

# National Consultation on Improving Working Conditions and Increasing Productivity of Salt Sector in Bangladesh

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April 30, 2025

Dhaka, Bangladesh



International  
Labour  
Organization

INNOCVISION  
Research | Technical Assistance | Project Management



From October 2024 to May 2025, INNOVISION Consulting (an implementing partner for ILO ISEC project in Cox's Bazar) worked for ILO to undertake a series of interventions to address the issues of climate vulnerability, occupational health and safety, decent work practices, women and youth empowerment through systemic interventions in the Salt value chain and market systems in Cox's Bazar, Bangladesh. This presentation highlights the experience of the project and defines the scope for future.



# Innovision

Innovision Consulting is an international advisory and management consulting company. Our research, technical assistance, project management, and capacity development services support international development partners, multinationals and start-ups, national private sector, not-for-profit organizations, and government agencies to facilitate sustainable and inclusive growth.

Over the last 16 years, we have undertaken more than 480 projects in 22 countries in Asia and the Pacific, the Middle East, and North Africa (MENA), West Africa, and Southern Africa. Our works primarily focus on SDG 17 - Strengthen the means of implementation and revitalize the global partnership for sustainable development.

Innovision has long-standing partnerships with both Swisscontact and SDC.



22		160+		480+		1.5m n~
Countries		Clients		Projects		beneficiary households

# Background of the Project

The ISEC project aims to economically empower local communities in Cox's Bazar through gender-sensitive skills development linked to employment and self-employment in high-growth sectors

It adopts a "leaving no one behind" approach, focusing on challenges faced by women, youth, ethnic and religious minorities, and persons with disabilities

Targeting youth aged 18 to 35, the project includes approximately 42% women among its beneficiaries.

The project takes a public-private partnership approach, involving government, public agencies, business owners, and labor representatives

Collaborating with BRAC and UNDP, the project addresses the needs of economically vulnerable groups through scalable solutions

The project aligns with national policies and aims to enhance employability for NEET youth, women, and persons with disabilities through market-driven interventions

# Why Salt Sector?

## Natural & Market Advantages

- High-salinity coastal waters, long dry season, and abundant sunlight enable low-cost, high-yield solar evaporation
- Small-scale processing and packaging investments

## Significant Economic Footprint

- Nearly 40,000 farming households and 55,000 skilled labourers directly engaged (2022–23); over 500,000 workers in the value chain nationally
- Higher domestic demand for human consumption and industry.

## Value Addition & Diversification Potential

- Forward-backward linkages into food processing, leather, textiles, pharmaceuticals, and animal feed
- Artisanal flavored salts, beauty-oriented products, and fish-drying have higher margins

# Strategic Constraints & Sectoral Challenges

## Core Market Constraints



- ☐ Low productivity & high costs
- ☐ Poor product quality and post-harvest losses (low-sodium chloride level, moisture/dust reduce quality)
- ☐ Informal, low-paid labour
- ☐ Weak value-chain governance
- ☐ Stifled innovation & limited diversification

## Supporting Function Constraints



- ☐ Limited training and extension services
- ☐ Limited access to formal finance
- ☐ Constrained producer associations & unions

## Rules & Regulations Constraints



- ☐ Limited occupational safety and health (OSH) practices & labour enforcement
- ☐ Limited regulation enforcement of salt import quotas
- ☐ Import bans and high tariffs

# Demand Side Analysis



## Overall domestic demand

- Dyeing **40%**
- Tannery **35%**
- Sugar **15%**
- Feed **5%**
- Iodized-salt processors **5%**

Human consumption ~**40%**

Industrial ~**45%**

Fisheries & livestock ~**15%** of total salt sales

## Key industrial buyers



### Projected demand (million MT)

Year	Processed	Crude (incl. 17% loss)
2023–24	2.198	2.648
2024–25	2.353	2.835
2025–26	2.530	3.048

# Demand Side Analysis

## Key Growth Drivers

- › Rising income & urbanisation spur demand for **high-quality, iodized salt**
- › Expansion in textiles, leather, feed & sugar industries underpins **40% industrial salt** share
- › Diversified **cottage products** like flavoured/artisanal salts for tourism markets
- › Steady requirement of **fish-drying enterprises** for unprocessed salt
- › Mandatory **iodization policy** ensuring a stable baseline demand for human consumption

## Strategic Imperatives

- ✓ **Scale up** vacuum/centrifuge capacity to serve premium urban markets
- ✓ **Develop** tailored quality grades and logistics for industrial buyers
- ✓ **Explore** bulk and branded offerings for growing fisheries & livestock segments
- ✓ **Support** small producers to capture higher margins in artisanal and fisheries markets



# Supply Side Analysis

## Production Trends & Capacity

- 2022–23 output: **2.23 MMT** (highest in 60 years), close to the 2.38 MMT target
- Cultivation area: Expanded from ~59,844 acres (2017–18) to **66,424 acres** (2022–23)
- Yield: National average rose from 29.23 MT/acre (2013–14) to **33.06 MT/acre** (2022–23)

## Processing Infrastructure

- Mill network (2022–23): **55 manual and 3 centrifuge mills**, and zero vacuum mills
- All **6 national vacuum plants** sit outside the district due to gas access

## Logistics & Infrastructure

- Transport: Teknaf→Chittagong/Dhaka **by road**; other upazilas **via Moheshkhali and Karnafuly river**
- Storage: Field pits lined with **polythene**—low cost but high spoilage risk; **private mill warehouses** for semi-refined salt

## Input & Finance

- High-quality polythene, pumps, and brine sources—often **overpriced** via intermediaries
- **> 90%** of farmers depend on trader loans at **5–10% price cuts**

# Supply Side Analysis

## Extension Service

- Training: No private **technical/vocational** training services for farmers
- **Government extension** reached ~2,000 farmers in 2022 only

## Import Regulation & Gaps

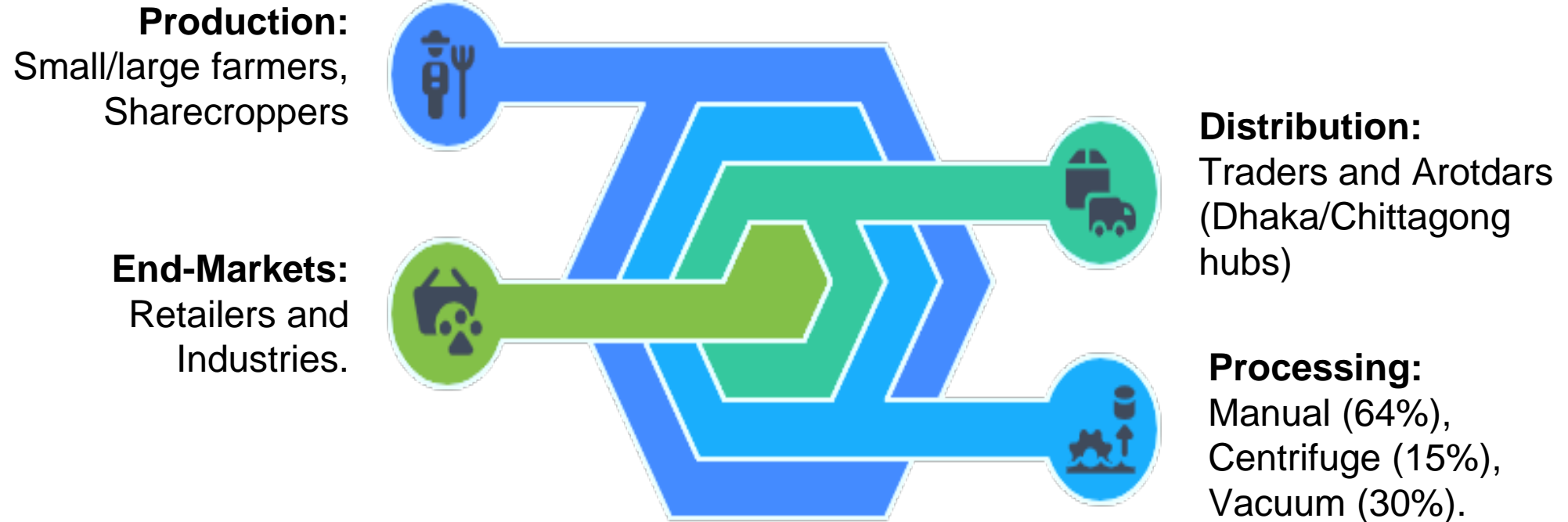
- Tariffs: ~ **90% +** on salt imports; the government sets **annual import quotas** based on BSCIC gap analysis
- Industrial shortfall: Despite high domestic output, Bangladesh **imports 250,000–400,000 MT/yr** of industrial salt due to **quality needs**

## Strategic Imperatives

- ✓ **Introduce** cost-effective storage solutions (drying yards, covered warehouses)
- ✓ **Upgrade processing** by expanding centrifuge/vacuum capacity close to production zones
- ✓ **Scale up** field-level extension services
- ✓ **Facilitate** formal credit schemes

*Source: Rapid market analysis of the salt value chain in Cox's Bazar, Bangladesh (ILO, 2024)*

# Value Chain Overview



*Source: Rapid market analysis of the salt value chain in Cox's Bazar, Bangladesh (ILO, 2024)*





# PROJECT CONTRIBUTIONS





**BETTER WORKING  
CONDITIONS**



## Purpose

Improve **occupational safety, health, and working conditions** for salt farmers and mill workers.

Raise **awareness** about workplace hazards and hygiene practices.

Facilitate **access to healthcare services** and promote fair labour practices through multi-stakeholder collaborations.

Facilitate the formation of a **workers' association** to enhance collective bargaining.

## Target Beneficiaries

**Salt farmers and mill workers**

# BETTER WORKING CONDITIONS

## Activities

Conducted baseline survey, identifying **276 salt farmers and mill workers**; assessed OSH gaps, lack of drinking water, and hygiene facilities.

Prepared training module and delivered OSH training to **185 workers and farmers** by a trainer from BSCIC Cox's Bazar.

Organized **six healthcare campaigns**; partnered with ACI Pure Salt, Eidgaon Adhunik Hospital, Fouad Al khateeb hospital and Gonoshasthaya Kendra, Cox's Bazar for **technical support** (Doctor consultation, tests, and medicine distribution).

## Achievement

**185 workers and farmers** trained on OSH (exceeding targets in both farmer and worker groups).

**444 beneficiaries** received medical consultations, medicine and treatments; **185 health cards** distributed.

MoUs signed with **2 hospitals and 6 salt mills** to formalise collaboration; MoU in progress with BSCIC.

## Purpose

Improve **occupational safety, health, and working conditions** for salt farmers and mill workers.

Raise **awareness** about workplace hazards and hygiene practices.

Facilitate **access to healthcare services** and **promote fair labour practices** through multi-stakeholder collaboration.

Facilitate the formation of a **workers' association** to enhance collective bargaining.

## Target Beneficiaries

**Salt farmers and mill workers**

## BETTER WORKING CONDITIONS

### Activities

Issued **health cards offering at least 30% - 35% discount** at two local hospitals; Eidgaon Adhunik Hospital and Cox's Bazar Fual-Al-Khateeb Hospital.

Organized a **coordination workshop** at, Cox's Bazar with **over 30 salt farmers and mill workers**, by collaborating with ILO, NCCWE, and BSCIC.

Recommended upgrading **Salt Policy 2021** to incorporate OSH in the policy.

### Achievement

Fully operational **task force engaging six mills** to improve workplace conditions.

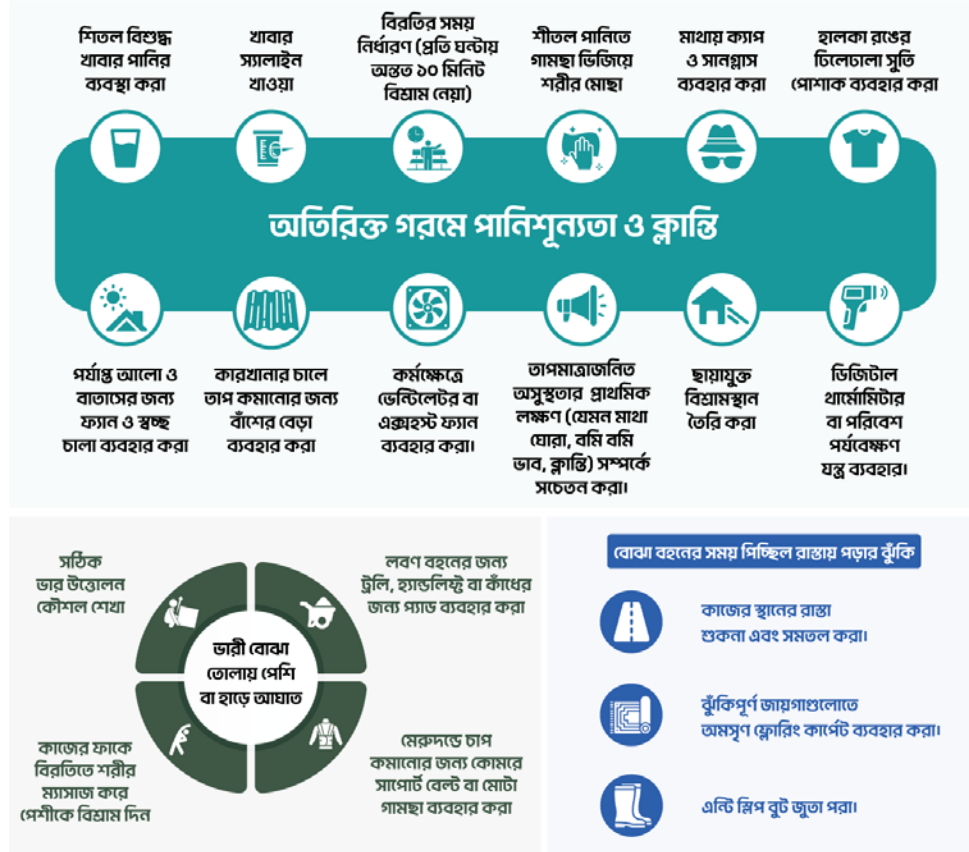
**Salt farmers and mill workers** from Chowfaldandi, Teknaf, Islampur, and Moheshkhali initiated the formation of a **trade union** to advocate for their rights and better conditions.

Workers and farmers are aware of **safety, healthcare, and hygiene initiatives**.

## পেশাগত সুরক্ষা ও স্বাস্থ্য (OSH) নির্দেশিকা

কক্সবাজারের লবণচাষী ও মিল শ্রমিকদের জন্য

প্রতিরোধমূলক ব্যবস্থা:



সহযোগিতায়

## Poster Prepared for OSH Training

**স্বাস্থ্যসেবা কার্ড**  
লবণ চাষি/ক্রাশিং মিল কর্মীদের জন্য

নাম: \_\_\_\_\_  
বয়স: \_\_\_\_\_  
ওজন: \_\_\_\_\_  
লিঙ্গ: \_\_\_\_\_  
রক্তের গ্রুপ: \_\_\_\_\_

**স্বাস্থ্যলিপি**

দীর্ঘমেয়াদি অস্থিসন্ধির ব্যথা? ☐ হ্যাঁ ☐ না  
ডিহাইড্রেশনের প্রবণতা? ☐ হ্যাঁ ☐ না  
শ্বাসপ্রশ্বাসের সমস্যা? ☐ হ্যাঁ ☐ না  
হিট স্ট্রোকের ঝুঁকি? ☐ হ্যাঁ ☐ না  
ক্ষতিগ্রস্ত ত্বক? ☐ হ্যাঁ ☐ না  
শ্রবণ সমস্যা? ☐ হ্যাঁ ☐ না  
দৃষ্টি সমস্যা? ☐ হ্যাঁ ☐ না

এই কার্ডটি প্রদান করেছে  
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+৮৮০২ ৮৮০ ২১৭৮, +৮৮০২ ৮৮২৬৩৮১  
info@innovision-bd.com

ISEC  
Improving Skills and  
Economic Opportunities  
for Cox's Bazar

INN VISION  
Research | Technical Assistance | Project Management

গণপ্রজাতন্ত্রী বাংলাদেশ সরকার

## Health Card Designed for Farmers and Workers





IMPROVED PRACTICES

## Purpose

Promote the adoption of **safe, efficient and quality salt production practices** among salt farmers.

Enhance **salt quality** to meet niche consumer market requirements.

## Targeted Beneficiaries

**Salt farmers and Mill owners**

## IMPROVED PRACTICES

## Activities

Training on **best practices** for quality salt for salt farmers.

Distribution of **six NaCl testing machines** in collaboration with City Group to measure sodium chloride levels and moisture content; awareness-raising conducted on their use.

**In-depth dialogues with farming communities** in Chowfoldondi, Teknaf, and Moheshkhali on ownership and usage of machines.

## Achievement

**94 farmers upskilled** in modern salt production techniques over **three areas** (Teknaf, Cox's Bazar Sadar, Moheshkhali).

**Six NaCl testing machines** were deployed for quality enhancement.



## Purpose

Promote the **adoption of safe and efficient salt production practices** among salt farmers and mill workers.

Enhance **salt quality** to meet niche consumer market requirements.

## Targeted Beneficiaries

**Salt farmers and Mill owners**

## IMPROVED PRACTICES

## Activities

Linking **farmers and mill owners to machine suppliers** in Dhaka for sustainable access.

Collaboration with City Group and mill owners **for salt quality improvement**.

**Industrial and sea salt assessments** conducted to explore niche markets; findings shared in a national event.

## Achievement

**Farmers and six mill owners** agreed to participate, ensuring future sustainability.

Collaborations with **City Group, mill owners, and salt farmers** were established.

Insights generated to **position sea salt products** for niche markets nationally and internationally.



**Salt farmers and Mill owner in Cox's Bazar observe a demonstration of a digital NaCl testing machine during a field-level training session to improve salt quality and promote shared ownership of quality control tools.**



## Improved Working Conditions for Women's Participation

- Though there is a limited involvement of women in salt production and salt crushing mills, women were actively included in the OSH training and healthcare services.
- Project emphasised improving working conditions equally for women workers.
- Linkage creation with health services and skills training to support women's economic participation.





***“There was no such health campaign for the mill workers where free doctor consultation, tests, and medicines were provided. This is the first time we get this opportunity and we hope it continues.”***

***- Salt mill worker from Islampur***

***“It’s the beginning of a movement to ensure that salt farmers and mill workers are no longer invisible. Through unity, knowledge, and leadership, we are laying the foundation for long-term labor justice in the salt industry.”***

***- A representative from NCCWE.***





# SYSTEMIC CHANGES

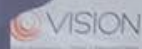


International  
Labour  
Organization



Canada

▶ "পেশাগত সুরক্ষা ও স্বাস্থ্য (OSH) উন্নয়নে  
জাতীয় শ্রমিক শিক্ষা সমন্বয় কমিটি (NCCWE) ও  
কক্সবাজারের লবণ শ্রমিকদের অংশগ্রহণে সমন্বয় কর্মশালা"



NCCWE





# Before-and-After Scenario

Indicator	Before (Oct 2024)	After (Apr 2025)
Occupational Safety & Health	<ul style="list-style-type: none"><li>• No formal OSH training for salt farmers or mill workers.</li><li>• No drinking water or hygienic toilets in fields or mills.</li><li>• The employer bore only the first-day health costs.</li></ul>	<ul style="list-style-type: none"><li>• 185 workers trained in OSH by the trainer from BSCIC, Salt Industries Development Office.</li><li>• A task force of 6 local mills to ensure safety and working condition.</li><li>• Health cards issued to 185 workers to access discounted services from two hospitals for continued health care.</li></ul>
Access to Healthcare	<ul style="list-style-type: none"><li>• No on-site medical services.</li><li>• Workers paid out of pocket for any treatment.</li></ul>	<ul style="list-style-type: none"><li>• 6 healthcare campaigns reached 444 farmers &amp; mill workers over four upazilas (Teknaf, Eidgaon, Cox's Bazar Sadar, and Moheshkhali).</li><li>• Free doctor consultations, tests, and medicines (ACI Pure Salt, Eidgaon Adhunik Hospital, Fuad-Al-Khateeb Hospital and Gonoshasthaya Kendra).</li><li>• 30%-35% discounted care at two local hospitals.</li></ul>

# Before-and-After Scenario

Indicator	Before (Oct 2024)	After (Apr 2025)
Quality Control & Equipment	<ul style="list-style-type: none"><li>• Limited training on improved production methods.</li><li>• Reliance on traditional manual methods.</li></ul>	<ul style="list-style-type: none"><li>• Introduced improved production method among new salt farmers' communities.</li><li>• Deployed 6 NaCl testing machines.</li><li>• Introduced shared-cost ownership model.</li><li>• Farmers connected with machine suppliers in Dhaka.</li></ul>
Policy & Institutional Support	<ul style="list-style-type: none"><li>• No mandatory OSH standards or sectoral safety committee.</li><li>• No farmers and workers' association or union.</li></ul>	<ul style="list-style-type: none"><li>• Recommended to embed workers' safety and well-being in the National Salt Policy.</li><li>• Initiated the formation of the salt farmers and mill workers association to ensure their rights.</li><li>• Partnership with BSCIC in progress.</li><li>• Task force collaboration formalised with local mills.</li></ul>

# Future Scopes and Recommendations

Embed OSH training and safety committee mandates into the National Salt Policy.

Scale up Cox's Bazar BSCIC-led training to all salt-producing upazilas.

Broaden health-card discounts for more salt farmer and mill workers.

Link farmers and small enterprises to market-development programmes and pilot niche-product launches.

Facilitate producer cooperatives and collective procurement of inputs for salt quality improvement.

Foster direct linkages with Industrial sub-sectors (leather, dyeing, food-processing, agriculture and feed producers, etc.)

Mobilise government institutes (BSCIC, local government), employers (large salt brands, crushing mills), Salt workers and farmers' associations to support for tripartite action plans.

# THANK YOU

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