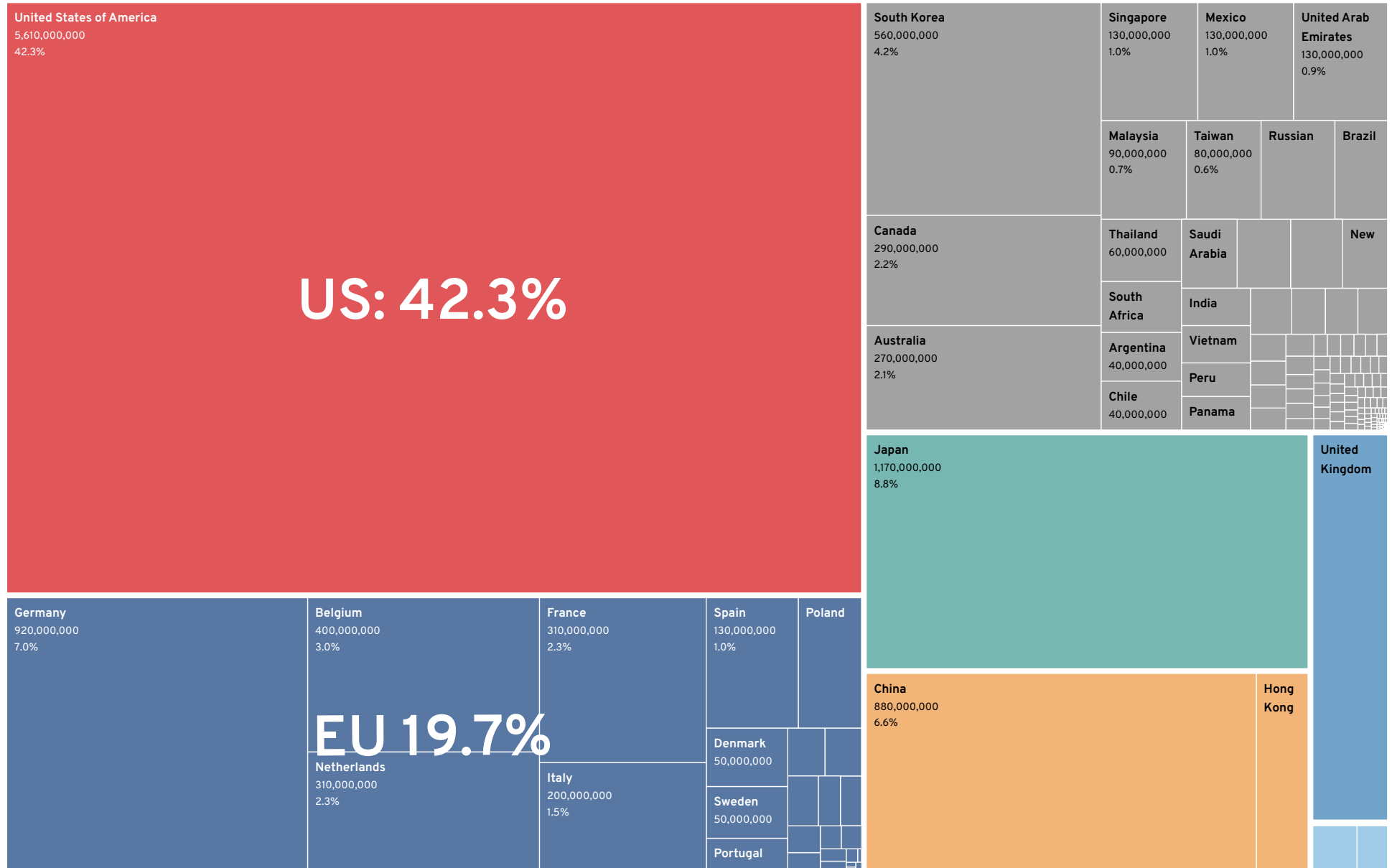
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

India Garment Exports 2019: \$20,780,000,000



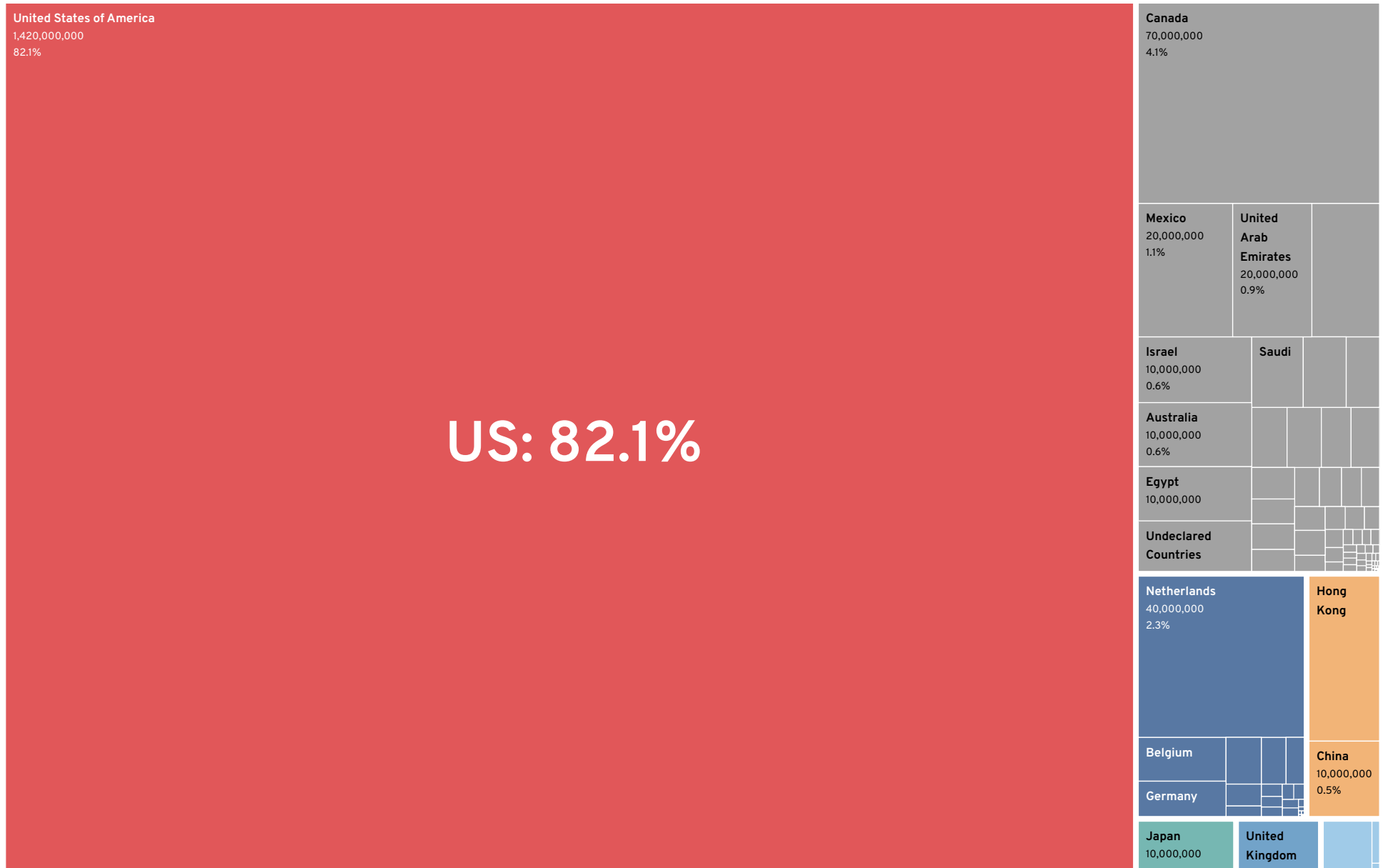
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Indonesia Garment Exports 2019: \$13,260,000,000



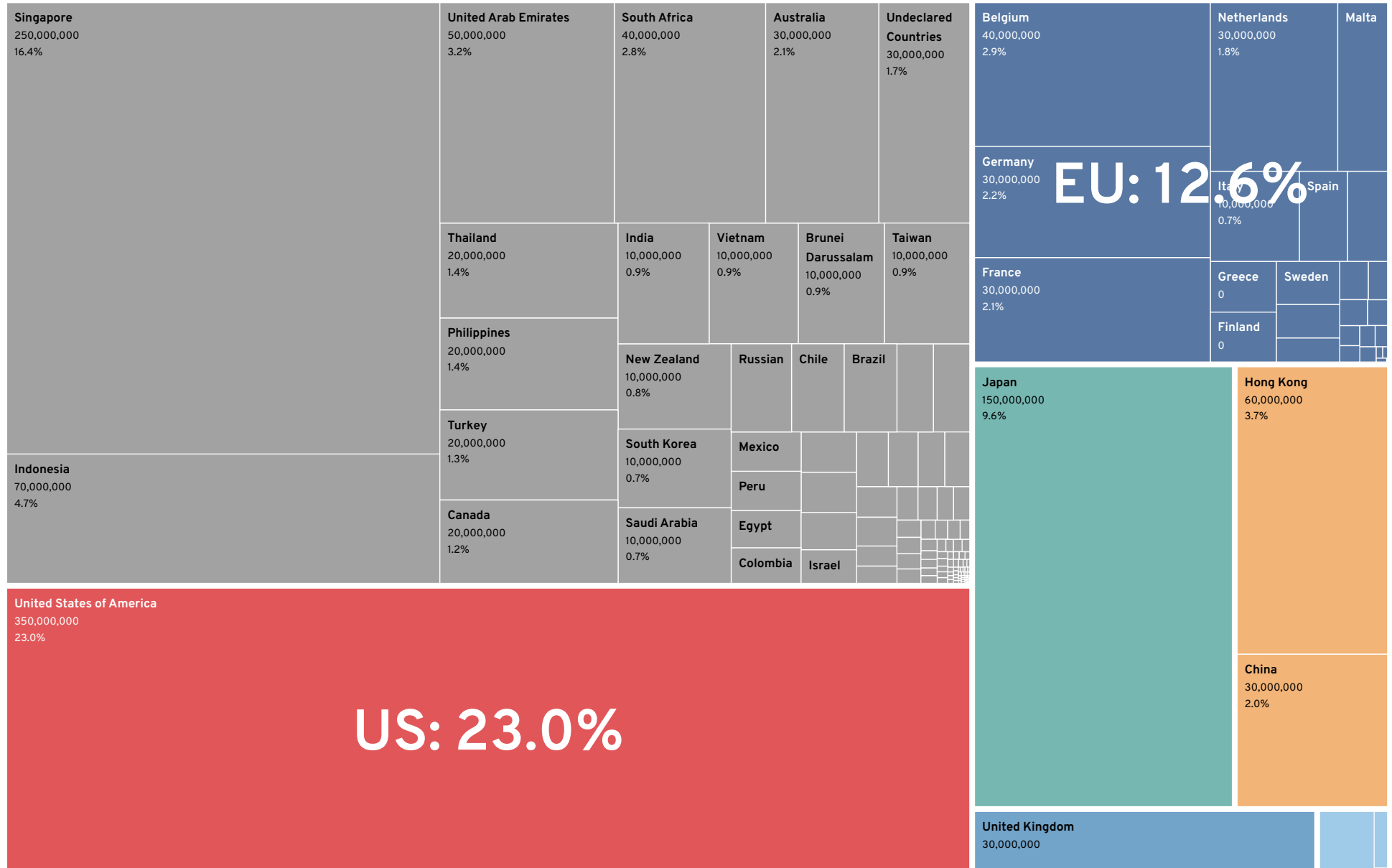
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Jordan Garment Exports 2019: \$1,720,000,000



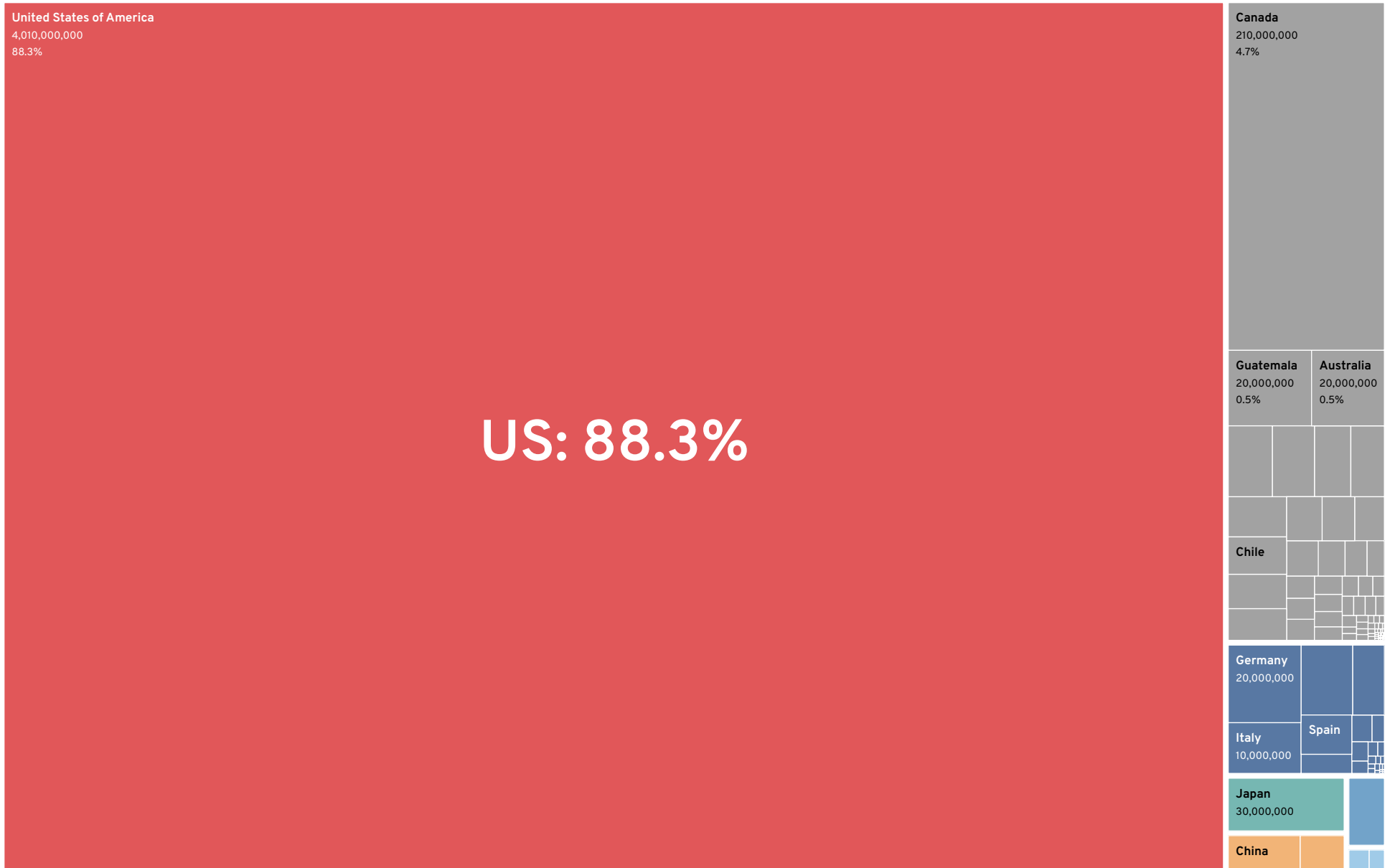
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Malaysia Garment Exports 2019: \$1,510,000,000



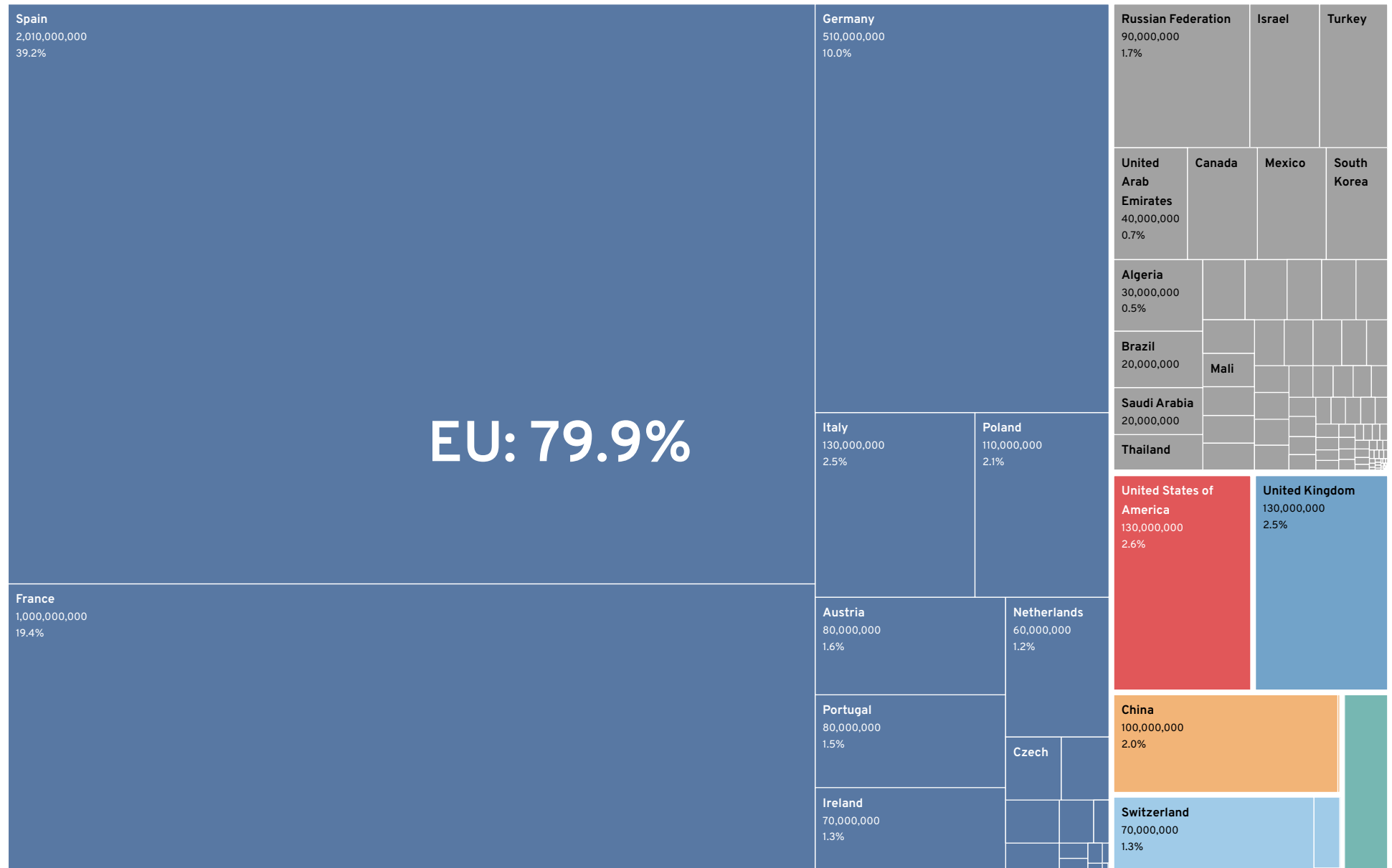
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Mexico Garment Exports 2019: \$4,540,000,000



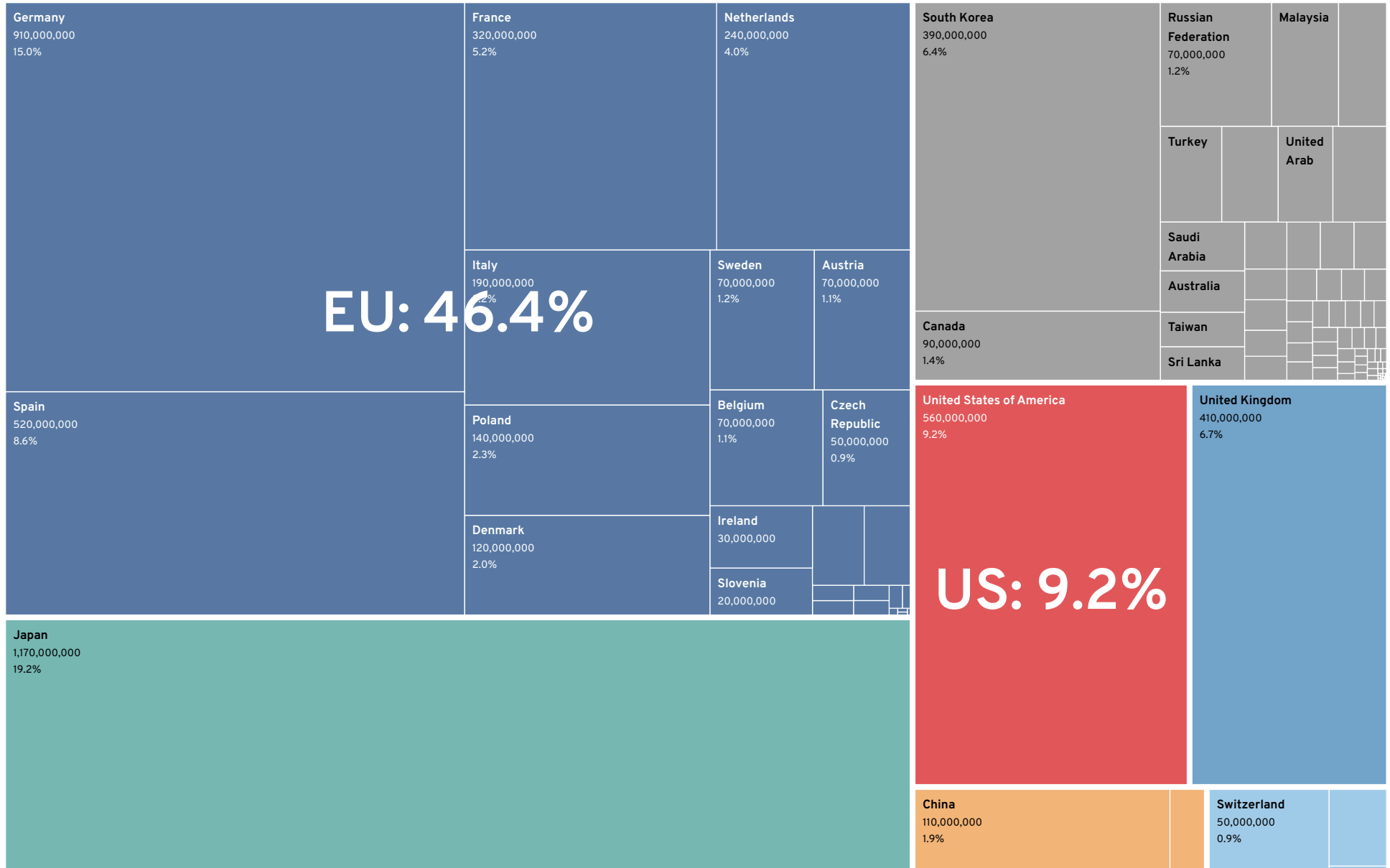
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Morocco Garment Exports 2019: \$5,130,000,000



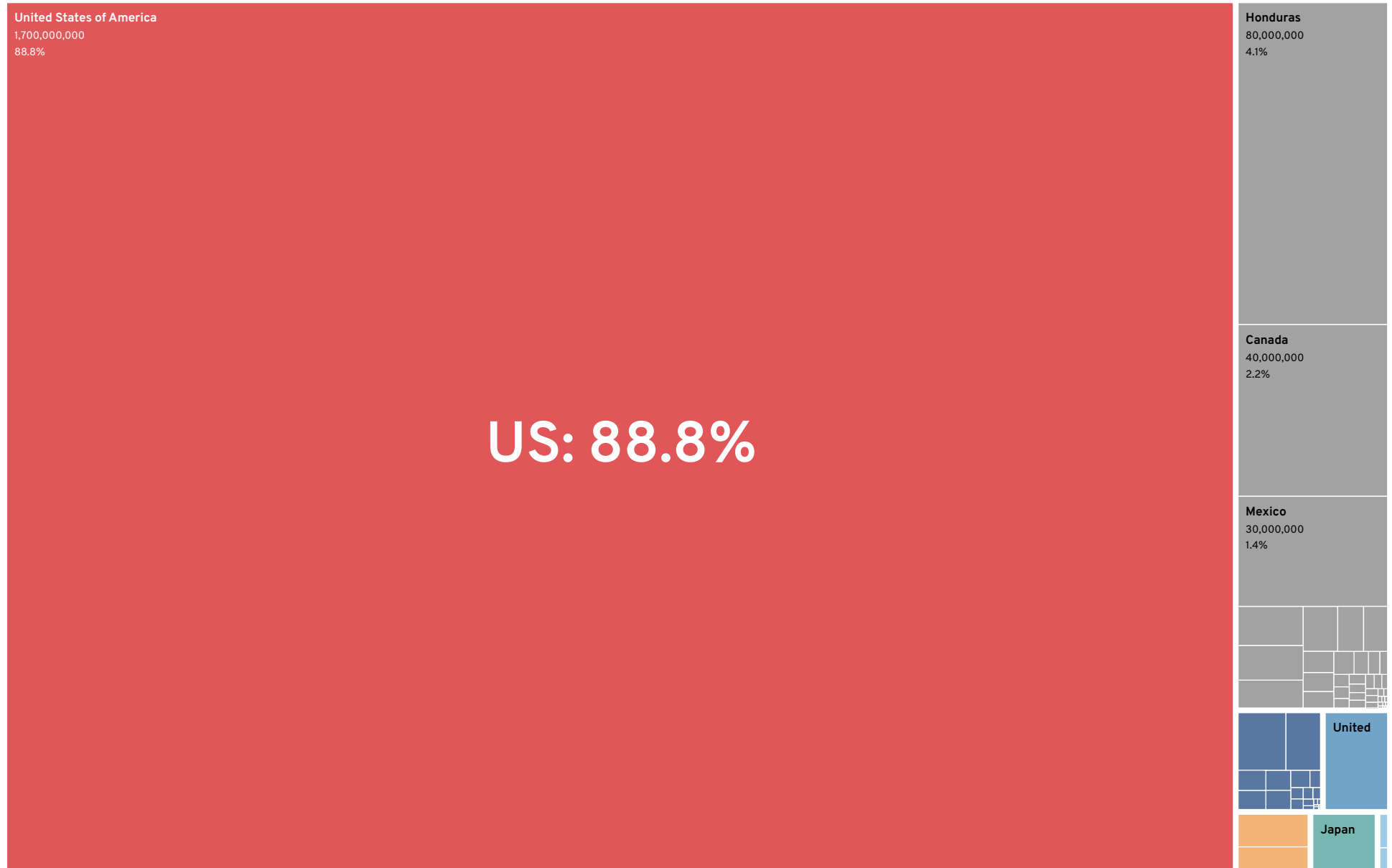
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Myanmar Garment Exports 2019: \$6,080,000,000



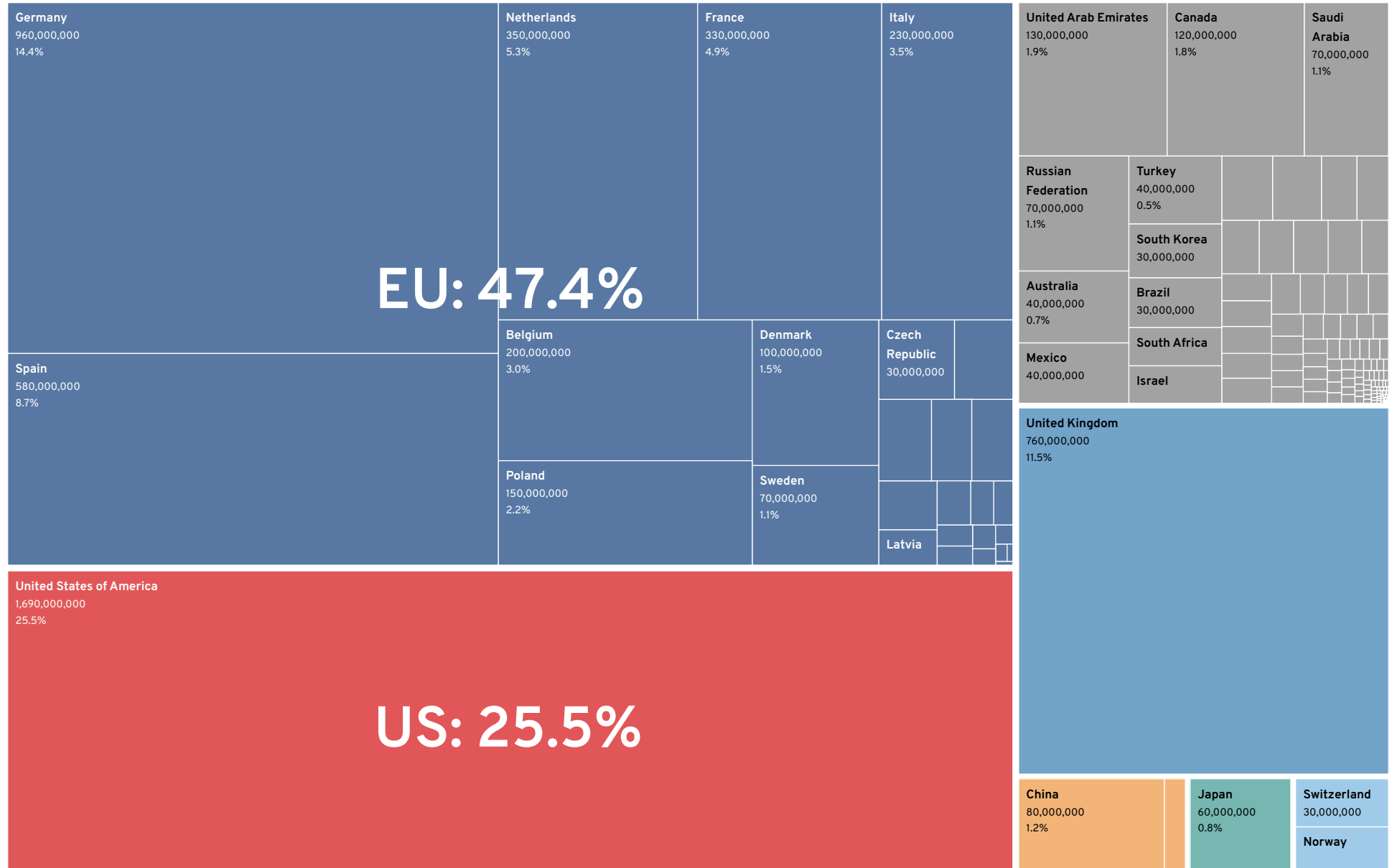
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Nicaragua Garment Exports 2019: \$1,920,000,000



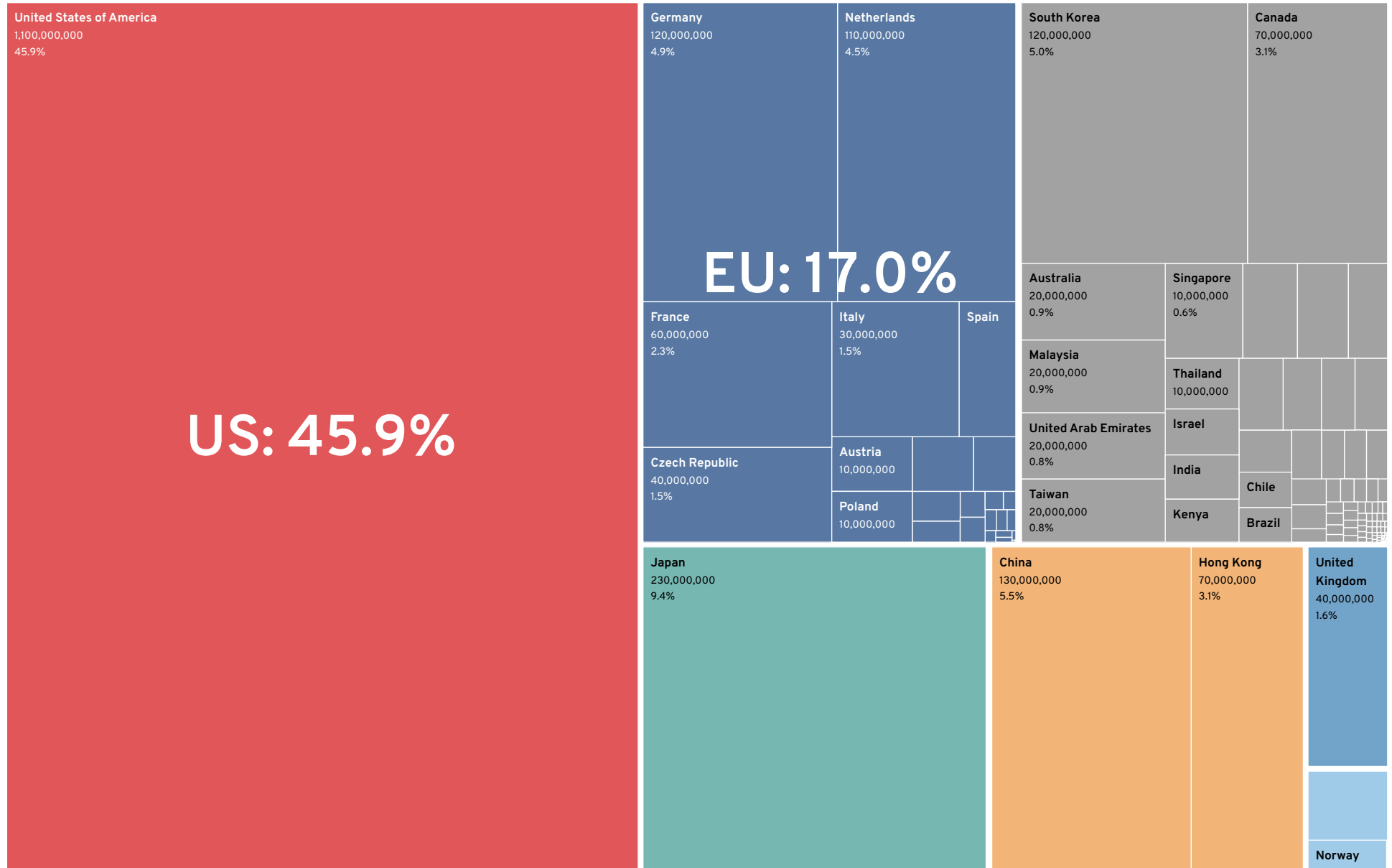
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Pakistan Garment Exports 2019: \$6,640,000,000



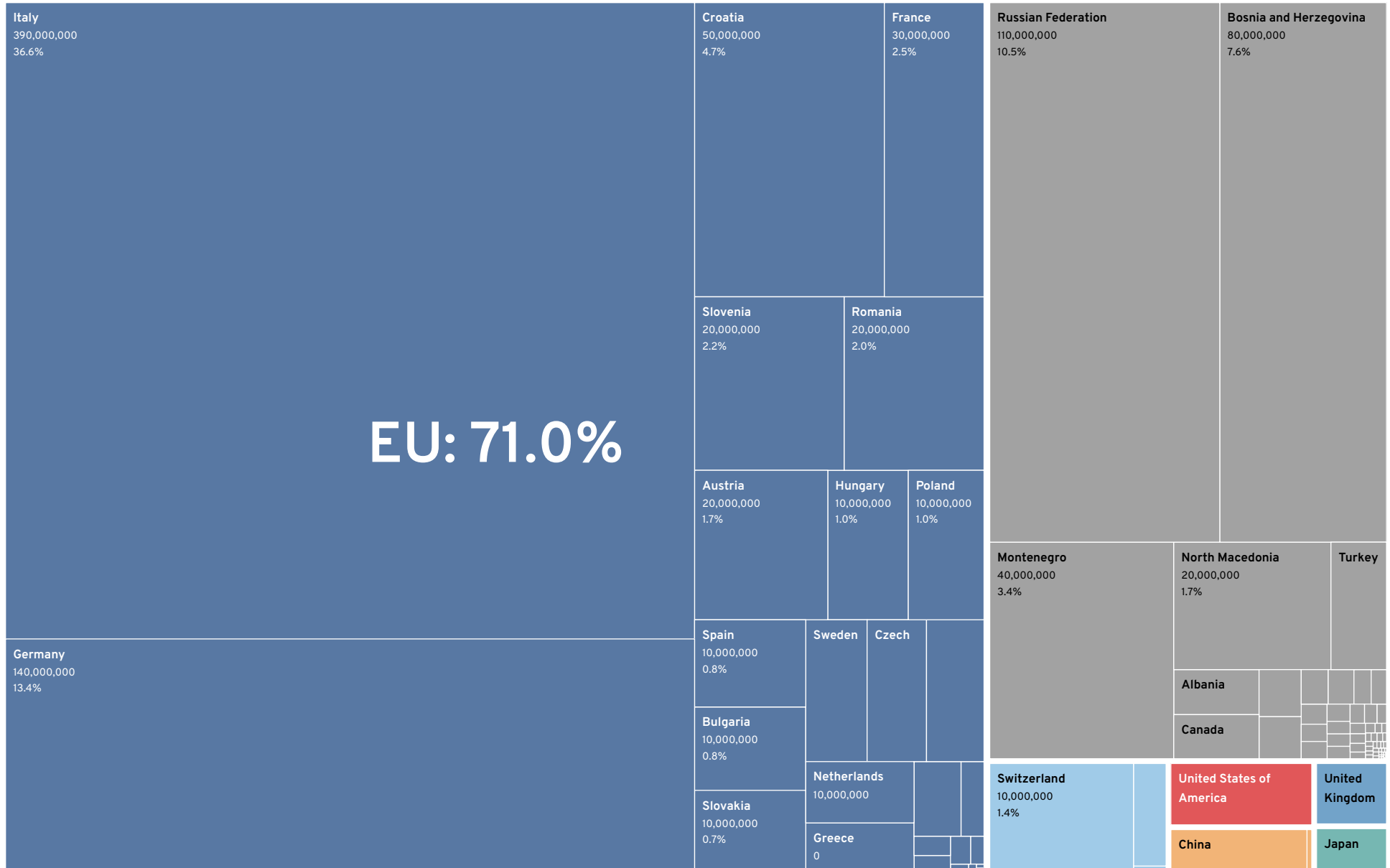
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Philippines Garment Exports 2019: \$2,390,000,000



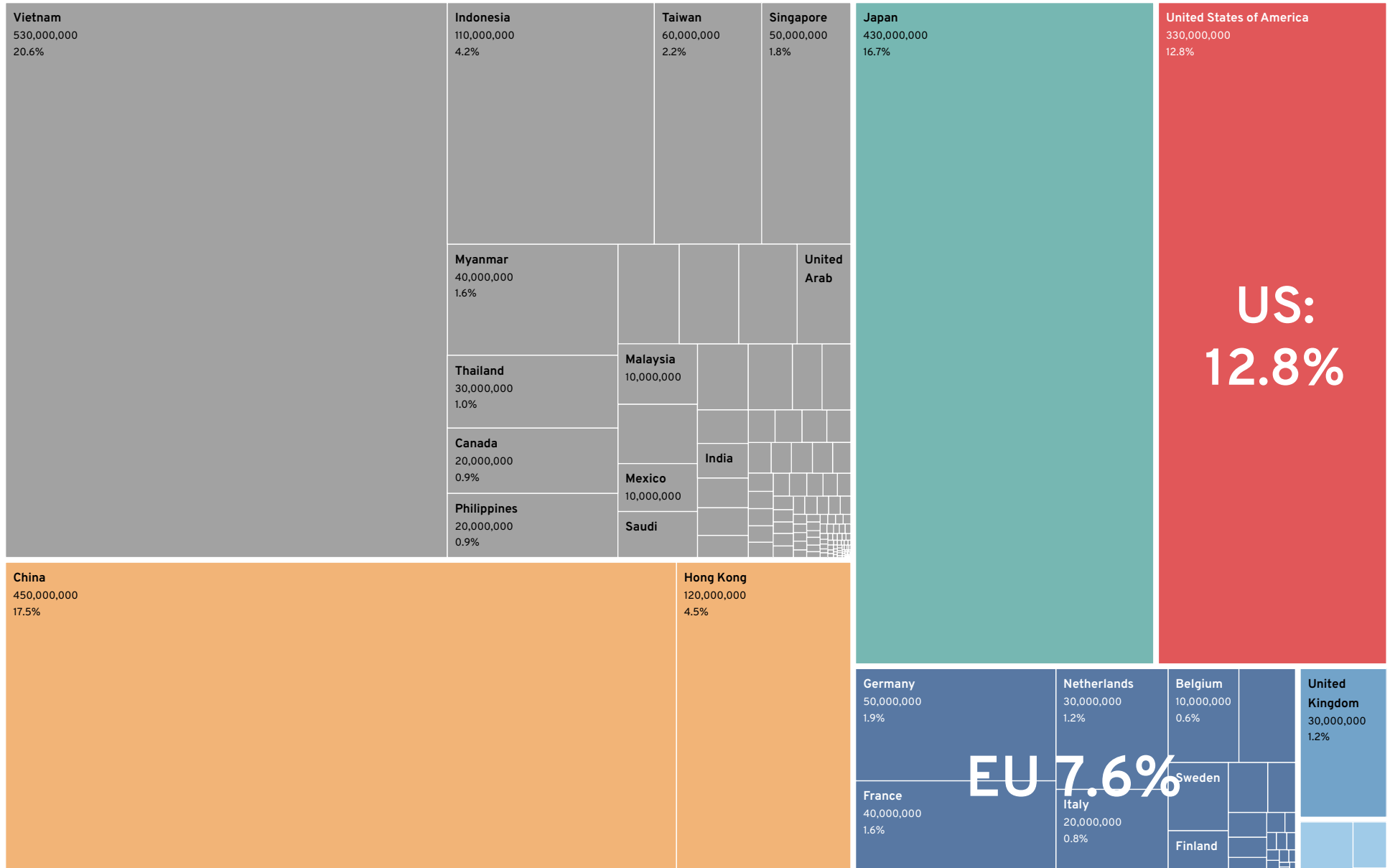
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Serbia Garment Exports 2019: \$1,070,000,000



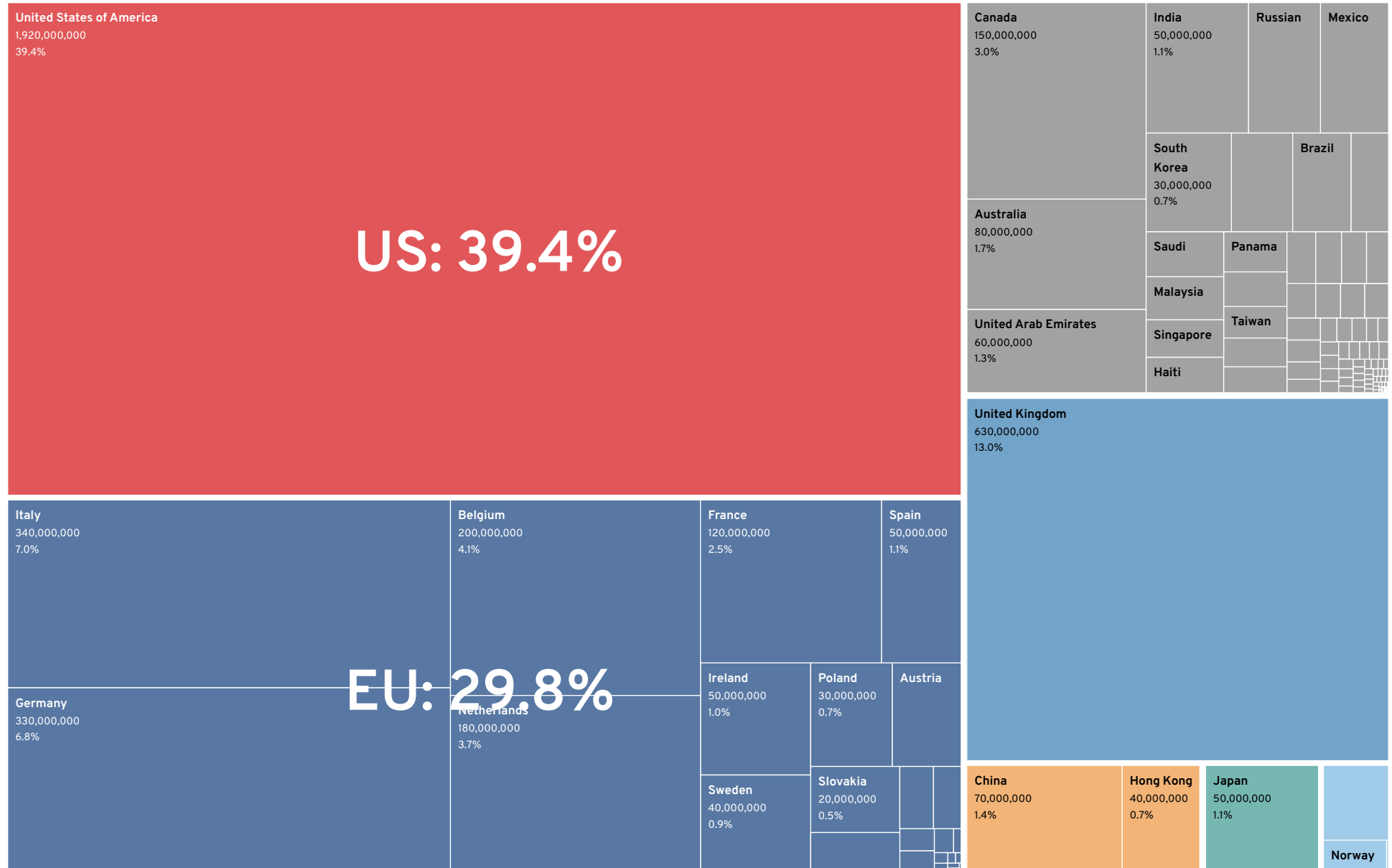
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South Korea Garment Exports 2019: \$2,560,000,000



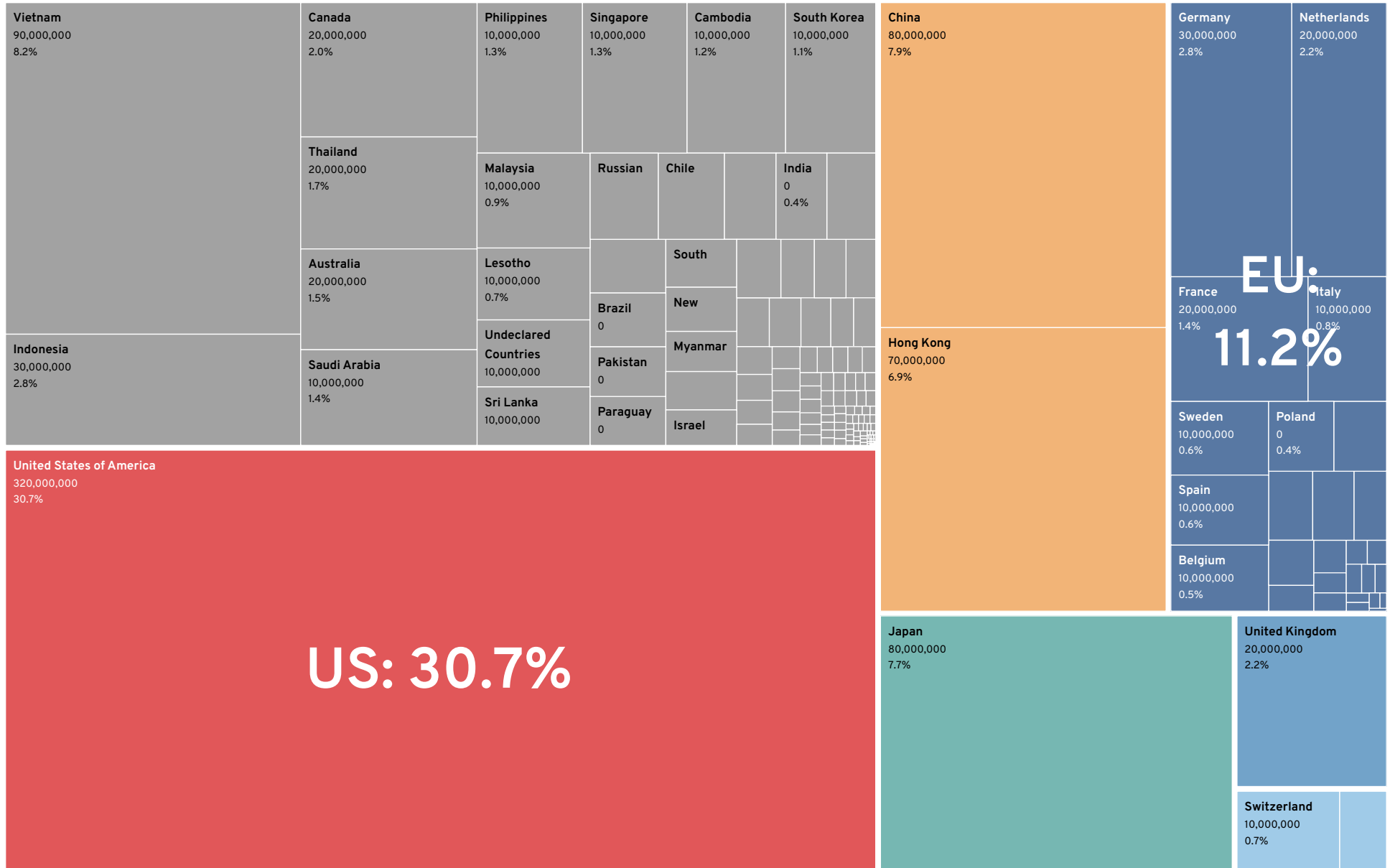
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Sri Lanka Garment Exports 2019: \$4,860,000,000



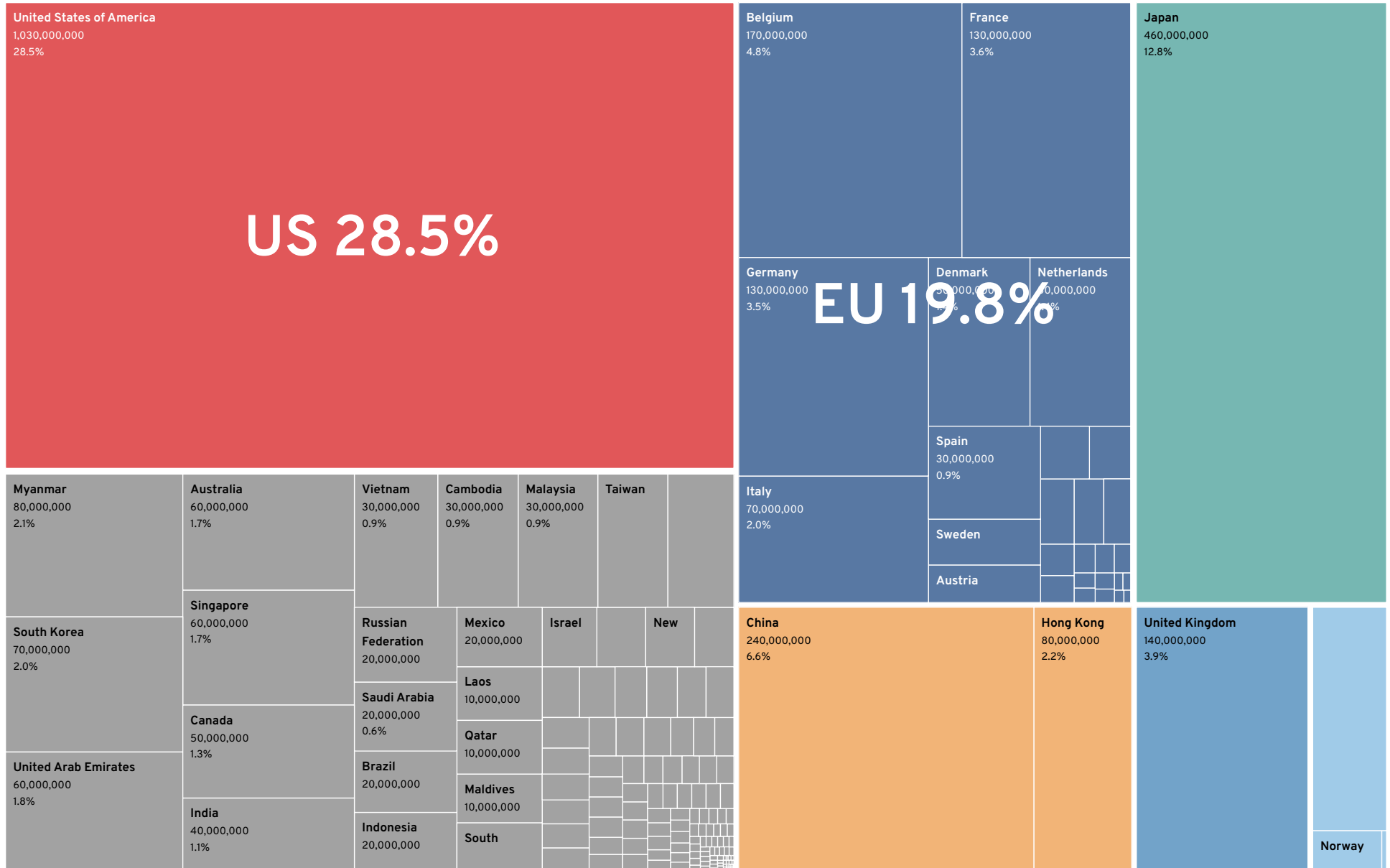
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Taiwan Garment Exports 2019: \$1,040,000,000



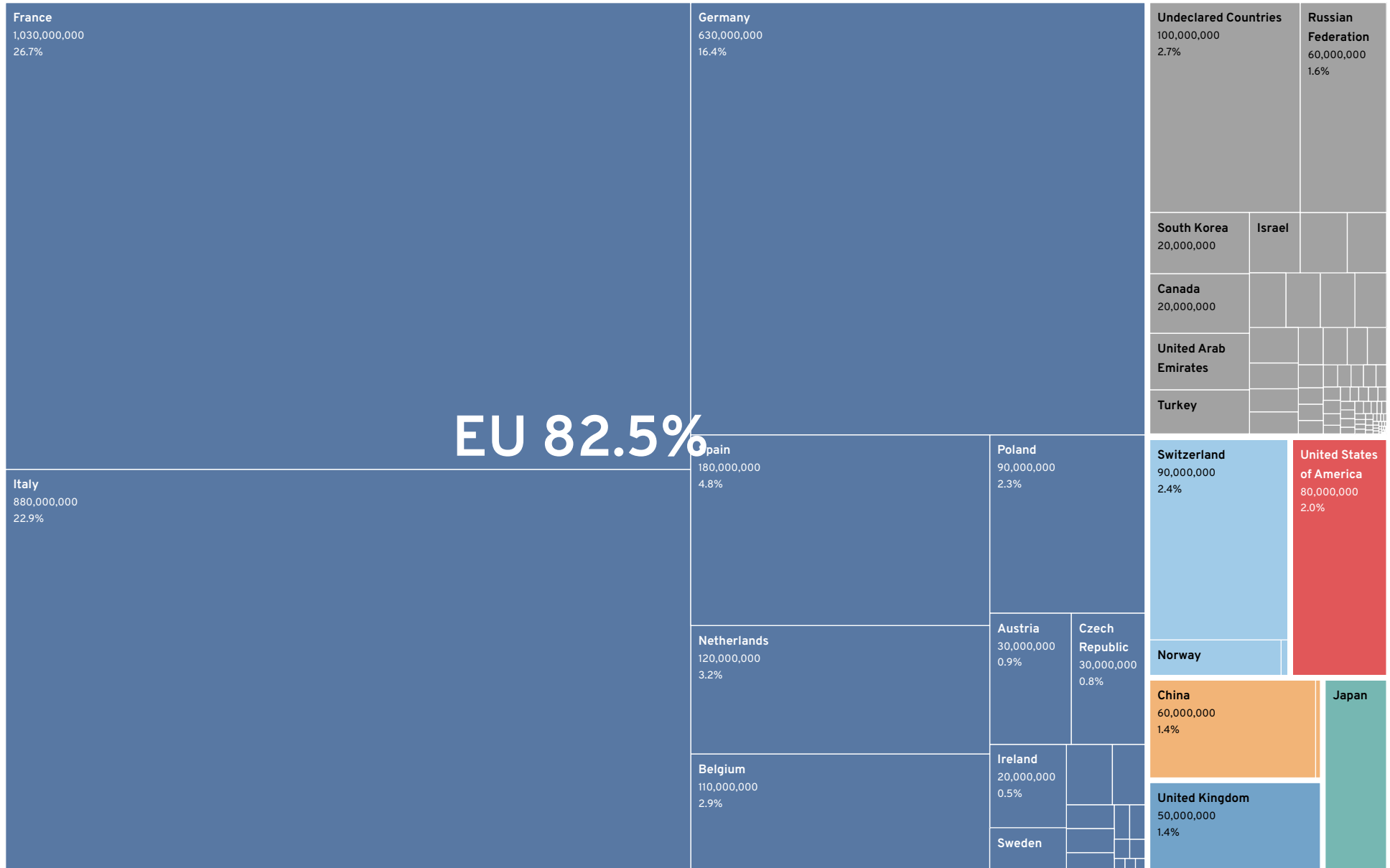
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Thailand Garment Exports 2019: \$3,600,000,000



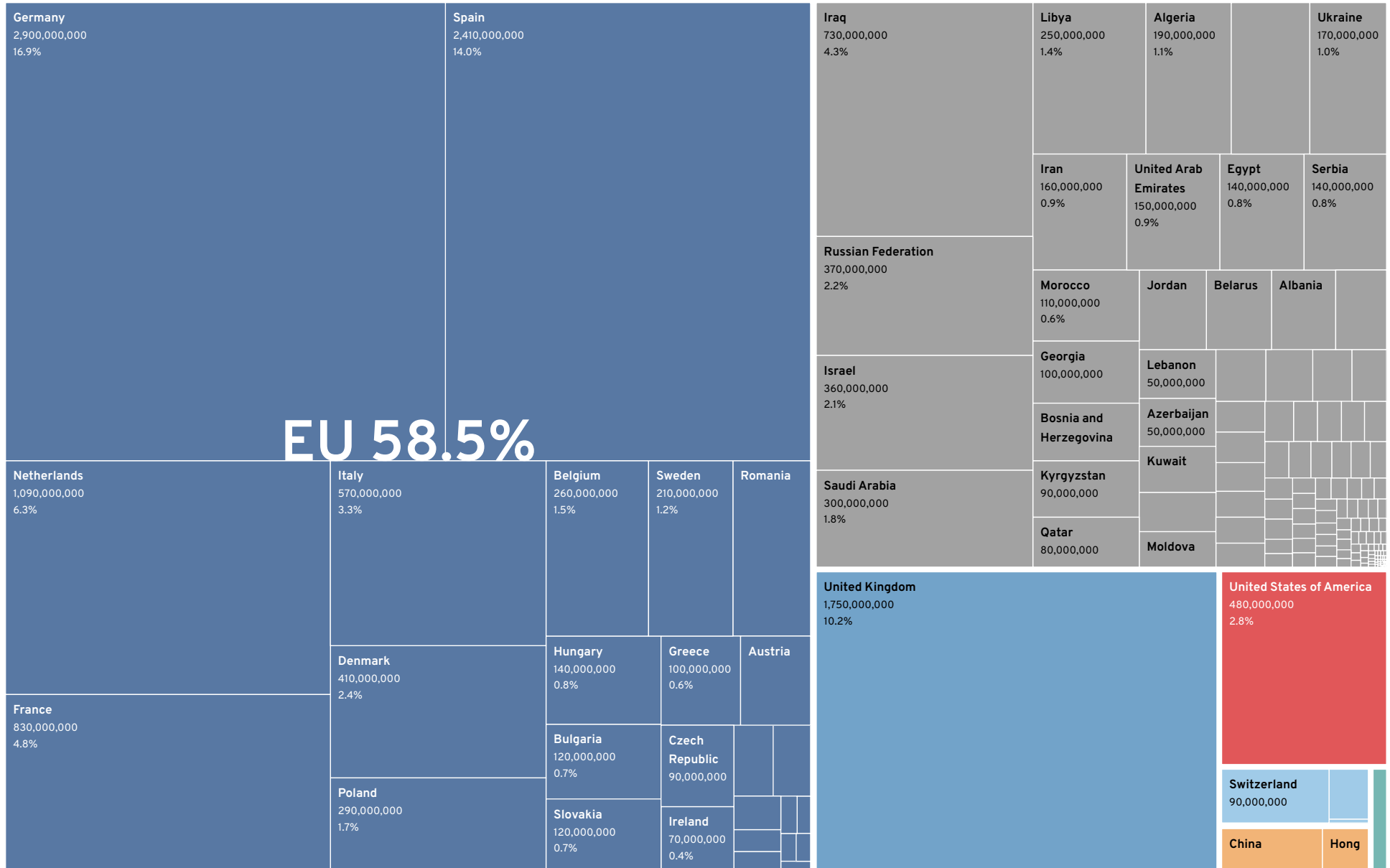
Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Tunisia Garment Exports 2019: \$3,860,000,000



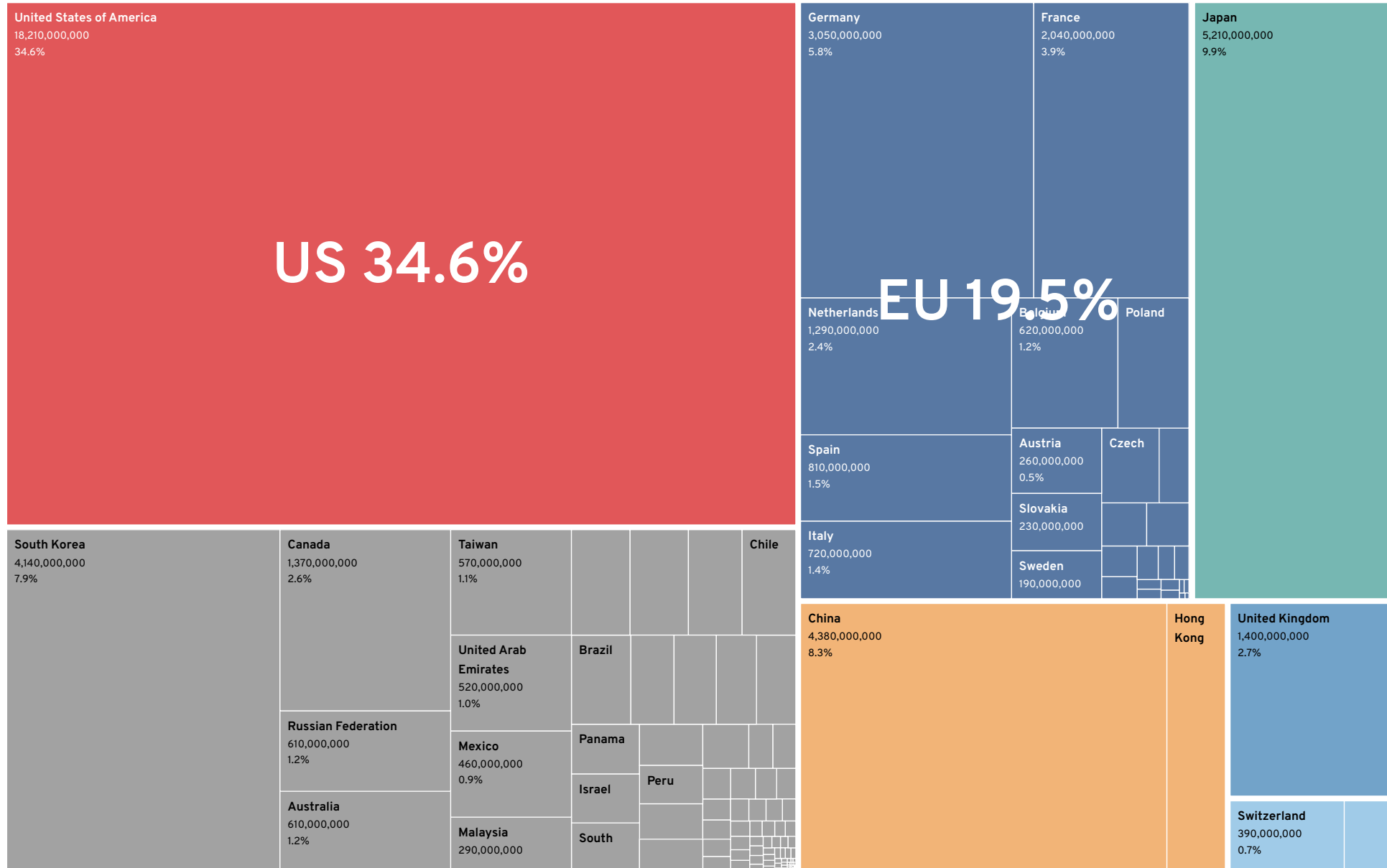
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Turkey Garment Exports 2019: \$17,210,000,000



Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

Vietnam Garment Exports 2019: \$52,680,000,000



Analysis by Katalyst Initiative; original data by the Atlas of Economic Complexity

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The authors wish to extend a particular thanks to the [Atlas of Economic Complexity team at the Harvard Growth Lab](#) for making their data freely available. The research presented here would not have been possible without their commitment to open data.

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About Katalyst Initiative

Katalyst Initiative was founded by veterans of the business & human rights civil society network. The aim is to help civil society – trade unions, NGOs, academics and activists – and government policymakers to develop new forms of human rights governance in supply chains, using the garment industry as a model. Katalyst also sees close links between the root causes of human rights violations and environmental and climate risks, and aims to support closer ties between the human rights and environmental communities. Please feel free to contact us at:

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