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Supply Chain Management Practices of the Readymade Garments in Bangladesh

Mst. Afroja Aktar
Associate Professor, School of Business, Primeasia University, Banani, Dhaka

ABSTRACT

Supply Chain Management (SCM) is the art and technique of developing good collaboration with suppliers through supply efforts for measuring SC performance using software for effective control and coordination. Objects of the study are to analyze the SCM practices of our garments sector based on secondary data. Findings are that there had been continuous increase in both import of required materials and export of garments products during last 10 years. Challenges are found in uncertainty in forecasting and planning, sourcing efforts, cost control, optimizing supply volume, effective operation management, and ensuring high productivity. We need to assess the environmental impact of SC, use of latest technology, monitor day to day performance, find out the variances with target supply, causes and impact of such variances along with the preventive measures for controlling same. Practically good relation with suppliers, vendor management, strategic partnership, automation and use of integrated software might be more contributory.

Keywords: Supply Chain Management, Resource Management, Sustainability and Risk Management, Ready-Made Garments, Data analytics.

Introduction

Supply Chain management is the good blending of the various system & processes comprising strategic planning & effective implementation through raw material sourcing, efficiency in production and distribution to the desired Customers. It consists of demand forecasting, sourcing of raw materials, manufacturing of quality products & timely delivery to customers and satisfying their expectations. Various Models used for the purpose are Continuous flow, Agile, Fast chain, Efficient chain, Flexible & Custom-configured supply chain model etc., (Rebello, 2024).Functions of SCM are mainly: Purchasing, Operations management, Logistics management, Resource Management, & Flow of Information (Albrecht et al., 2023).Practically, it prevents the complexities of global network through satisfying the changing customer's expectation, minimizing cost burden and fulfilling the corporate social responsibilities. Forecasting the risk and its mitigation might be possible through effective planning, sourcing, producing, supplying, and including the network activities. We know that timely purchasing, control of operation, use of proper logistics, effective resource management and timely flow of information, facilitate the technical efficiency of SCM, as well as good earnings and business growth. (Krajewski et al., 2021). Critical Phases of supply chain consist of forecasting & planning, sourcing efforts, production management, distribution management and opportunities for return adjustments, controlling cost, reducing cost, a control of supply shortages, optimizing supply volume, good use of resources and ensuring high productivity etc., (Fernando, 2024)and measures of supply chain performance are the calculation of perfect order rate, supply chain cost volume, order fulfilling rate, cash to cash relation, recovery cycle, cash conversion cycle, inventory

turnover, no accumulation, no shortage/ misuse, high materials productivity, production efficiency, high distribution success etc., (Flora, 2024).

Now a days we see Green SCM which consists of assessing the environmental impact of SC, develop updated SC based on latest technology, monitoring the day-to-day performance of our SC system, measure the variance with target, locate the variances, causes of variances etc., (abcsupplychain.com, 2023).

7Cs of SCM as the determinants of effective SCM are connectivity, creativity, customization, co-ordination, consolidation, collaboration, and contribution (Vereecke et al., 2016). Major areas of SCM are Sourcing and Procurement, Manufacturing and Production, Inventory Management, Logistics and Transportation, Demand Forecasting and Planning, Customer Relationship Management, and Sustainability and Risk Management (Education, 2024). SCM is the good combination of business whole production flow from sourcing raw materials to delivery of finished products to the target customers.

Objectives of the Study

1. To analyze the SCM practices of the Ready-Made Garments (RMG) sector in Bangladesh
2. To analyze the various determinants of effective SCM in the said sector
3. To analyze the various models and strategies used for this purpose
4. To measure the comparative benefits and challenges of SCM
5. To suggest for improving the policy practices based on environmental opportunity and threat.

Theoretical Framework

SCM is the systematic, strategic coordination of the traditional business functions & the tactics for improving the long-term performance of individual firm and the supply chain in specific. It covers the activities related to the flow & conversion of raw materials into suitable products delivered to the end users. It follows the logistics interactions among the marketing, logistics & production within a firm. Logistics is the significant aspect of supply chain that plans, implements & controls the efficient flow, storage of goods to the consumers as per their requirement (Ballou, R.H. 2004).

Manufacturing Supply Chain management refers to the art & technique of strengthening collaboration with major suppliers, assessing supply chain performance, enhancing supply chain resilience through installing backup systems and installing manufacturing software for good visibility as well as effective control & coordination over the supply efforts.

Virtually Supply Chain is the good blending of specific processes, people, business firms, their activities flow of accurate information and quality resources to develop specific products and deliver to the customers as per their expectation and satisfaction. (MRP easy.com, 2024).

The basic goal of SCM is to ensure that right raw materials are made available in right quality, price & quantity tor efficient production, effective distribution among the customers for their satisfaction and object is to minimize the lead time and product costs, to match the production & procurement quantities with the forecast demand, to create market leadership through product development & diversification to survive in global competition, to strengthen a sustainable business growth through increasing the both short term and long-term solvency of the business, good earnings, value of firms and accomplishing the corporate social responsibilities & value added to the economy.

Coursera Staff, 2024, states that functions of SCM are as follows:

a) Controlling the purchase, production and marketing activities
b) Liaison with procurement, managers, vendors, customers to select the reliable sources of quality materials at a competitive price rate.
c) Making contracts with suppliers, vendors and customers.
d) Use of software to place the items to the warehouse
e) Cost control, quantity control for achieving the target
f) Managing relation with different stakeholders
g) Strengthening the SC process through efficiency and effectiveness
h) Continuous developments trends etc.

Practical uses of SCM

SCM eliminates waste, maximizes customer's value, and develop competitive advantage in global as well as in domestic market (Fernando, 2024). He stated major critical phasesof Supply Chain Management (SCM) as planning, sourcing production, distribution and return activities. Supply chain manager controls cost, reduces cost and prevents supply shortage.

Continuous Flow Model is the traditional supply chain model where customer demand variation is negligible, where manufacturer manufactures the same particular good over a period of time.

Agile Model In this model flexibility of demand is considered to customize with custom-order products.

Fast Model Quick production, quick sales, i.e., quick turnover of a product having short life cycle.

Flexible Model This is for managing seasonal variation in demand according that production and procurement volume are adjusted.

Efficient Model This model is for competing with others ensuring the maximum utilization of equipment and machineries, inventory control, and processing order supply.

Custom Model This is for specialized industries having technical needs like automobile products.

Supply chain ethics is a vital factor to develops efficient SCM.

Types of Supply Chain in the Apparel Industry

Push Strategy: This supply chain management strategy involves forecasting demand for an item and subsequently distributing it to vendors according to their projections. The disadvantage is that it may result in overproduction or underproduction due to analysts' errors in predicting customer behavior. Excessive or insufficient production might incur financial losses for a corporation.

Pull Strategy: A tactic in which retailers anticipate consumer demand prior to producing corresponding products. This reduces expenses related to maintaining unsold inventories and their carrying cost, cost of excess production etc.

The Push-Pull Supply Chain: This method is the good blending of both the methods where production is made in small batches as a result over production, wastage, accumulation of costs etc. are prevented and customers' demands act as central point.

Order processing, lead time, production time, customer care service, quick response and product availability are positively related with customer satisfaction. Quick response is the most important device for providing customer satisfaction.

Ballou and Srivastava prescribe a model for effective SCM

	Supply Chain in the Global Environment
Coordination of Trust Commitment Risk Dependence Cooperative Behavior	Marketing Efforts Sales Planning Research & Development Activities Forecasting Mechanism Purchasing activities Logistics Support MIS Financial Planning & Control Customer Satisfaction

Source: (Ballou, 2004), PP.6-7

This model is suitable for competitive advantage, value creation, good learnings, customer satisfaction & sustainable business growth in a competitive business arena.

While narrating the evolution of logistics for effective SCM, the following variables are significant:

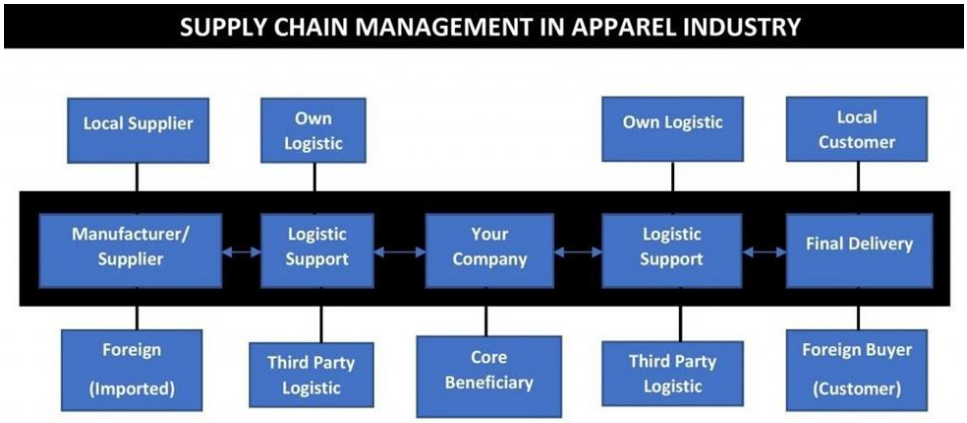
Up to 1980	**1980 – 2000**	**2000+**
Demand Forecasting Purchasing Activities Production Planning	Purchasing Materials	
Inventory Management Warehousing Materials Control Packaging	Logistics	
Finished goods inventory Control Distribution Decision Order processing Transportation Customer service Providing Information Marketing Activities Financial Control	Distribution Activities	SCM

Source: (Ballou, 2004)

Lean Practice isthe technique of reducing and preventing wastage and non-valued elements, enhancing efficiency, and innovating the whole efforts of the entire supply chain. Practically, non-valued elements create negative impact like zero return on capital investment (taulia.com, 2024).

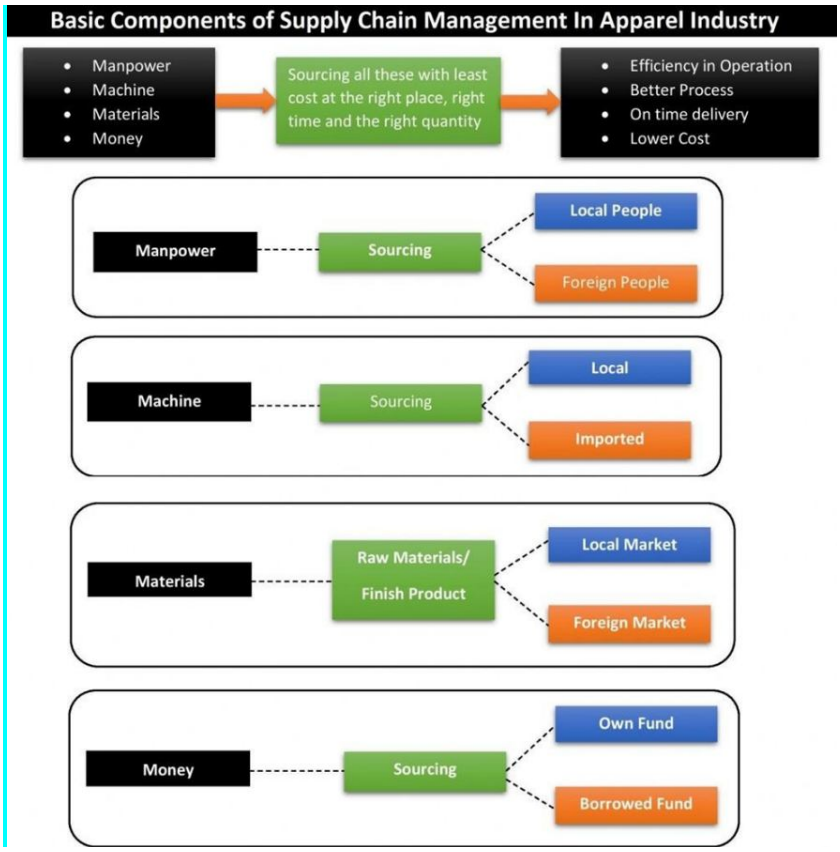
Integrated Supply Chain Practices refer to good use of predictive analytics & data driven approaches to facilitate quick decisions for materials procurements, productions and fair distribution to customers.Virtually Integrated Supply Chainfollows updated software systems using reliable and common data at both operating & higher level (Mahr, 2023).

Supply Chain Approaches follow mainly good use of automation, use of big data, proper use of logistics, application of collaborative planning, forecasting, and replenishment (CPFR), following vendor-managed inventory (VMI), use of just-in-time (JIT) approach, emphasis on lean logistics etc., (Deskera, n.d., 2024).



Source:(**Shaikat, 2018)**

Supply Chain Management is applicable to Manpower, Machine, Materials & Money.



Source: (Shaikat, 2018)

Need for the Study

Apparel SC is the network of business, services organization, people, activities, information and relevant resources based on procurement of quality raw materials, efficient production and good delivery for customers' satisfaction (Hossain & Esrat, 2020).Virtually SCM is the management of constant flow products, relevant data, required finances tor the procurement of the quality raw materials, in time production and final delivery to the customers as per their expectations. (Oracle, 2024).Effective SCM ensuresflexibility in operation**,** mobility of resources**,** cost control**,** utilization of available resources**,** &good logistics management for raw materials, collections and distribution of finished products etc., (Shaikat, 2018).

Major activities of SCM are inventory strategy, forecasting mechanism, inventory planning and control, purchasing planning, supply scheduling, storage decision, etc. These also cover transport activities along with planning and organizing customer satisfaction, product service, order delivery & information flow strategy formulation, etc.(Ballou, 2004).

Pillars of SC are Design, Source, Plan, Make, Deliver, and Sustain (Buffington, 2020).SC efficiency depends on increasing SC visibility, good relation with suppliers, proper vendor management, strategic partnership, automation through software, and integrated software (Campos, 2023).

Major Findings and Observations

Supply Chain strategy is the Mechanism used for planning design execution, Control and good monitoring of Supply Chain activities. It relates to efficient operations & initiatives for developing basic Performance indicators. It is aligned to business goals and integration of all Supply Chain activities. It follows top-down approach to provide business direction.

Supply Chain strategies comprise the following:

- Efficient Flow of Activities
- Minimum Cost,
- Rapid Speed,
- Adheres to Customization,
- Adjusting with Demand Variation, and
- Follow the Customer grievances

Sustainable SC Practices

It follows environmentally & socially sustainable practices in every level to preserve the environmental interests & that of people in general. Practically environmental & Social standards are developed in managing both own operations & Suppliers' operation accurately. (https//www.sedex.com)

Table – 1: Comparative Statement on Exports of RMG & Total Export of Bangladesh (Value in Billion USD)

Year	Export of RMG	Total Export of Bangladesh	% of RMG's To Total Export
2009-10	12.496	16.204	77.12
2010-11	17.914	22.924	78.15
2011-12	19.089	24.301	78.55
2012-13	21.515	27.027	79.61
2013-14	24.491	30.186	81.13

2014-15	25.491	31.208	81.68
2015-16	28.094	34.257	82.01
2016-17	28.149	34.655	81.23
2017-18	30.614	36.668	83.49
2018-19	34.133	40.535	84.21
2019-20	27.949	33.674	83.00
2020-21	31.456	38.758	81.16
2021-22	42.613	52.082	81.82
2022-23	46.991	55.558	84.58
$\bar{X}$	27.93	34.15	81.27
SD	9.25	10.63	2.248
CV	33.12	31.13	2.77

Source:https://www.bgmea.com.bd/

Table- 1: shows that export of RMG had increasing trend up to 2018 – 2019 and it declined in 2019 – 2020 to 2020 –2021 with increasing again in 2021-2022 & 2022-2023. Mean value of share of RMG to total export was 81.27% during the period.

Table - 2: Trends in Category-wise Exports, Garments Products (2013 to 2022) (Billion USD)

Items	FY 13	FY 14	FY 15	FY 16	FY 17	FY 18	FY 19	FY 20	FY 21	FY 22	$\bar{X}$	SD	CV
Total RMG exports	21.515	24.491	25.491	28.094	28.149	30.614	34.133	27.949	31.456	42.613	29.45	5.86	19.91
Knitwear	10.475	12.049	12.426	13.355	13.757	15.188	16.888	13.908	16.960	23.214	14.82	3.58	24.21
Woven garment	11.039	12.442	13.064	14.738	14.392	15.426	17.244	14.041	14.496	19.398	14.63	2.37	16.24

Source: Bangladesh Bank

Table-2 shows that average export volume of RMG product was Billion USD **29.45** during last 10 years. Average of knitwear was 14.82 billion US dollar and that of woven garments was 14.63 billion US dollar.

Table – 3: Trends in Category-wise Imports,Garments Products (2013 to 2022) (Billion USD)

Items	FY 13	FY 14	FY 15	FY 16	FY 17	FY 18	FY 19	FY 20	FY 21	FY 22	$\bar{X}$	SD	CV
RMG goods	10.325	11.194	11.566	12.038	12.162	14.320	14.818	13.024	14.069	22.254	13.57	3.37	24.83
1.Raw cotton	2.255	2.464	2.295	2.244	2.528	3.235	3.082	2.960	3.186	4.438	2.86	0.67	23.43
2.Yarn	1.675	1.816	1.851	1.968	1.971	2.351	2.444	0.190	2.435	5.245	2.19	1.25	57.07
3. Textile	5.071	5.360	5.742	6.220	6.038	6.859	7.284	6.380	6.552	9.936	6.54	1.36	20.80
4. Staple Fiber	0.877	1.010	1.078	1.018	1.016	1.179	1.228	1.085	1.039	1.568	1.11	0.18	16.22
5. Dyeing materials	0.445	0.543	0.599	0.586	0.606	0.695	0.779	0.697	0.854	1.065	0.68	0.17	25

Source: Bangladesh Bank

Table-3 reviews that imports of raw cotton, yarn, Textile and Textile articles thereof, Staple Fiber, Dyeing and Tanning materials had increasing trends during the periods.

Table - 4: Bangladesh's Apparel Export to World [Value in Billion USD]

Year	Woven	Knit	Total RMG	Growth
2018-2019	17.24	16.89	34.13	11.49%
2019-2020	14.04	13.91	27.95	-18.12%
2020-2021	14.50	16.96	31.46	12.55%
2021-2022	19.40	23.21	42.61	35.47%
2022-2023	21.25	25.74	46.99	10.27%
$\overline{X}$	17.29	19.34	36.63	10.33%
SD	3.10	4.93	7.93	0.19
CV	17.94	25.47	21.64	184.13

Source: Export Promotion Bureau (EPB)

Table-4 indicates that growth rate declined in 2019-2020. It rose up in 2021 to 2022, again declined in 2022-2023

Table – 5: EU's Apparel Import from the world (Value in USD billion)

Country	2017	2018	2019	2020	2021	2022	CAGR in last 5 years	$\overline{X}$	SD	CV
World	83.49	90.54	89.46	78.64	85.23	103.10	4.31%	88.41	8.38	9.47
China	26.03	27.30	25.87	23.60	25.76	30.15	2.98%	26.45	2.16	8.16
Bangladesh	14.60	16.44	16.75	14.18	16.87	22.89	9.42%	16.95	3.12	18.41
Turkey	9.23	9.93	9.86	9.30	10.88	11.98	5.35%	10.19	1.05	10.30
India	4.47	4.60	4.39	3.39	4.02	4.86	1.73%	4.28	0.51	11.92
Vietnam	2.96	3.33	3.49	3.16	3.38	4.57	9.11%	3.48	0.56	16.09
Cambodia	3.37	3.83	3.68	2.80	2.81	3.81	2.51%	3.38	0.47	13.91
Morocco	2.83	3.06	2.95	2.32	2.93	3.12	1.98%	2.86	0.28	9.79
Sri Lanka	1.09	1.25	1.35	1.19	1.41	1.62	8.18%	1.31	0.18	13.74
Indonesia	1.26	1.27	1.28	1.04	1.10	1.36	1.59%	1.21	0.12	9.92
Pakistan	2.42	2.55	2.73	2.45	3.08	3.94	10.29%	2.86	0.58	20.28

Source: EUROSTAT (*Apparel-Story-July-August-2023.Pdf*, n.d.), P:18

The above table shows that China had the highest export followed by Bangladesh, Turkey, India, Vietnam and other respectively during 2017 to 2022.

Table – 6: US Apparel Import from the world (Value in USD billion)

Country	2017	2018	2019	2020	2021	2022	Last 5 years CAGR	$\overline{X}$	SD	CV
World	80.17	82.88	83.70	64.06	81.59	99.93	4.50%	82.05	11.40	13.89
China	27.01	27.37	24.91	15.15	19.61	21.73	-4.25%	22.63	4.74	20.94
Vietnam	11.55	12.22	13.55	12.57	14.37	18.25	9.57%	13.75	2.41	17.52
Bangladesh	5.06	5.40	5.92	5.23	7.15	9.75	13.99%	6.33	1.61	25.43
India	3.68	3.81	4.06	3.02	4.20	5.68	9.09%	4.07	0.88	21.62
Indonesia	4.56	4.48	4.40	3.51	4.14	5.61	4.23%	4.45	0.68	15.28
Cambodia	2.15	2.41	2.68	2.82	3.39	4.35	15.20%	2.97	0.79	26.59

Honduras	2.46	2.57	2.79	1.83	2.66	3.19	5.30%	2.58	0.44	17.05
Mexico	3.57	3.36	3.12	2.20	2.84	3.16	-2.39%	3.04	0.47	15.46
Pakistan	1.27	1.36	1.46	1.40	2.22	2.75	16.61%	1.74	0.60	34.48
S. Korea	0.23	0.22	0.20	0.15	0.18	0.23	0.03%	0.20	0.03	15

Source: OTEXA (*Apparel-Story-July-August-2023.Pdf*, n.d.), P:19

Table-6 indicates that in US apparel imports similar participation of China, Vietnam, Bangladesh and India, Indonesia and Cambodia are found and this is very encouraging for the global market of the RMG products.

- Major sources of raw materials are China, India and USA. Absolute dependance requires good understanding with global suppliers. Government decided to withdraw all cash incentives to export sectors by July 2026 at a rate of 0.5% every six months before the graduation from LDC status.
- Main raw materials cotton, wool, silk, jute and flax fiber are the raw materials of the textile industry. It might be natural or man-made.
- We are to explore new export opportunity diversifying exportable items, through creating apparel images and attraction for FDI.
- Cash incentives for inward wage remittances, 25% bonus is given on the value of remittances.
- Challenges of SC might be global in the sense that legal & moral frame wok in other countries are different. Working with suppliers requires good understanding of their language & culture. Seasonal changes are also determining factors.
- Multiple players like vendors, manufacturers, wholesalers, retailers' customers need good supply chain through exchange of reliable information. Tax on import items, local production costs, Laboon practices, wage rates etc. need to be studied in a Good Model to achieve success in SCM.
- The uses of SCM might be influenced by end-to-end value Chain integration, use of tracking software, use of Big data & data analytics. In reality apparel supply chain is highly complex and ever-changing system.

Challenges of SCM are related to

I. **Internal Causes**- like
   - Production failure
   - Need for product modification
   - Installation of new products
   - Promotional demand size
   - Un reliable information
   - Value analysis difficulty
   - Need for forward placement
   - Dependence on backward placement
   - High Production Costs, like set up cost, lot sizes, transport cost, Delay time, lost sales etc.

II. **External limiting Factors** are mainly as follows:
   - Need for changing volume
   - Changing Product mix
   - Delivery to difficulties
   - Shipping hindrances like high freight, Changing time schedule.
   - Changing price rates
   - Low quality of materials

- High lead Lime
- Non-Cooperation of Suppliers
- Changing terms & conditions
- Shortage of Suppliers
- Unethical practices of Supplier
- Natural Calamities
- Shortage of raw materials
- Their high cost of cultivation
- Competitive market
- Lack of Trade audit facility
- Adverse supply provisions
- Difficulties in tracing quality and materials
- Competitive market
- Difficulties in payment of supplies
- Inspection crisis
- Coordination & Controlling difficulties
- Lack of motivation for suppliers
- Lack of compliance with suppliers' terms & conditions
- Difficulties in cancellation order due to customers' demand
- Lack of advertisement
- Lack of suitable business climate.

Major Techniques used for SCM:

a) Purchase activities
b) Manufacturing efforts
c) Inventory Planning & Control
d) Demand forecasting & effective planning
e) Warehousing decisions
f) Control and Transport activities
g) Providing customer satisfaction
h) Market feed back
i) Good coordination through digital network
j) Use of Management by objectives (MBO) & TDA Balanced Score'Card
(Source: https://www.supplychain4me.com)

While formulating SC strategies, the following factors are considered:

a) Formulation of clear objectives and goal based on mission and vision of the organization
b) Use of supply chain management technology
c) Strategically sourcing of supply
d) Develop reliable supplier relation chain
e) Optimum inventory level
f) Control the supply chain risks
g) Ensure good corporate governance
h) Advance market research for demand forecasting
i) Utilize supply chain financial opportunities
j) Assess supply chain key performance indicators
k) Conduct periodic evaluations to focus the strength and weakness threats and opportunities

Recommendations for Further Studies

Considering the limitations of the study, further areas for in depth research are given below:

1. Similar study can be done following a good number of garments unit through reliable sampling technique.
2. Statistical interpretation-based studies might be done.
3. Comparative similarities and dissimilarities in SCM performance of different units can be studied.
4. Use of research questions and hypothesis testing would be more helping for the policy makers to develop their SC strategies and approaches.
5. Size, ownership and age wise difference in SCM performance can be studied to suggest for managing the SC challenges and increasing business growth

Conclusion

From the aforesaid analysis of both quantitative and qualitative data and information, it could be concluded that SCM practices of our garments sector are yet to be made effective due to their inherent weakness, lack of cooperation of suppliers, production difficulties, shipment problems, flexible demand in global market, unfair competition there on political crisis, lack of compliance with industrial law, adverse working condition, low productivity, low employees' morale and motivation, unfair industrial relation, lack of product development and diversification market research and provisional measures. In reality, management should apply the strategic devices for strengthening the effectiveness of the SCM practices leading to the achievement of SDGs:

1. Manufacturer and supplier relation must be developed to ensure the supply in right time, in right quantity, right quality, right price rates and right volume to minimize the cost of production and rising productivity.
2. Maximization of production volume to achieve economy in average cost of production through breakeven analysis is highly significant.
3. Cost control steps like budgetary control, standard costing system, managerial costing, process costing system must be followed.
4. Market research activities must be organized to introduce product development and diversification.
5. Provisional measures need to be adopted through making good liaison with suppliers and customers, wholesalers and retailers.
6. Absolute compliance with Industrial Law 2006 as amended in 2020 should be ensured.
7. Incentives for wholesalers, retailers and customers will increase their motivation and cooperation.
8. Cordial industrial relation should be developed to enhance their morale and productivity.
9. Physical working condition, welfare measures must be developed.
10. More motivation should be given to the competitive suppliers for timely procurement of refined materials, machines, methods and money supply.

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