

Key Notes

**“Investing in the future of manufacturing”
Opportunities in automobile and hi-tech manufacturing in Bangladesh**



Made in Bangladesh

A Global Brand

Samsung Manufacturing







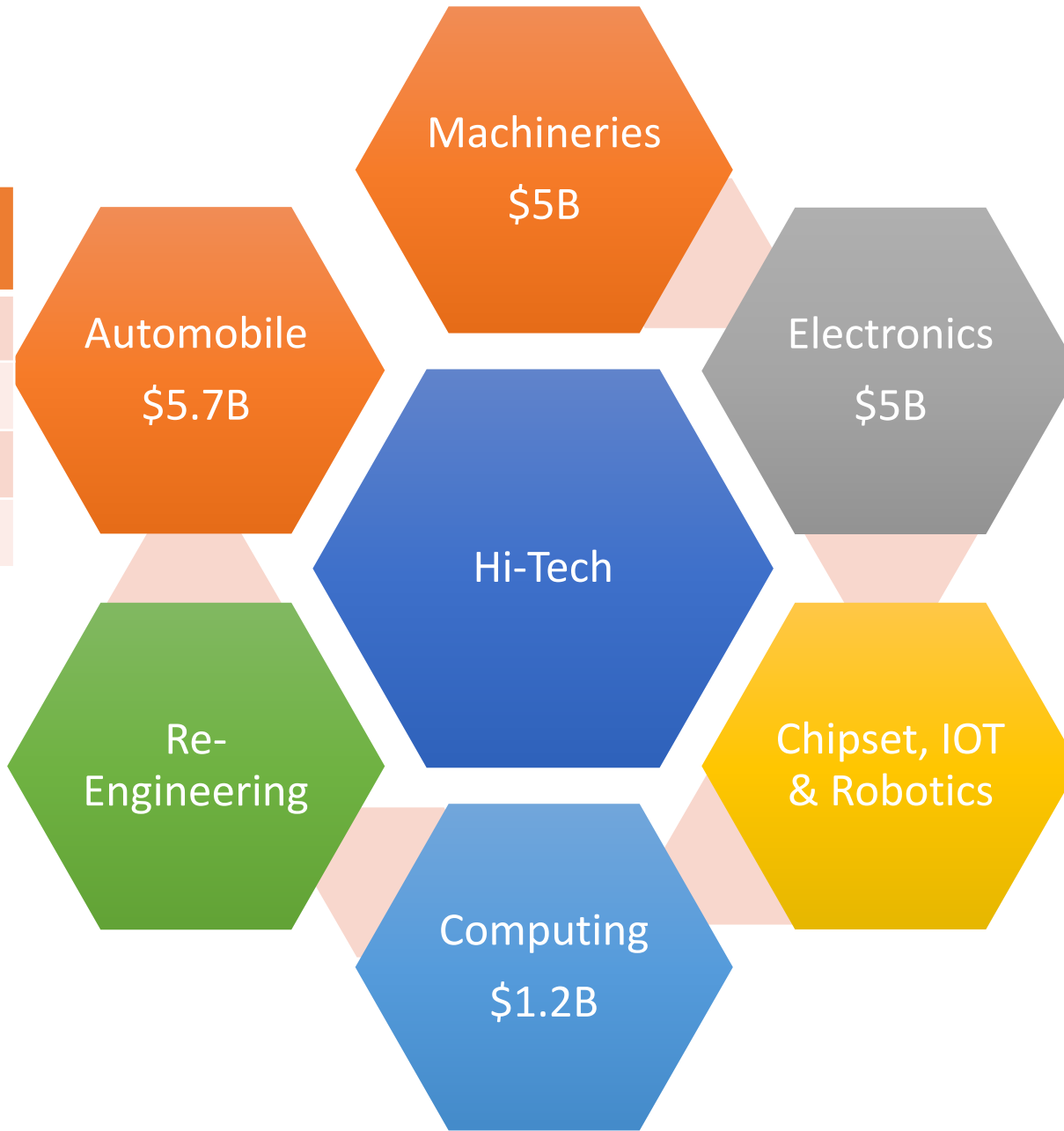
- Y2017 – We started Electronics Manufacturing in Narsingdi
- Products – Mobile, Refrigerator, Television, Washing Machine, Micro-wave Oven & Air-condition
- 3000+ Skilled Work force working directly
- Producing Mother-board for Mobile

Hyundai Manufacturing



- Y2023 – We started Hyundai Manufacturing
- Products – SUVs
- 500+ Skilled Work force working directly

		Local Manufacturing
2W	\$0.7B	
3W	\$1.0B	
4W PV	\$2.2B	
4W CV	\$1.9B	



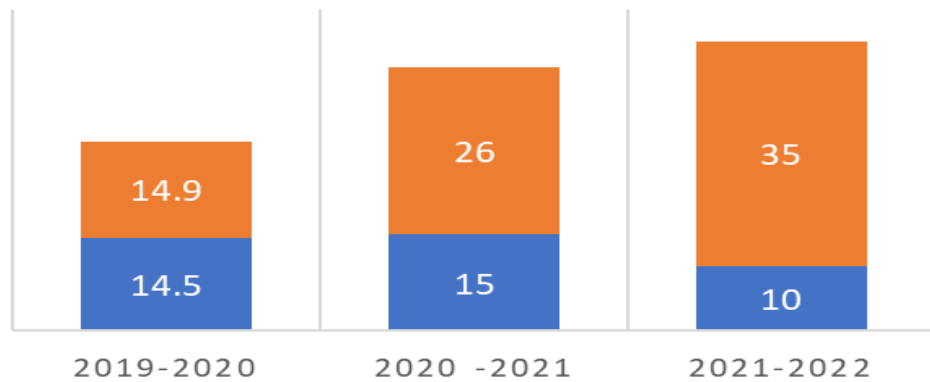
Local Manufacturing 93%	
Electronics	\$2.5B
Mobile	\$1.9B
Electrical	\$0.7B

Electronics Market Snapshot

Mobile

BTRC DATA ON MOBILE DEVICE MKT

■ Imported ■ Local M



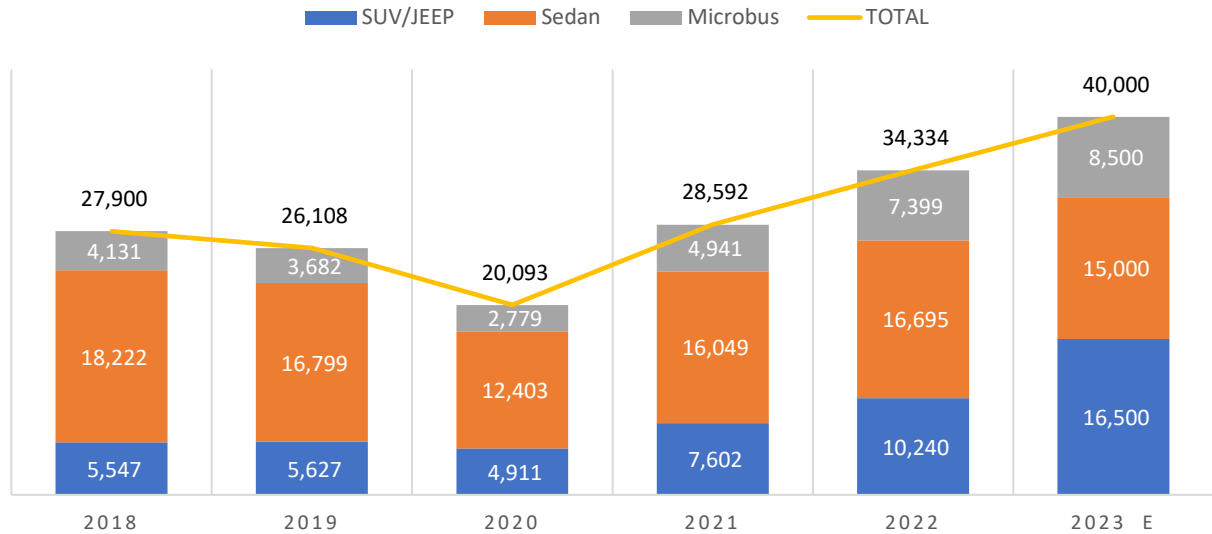
FY2022-23 1H – SMP Local production contribute 100% to Market

Consumer Electronics

- Current Market in Bangladesh
 - Refrigerator 3mln
 - Television 1.8mln
 - Computer & Laptop 0.7mln
 - Other Electronics Equipment 1.5mln
- 97% of Local Market requirements is catered by Local manufacturing
- Walton, Minister, Jamuna, Eco Butterfly etc are major local brands
- Samsung, LG, Singer, Whirlpool etc. have established their local manufacturing.

Passenger Vehicle Market

4W PV DATA - BRTA



- Passenger Vehicle CAGR : 8%
- Sedan market stagnant
- SUV market CAGR : 13%, but in YoY : 34%+.
- Surge in Microbus LY – Fleet Market
- Y2023 Market Gr. Est. 17%

DESCRIPTION	TYPES	2018	2019	2020	2021	2022	2023 E
Total	SUV/JEEP	5,547	5,627	4,911	7,602	10,240	16,500
	Sedan	18,222	16,799	12,403	16,049	16,695	15,000
	Microbus	4,131	3,682	2,779	4,941	7,399	8,500
	TOTAL	27,900	26,108	20,093	28,592	34,334	40,000
	YoY Gr. %		-6%	-23%	42%	20%	17%

Penetration of Vehicles – 4Wheeler

Rank	Country	Vehicles/'000 per	# of Vehicles '000
117	India	70	57000
100	Nepal	110	3080
154	Pakistan	17	3557
86	Sri Lanka	157	3427
151	Myanmar	20	1065
178	Bangladesh	4	620

Source: Wikipedia

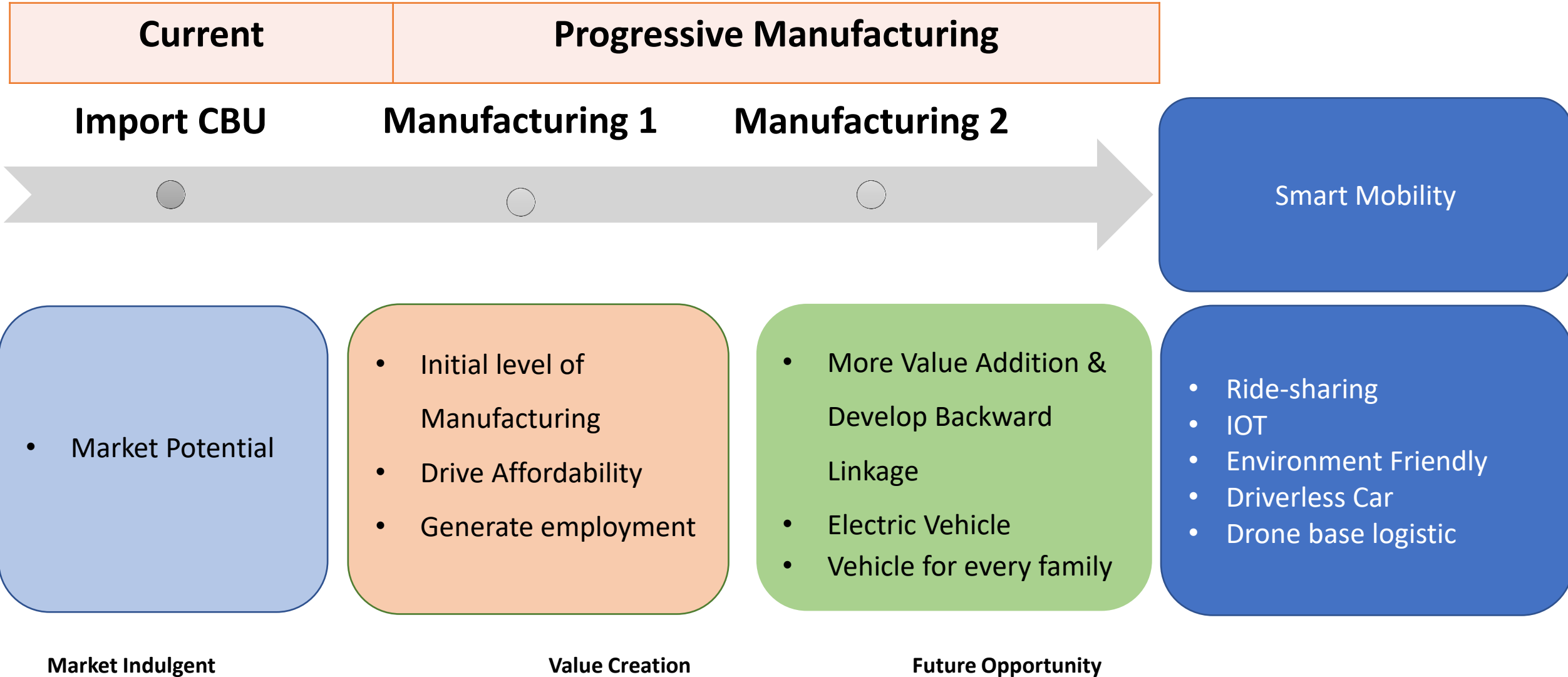
Opportunity

- Huge Investment in Roads, Highways, Bridges & other infrastructure - Paved Road increases from 3600km in 1971 → 375,000km recent time
- Global largest Economy – BD position 41st Y2022 → 20th Y2037
- Policy sponsoring Local manufacturing
- 8th Largest Population – Domestic market potential

Challenges

- Skilled Manpower – Focused Curriculum for Hi-tech Industry
- Lack of Raw Materials availability
- Research & Development

4W Roadmap in Bangladesh



Future is **Electric Vehicles**

- Bangladesh consume ~5000barrels of Gasoline everyday
- Capacity of Electricity production
- Reduction in Carbon Emission
- Reduce cost of ownership – Un-predicable Fuel Price & Maintenance cost
- **Smart Mobility – Ride Sharing, Environment friendly, IOT connected, Driverless Car & many more**

***Globally Transportation accounts for 14% of Global Greenhouse Gas Emissions**

Improve CO2 Emission Impact in Bangladesh:

- Environmental Performance Index - Bangladesh ranks **162** (out of 177 countries)

Emission Legislation for Vehicles

Europe

2020: 95 g CO2/km

2025: \leq 78 CO2/km

Emission Legislation for Vehicles

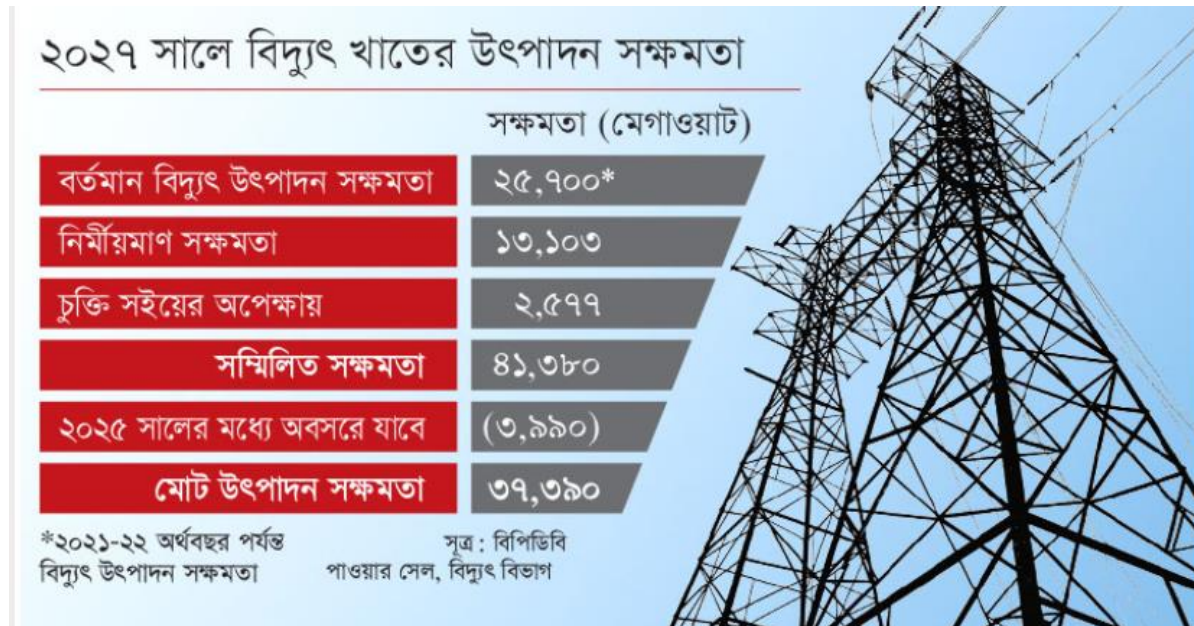
USA

2020: 125 g CO2/km

2025: 87 g CO2/km

- **Whereas in Bangladesh IC engine vehicles emit over 170 g CO2/km**

Current Status of Electricity Capacity in Bangladesh:



- Installed Capacity 25,782 MW

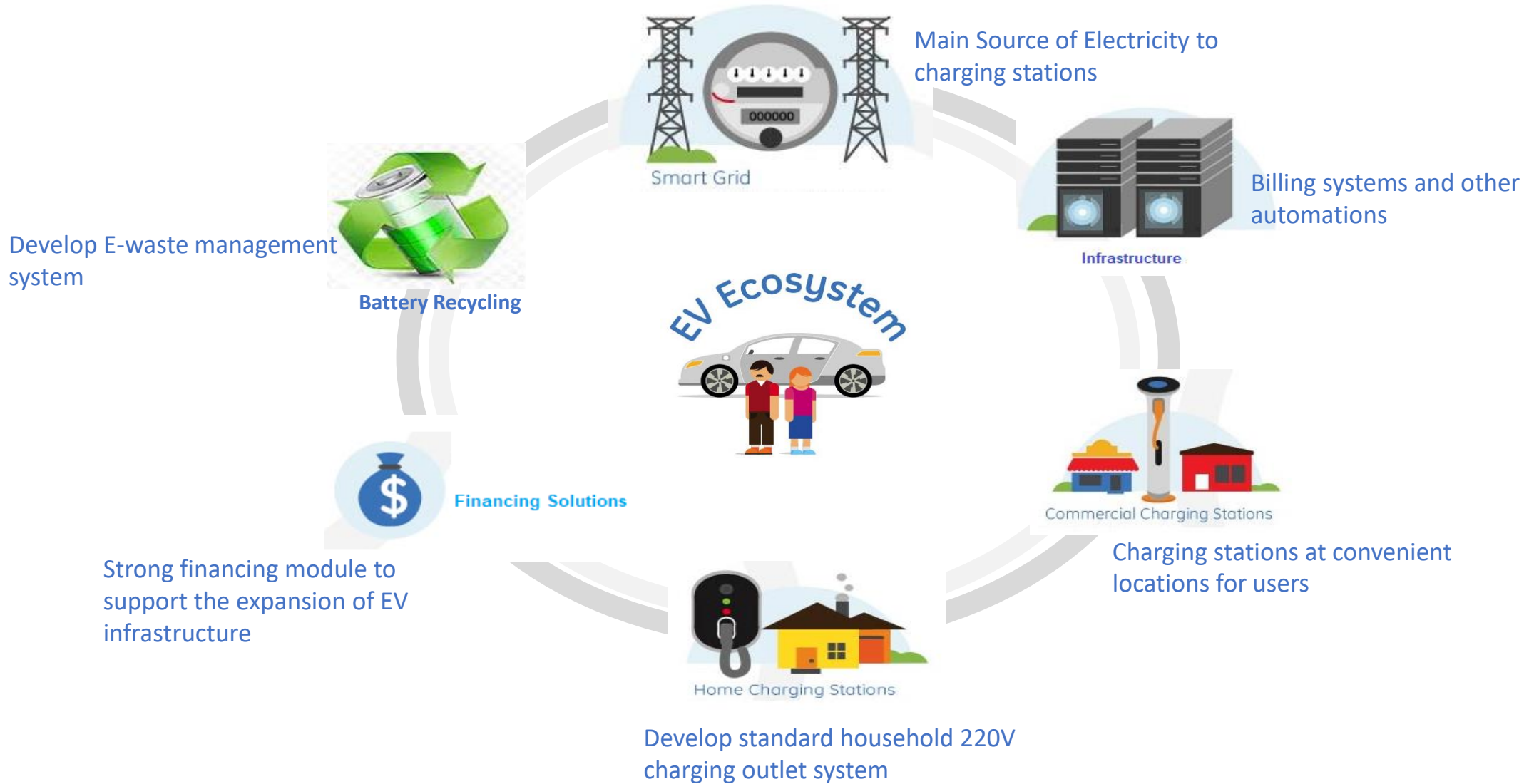
- Current Usage 12,000MW

- Projected Capacity 37,390 MW

- Projected Usage ~17,000 MW

- Unutilized Capacity 25,000 MW

EV Ecosystem



Way Forward

- Collaborate with Global Brands & Tech-Transfer
- EV Eco-System & Incentives
- Focused Curriculum & Develop Skilled Manpower
- Raw Material re-engineering
- Backward linkage development to Increase Local Value Addition

- Wire-Harness
- Inner Cushion
- Bumpers
- Filters/Carpets/ Accessories
- Painting
- Seat
- Lamps
- Windshield
- Tire for Passenger Car
- Others

Thank You

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