

Amman Chamber of Commerce

From: Bangladesh Embassy, Jordan <mission.amman@mofa.gov.bd>
Sent: Thursday, February 13, 2025 2:53 PM
To: info@jocc.org.jo; info@aqabacc.com; Amman Chamber of Commerce; Ghaleb Hijazi; bangcons@scs-net.org
Subject: Investment Promotion and upcoming Bangladesh Investment Summit 2025
Attachments: MOFA information.xlsx; Press_Heatmap.pdf; Bangladesh Deck.pptx

Dear Sir,

Please find attached some materials related to investment potentials in Bangladesh.

The Embassy and the relevant Bangladesh government agencies remain ready to facilitate/fast track any potential investment in Bangladesh.

For any feedback, feel free to write to us.

It may be noted that there is going to be a large investment summit in Dhaka on 07-10 April 2025.

**The link of the summit for registration and other details are as follows:
(<https://summit.bida.gov.bd>)**

Best Regards,

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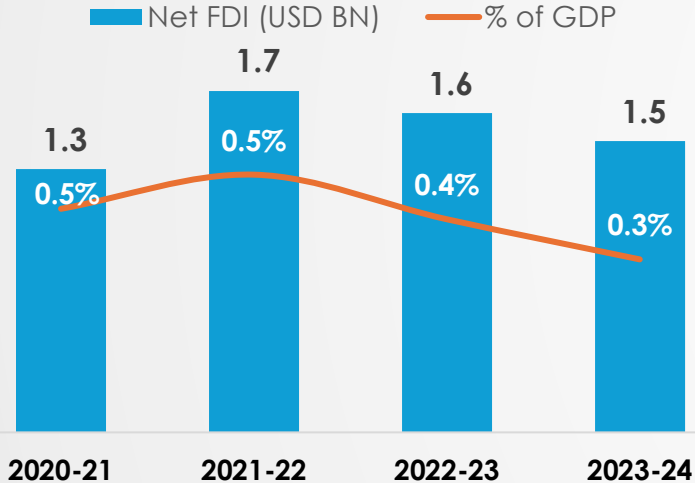
P.O. Box 5685 Amman 11183 Jordan



Bangladesh “FDI HEATMAP”

FDI Snapshot : Stagnant FDI inflow into Bangladesh, lack of structured investment promotion

Bangladesh : Declining contribution



Only 45% direct FDI, rest are intercompany loans or reinvestments

Bottlenecks with BIDA’s promotion efforts

- Lack of alignment on **priority sectors & segments**.
- Lack of **sectoral Insights & analysis**.
- Limited visibility on **long-term potential sectors**.
- Inadequate **competitor benchmarking**.
- Inability to set **specific investment goals**.



LEADING to WEAK, AD-HOC investment promotional efforts

Global references & Best Practices



BOI collaboration with Harvard.



Uses **investment heatmaps** to align FDI flows with national goals.



Uses geography based **FDI heatmap** to assess regional investment distribution,



Similar cases of using **prioritization frameworks** to structure FDI inflows.



Creation of a Bangladesh “FDI Heatmap”

 **BIDA is building Bangladesh’s FDI Heatmap!**



PARTNERING WITH INDUSTRY EXPERTS TO
MAP CRITICAL SECTORS & SUB-SEGMENTS
IDENTIFY PRIORITY COUNTRIES, REGIONS & ANCHOR INVESTORS

Multi-party “Private sector” consultation

Financial Institutions



Management Consultants



Business Associations



Development Partners





Creation of a Bangladesh “FDI Heatmap” : METHODOLOGY





1. Define : Key sector identification

Multi-party "Private sector" consultation

Financial Institutions



Management Consultants



Business Associations



Development Partners



19 Sectors shortlisted



Core Apparel



Advanced Textiles



Technical Textiles



Renewable Energy



Leather



Automotive & parts



Pharma



Plastic



Light Engineering



Footwear



Electronics



Semicon



Agro processing



Toy



Medical Devices



EV Battery



IT-es



Logistics



API



2. Develop :“Index” based scoring to identify priority sectors

Sectors shortlisted from private sector consultation



Core Apparel



Advanced Textiles



Technical Textiles



Renewable Energy



Leather



Automotive & parts



Pharma



Plastic



Light Engineering



Footwear



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EV Battery



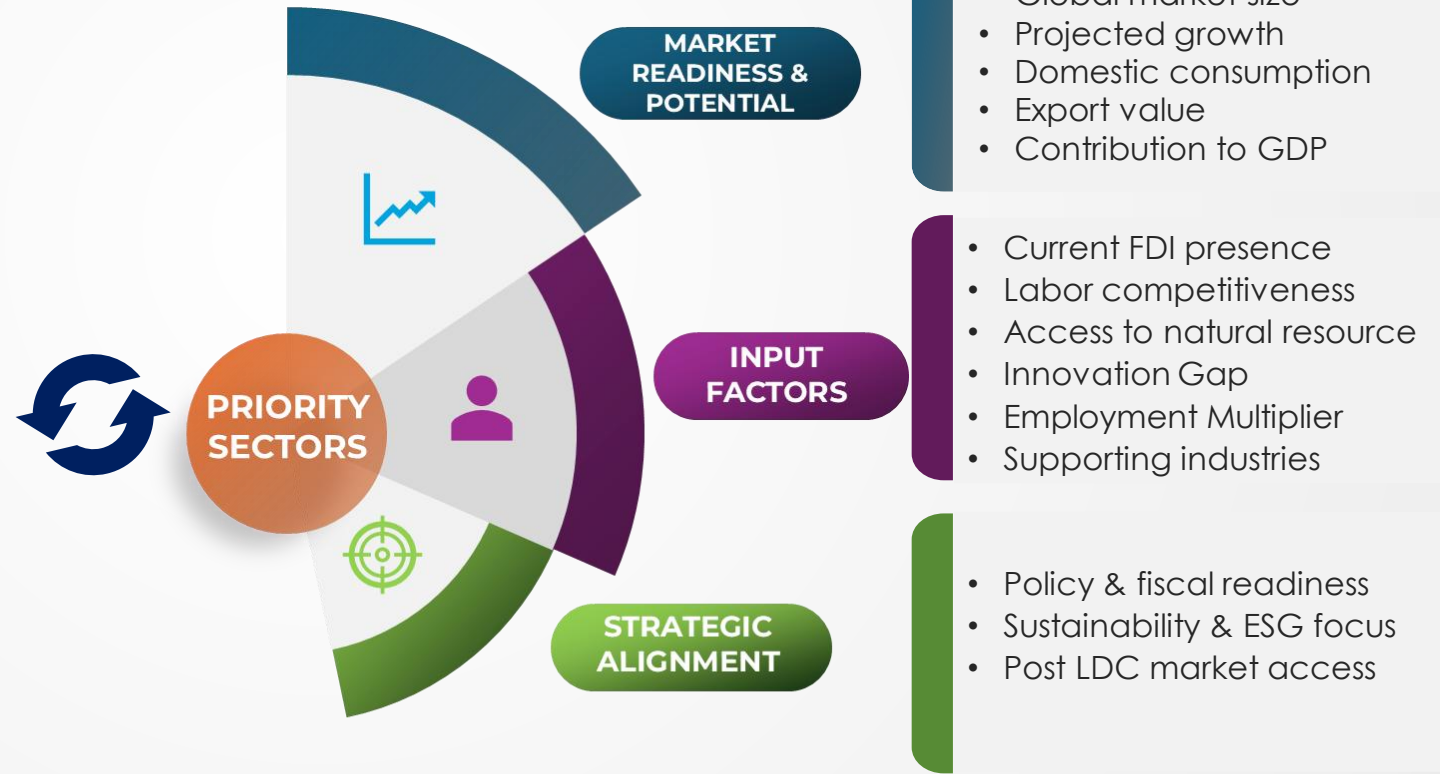
IT-es



Logistics

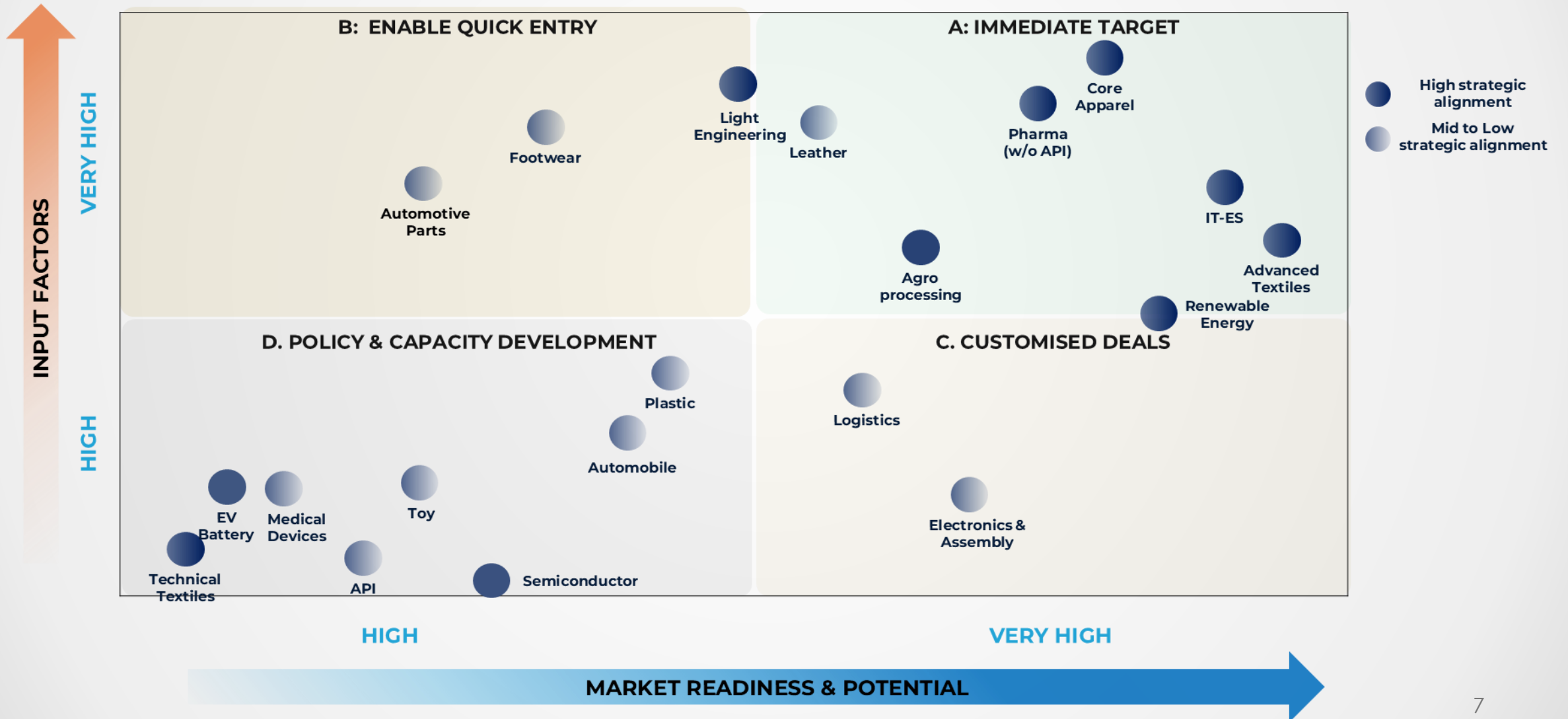


API



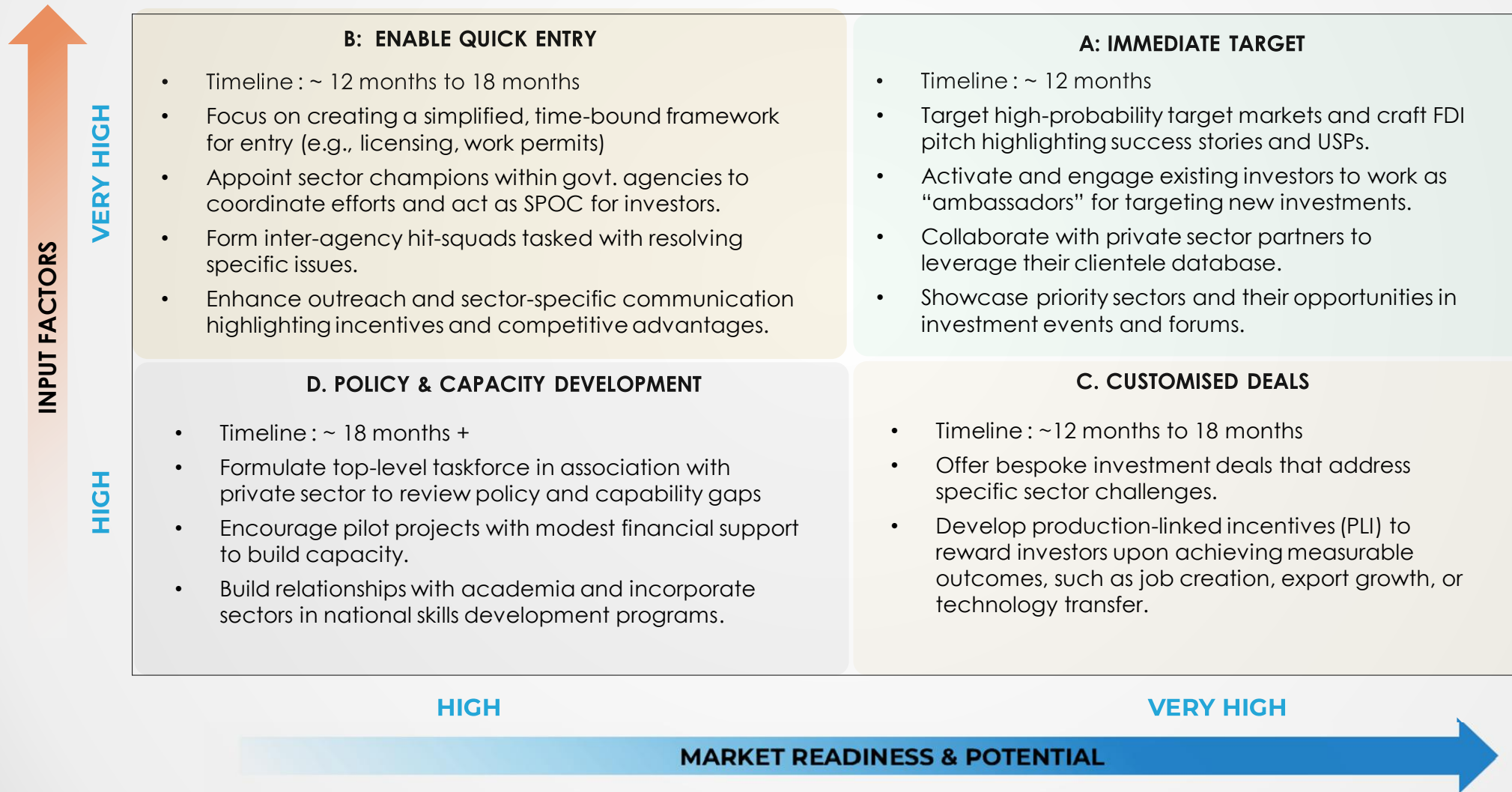


2. Putting it altogether : Sector prioritisation and strategies





3. Devise Actions : Bringing the heatmap to life



**Welcome to
Bangladesh!**

The background of the slide is a stylized representation of the cover of 'The Economist' magazine. It features the Bangladesh national flag (green and red) in the upper right corner, a gold medal with a globe design on the left, and a red rectangular box containing the magazine's title. The text 'The Economist's country of the year for 2024' is prominently displayed in the center, with a sub-headline below it.

**The
Economist**

Leaders | When nations excel

**The Economist's country
of the year for 2024**

The winner toppled a tyrant and seems headed for something better

WHAT PERCEPTION COULD BE

- Massive social unrest
- Heading towards economic crisis
- Environment not business – friendly



WHAT ARE THE FACTS

- Capital account in surplus
- \$6bn new fund commitment
- \$1.5bn dues repaid



The story needs to be retold..

Topics we will cover today

1. Bangladesh Growth Journey

2 Improving the fundamentals

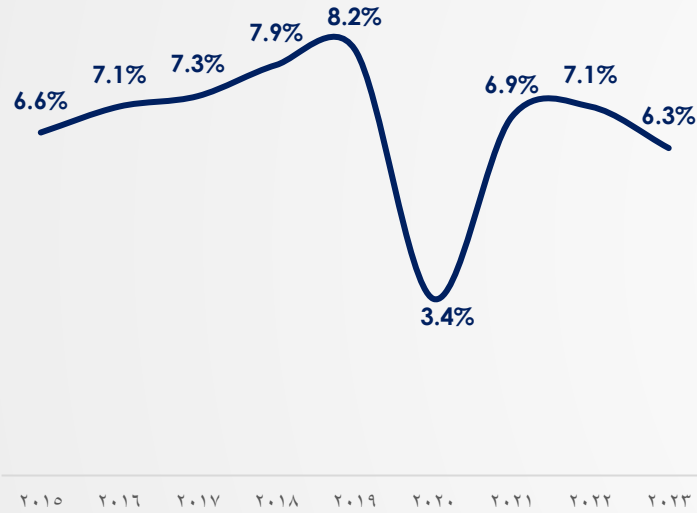
3 Why invest in Bangladesh

4 Where to invest

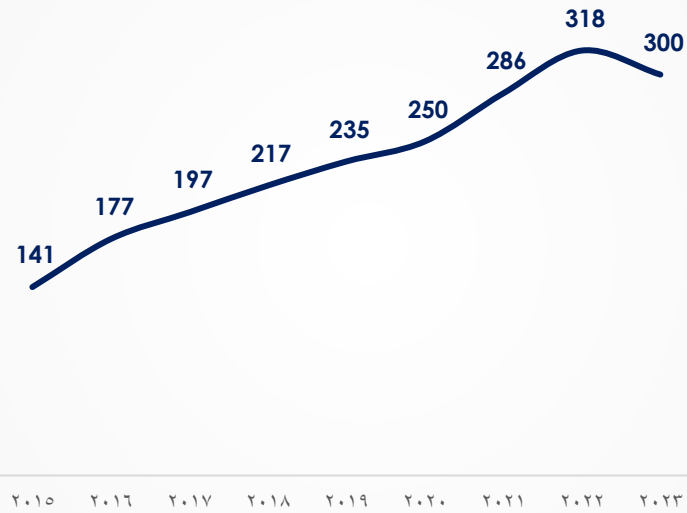
Bangladesh Growth Journey

A decade of consistent growth aided by resilient fundamentals

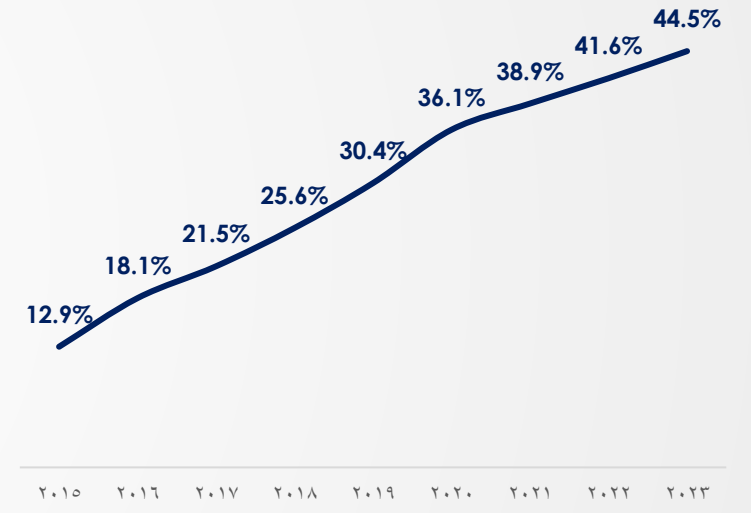
GDP Growth (%)



Household expenditure (USD Bn)



Rate of internet penetration



\$3.6 Bn (9% CAGR)

FMCG Market Size 2023

Bangladesh Business Summit

437 Bn USD

Second highest GDP in South Asia

World Bank

170 Mn +

Mobile Phone Subscription 2023

World Bank

-3pp poverty

10.44% in 2022 vs 13.47% in 2016

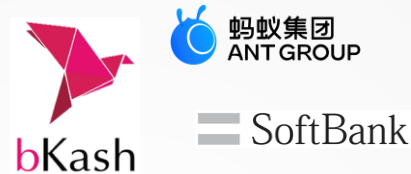
World Bank

24 Bn USD

Remittance Inflow in FY 23-24

Bangladesh Bank

Success Story : 1st Ever Unicorn Startup in only 10 years



bKash has established itself as Bangladesh's leading mobile financial service, facilitating transactions worth approximately **USD 10 billion annually**. By providing a user-friendly platform for money transfers, bill payments, and merchant transactions, bKash has significantly enhanced financial inclusion, particularly for the unbanked population.

75 Mn

Registered Users as
of October, 2024

40%

Market Share
as of July 2023

**Key
Stats**

75%

Rural
Households
receive
financial access

1.5 Bn

Transactions
processed annually

**Financial
Inclusion**

**Fortune's "Change the
World"**

Ranked in the list in 2017

**Bill & Melinda Gates Foundation,
SoftBank, Alipay, IFC**

Noteworthy investment backings

**Global
Recognition**

300,000

Agents across
urban and rural
areas

350,000

Merchant
collaborations

**Agents &
Merchants**

Success Story : Global Market Leaders Operating in Bangladesh



■ **Unilever Bangladesh**

Unilever Bangladesh commands over [50% of the FMCG categories where it operates](#) with revenue in the range of U\$ 500 million. With a robust distribution network that penetrates both urban and rural areas, Unilever has significantly enhanced accessibility to essential goods. The company has also contributed to local economy by [partnering with small retailers and promoting sustainable practices across its value chain](#).



■ **Grameenphone**

Grameenphone, Bangladesh's largest telecom operator, serves over [83 million subscribers, commanding a 46% market share](#). Generating annual revenues surpassing [U\\$1.3 billion](#), Grameenphone has played a pivotal role in expanding internet access and driving financial inclusion, especially in underserved rural areas. Grameenphone is also Telenors second biggest market in terms of revenue.



■ **Samsung Bangladesh**

Samsung holds a significant position in Bangladesh's electronics market, particularly in the smartphone segment. As of October 2024, Samsung captured [17.62% of the mobile vendor market share](#) in Bangladesh. Samsung's investment in local assembly plants has enhanced [product affordability](#) and created [employment opportunities](#), reinforcing its commitment to the Bangladeshi market.



■ **Marico Bangladesh**

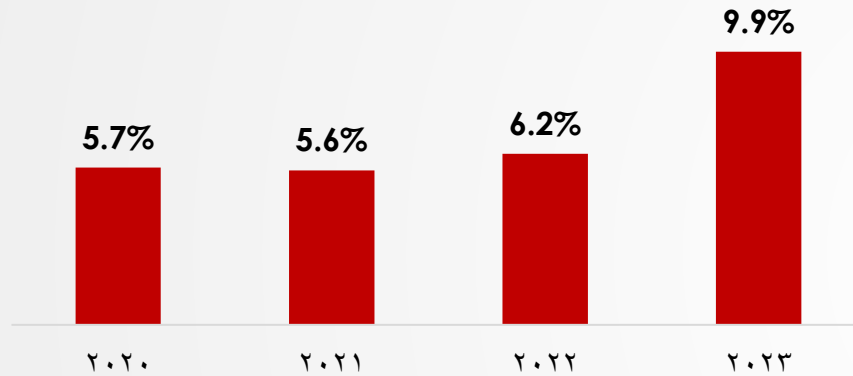
Marico Bangladesh is a leading player in the FMCG sector, known for its popular brands like Parachute and Saffola. The company generates annual revenues [around U\\$150 million](#) and commands a [significant share of the edible oil and hair care markets in the country](#). Through its sustainable practices and commitment to innovation, Marico has contributed to the growth of the consumer goods sector in Bangladesh.

Improving the fundamentals

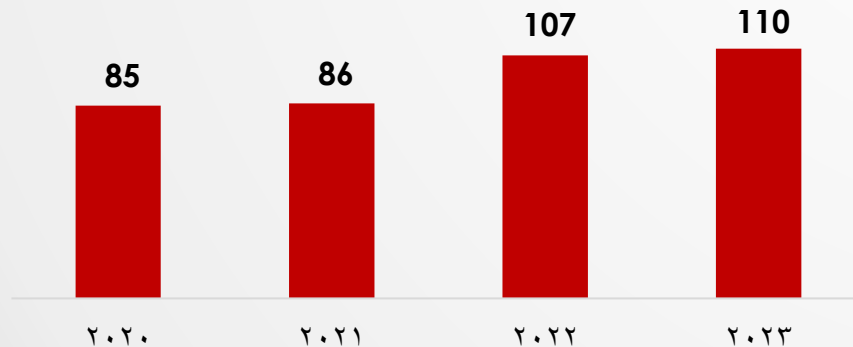
Economic indicators gradually stabilizing

Challenging macro in 2022-23

Inflation Rate (%)



Exchange rate (vs USD)



Signs of recovering economy post the July-Aug Revolution

Imports on the rebound

+2% In FY 24-25, vs -20.64% decline in SPLY

Signaling increased production

~ 20 Bn + Reserves Post July

Crossing the 20 billion mark, despite large repayments

Arrested exchange rate decline

+6.5% economic dynamism

Purchasing managers' index (PMI) increased in Oct-Nov

Economic expansion in all sectors

Key Investor Concerns Identified

- **Quality of govt services**
- **Industry consultation**
- **Policy continuity**
- **Access to resources**
- **Corruption**

Action points triggered to address all of them

Q4, 2024

Understanding the landscape

Communication platform

GoB coordination committee

Project ambassador

Govt. service data for all

FDI heatmap

Right-sizing economic zones

Foreign currency loans rules

Institutional excellence: digitization

Institutional excellence: daycare

Institutional excellence: canteen

Q1, 2025

Colocation of govt. agencies

Private sector advisory counsel

Work permit / visa related issues

Authorized economic operator

National single window

Port strategy

Tax rules: incubation & grandfathering

Repatriation rules

Onboarding/starter experience

Institutional excellence: training

Institutional excellence: research unit

Q2, 2025

CRM model

Single platform

Licensing requirement review

FDI outreach

Investor summit

Optimizing govt. owned assets

Energy supply strategy

M&A transaction rules

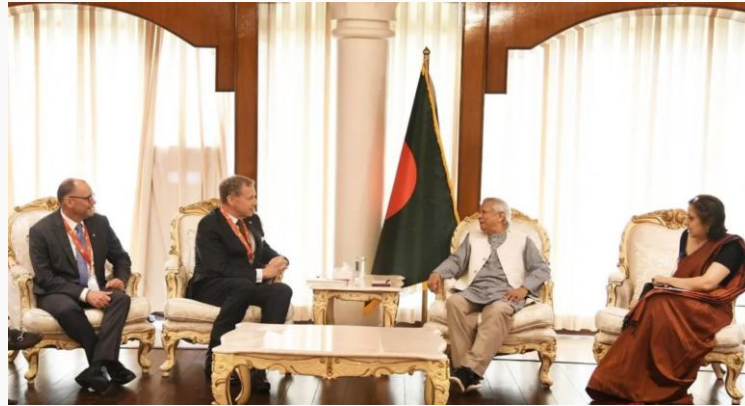
Institutional excellence: Act review

Institutional excellence: integration

Few success stories



**Inter-ministerial body to ensure integration
between all govt. agencies**



**Excelerate Energy contractual situation
resolved – mentioned in Q3' earnings**

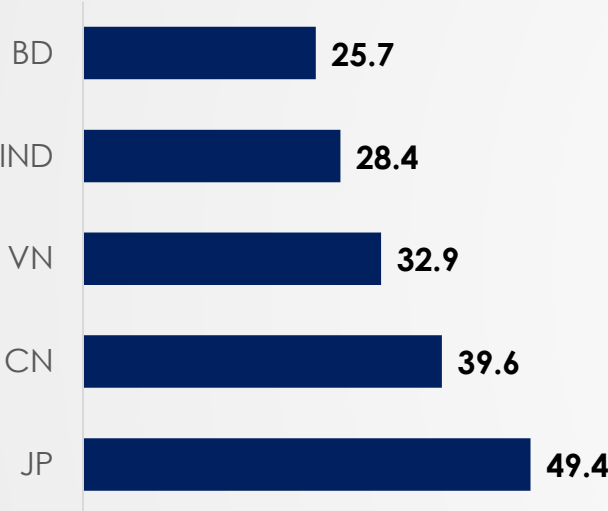


**Youngone group's long standing land issues
resolved**

Why invest in Bangladesh

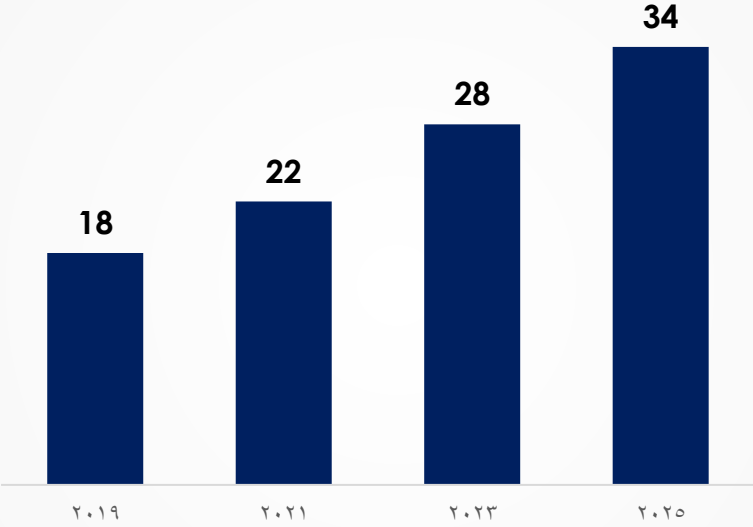
1. The macro factors continue to be impressive

Median Age (Years)



WHO

Growing Middle & Affluent Class (Mn)



BCG

GDP growth Forecast (%)



74mn

Working population with 26 million aged between 15-29 years

2X in Last 5 years

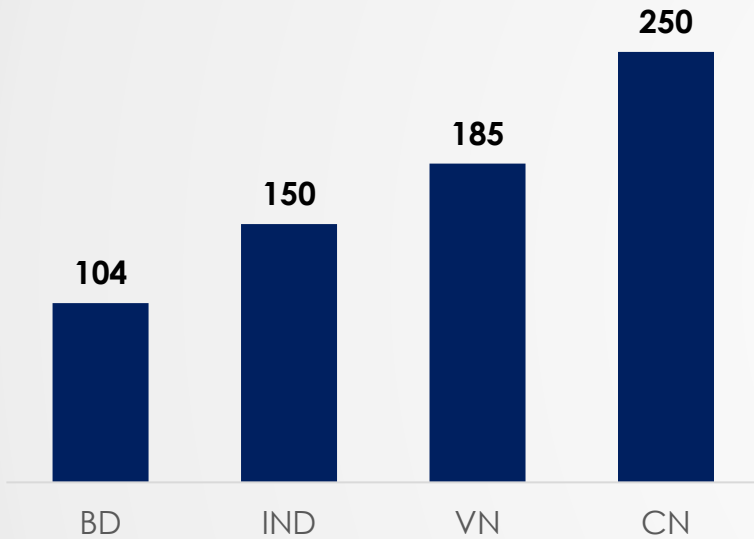
Bangladesh Middle and Affluent Class in 2025 to surpass Malaysia TOTAL population !

USD 4,000+

GDP Per Capita (US\$) by 2030 1.6X vs current levels

2. Input factors to enable competitiveness

Cost Advantage
(Minimum monthly wage (US\$ by Govt.)



Dedicated Economic Zones



97 EZs, 13 operational

Land bank 61k acres

\$28bn inv. proposals

- Land & Utilities supplied by GoB
- Zero Income Tax first 3 years
- Zero Dividend Tax in 10 Yrs
- Duty free import on capital machinery
- Duty free import on export businesses
- 100% profit repatriation allowed

Accessibility improving rapidly

North to South connectivity via road



550km
14-15 hrs



1,700km
35hrs +



1,500km
25hrs +

Port connectivity projects ongoing



Deep Sea Port



ICD Railway

Duty free Access to markets



\$12,000

+56% growth in Bangladesh's per labor productivity

See it for yourself!



1/3rd reduction

Export lead time once key projects are completed

3. Investment opportunity with high-returns

Name	Sector	Mcap (USD Mn)	LTM PAT (USD Mn)	5Y CAGR	Return on Equity	Global Sectoral Average
Grameenphone	Telecom	3590	295	0.9%	56.1%	15%
BAT	Tobacco	1580	146	15.3%	33.3%	16%
Berger Paints	Construction Material	680	28	7.4%	25.6%	15%
Lafarge Holcim	Construction Material	520	34	17.5%	29.8%	10%
Reckitt Benckiser	Consumer goods	170	7	11.8%	80.9%	20%
Marico Bangladesh	Consumer Goods	610	44	16.2%	56.1%	
EBL	Bank	261	54	8.6%	14.4%	10%

Where to invest

Bangladesh “FDI” heatmap creation

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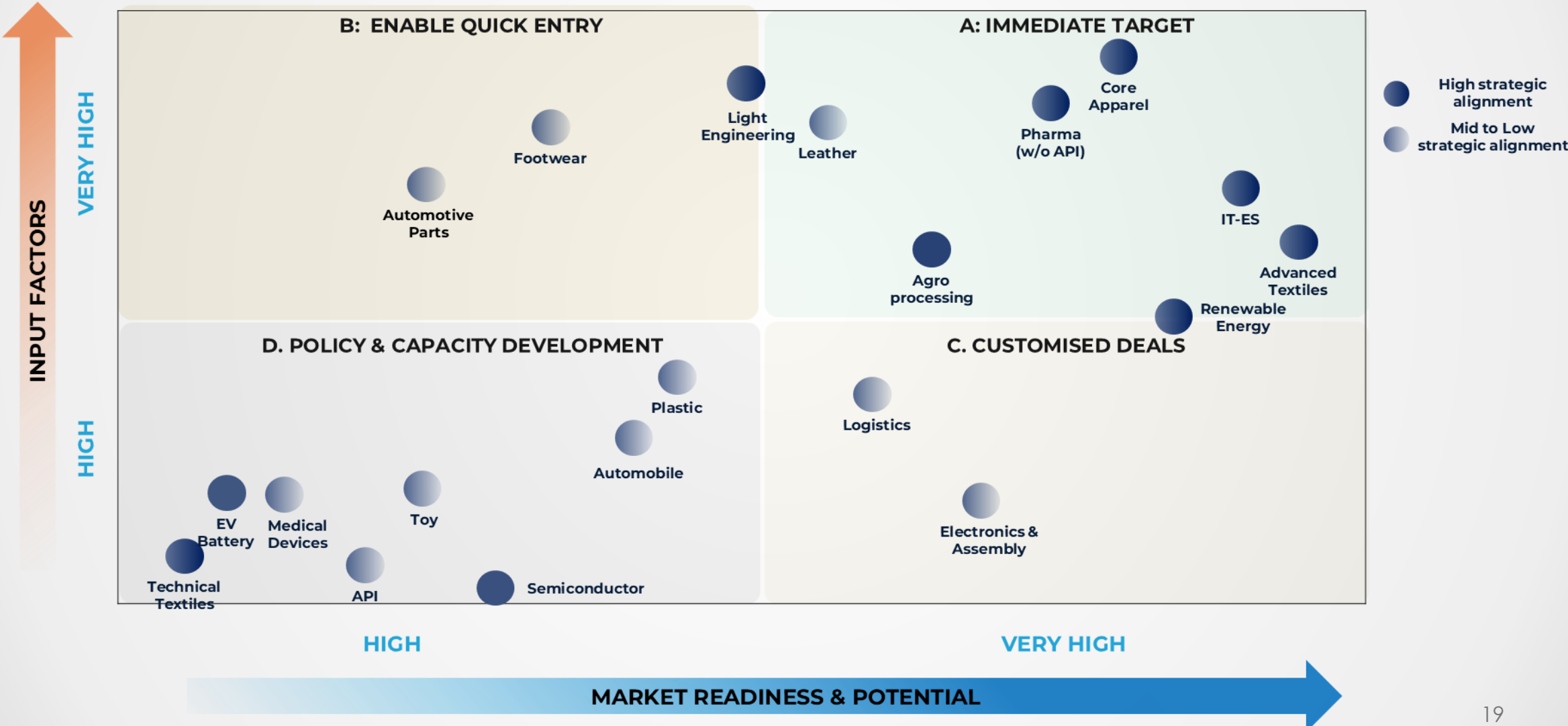
Business Associations



Development Partners



Bangladesh “FDI” heatmap creation



So, what's next?



Visit BIDA : Your “One Stop Investment Service” Point from start to finish

- Pre-investment Consultations
- Investment Facilitation
- Investment Aftercare

