



Path to a Living Wage

Key Insights from AFWA's 2024 Survey Data and Wage Figures

November 2024



Introduction to **Living Wages** and the Consumption Survey

- **A living wage ensures that workers can meet their basic needs** such as food, housing, healthcare, and financial savings, which are particularly crucial during crises like the COVID-19 pandemic. The current poverty-level wages that workers and their families are forced into will not be enough to tide them over moments of crisis.
- In Asia, **the garment sector constitutes a major industry**, employing a vast workforce. However, it is alarmingly common for garment sector workers to receive wages that fall short of living wage standards, thereby perpetuating financial insecurity for millions of workers.
- Established in 2007, Asia Floor Wage Alliance (AFWA), **unifies garment workers across Asia, calling for a cross-border living wage**. AFWA's cross-border approach overcomes brands' threats of relocation that drive down the cost of labor and suppress wages by pitting Asian governments, industry and labor against one another.
- **This survey covers 8 garment-producing countries**—Bangladesh, Cambodia, India, Indonesia, Myanmar, Philippines, Sri Lanka, and Vietnam. This cross-border survey ensures that a regional approach to living wages takes into account varying economic conditions and consumption needs.



Historical Context of the Consumption Survey

In 2009, AFWA declared the **first cross-border living wage figure**, establishing a regional standard that challenged the detrimental race-to-the-bottom in the global garment industry

Starting in 2013, AFWA formulated a **Regional Consumer Price Index** to update the Asia Floor Wage figure regularly in between the years where food basket surveys are conducted

2022 onwards, AFWA incorporated **essential non-food expenditures** such as housing and education in its survey process.



AFWA recognized that **brands' relentless pursuit of low labor costs** has suppressed wages at or below subsistence levels for workers, despite the global garment sector's massive growth



From 2012 onwards, AFWA began **updating its living wage methodology** through regular food basket surveys, laying the groundwork for a comprehensive understanding of workers' consumption needs



In 2020, AFWA refined the **ratio of food to non-food costs to 45:55**, reflecting the growing burden of non-food expenses like housing and education on workers' budgets.



By adapting its methodology over time, AFWA has ensured that the **living wage benchmark** remains responsive to the evolving realities faced by women garment workers, who constitute the majority of the industry's workforce.



Relevance of the Consumption Survey

This 2024 Consumption Survey examines wages across Asia's garment-producing countries, providing a detailed picture of how wages fall short of meeting the basic consumption requirements of workers. By documenting food and non-food consumption and mapping wages across countries, the data enables trade unions, policymakers and brands to converge on a regional formulation and overcome the challenges posed by wage disparities across national borders.



Why Asia?

Asia produces the majority of the world's garments and has some of the **lowest industrial wages in the world**, making it the battleground for the living wage movement. AFWA and its trade union partners have led this struggle, strengthening the cross-border labor movement, and influencing how brands and multi-stakeholder initiatives (MSIs) assess wage gaps in supply chains.

Survey Methodology

Overview

The 2024 Consumption Survey covered garment workers across 8 Asian countries: **Bangladesh, Cambodia, India, Indonesia, Myanmar, Philippines, Sri Lanka, and Vietnam**



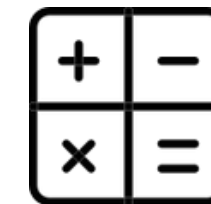
The survey was conducted over 4 months
Dec 2023 - Feb 2024

The unions conducted the survey and were consulted on **the questionnaire, survey findings and in deciding the Asia Floor Wage Figures.**



AFWA's methodology uses a family size of 3 consumption units

- 2 adults = 1 unit each + 2 children = 0.5 units each
- Or 1 adult (1 unit) + 4 children (0.5 units each)
- Or 3 adults (1 unit each)



The living wage calculation is split into:

- 45% for food costs
- 55% for non-food expenditures



A benchmark of 3,000 calories per day per adult

is used to determine food requirements

Scope of the Consumption Survey

The survey examined both food and non-food consumption patterns of garment workers to understand how current wages compare to the costs of maintaining a basic standard of living.



Food Consumption:

- Detailed **analysis of workers' dietary intake**, including staple foods like rice, vegetables, and protein sources
- **Assessment of caloric sufficiency** based on the 3,000 calories per day per adult standard

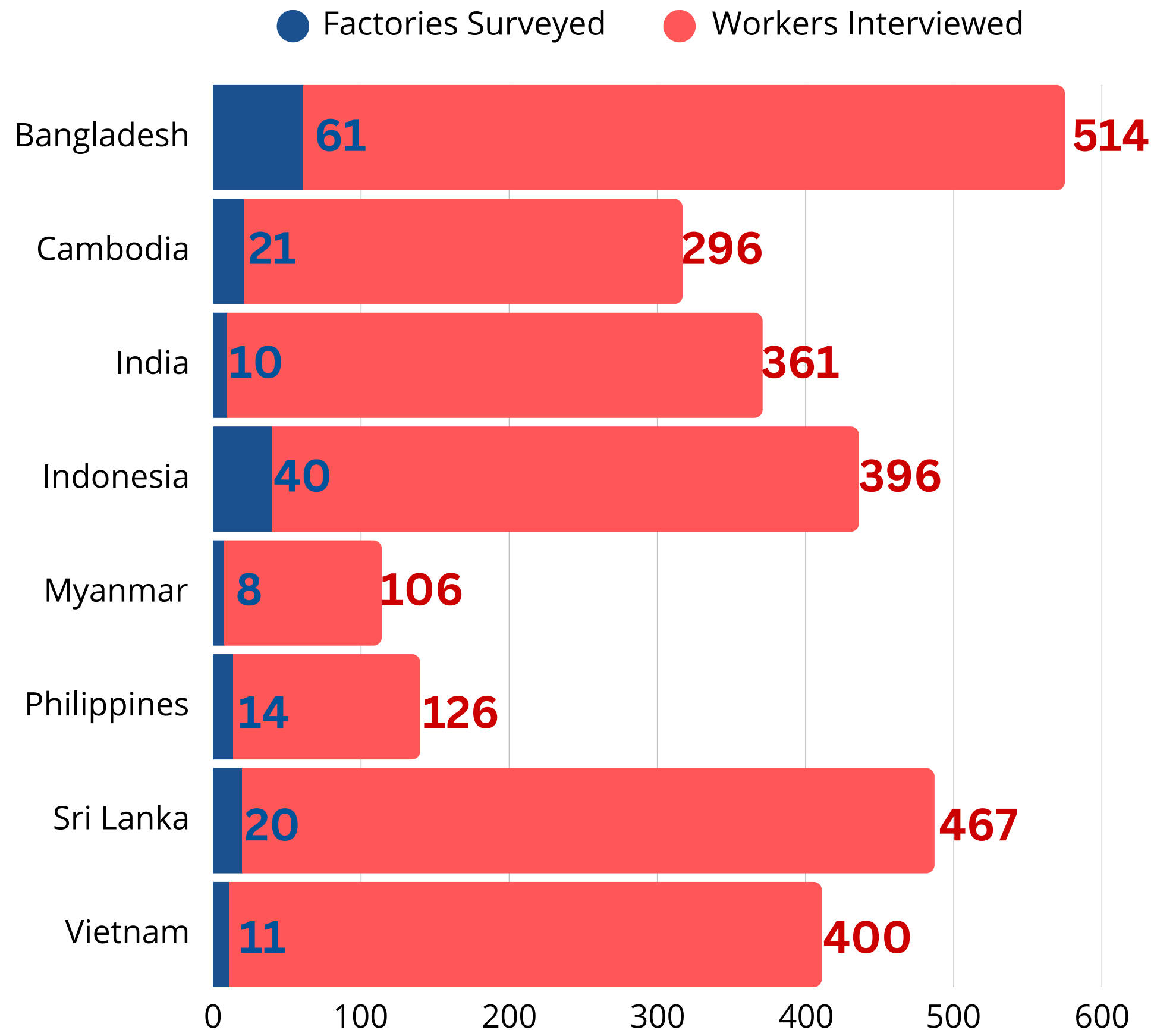


Non-Food Expenditures:

- Comprehensive **data on essential non-food costs**, such as:
 - Housing (rent, utilities)
 - Healthcare
 - Education for children
 - Transportation
 - Other necessities
- **Evaluation of how these non-food expenses impact workers'** overall financial well-being

Workers and Factories Surveyed

The consumption survey reached a significant sample size, capturing garment workers' realities across 8 major production countries in Asia.



Steps in Conducting the Survey

01

Factory Selection:

Factories were selected based on their export orientation and significance in the global garment supply chain.

02

Worker Interviews:

Detailed interviews with workers on wages, family size, food and non-food consumption were conducted

03

Data Collection:

Detailed food consumption patterns, non-food expenditures, actual wages and total household income. Expenses were monitored across different periods: weekly (food), monthly (food and utilities) and yearly (education/healthcare).

04

Analysis:

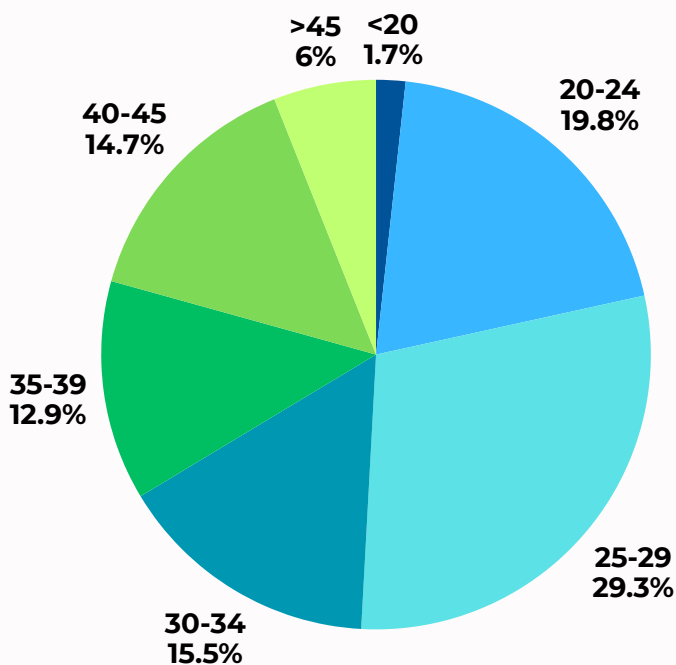
Wage shortfalls were calculated by comparing income to actual consumption needs.

Worker Demographics:

Age and Gender Identities of
Garment Workers Surveyed

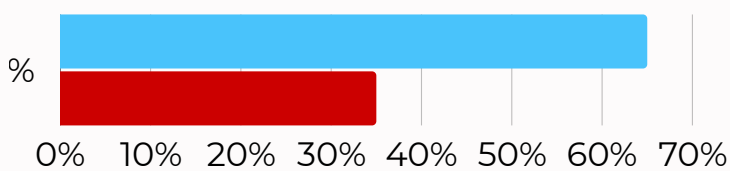
Bangladesh

Age Distribution



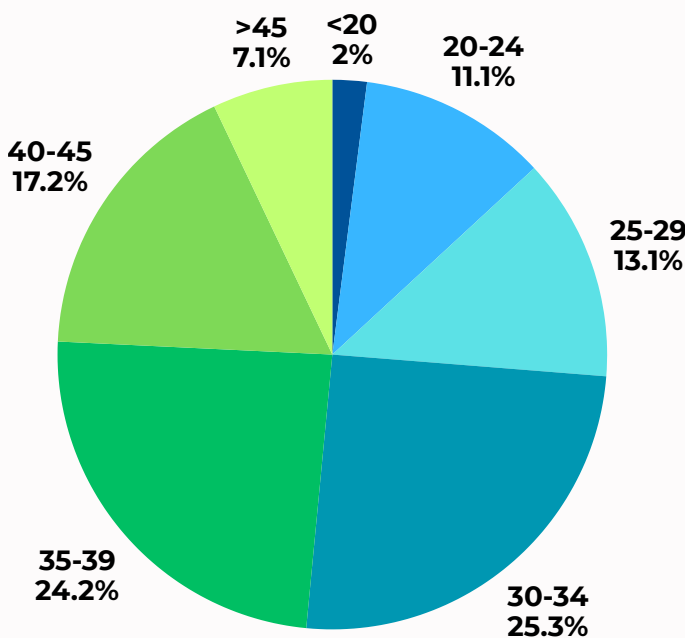
Gender Distribution (%)

Female Male



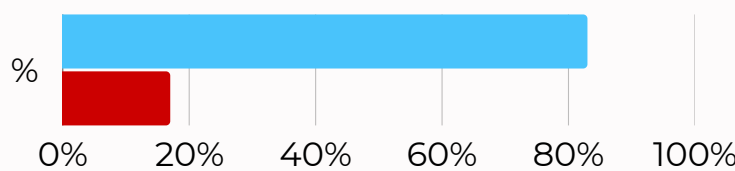
Cambodia

Age Distribution



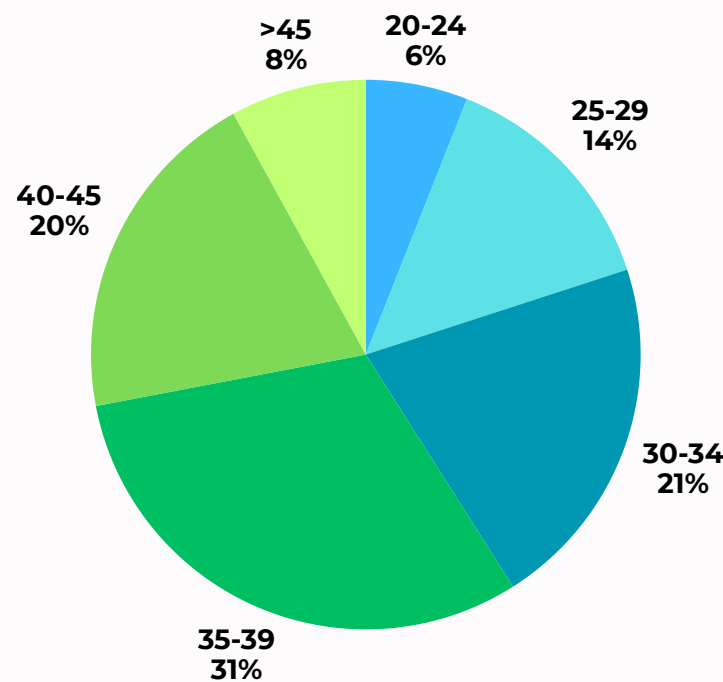
Gender Distribution (%)

Female Male



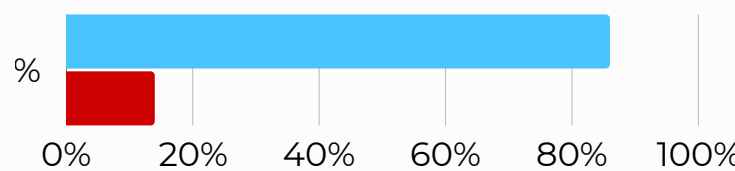
India

Age Distribution



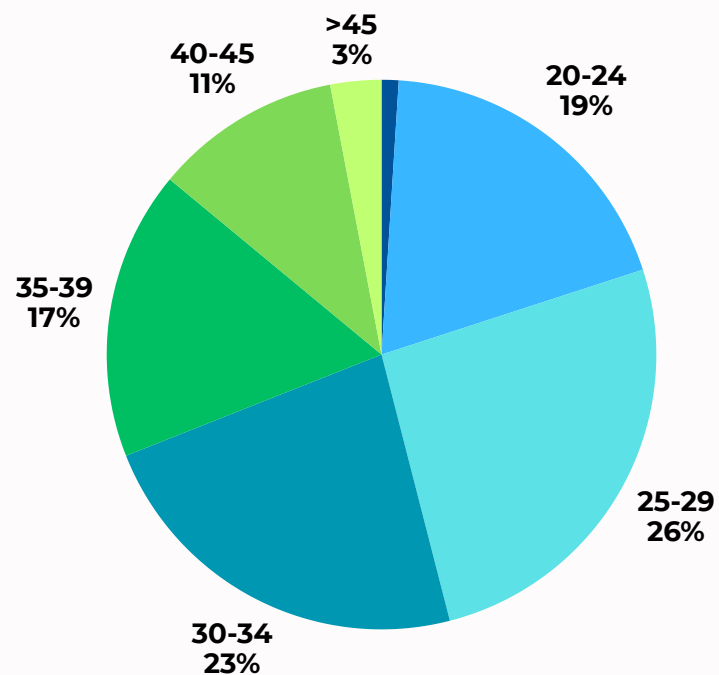
Gender Distribution (%)

Female Male



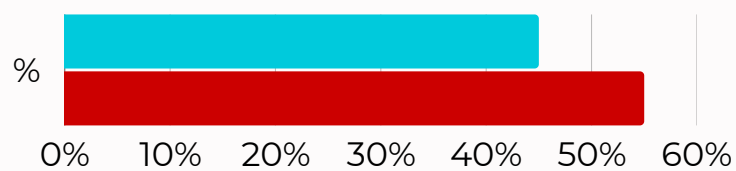
Indonesia

Age Distribution



Gender Distribution (%)

Male Female

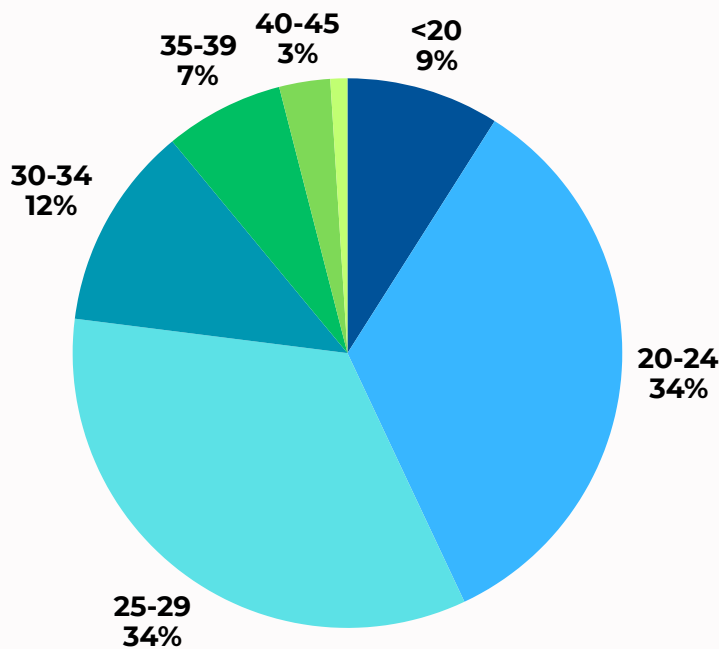


Worker Demographics:

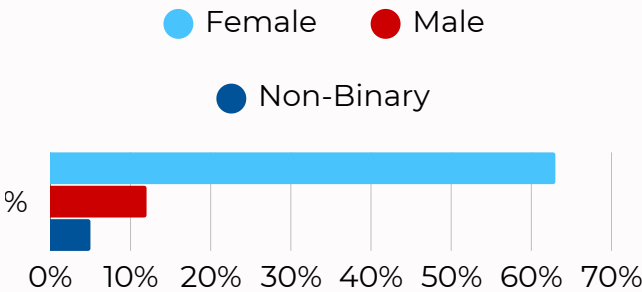
Age and Gender Identities of
Garment Workers Surveyed

Myanmar

Age Distribution

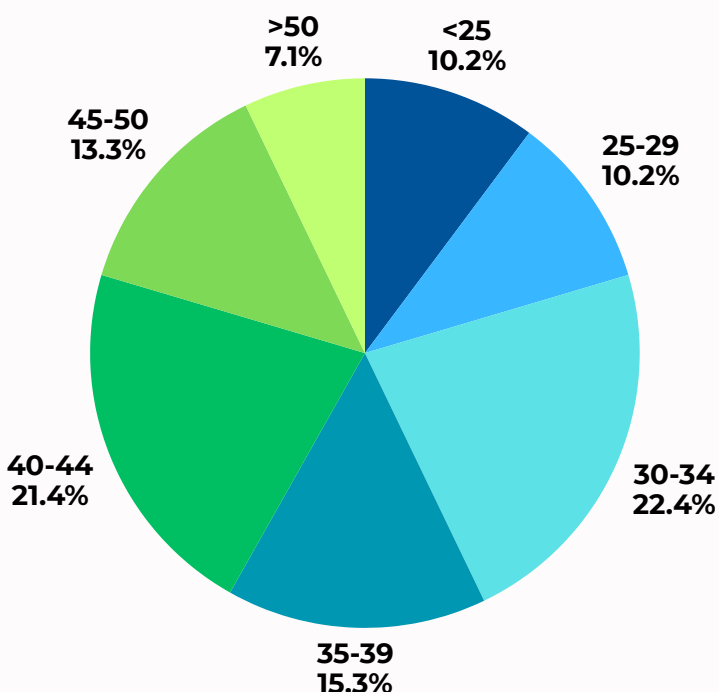


Gender Distribution (%)

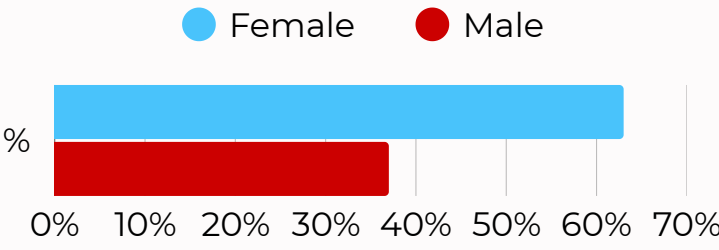


Philippines

Age Distribution

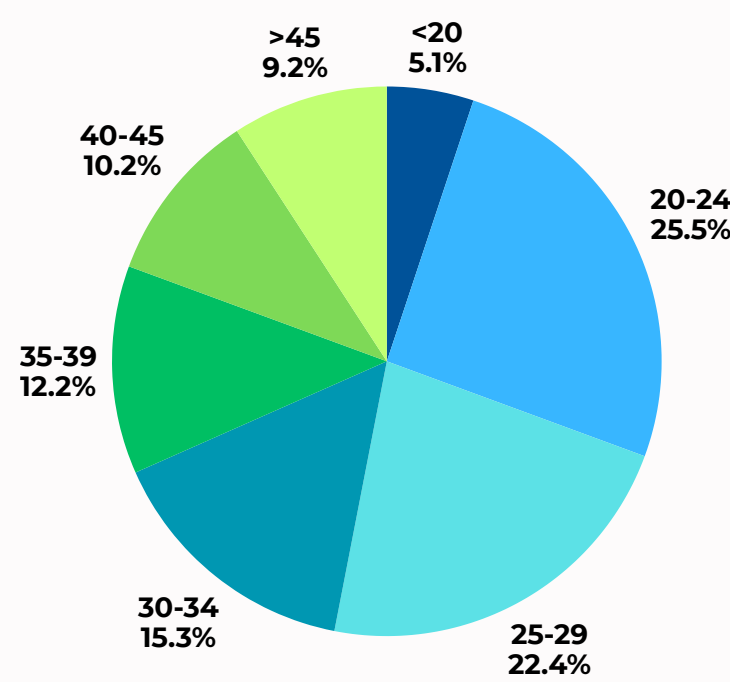


Gender Distribution (%)

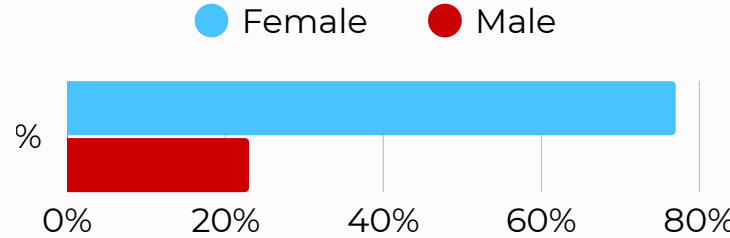


Sri Lanka

Age Distribution

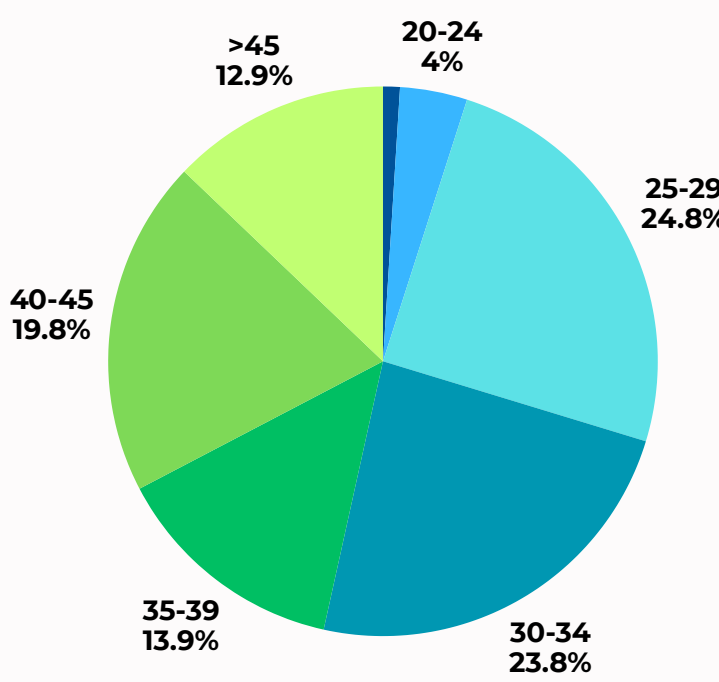


Gender Distribution (%)

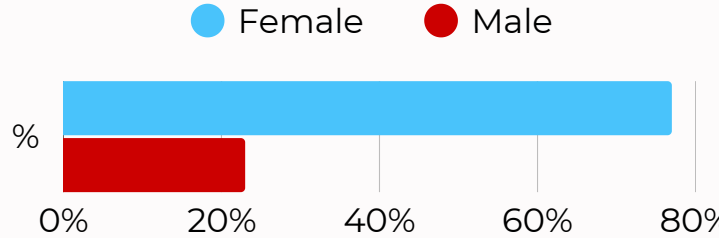


Vietnam

Age Distribution



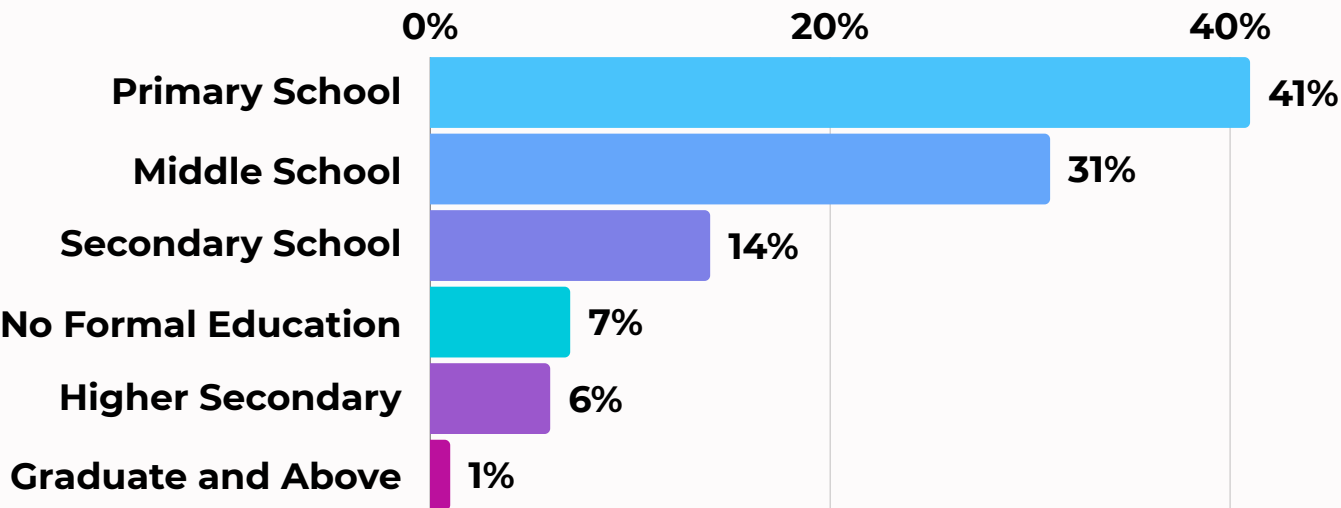
Gender Distribution (%)



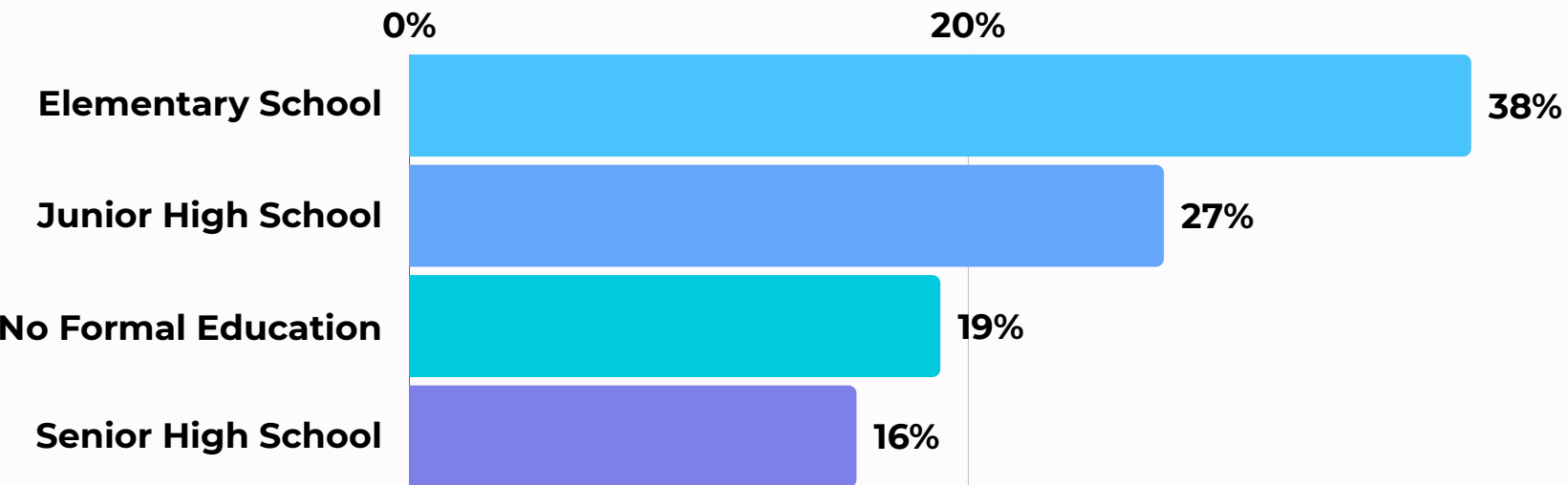
Worker Demographics:

Education Status of Garment Workers Surveyed

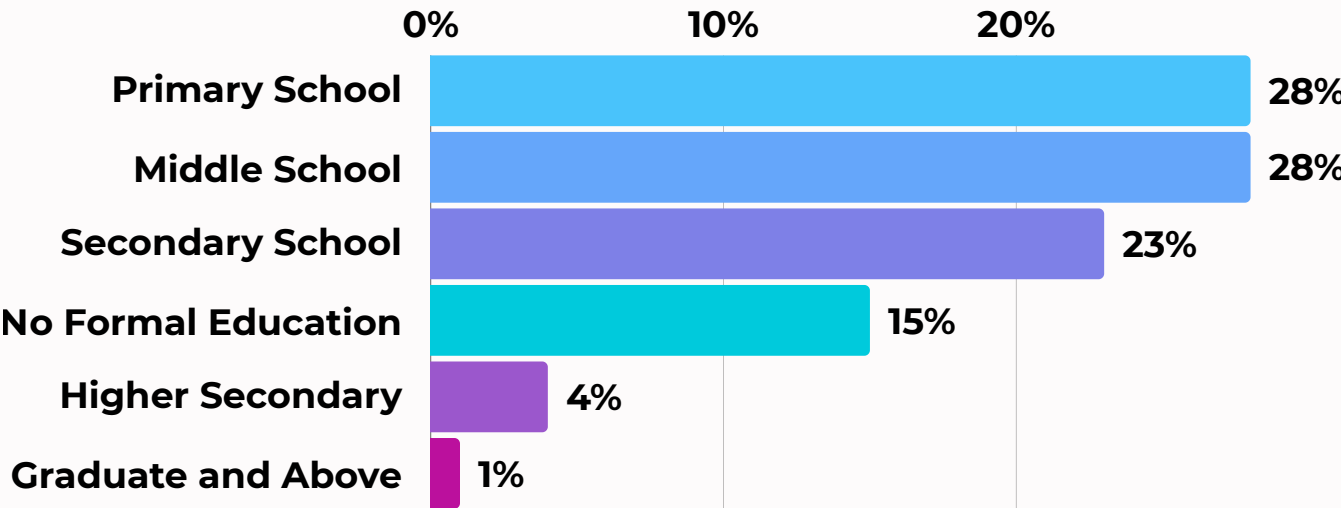
Bangladesh



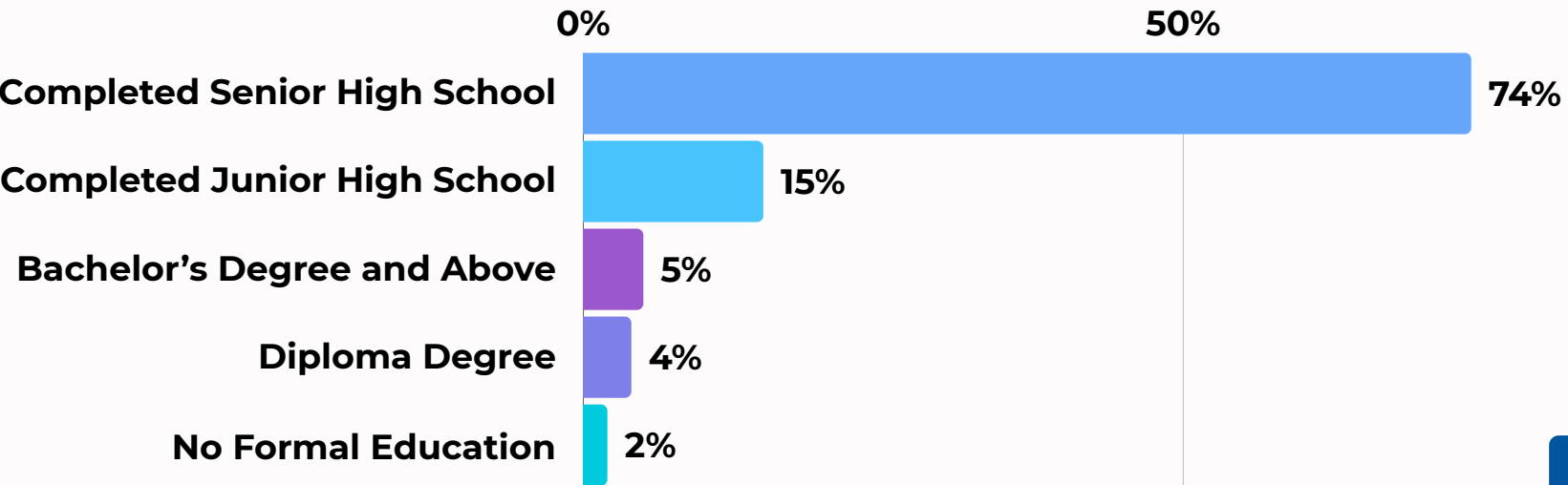
Cambodia



India



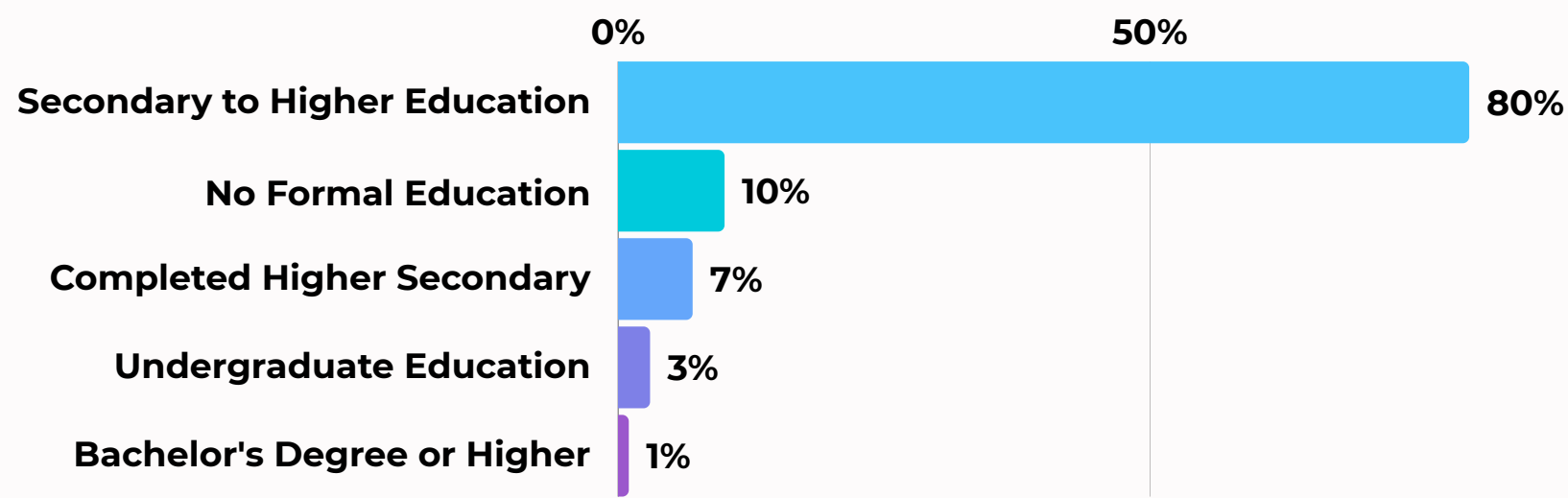
Indonesia



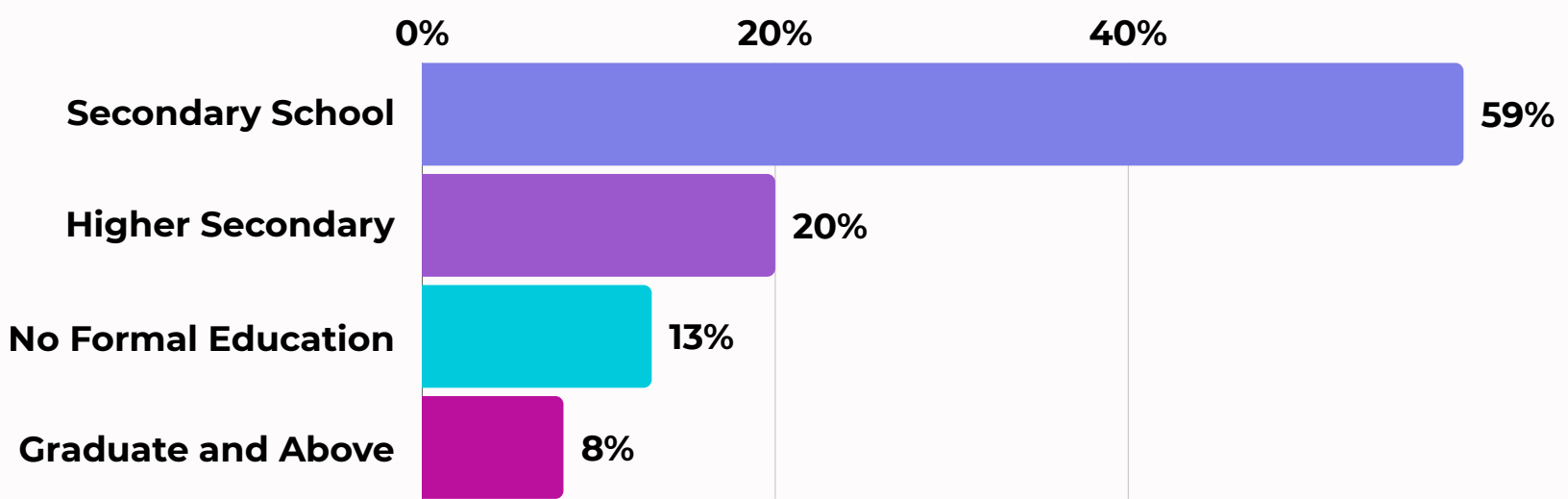
Worker Demographics:

Education Status of Garment Workers Surveyed

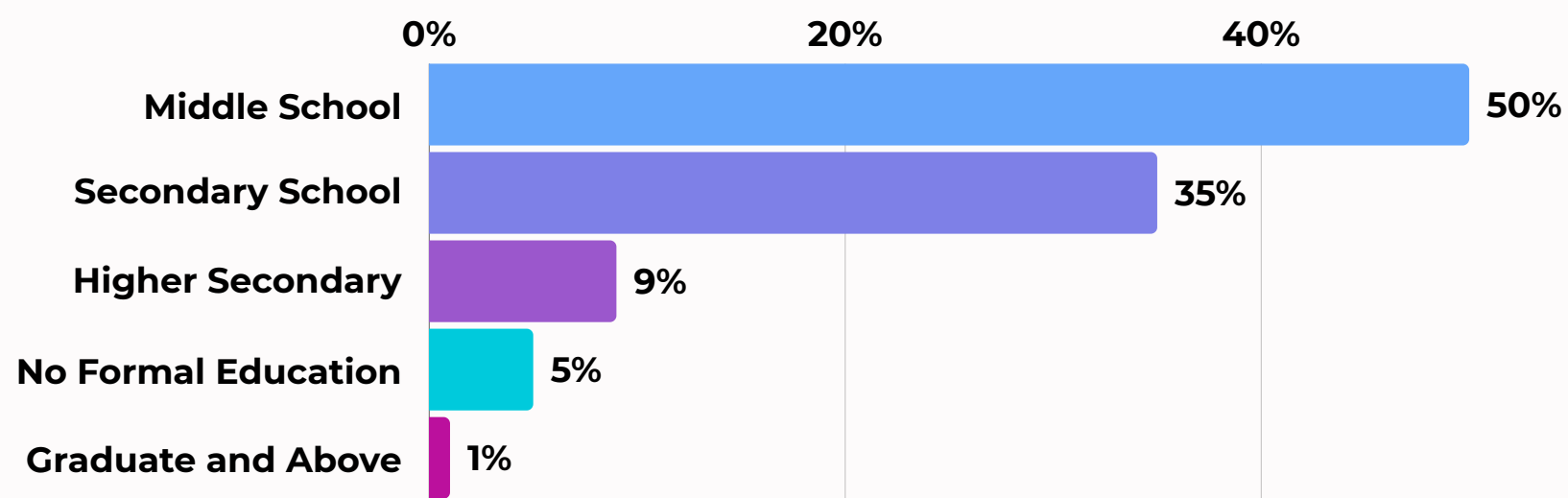
Myanmar



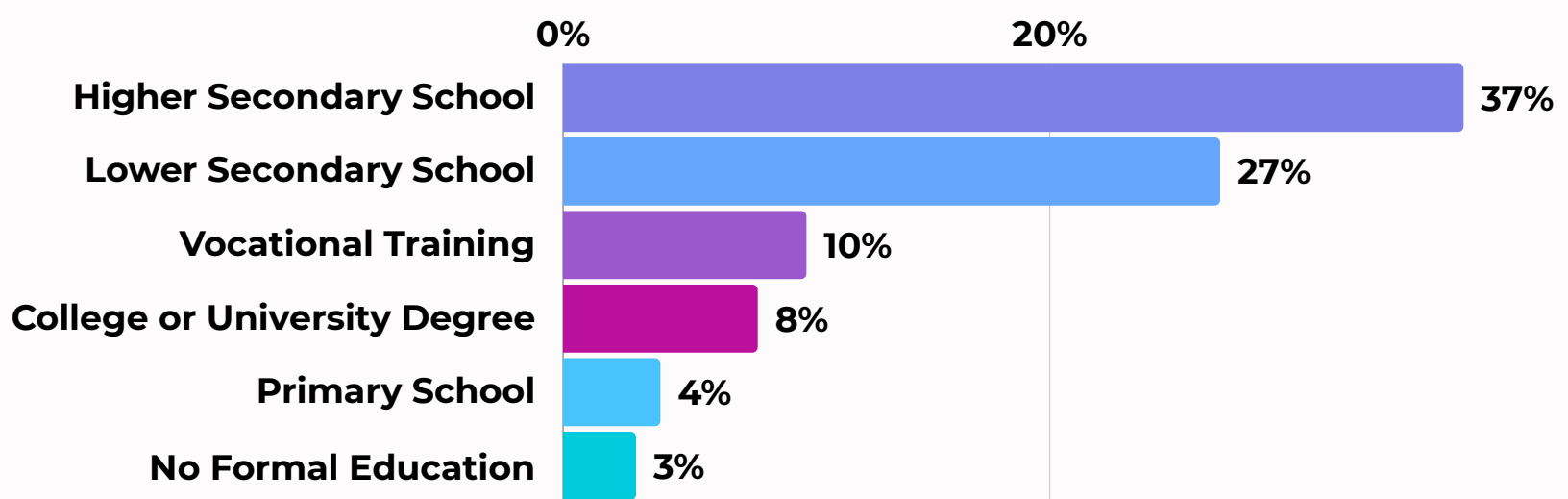
Philippines



Sri Lanka

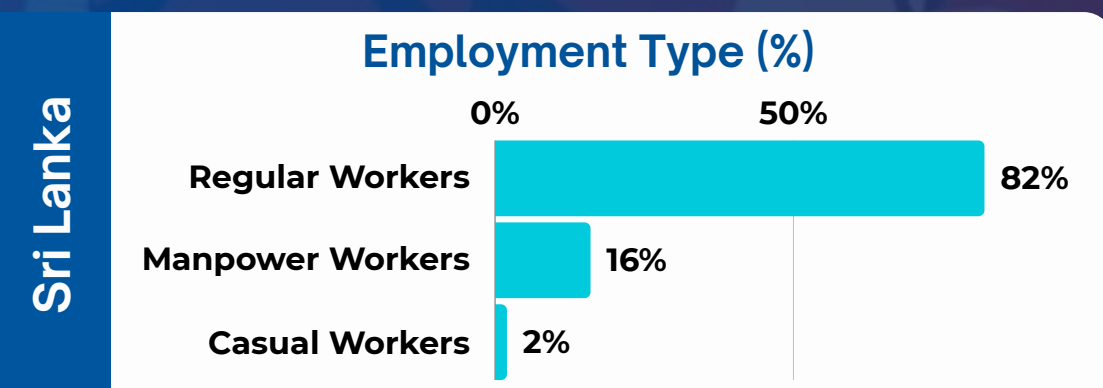
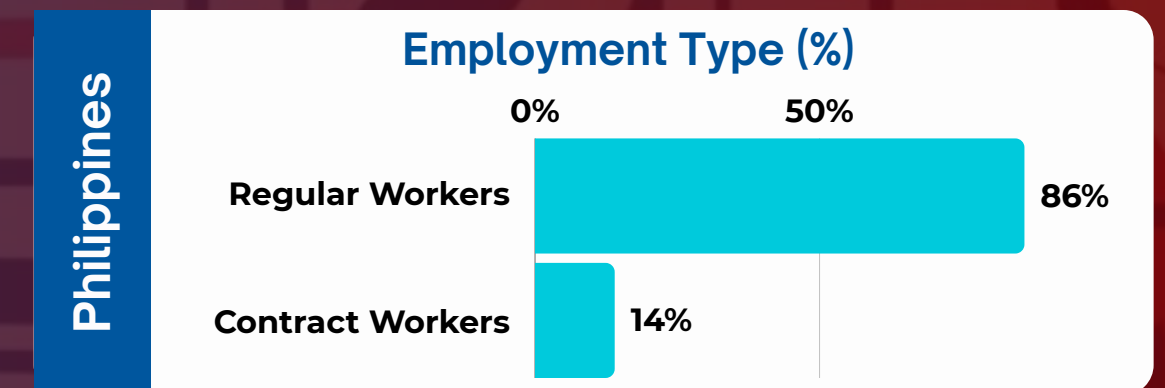
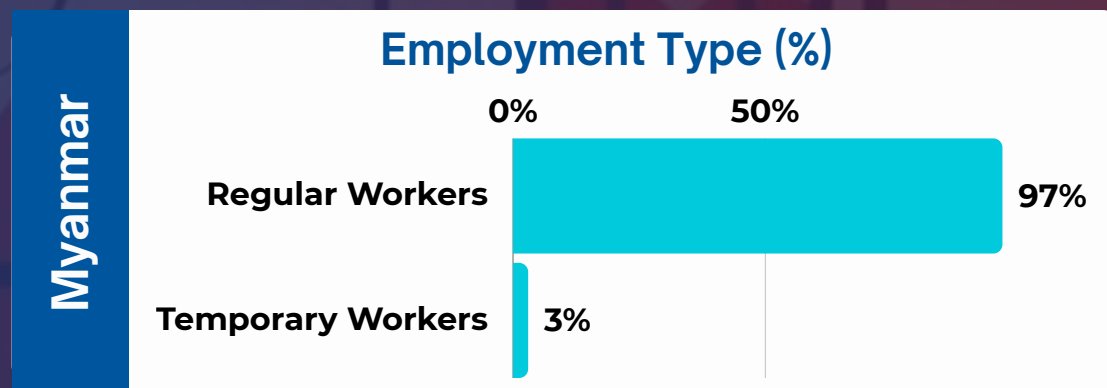
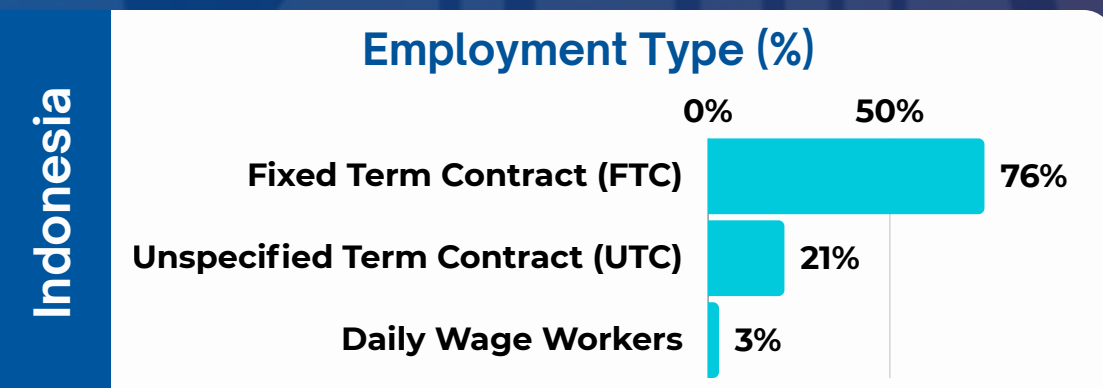
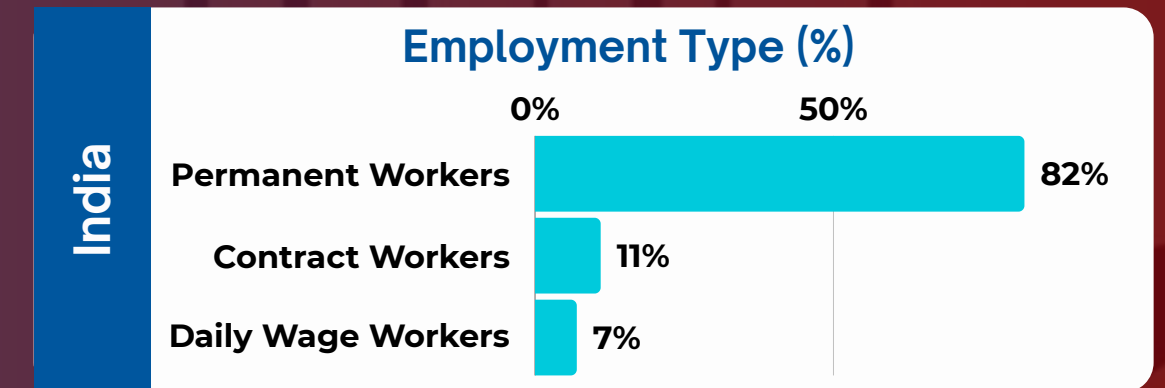
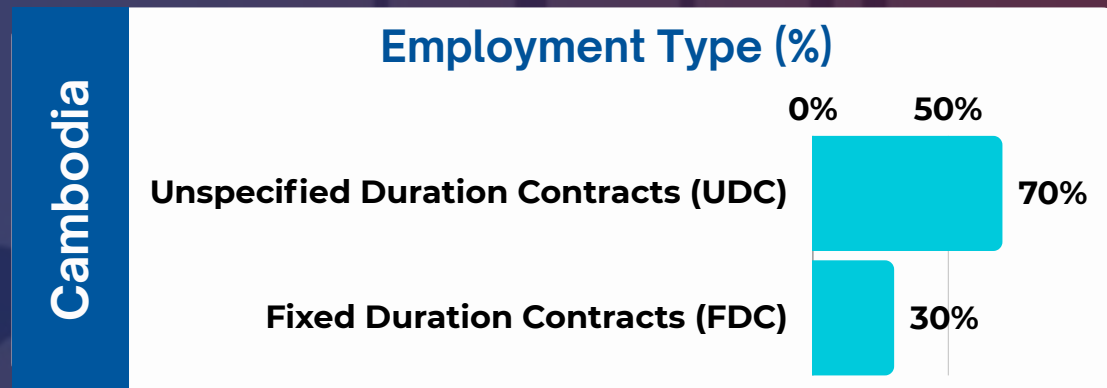
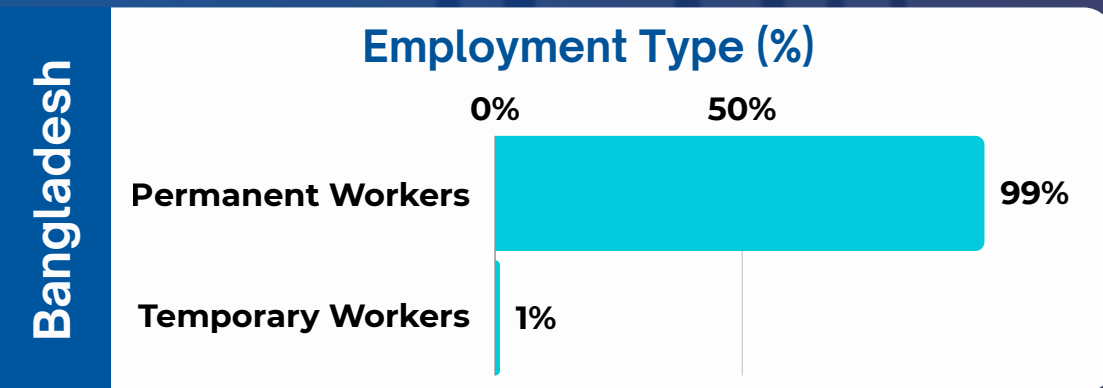


Vietnam



Employment Status

The survey data, gathered through interviews with union-associated workers, reflects a higher proportion of permanent and regular workers. Unionized workers are more likely to hold stable employment contracts.



Impact of Climate Change on Garment Workers

Country	Workers Affected by Climate Change	Workers Who Experienced Climate Change	Experienced Manifestations of Climate Change
Bangladesh	78%	87%	Increased disasters (cyclones), decreased rainfall, high temperatures, colder winters
Cambodia	90%	95%	Increased temperatures, colder winters
Indonesia	80%	88%	Higher temperatures, colder winters, rainfall changes
Philippines	89%	94%	Increased temperatures, extreme weather events
Sri Lanka	54%	60%	Higher temperatures, colder winters, rainfall fluctuations
Vietnam	79%	88%	Higher temperatures, more rainfall and extreme weather events

Individual Income and Family Income

Country	Individual Income (Local Currency)	Family Income (Local Currency)
Bangladesh	BDT 10,200	BDT 22,000
Cambodia	KHR 1,000,250	KHR 1,900,475
India	INR 11,000	INR 25,000
Indonesia	IDR 2,300,000	IDR 3,300,000
Myanmar	MMK 300,000	MMK 500,000
Philippines	PHP 7,000	PHP 13,000
Sri Lanka	LKR 33,500	LKR 50,000
Vietnam	VND 6,000,000	VND 12,500,000





Calorie Intake Per Country

AFWA benchmark
for daily caloric
consumption

3000
Calories

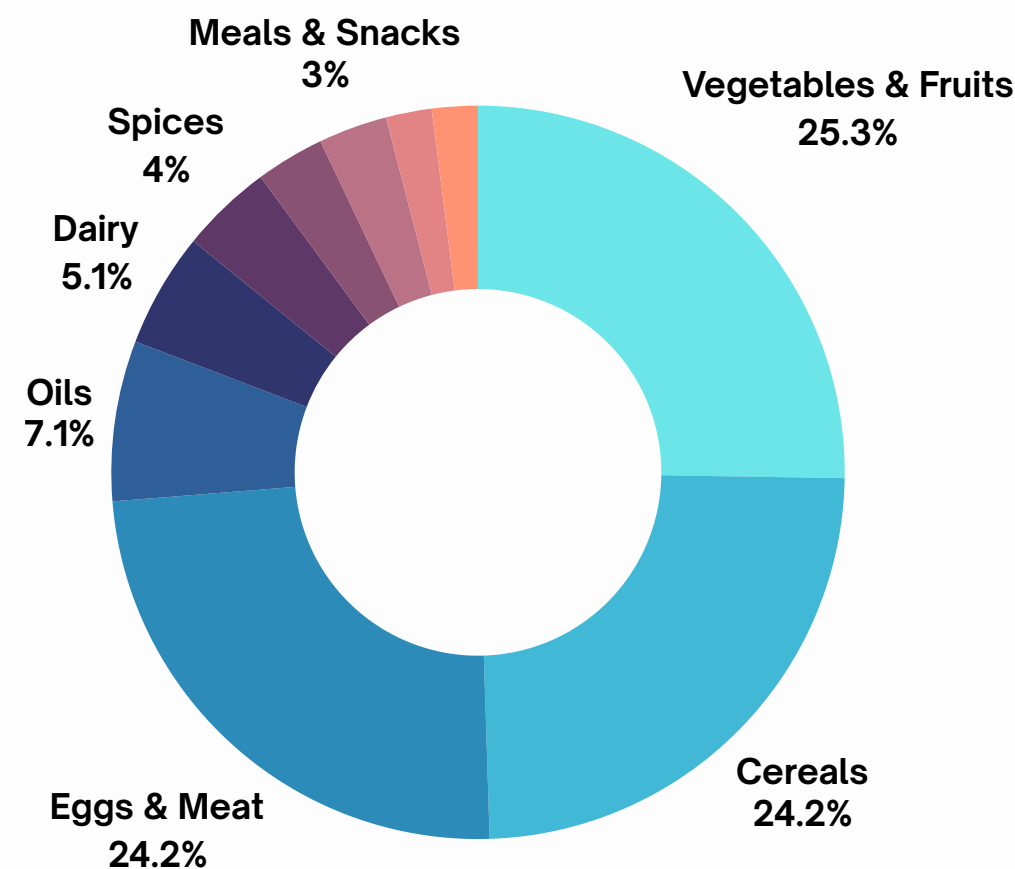
ILO benchmark
for daily caloric
consumption

2950
Calories

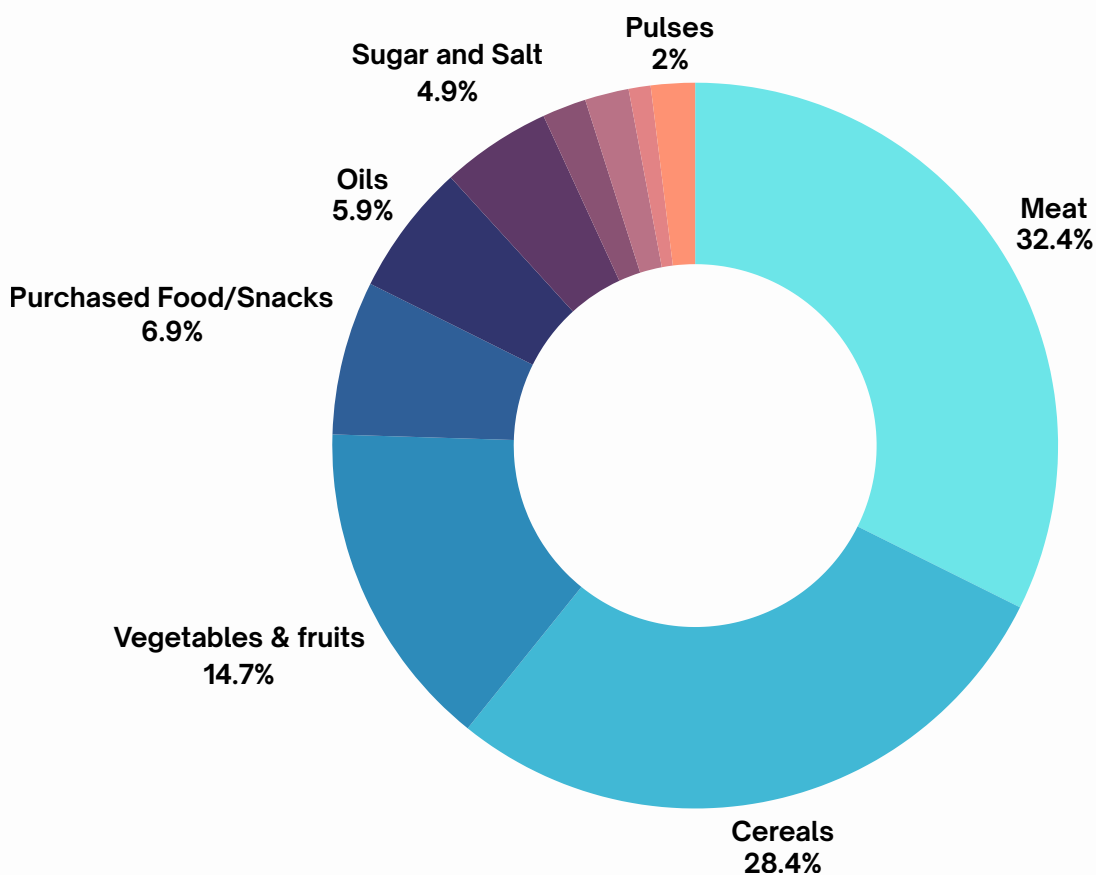
Country	Average Daily Consumption (Calories)	Government Caloric Poverty Line (Calories)
Bangladesh	1950.57	2122
Cambodia	2162	2200
India	2286	2100
Indonesia	1963	2150
Myanmar	1845	2238
Philippines	2057	2000
Sri Lanka	1951	2030
Vietnam	2039	2100

Breakdown of Food Expenditure

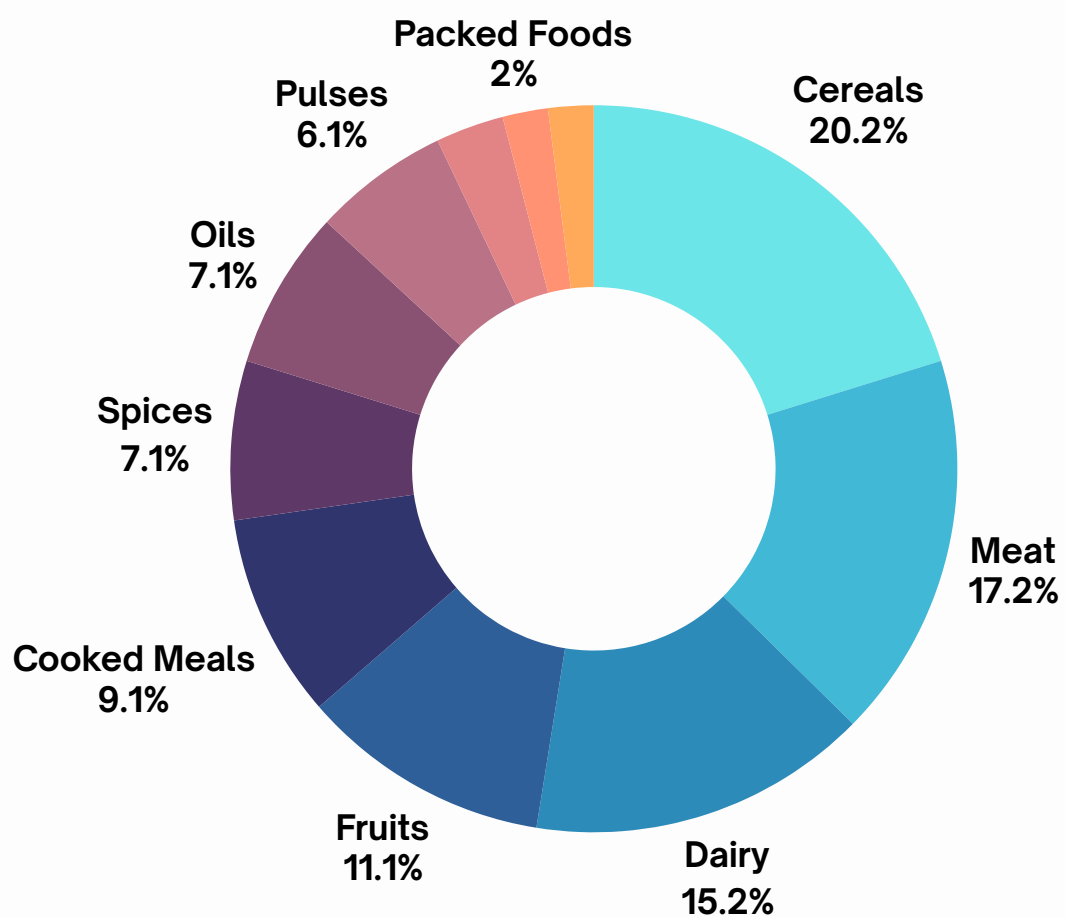
Bangladesh



Cambodia

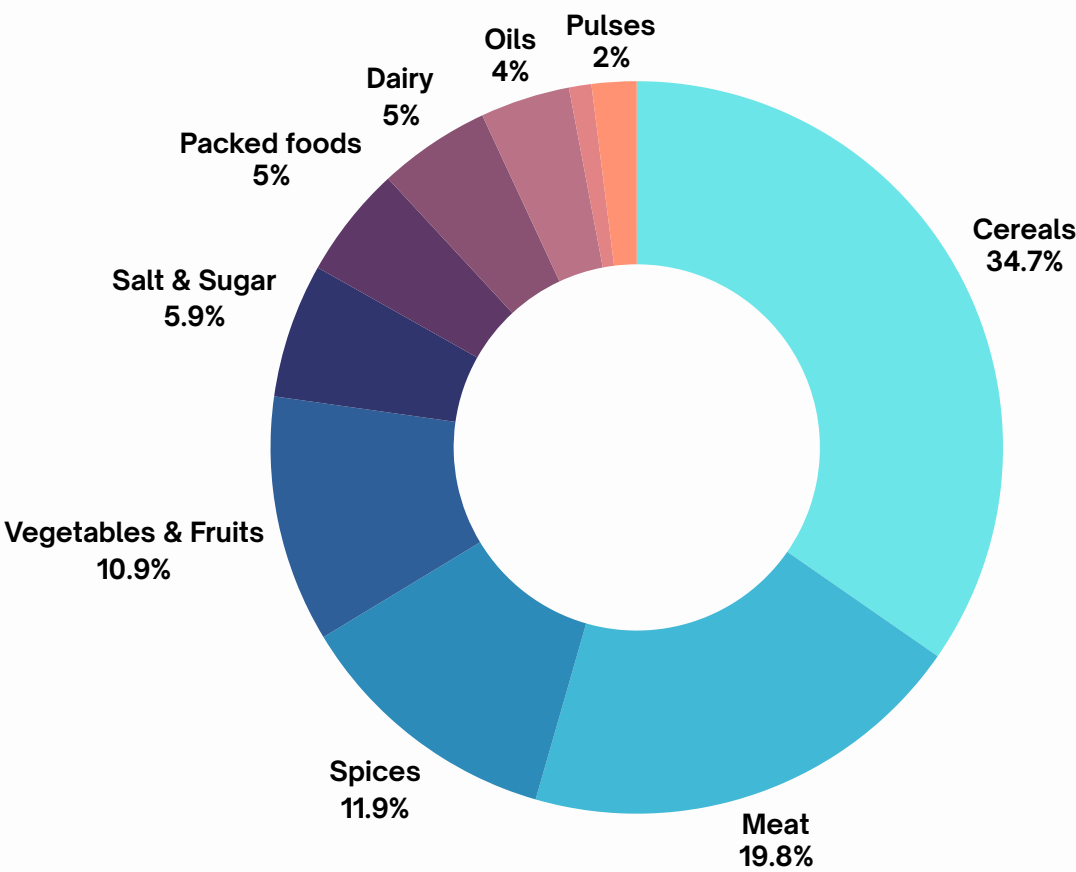


India

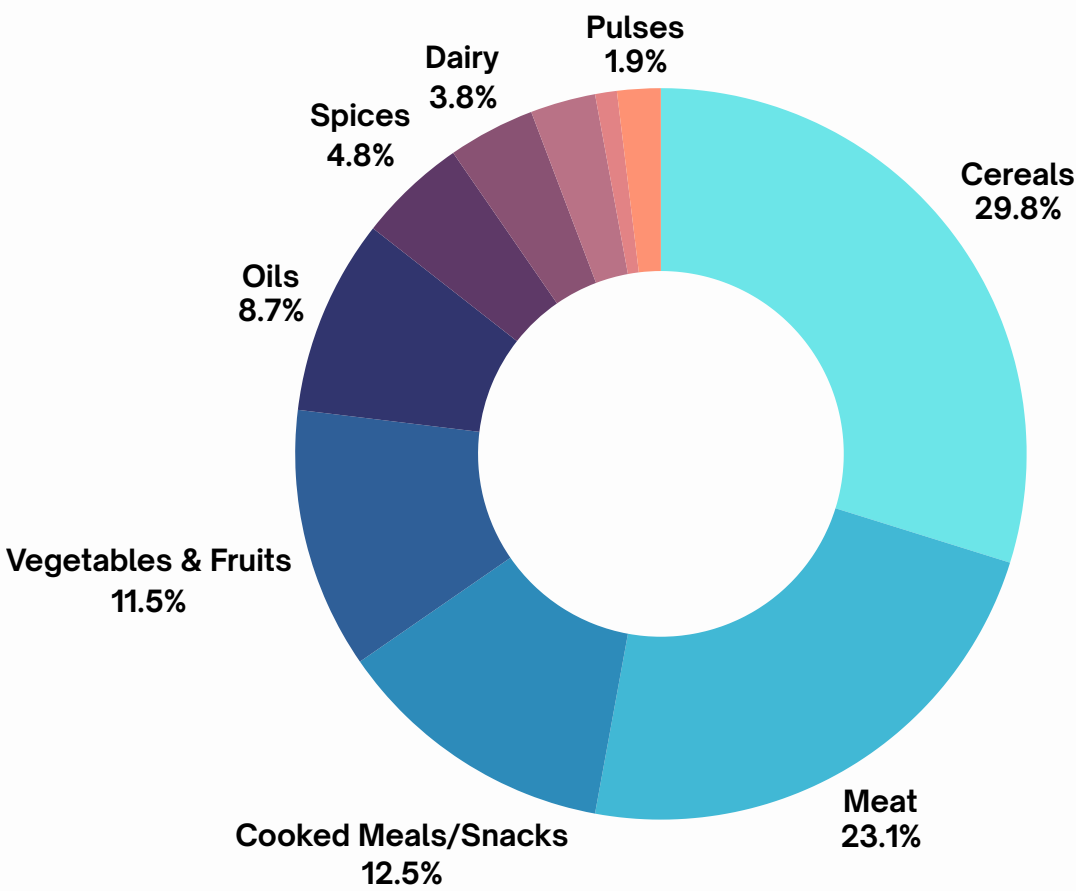


Breakdown of Food Expenditure

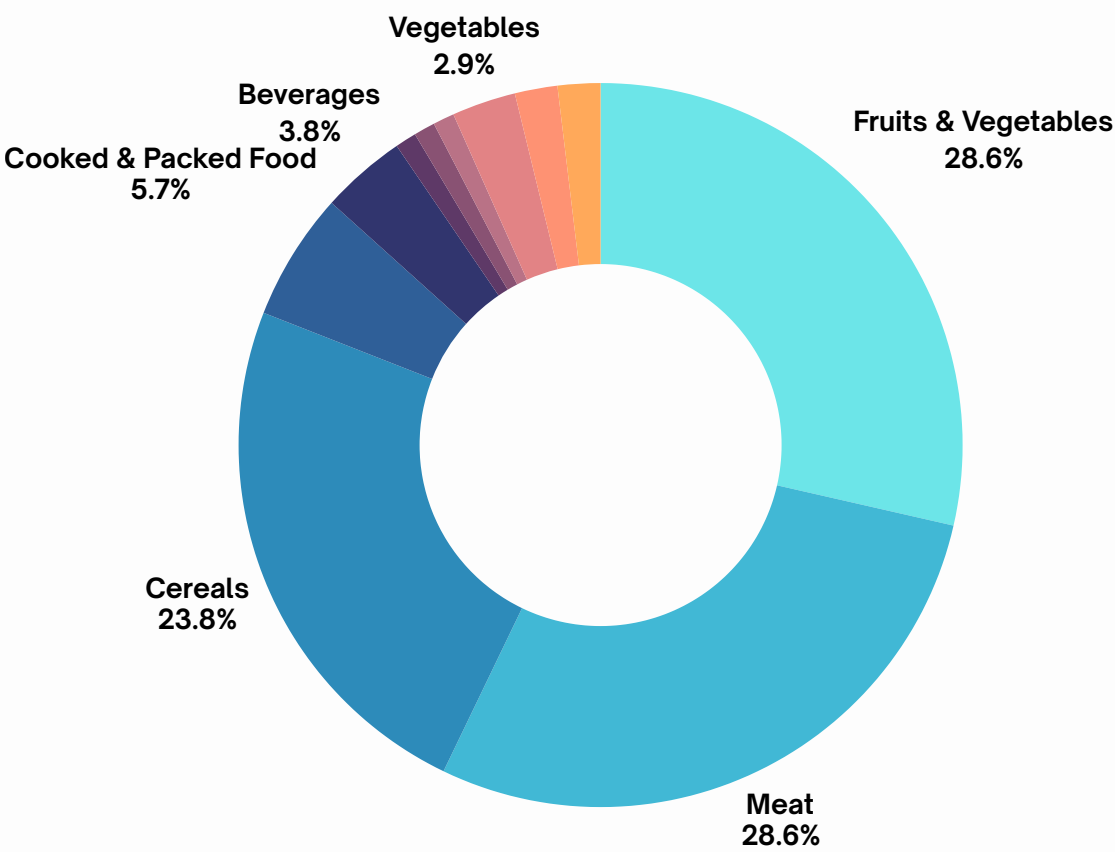
Indonesia



Myanmar

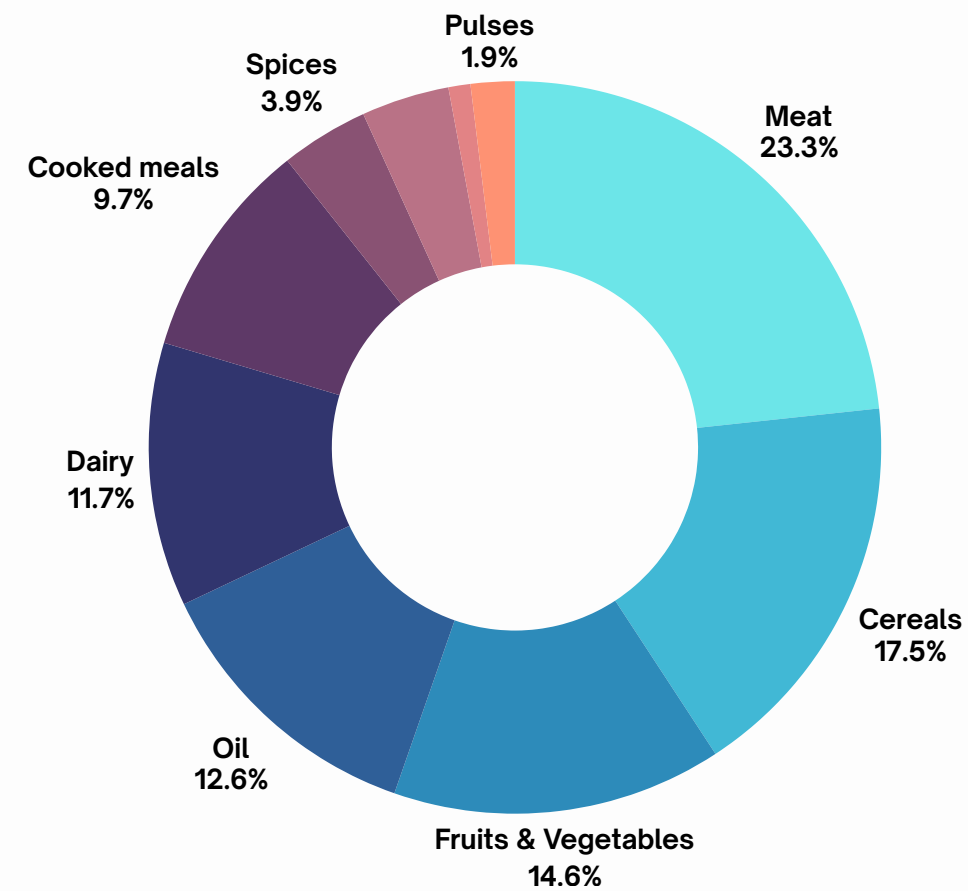


Philippines

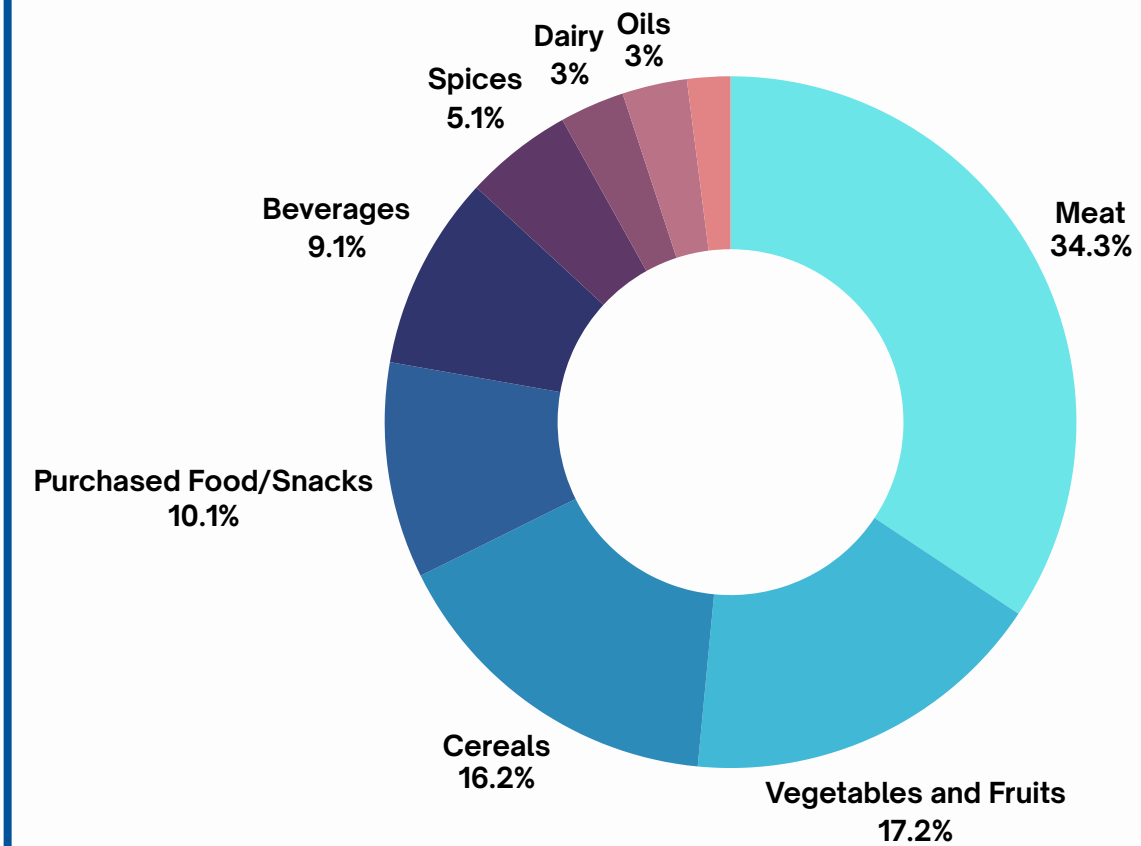


Breakdown of Food Expenditure

Sri Lanka:



Vietnam

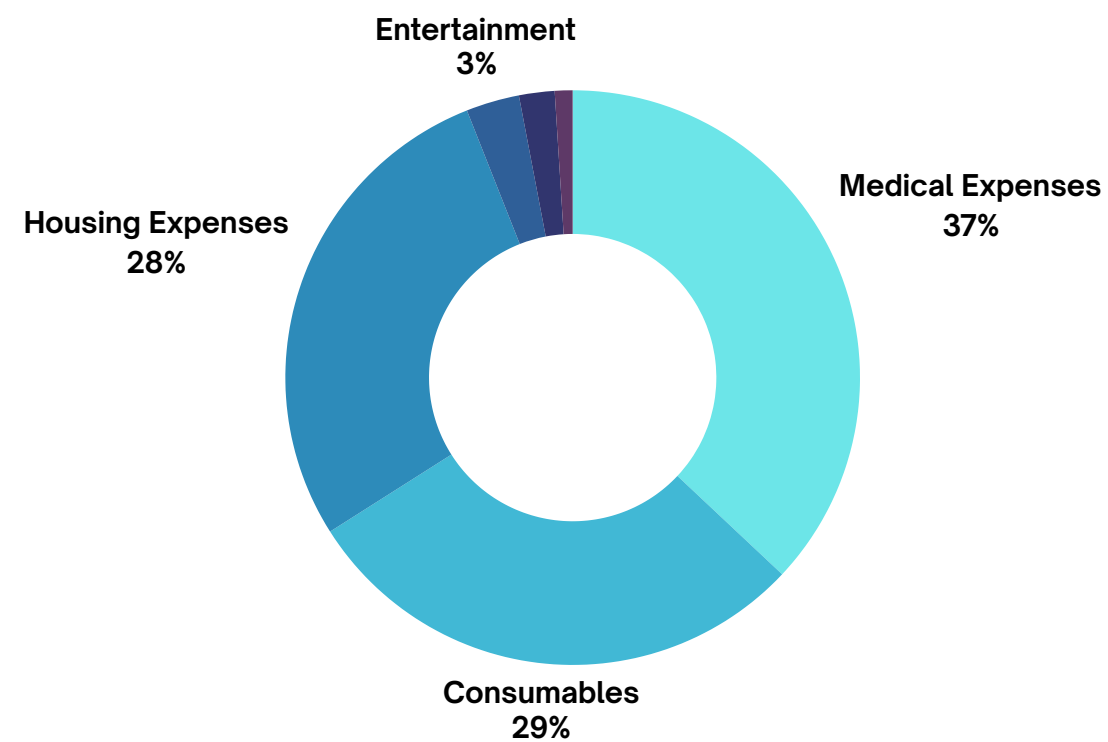


Income, Expenditure, Nutrition & Food Cost

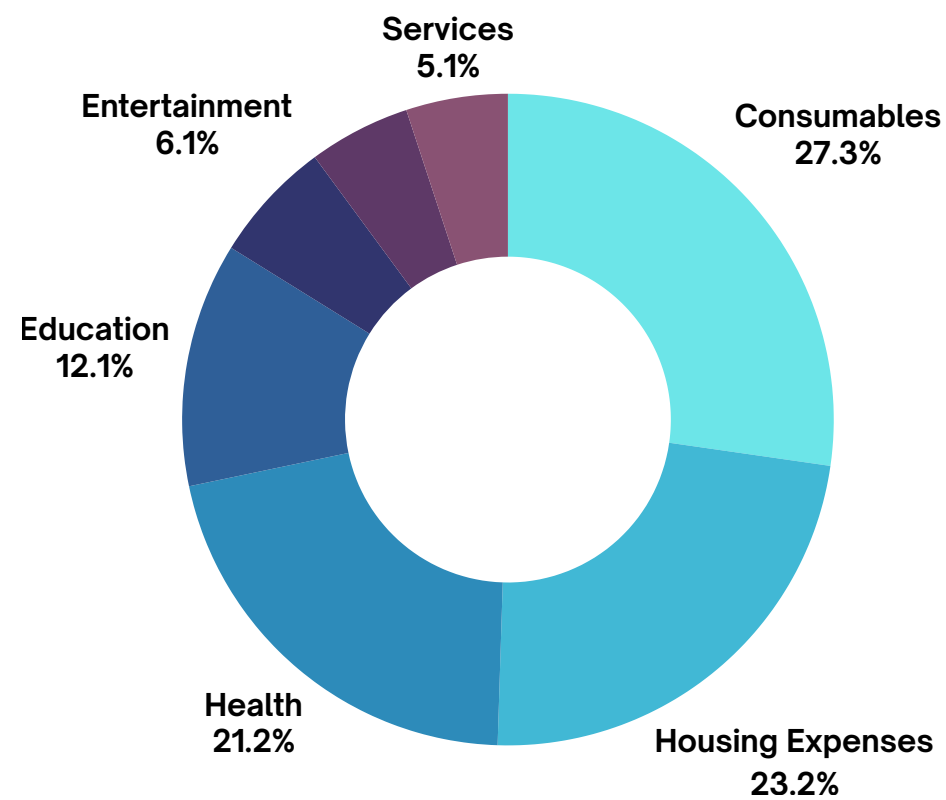
Country	Currency	Individual Income	Family Income	Expenditure	Kcal/day	Cost per 1000 calories (in local currency)
Bangladesh	BDT	10,200	22,000	36,372	1,950.57	0.097
Cambodia	KHR	1,000,250	1,900,475	1,632,408	2,162.00	4.848
India	INR	11,000	25,000	21,095	2,286.00	0.066
Indonesia	IDR	2,300,000	3,300,000	5,402,935	1,962.77	14.069
Myanmar	MMK	300,000	500,000	435,022	1,845.00	1.240
Philippines	PHP	7,000	13,000	27,111	2,057.00	0.056
Sri Lanka	LKR	33,500	50,000	88,803	1,951.00	0.217
Vietnam	VND	6,000,000	12,500,000	9,770,000	2,039.00	19.90

Breakdown of Non-Food Expenditure

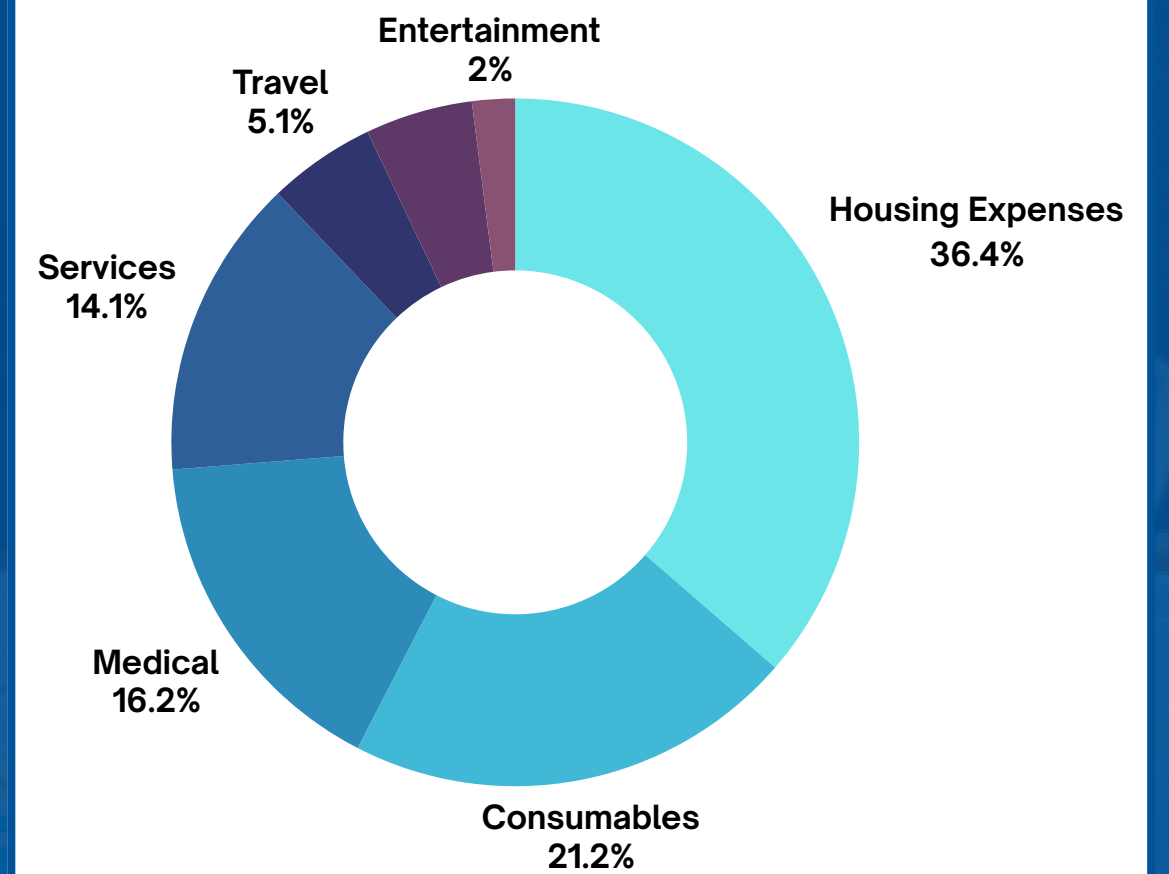
Bangladesh



Cambodia

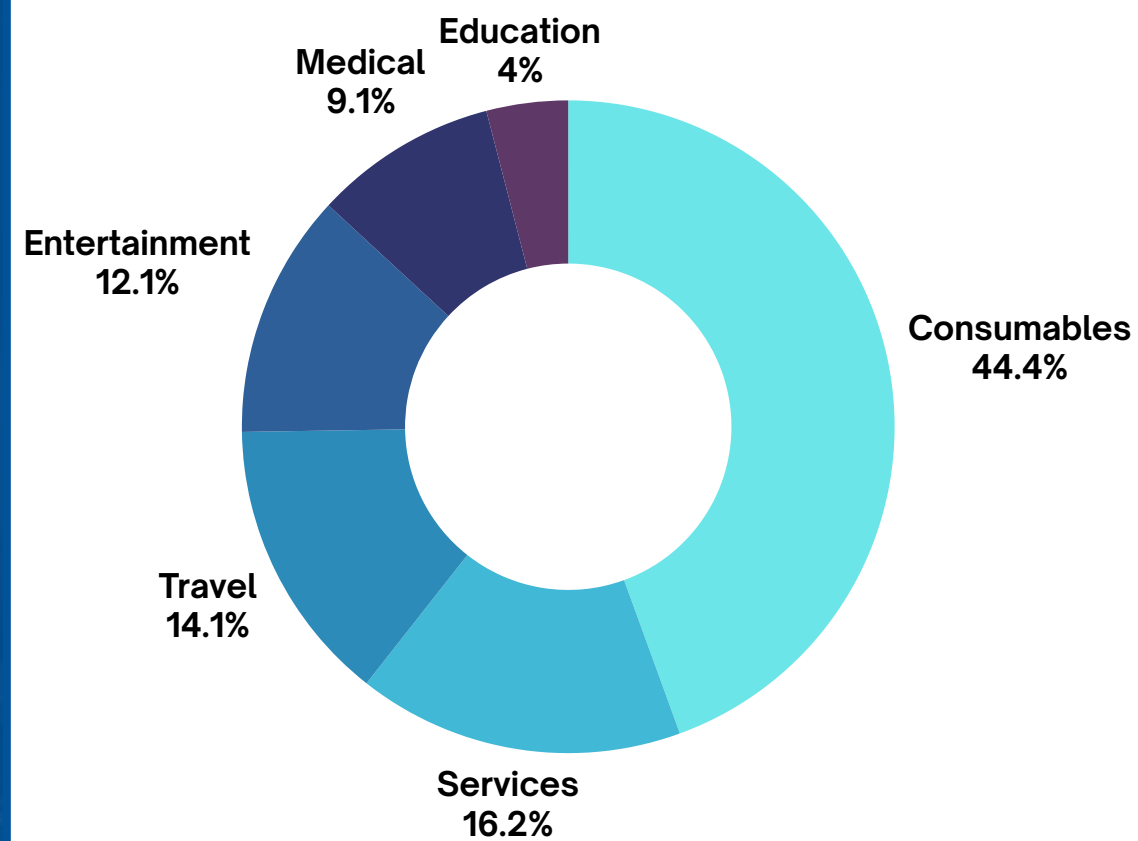


India

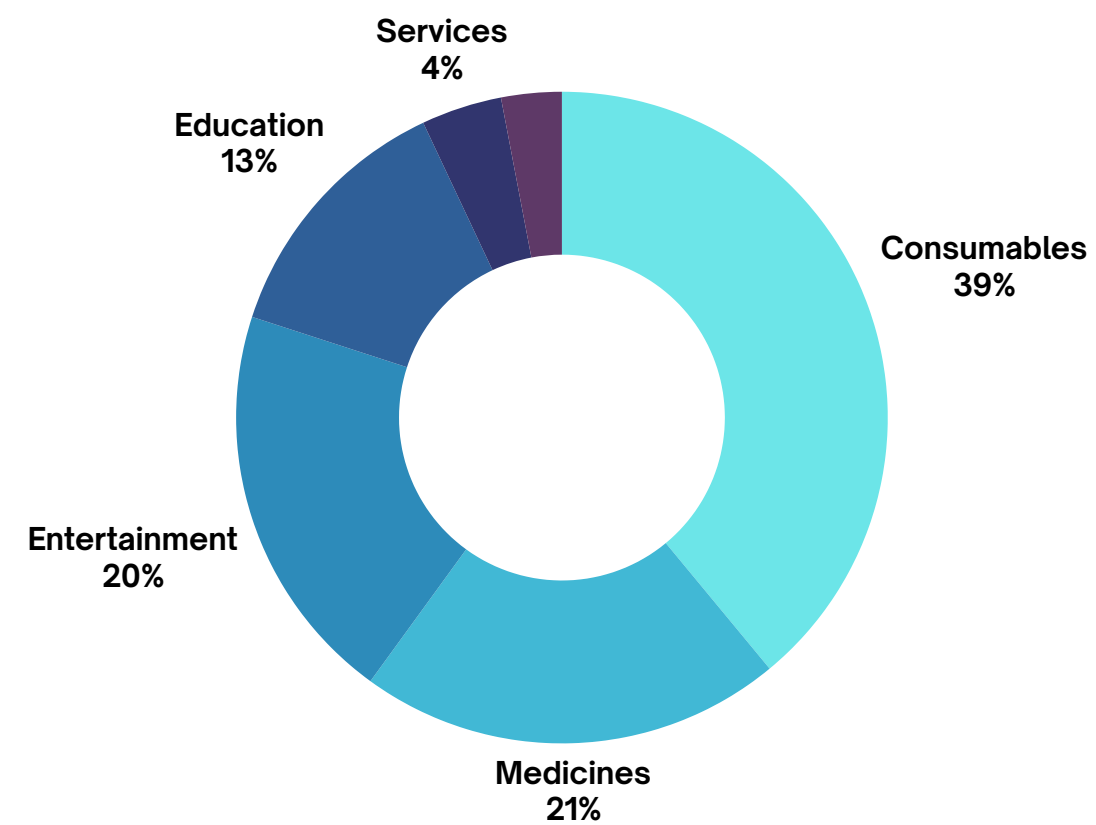


Breakdown of Non-Food Expenditure

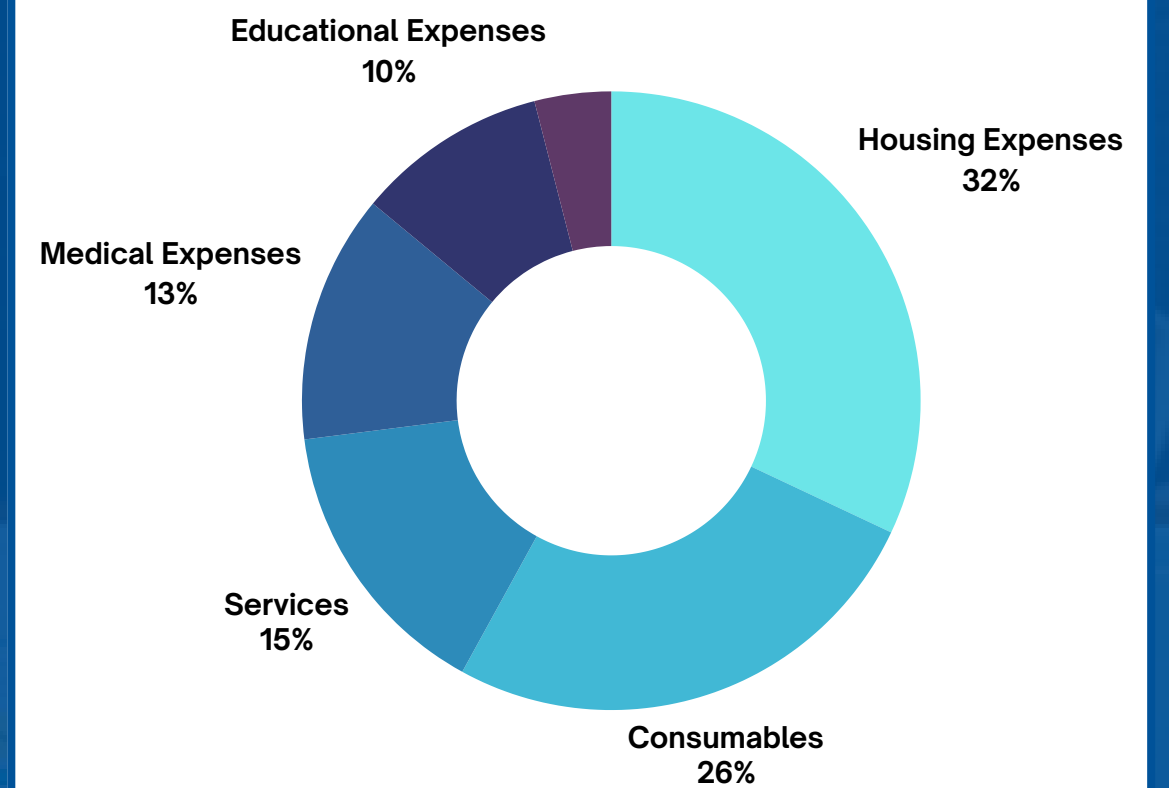
Indonesia



Philippines

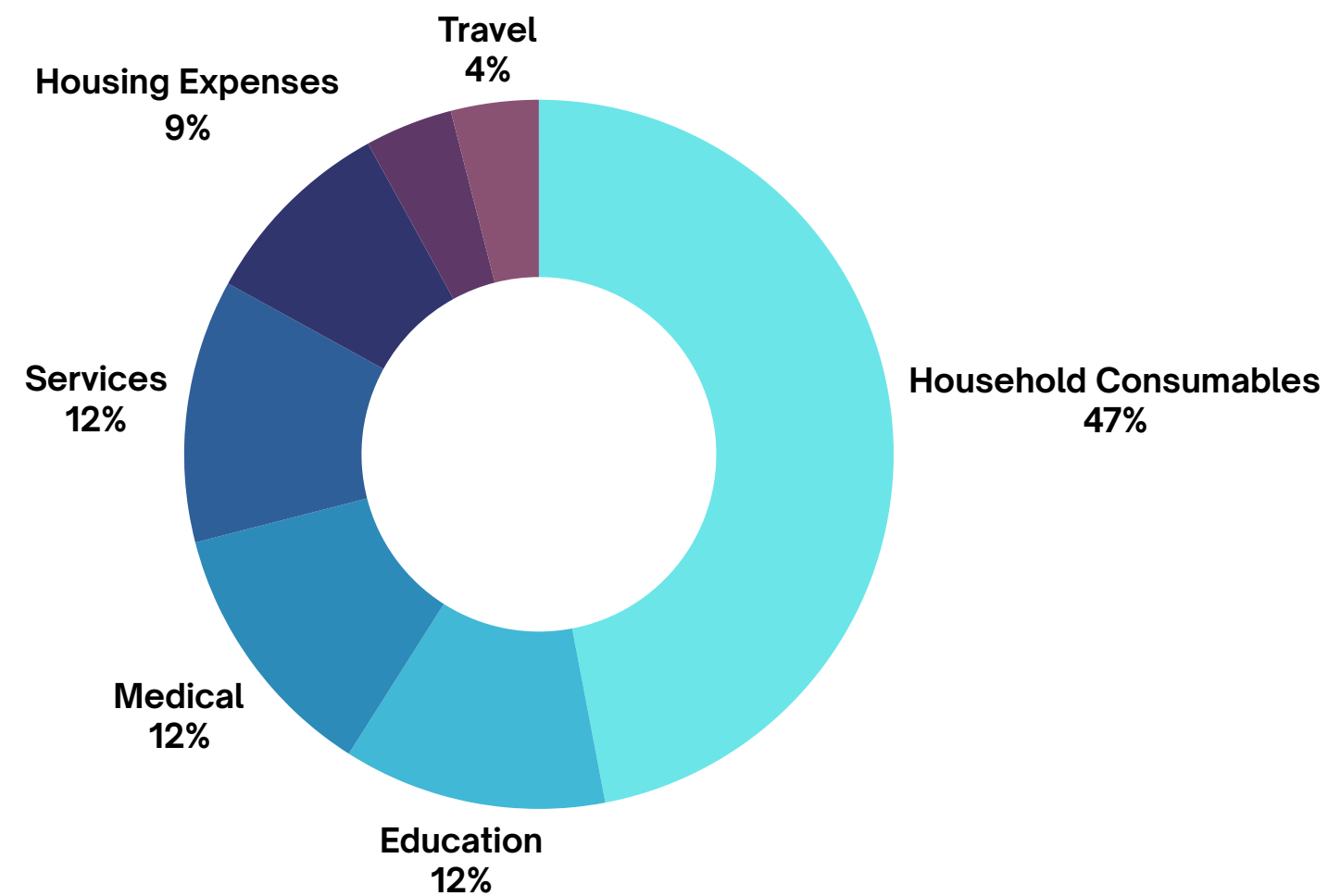


Myanmar

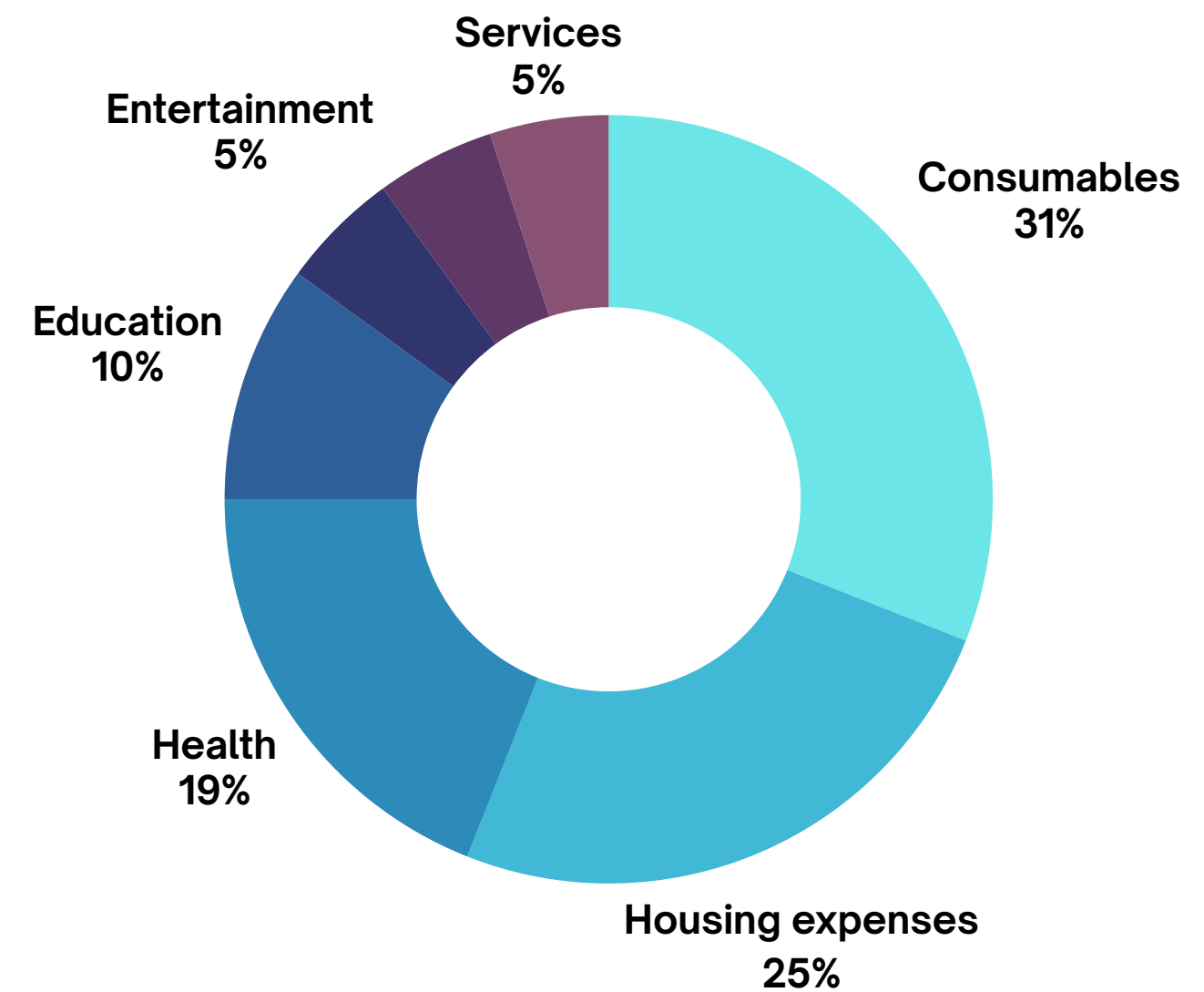


Breakdown of Non-Food Expenditure

Sri Lanka



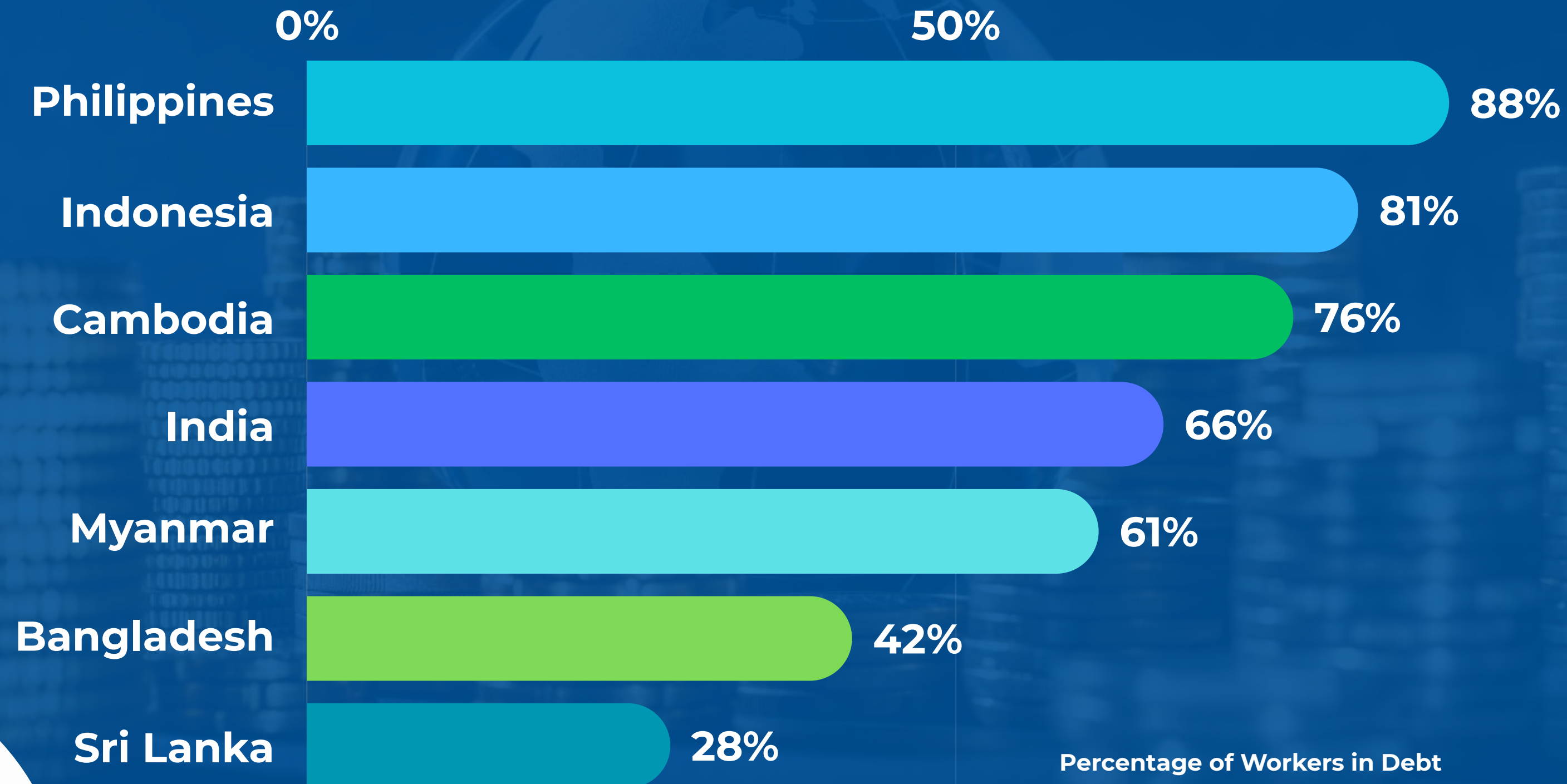
Vietnam



Overall Assessment of Monthly Living Costs

Country	Currency	Food Expenses for 3 Required – 3000 Calories/Day	Non-Food Expenses	Total Estimate of Living Cost (food and non-food)
Bangladesh	BDT	26,271.21	32,109.26	58,380.48
Cambodia	KHR	1,308,991.32	1,599,878.29	2,908,869.61
India	INR	17,764.09	21,711.67	39,475.76
Indonesia	IDR	3,798,737.96	4,642,901.95	8,441,639.91
Myanmar	MMK	334,874.17	409,290.66	744,164.83
Philippines	PHP	15,244.29	18,631.91	33,876.20
Sri Lanka	LKR	58,658.26	71,693.42	130,351.68
Vietnam	VND	5,397,192.12	6,596,568.14	11,993,760.26

Debt Prevalence Among Garment Workers



The Gap Between Individual Wage and Living Wage

Country	Expenditure	Wage	Living Wage	Monthly Wages Share of Actual Expenses	Monthly Wage Share of Living Wages
Bangladesh	BDT 36,372	BDT 10,200	BDT 53,828.97	28%	19%
Cambodia	KHR 1,632,408	KHR 1,000,250	KHR 2,641,890.86	61%	38%
India	INR 21,095	INR 11,000	INR 34,170.46	52%	32%
Indonesia	IDR 5,402,935	IDR 2,300,000	IDR 9,003,687.42	43%	26%
Myanmar	MMK 435,022	MMK 300,000	MMK 874,742.65	69%	34%
Philippines	PHP 27,111	PHP 7,000	PHP 36,218.58	26%	19%
Sri Lanka	LKR 88,803	LKR 33,500	LKR 158,353.45	38%	21%
Vietnam	VND 9,770,000	VND 6,000,000	VND 12,453,835.59	61%	48%

Relevance for Women Workers and Unions

- The consumption survey data provides a robust basis for women workers to demand a living wage that encompasses not just basic needs, but also a **dignified standard of living for themselves and their families.**
- The survey findings expose the **vast chasm between current poverty-level minimum wages and the living wage standard** required to sustain women workers and their families. This evidence strengthens the collective bargaining efforts of unions.
- AFWA's cross-border methodology **enables garment workers' unions across Asia to collectively demand** a regional living wage from brands, transcending national boundaries.
- The survey's emphasis on the actual consumption requirements of workers and their families establishes a benchmark that **can be leveraged to hold brands accountable and drive industry-wide reforms.**





Relevance for Brands:

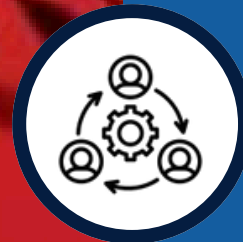
From 'Commitment' to Measurable Impact



Brands can use the survey findings to understand the daily realities faced by workers in their supply chains that social audits cannot encompass, and minimum wage laws cannot rectify.



Brands should be compelled by this data to engage in dialogue with AFWA and trade unions to implement concrete measures that bridge the gap between minimum and living wages.



Brands must restructure their purchasing practices and pricing mechanisms to redistribute revenue and enable their supplier factories to pay living wages.

Relevance for Policymakers:

Prioritizing Women Workers' Wellbeing and Dignity



AFWA's survey findings provide compelling evidence in guiding policymakers to reform wage policy to address the systemic poverty faced by women garment workers. And uphold workers' rights to collectively bargain for higher wages.



Policymakers can use the survey data to better understand the gendered dimensions of wage inequality and create and implement policies that reduce women's risk of financial hardship during times of crises and ensure their resilience.



Governments can develop policies in consultation with trade unions for progressive realization of living wage, ensuring women workers can support their families and live a life of dignity.



Facilitating Dialogue for Worker-Centered Change

- The consumption survey data is a **catalyst for dialogue** between brands, trade unions and suppliers to address the poverty, malnourishment and indebtedness faced by garment workers.
- Trade unions can leverage the survey data to bargain with suppliers, brands and governments and demand changes that **prioritize the needs of workers** and their families, and access to fundamental labor rights.



Acknowledgments

AFWA's 2024 Survey Data Findings and Wage Figures Formulation represents a collaborative effort between the AFWA and trade unions across eight Asian countries.

Bangladesh

- Bangladesh Garment and Industrial Workers Federation (BGIWF)
- Bangladesh Garments Labor Congress (BGLC)
- Bangladesh Garment & Sweaters Workers Trade Union Center (BGSWTUC)
- Garments Workers Unity League (GWUL)
- Green Bangla Garments Workers Federation (GBGWF)
- Motherland Garments Workers Federation (MGWF)
- Textile Garment Workers Federation (TGWF)

Cambodia

- Cambodian Alliance of Trade Unions (CATU)
- Coalition of Cambodian Apparel Workers Democratic Union (CCAWDU)
- Federation of Free Trade Union of Workers of the Kingdom of Cambodia (FTUWKC)
- Federation Union of Free and Independent (FUFi)
- Independent Trade Union Federation (INTUFE)
- Federation Union of Labor Influences (FULI)

Acknowledgments

India

- Fedina
- Garment Labour Union (GLU)
- Garment Workers Welfare Union (GWWU)
- Garment and Allied Workers Union (GAWU)
- Karnataka Garment Workers Union (KGWU)
- Munnade

Indonesia

- Federasi Serikat Buruh Garmen Kerajinan Tekstil Kulit dan Sentra Industri (FSB Garteks)
- Serikat Pekerja Nasional (SPN)

Philippines

- PIGLAS-SENTRO
- Federation of Free Workers
- Partido Manggagawa
- TELAstory

Sri Lanka

- Commercial and Industrial Workers Union (CIWU)
- Dabindu Collective
- Revolutionary Existence for Human Development (RED) Union
- Sharamabimani
- Standup Movement Lanka
- Textile Garment and Clothing Workers Union (TGCWU)

Add

- Additional Support: Workers' rights organizations in Vietnam and Myanmar



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The 2024 Living Wage Numbers



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