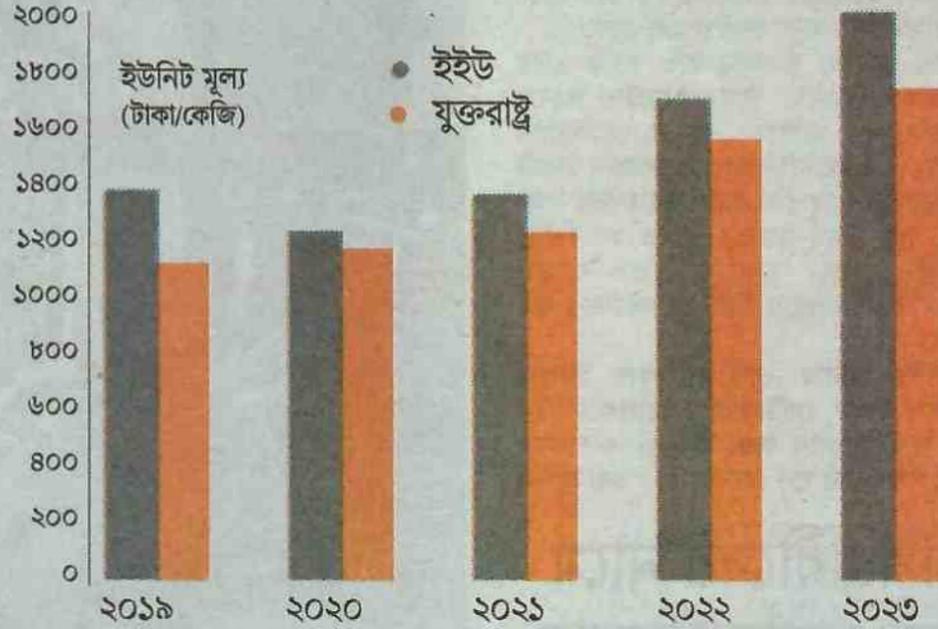


## ইইউ এবং যুক্তরাষ্ট্রে রপ্তানি করা শীর্ষ ১০ পণ্য এবং ৫ রপ্তানিকারক প্রতিষ্ঠানের পোশাকের গড় দর

▶ বিনিময় হার পরিবর্তনের  
প্রভাব পুরোপুরি রপ্তানি  
মূল্যে প্রতিফলিত হয় না



## যুক্তরাষ্ট্রের তুলনায় ইইউতে বেশি দরে পোশাক রপ্তানি

### ■ সমকাল প্রতিবেদক

দেশের পোশাক রপ্তানিকারকরা ইউরোপীয় ইউনিয়নের (ইইউ) বাজারে যুক্তরাষ্ট্রের তুলনায় ৫ থেকে ১৮ শতাংশ বেশি দাম পান। অগ্রাধিকারমূলক বাজার সুবিধা এবং ভিন্ন ভিন্ন মূল্য নির্ধারণ কৌশলের কারণে ইইউ বাজারে দাম তুলনামূলক বেশি থাকে। ফলে বাংলাদেশ স্বল্পমত দেশের (এলডিসি) তালিকা থেকে উত্তরণের পর বাণিজ্য অগ্রাধিকার সুবিধা কমে গেলে রপ্তানিকারকরা শুধু বাজারে প্রবেশাধিকার নয়, পণ্যের দাম বা আয়ের ক্ষেত্রেও চাপের মুখে পড়তে পারেন। বেসরকারি গবেষণা সংস্থা রিসার্চ অ্যান্ড পলিসি ইন্সটিটিউশন ফর ডেভেলপমেন্ট (র্যাপিড)-এর এক গবেষণায় এ তথ্য উঠে এসেছে।

গতকাল শনিবার ঢাকা বিশ্ববিদ্যালয়ের উন্নয়ন অধ্যয়ন বিভাগের (ডেভেলপমেন্ট স্টাডিজ) সন্মেলন কক্ষে এক আলোচনা সভায় ‘অগ্রাধিকার ও অ-অগ্রাধিকার বাজারে রপ্তানি মূল্য: এলডিসি উত্তরণের প্রেক্ষাপটে বাংলাদেশের পোশাক খাতের প্রতিষ্ঠানভিত্তিক বিশ্লেষণ’ শীর্ষক গবেষণার ফল উপস্থাপন করেন র্যাপিডের উপপরিচালক জিল্লুর রহমান। বাংলাদেশ কাপ্তমসের দৈনন্দিন লেনদেনভিত্তিক প্রায় তিন হাজার রপ্তানিকারক প্রতিষ্ঠানের তথ্য বিশ্লেষণ করে এ গবেষণা করা হয়।

অনুষ্ঠানে সভাপতিত্ব করেন র্যাপিডের নির্বাহী পরিচালক ড. এম আবু ইউসুফ। এতে আরও বক্তব্য দেন বাণিজ্য মন্ত্রণালয়ের অতিরিক্ত সচিব আব্দুর রহিম খান, ঢাকা বিশ্ববিদ্যালয়ের সামাজিক বিজ্ঞান অনুষদের ডিন অধ্যাপক ড. তৈয়েবুর রহমান, বিশ্বব্যাংকের ট্রেড পলিসি ও ট্রেড ফ্যাসিলিটেশন-বিষয়ক উপদেষ্টা হাফিজুর রহমান, ডব্লিউটিও সেলের সাবেক মহাপরিচালক মো. মুনির চৌধুরী, ইকোনমিক রিপোর্টার্স ফোরামের সভাপতি দৌলত আক্তার মালি প্রমুখ।

গবেষণার ফল তুলে ধরে জিল্লুর রহমান বলেন, একই ধরনের পোশাক পণ্য হলেও গন্তব্যভেদে রপ্তানির দামে বড় পার্থক্য দেখা যায়। যুক্তরাষ্ট্রের তুলনায় জার্মানির বাজারে বাংলাদেশি টি-শার্ট রপ্তানিতে ২০ থেকে ২৭ শতাংশ বেশি দাম পাওয়া যায়। আবার জার্মানিতে ট্রাউজার রপ্তানিতে ৯ থেকে ১৫ শতাংশ পর্যন্ত বেশি দাম পাওয়া যায়। এভাবে প্রধান ১০টি পোশাক পণ্যের ক্ষেত্রেও শীর্ষ রপ্তানিকারকরা ইইউ বাজারে যুক্তরাষ্ট্রের তুলনায় ৫ থেকে ১৮ শতাংশ বেশি দাম পাচ্ছেন। এসব তথ্য থেকে বোঝা যায় অগ্রাধিকারমূলক বাজার (ইইউ) ও

### র্যাপিডের গবেষণা

প্রতিবেদনে আরও বলা হয়েছে, বিনিময় হার পরিবর্তনের প্রভাবও পুরোপুরি রপ্তানি মূল্যে প্রতিফলিত হয় না। এতে দেখা যায়, যুক্তরাষ্ট্রে রপ্তানির ক্ষেত্রে রপ্তানিকারকরা মুদ্রার অবমূল্যায়নের প্রায় ৫৫ শতাংশ নিজেদের কাঁধে নিয়ে নেন। ইইউর ক্ষেত্রে এ হার প্রায় ৪০ শতাংশ। গবেষণার তথ্য অনুযায়ী, ২০২৩ সালে প্রায় ৪৩ দশমিক ৪ শতাংশ প্রতিষ্ঠান শুধু ইইউতে রপ্তানি করেছে। অন্যদিকে ১১ দশমিক ৮ শতাংশ প্রতিষ্ঠান কেবল যুক্তরাষ্ট্রে রপ্তানি করেছে। বাকি ৪৪ দশমিক ৮ শতাংশ প্রতিষ্ঠান দুই বাজারেই রপ্তানি করেছে। তবে মোট পোশাক রপ্তানি আয়ের ৬৬ শতাংশের বেশি এসেছে সেই প্রতিষ্ঠানগুলোর কাছ থেকে, যারা একই সঙ্গে ইইউ ও যুক্তরাষ্ট্র উভয় বাজারে রপ্তানি করে।

গবেষণায় আরও দেখা গেছে, প্রতিষ্ঠানভিত্তিক বৈশিষ্ট্যও রপ্তানি মূল্যে গুরুত্বপূর্ণ ভূমিকা রাখে। বড় প্রতিষ্ঠানগুলো ছোট ও মাঝারি প্রতিষ্ঠানের তুলনায় ইইউ ও যুক্তরাষ্ট্র উভয় বাজারেই ৩০ থেকে ৩৫ শতাংশ বেশি দামে পণ্য বিক্রি করতে পারে। এর পেছনে বড় ফ্রেতাদের সঙ্গে কাজ করার সুযোগ, উন্নত পণ্যের মান এবং দরকষাকষির ক্ষমতা গুরুত্বপূর্ণ ভূমিকা রাখে। তাই এলডিসি উত্তরণের পর সবচেয়ে বেশি চাপে পড়তে পারেন ক্ষুদ্র ও মাঝারি উদ্যোক্তারা।

আব্দুর রহিম খান বলেন, এলডিসি উত্তরণের প্রেক্ষাপটে বাংলাদেশের রপ্তানি খাত, বিশেষ করে তৈরি পোশাকশিল্পকে নতুন বাস্তবতার জন্য প্রস্তুত হতে হবে। তিনি বলেন, সরকার তিন বছরের অতিরিক্ত ট্রেনিং সময় পাওয়ার চেষ্টা করেছে। তবে সময় পেলেও প্রস্তুতি নেওয়ার ক্ষেত্রে পিছিয়ে থাকার সুযোগ নেই।

হাফিজুর রহমান বলেন, আন্তর্জাতিক বাজারে বাংলাদেশের তৈরি পোশাক খাতের মূল্য নির্ধারণ নিয়ে দীর্ঘদিন ধরে আলোচনা রয়েছে। অনেকেই মনে করেন, বাংলাদেশ তুলনামূলক কম দামে পণ্য রপ্তানি করে প্রতিযোগিতায় টিকে আছে। তবে গবেষণার ফল থেকে বোঝা যায়, রপ্তানি মূল্যের সঙ্গে শুল্ক কাঠামোর ঘনিষ্ঠ সম্পর্ক রয়েছে।

মো. মুনির চৌধুরী বলেন, এলডিসি উত্তরণের প্রেক্ষাপটে বাংলাদেশের রপ্তানি মূল্য নির্ধারণের বিষয়টি এখন আরও গুরুত্বপূর্ণ হয়ে উঠছে। এ

# যুক্তরাষ্ট্রের চেয়ে ইইউতে ১০% বেশি দাম পান রপ্তানিকারকেরা

## র‍্যাপিডের গবেষণার তথ্য

গবেষণায় উঠে আসে যুক্তরাষ্ট্রের তুলনায় জার্মানিতে টি-শার্ট রপ্তানিতে ২০-২৭ শতাংশ বেশি দাম পাওয়া যায়।

নিজস্ব প্রতিবেদক, ঢাকা

বাংলাদেশের তৈরি পোশাক রপ্তানিকারকেরা ইউরোপীয় বাজারে যুক্তরাষ্ট্রের তুলনায় ১০ শতাংশের বেশি দাম পান, যার প্রধান কারণ দুই বাজারে শুষ্ককাঠামোর পার্থক্য ও অগ্রাধিকারমূলক সুবিধা। তবে স্বল্পমত দেশ (এলডিসি) থেকে উত্তরণ হলে বাংলাদেশ ইইউতে এই সুবিধা হারাতে পারে। কিছু ক্ষেত্রে সুরক্ষাব্যবস্থার কারণে ভবিষ্যতে ইউরোপীয় ইউনিয়নে (ইইউ) পোশাক রপ্তানিতে প্রায় ১২ শতাংশ শুষ্ক আরোপের ঝুঁকিও রয়েছে।

বেসরকারি গবেষণা সংস্থা রিসার্চ অ্যান্ড পলিসি ইন্টিগ্রেশন ফর ডেভেলপমেন্টের (র‍্যাপিড) সাম্প্রতিক এক গবেষণায় এমন তথ্য উঠে এসেছে। গতকাল শনিবার ঢাকা বিশ্ববিদ্যালয়ের (ঢাবি) উন্নয়ন অধ্যয়ন বিভাগে আয়োজিত এক পরামর্শ সভায় গবেষণাটির তথ্য উপস্থাপন করা হয়।

গবেষণায় বলা হয়েছে, এলডিসি থেকে উত্তরণের পর বাংলাদেশের রপ্তানি প্রতিযোগিতা ধরে রাখতে কয়েকটি গুরুত্বপূর্ণ পদক্ষেপ নেওয়া জরুরি। এর মধ্যে ইইউর সঙ্গে সুবিধাজনক বাণিজ্য চুক্তি নিশ্চিত করা এবং নতুন সম্ভাবনাময় বাজারে অনুকূল বাণিজ্য সুবিধা অর্জনের জন্য আলোচনা এগিয়ে নেওয়া। পাশাপাশি প্রযুক্তির ব্যবহার, শ্রমিকদের দক্ষতা বৃদ্ধি ও পণ্যের বৈচিত্র্য বাড়িয়ে উচ্চমূল্যের পণ্য তৈরিতে মনোযোগী হতে হবে।

অনুষ্ঠানে প্রধান অতিথি ছিলেন বাণিজ্য মন্ত্রণালয়ের অতিরিক্ত সচিব ও এফবিসিসিআইয়ের প্রশাসক মো. আবদুর রহিম খান। অতিথি হিসেবে বক্তব্য দেন ঢাবির সামাজিক বিজ্ঞান অনুসন্ধান ভারপ্রাপ্ত ডিন অধ্যাপক তৈয়েবুর রহমান এবং অর্থ ও বাণিজ্যবিষয়ক সাংবাদিকদের সংগঠন ইকোনমিক রিপোর্টার্স ফোরামের (ইআরএফ) সভাপতি দৌলত আকতার।

র‍্যাপিডের নির্বাহী পরিচালক ও ঢাবির উন্নয়ন অধ্যয়ন বিভাগের অধ্যাপক অধ্যাপক আবু ইউসুফের সম্মেলনায় অনুষ্ঠানে প্যানেল আলোচক ছিলেন বাংলাদেশ উন্নয়ন গবেষণা প্রতিষ্ঠানের (বিআইডিএস) জ্যেষ্ঠ গবেষণা ফেলো বদরুল্লাহ আহমেদ, বাংলাদেশ রিজিওনাল কানেক্টিভিটি প্রকল্পের (বিআরসিপি) বাণিজ্য বিশেষজ্ঞ মো. মুনির চৌধুরী, বিশ্বব্যাংকের বাণিজ্য নীতি ও বাণিজ্য সহজীকরণ উপদেষ্টা হাফিজুর রহমান এবং র‍্যাপিডের গবেষণা পরিচালক ও ঢাবির অর্থনীতি বিভাগের অধ্যাপক মো. দীন ইসলাম।

অনুষ্ঠানে 'এলডিসি উত্তরণের প্রেক্ষাপটে

বাংলাদেশে তৈরি পোশাক রপ্তানির প্রতিষ্ঠানভিত্তিক প্রমাণ: অগ্রাধিকারমূলক ও অগ্রাধিকারবিহীন বাজারে রপ্তানি মূল্য নির্ধারণ' শীর্ষক এ গবেষণার তথ্য তুলে ধরেন র‍্যাপিডের উপপরিচালক ও উন্নয়ন অধ্যয়ন বিভাগের প্রভাষক জিল্লুর রহমান। তিনি জানান, শুষ্ক বিভাগ থেকে ২০১০ থেকে ২০২৩ সাল পর্যন্ত প্রায় ৩ হাজার রপ্তানিকারক প্রতিষ্ঠানের লেনদেনের তথ্য নিয়ে গবেষণাটি করা হয়েছে। এদের মধ্যে প্রায় ৪৫ শতাংশ পোশাক কারখানা উভয় বাজারে পণ্য রপ্তানি করে।

জিল্লুর রহমান জানান, প্রধান পোশাক পণ্য রপ্তানির ক্ষেত্রে গড়ে যুক্তরাষ্ট্রের তুলনায় ইউরোপে বেশি দাম পাওয়া যায়। যেমন, যুক্তরাষ্ট্রের তুলনায় জার্মানিতে (ইইউ) টি-শার্ট রপ্তানিতে ২০-২৭ শতাংশ এবং ট্রাউজার রপ্তানিতে ৯-১৫ শতাংশ বেশি দাম পাওয়া যায়। শীর্ষ ১০টি পোশাক পণ্য বিবেচনা করলে রপ্তানিকারকেরা ইউরোপীয় বাজারে যুক্তরাষ্ট্রের তুলনায় ৫ থেকে ১৮ শতাংশ বেশি দাম পান।

গবেষণায় উঠে এসেছে, বড় প্রতিষ্ঠানগুলো ছোট ও মাঝারি প্রতিষ্ঠানের ক্রেতাদের কাছ থেকে তুলনায় ৩০-৩৫ শতাংশ বেশি দাম আদায় করতে পারে। আবার যারা বেশি সংখ্যক দেশে রপ্তানি করে, তারা ইউরোপে ১-৩ শতাংশ এবং যুক্তরাষ্ট্রে ৪-৫ শতাংশ বেশি দাম পায়। শুধু একধরনের পণ্য রপ্তানি করলে ১০-১৩ শতাংশ কম দাম পাওয়া যায়।

## রপ্তানিনির্ভর বিনিয়োগ প্রয়োজন

অনুষ্ঠানে বাণিজ্য মন্ত্রণালয়ের অতিরিক্ত সচিব আবদুর রহিম খান বলেন, 'গত ৫০ বছরে আমরা বিকল্প বাজার বা পণ্যের প্রতিযোগিতা তৈরি করতে পারিনি। কিন্তু আমাদের এখন রপ্তানিনির্ভর বিনিয়োগ প্রয়োজন। প্রস্তুতি ছাড়া এলডিসি উত্তরণ হলে এবং অগ্রাধিকারমূলক বাজার সুবিধা না থাকলে দেশের অর্থনীতি ও সামাজিক কাঠামো দুই জায়গাতেই বড় আঘাত আসবে।'

ইআরএফ সভাপতি দৌলত আকতার বলেন, 'আমাদের তৈরি পোশাকশিল্পের সবচেয়ে বড় সমস্যা হলো, আমরা সব কটি ডিম এক বুড়িতে রেখেছি। পণ্য ও বাজারে যথাযথ বৈচিত্র্য তৈরি হয়নি। ফলে যখনই যুক্তরাষ্ট্র বা ইউরোপের বাজারে অস্থিরতা দেখা দেয়, তা আমাদের জন্যও বড় ধরনের চ্যালেঞ্জ হিসেবে আসে।'

বিশ্বব্যাংকের বাণিজ্য নীতি ও বাণিজ্য সহজীকরণ উপদেষ্টা হাফিজুর রহমান বলেন, বাংলাদেশকে লো-কস্ট বা লো-প্রাইস ব্র্যান্ড থেকে হাই-প্রাইস ব্র্যান্ডে স্থানান্তর হতে হবে। এতে দাম নির্ধারণের ক্ষমতা বাড়াবে এবং আন্তর্জাতিক বাজারে প্রতিযোগীসক্ষম থাকবে।

বিআইডিএসের জ্যেষ্ঠ গবেষণা ফেলো বদরুল্লাহ আহমেদ বলেন, যুক্তরাষ্ট্রের বাজার বৈচিত্র্যময়, তাই কিছু পণ্যের দাম তুলনামূলক বেশি। কিন্তু ইইউর পণ্যের দাম ও বৈচিত্র্য কম হওয়ায় প্রতিযোগিতার চাপ বেশি।



15 MAR 2026

The Daily Star



Tareq Rafi Bhuiyan

# EPA set to redefine Bangladesh-Japan trade landscape

Says Tareq Rafi Bhuiyan, president of bilateral business chamber

## JAGARAN CHAKMA

The Economic Partnership Agreement (EPA) signed between Bangladesh and Japan on February 6, in Tokyo is poised to transform the trajectory of bilateral trade between the two countries, said Tareq Rafi Bhuiyan (Jun), president of the Japan-Bangladesh Chamber of Commerce and Industry (JBCCI).

In an interview with The Daily Star, Bhuiyan described the agreement as Bangladesh's first comprehensive EPA and a landmark shift from a unilateral preference-based arrangement to a structured, rules-based bilateral trade framework.

"This is not just about tariff cuts," he said. "It institutionalises our trade relationship with Japan. It provides predictability, transparency and legal certainty — all of which are essential for sustainable trade growth."

He said Japan has long been one of Bangladesh's key trading partners, particularly as a destination for ready-made garments (RMG) and textile products.

However, he said with Bangladesh set to graduate from least developed country (LDC) status in the near future,

sanitary and phytosanitary measures, intellectual property and digital trade — all of which reduce non-tariff barriers and enhance transparency.

"Many exporters struggle not just with tariffs but with complex procedures and compliance requirements," he said. "Clearer rules and improved cooperation between customs authorities will lower transaction costs and reduce uncertainty."

He believes that sectors such as agro-processing, leather goods, light engineering products, plastics

"It allows Bangladesh to liberalise gradually while giving domestic industries time to adjust," he said. "At the same time, access to high-quality Japanese machinery and intermediate goods will strengthen our industrial capacity."

He noted that improved access to advanced machinery and components, can raise productivity in Bangladesh's manufacturing sector, which in turn enhances export competitiveness in third-country markets.

"In bilateral trade, imports are not necessarily a threat. Strategic imports —

medium enterprises (SMEs) must be prepared to take advantage of the EPA's opportunities.

Export-oriented SMEs in garments are already integrated into global value chains, but other sectors may require capacity building.

"Compliance with rules of origin and technical standards will be crucial," he said. "Government agencies and business associations must work together to ensure that exporters understand and utilise the agreement effectively."

He also pointed to the importance

## TAKEAWAYS FROM INTERVIEW

### Trade framework

EPA shifts Bangladesh-Japan trade to a rules-based partnership

Deal brings predictability and legal certainty to bilateral trade

### Market access

More than 7,300 Bangladeshi products gain duty-free access or reduced tariffs

EPA shields exporters from 8-15% tariffs after LDC graduation

### Trade diversification

New export scope for agro-processing, plastics and light engineering

Leather and footwear may

### Imports and industry

Japan gains preferential access for over 1,000 products in Bangladesh

Japanese machinery imports could boost industrial productivity



Commerce and Industry (DCCI). In an interview with The Daily Star, Bhuiyan described the agreement as Bangladesh's first comprehensive EPA and a landmark shift from a unilateral preference-based arrangement to a structured, rules-based bilateral trade framework.

"This is not just about tariff cuts," he said. "It institutionalises our trade relationship with Japan. It provides predictability, transparency and legal certainty — all of which are essential for sustainable trade growth."

He said Japan has long been one of Bangladesh's key trading partners, particularly as a destination for ready-made garments (RMG) and textile products.

However, he said with Bangladesh set to graduate from least developed country (LDC) status in the near future, concerns had emerged over the possible erosion of preferential market access.

He said under the existing Generalized System of Preferences (GSP) schemes, Bangladeshi exports enjoy duty-free or preferential treatment. After graduation, those benefits would no longer automatically apply.

"Without the EPA, our exporters, especially in garments, could have faced tariffs of 8 percent to 15 percent or more in the Japanese market," Bhuiyan said. "That would have significantly affected our price competitiveness."

He noted that the EPA secures duty-free or reduced-tariff access for more than 7,300 Bangladeshi products, including RMG, textiles and a wide range of manufactured goods. This ensures continuity in market access and shields exporters from sudden tariff shocks.

"For our bilateral trade, this continuity is critical. It means buyers in Japan can continue sourcing from Bangladesh without disruption, and our exporters can plan long-term investments with confidence," he added.

While garments dominate Bangladesh's exports to Japan, Bhuiyan said the EPA opens opportunities to diversify the trade basket.

The agreement includes provisions on customs facilitation, standards,

and reduce uncertainty."

He believes that sectors such as agro-processing, leather goods, light engineering products, plastics

enhances export competitiveness in third-country markets.

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ensure that exporters understand and utilise the agreement effectively." He also pointed to the importance

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**Outlook** EPA expected to attract Japanese investment

and specialised manufacturing can gradually expand their presence in Japan if supported by quality improvements and compliance with Japanese standards.

However, he acknowledged that some leather and footwear products may not receive full-duty benefits under the initial framework, which could create competitive pressure in certain segments.

"Industry stakeholders have raised concerns, particularly in leather. While the overall agreement is positive, sectors that do not receive immediate duty-free access will need to focus more on quality, branding and niche positioning," he said.

On the import side, the EPA grants Japan preferential access to Bangladesh's expanding domestic market for more than 1,000 products, including steel, machinery, auto parts and electronics. Some tariff reductions will be phased in over periods extending up to 18 years.

Bhuiyan described the phased approach as balanced and pragmatic,

especially capital goods and technology — can support export expansion," he said.

Bhuiyan emphasised that the EPA has broader implications for supply chain integration between the two countries.

Japan is actively seeking to diversify and strengthen its supply chains in Asia. Bangladesh, with its competitive labour force, growing industrial zones and strategic location, can position itself as a reliable partner.

"The agreement reduces trade risks by establishing clear dispute settlement mechanisms and regulatory transparency," he said. "This gives Japanese firms greater confidence in sourcing from and investing in Bangladesh."

He added that improved customs cooperation and streamlined procedures will reduce delays and enhance reliability — a key factor in modern supply chains.

"As supply chains become more integrated, bilateral trade will not only grow in volume but also in sophistication," he said.

Bhuiyan stressed that small and

of upgrading logistics infrastructure, including ports and cold chain facilities, to support higher trade volumes.

"Trade agreements create opportunities, but implementation determines the outcome," he added.

While the EPA may not result in an immediate surge in trade volumes, Bhuiyan expressed confidence that it will generate steady and sustainable growth in bilateral trade over the medium to long term.

"This agreement marks a transition from a unilateral preference system to a mutually negotiated partnership," he said. "It creates stability for our exports and enables structured expansion of trade in both directions."

He emphasised that the success of the EPA will depend on proactive implementation, regulatory strengthening and private sector engagement in both countries.

"The framework is now in place," Bhuiyan said. "If we utilise it effectively, Bangladesh-Japan bilateral trade can expand in volume, diversify in composition and deepen in value addition."



# Bangladeshi garments fetch over 10% higher prices in EU than US

## Finds RAPID study

**STAR BUSINESS REPORT**

Bangladeshi apparels are fetching over 10 percent higher prices in European markets on average compared to the United States, even for similar products, according to a recent study by the Research and Policy Integration for Development (RAPID).

The study, unveiled yesterday by the local think tank in Dhaka, links the price gap to differences in tariff structures and trade preferences, with exporters benefiting from lower tariffs in Europe while facing higher barriers in the US.

RAPID said the research was based on transaction data from nearly 3,000 exporting firms collected by the customs department of the National Board of Revenue between 2010 and 2023.

It found that about 45 percent of these garment factories export to both the US and EU markets. For major

products, prices in the EU consistently exceed those in the US.

On average, leading exporters fetch 5-18 percent higher prices in the EU than the US for major 10 apparel products, it states. T-shirts, for instance, earn 20-27 percent higher prices in Germany than in the US, while trousers fetch 9-15 percent more.

Presenting the findings, Jillur Rahman, deputy director at RAPID and lecturer in development studies at Dhaka University, said, "The gap remains significant even after accounting for product type, firm size, and technological intensity."

He also highlighted differences in pricing strategies across preferential and non-preferential markets.

"High US tariffs compel exporters to absorb a significant share of the tax burden within their own margins to remain competitive at the border," Rahman noted.

"The findings are particularly important as Bangladesh prepares to graduate from the least developed country (LDC) category," he added.

Currently, duty-free access to the EU helps exporters secure better prices. But once Bangladesh graduates, some of these trade preferences may gradually erode, he said.

"The industry will need to strengthen competitiveness by improving product quality, diversifying into higher-value apparel segments and enhancing technological capabilities," he noted.

Without such upgrades, he said exporters may face growing pressure on prices and margins in global markets, especially in destinations where Bangladesh lacks preferential trade access.

Abdur Rahim Khan, additional secretary of the Ministry of Commerce, said in the past 50 years, the country has failed to

develop alternative markets or product competition, and now needed export-driven investment.

"If we graduate from LDC status without proper preparation and preferential market access, it will deal a major blow to both the country's economy and social structure," he added.

Doulot Akter, Mala, president of the Economic Reporters Forum, added, "The biggest problem of our ready-made garments industry is that we have put all our eggs in one basket. Lack of diversification in products and markets makes us vulnerable whenever instability arises in the US or European markets."

Md Hafizur Rahman, adviser on trade policy and trade facilitation at the World Bank, said, "Bangladesh needs to move from being a low-cost or low-price brand to a high-price brand. This will increase pricing power and competitiveness in international markets."



# EU market pays more for Bangladeshi garments than US: RAPID study

## FE REPORT

Bangladeshi-made major garment items fetch higher prices in the European Union (EU) compared to the US due to different pricing and margin strategies based on preferential market access, according to a study by Research and Policy Integration for Development (RAPID).

"On average, firms obtain 5.0 per cent to 18 per cent higher prices in the EU than in the US market for top ten apparel products," said Jillur Rahman, a lecturer at the Department of Development Studies of Dhaka University.

Citing example, the academic, also deputy director of RAPID, said exporters receive about 20-27 per cent higher prices for T-shirts in Germany than in the US, while trousers command a 9.0-15 per cent price premium in the German market.

He attributed the trend to a systematic price differential between preferential (EU) and non-preferential (US) markets, consistent with destination-specific pricing behaviour.

While the EU provides duty-free access under the Everything But Arms (EBA) initiative, the USA applies Most Favored Nation (MFN) tariffs averaging 12-15 per cent and offers no comparable preference.

Mr Rahman presented the findings of the study "Navigating Post-LDC Graduation: Firm-level Evidence on Export Pricing Strategies in Bangladesh's RMG Sector in Preferential vs Non-Preferential Markets" at a consultation event held on Saturday at the conference room of Department of Development Studies at the University of Dhaka. RAPID Executive Director Dr Muhammad Abu Eusuf moderated the session. Among others, Additional Secretary of the Ministry of Commerce Abdur Rahim Khan, acting Dean of the Faculty of Social Sciences at DU Dr Taiabur Rahman, Director General of Export Promotion Bureau Md Ruhul Amin and President of Economic Reporters' Forum Doulot Akter Mala spoke.

Bangladeshi apparel exporters pursue markedly different pricing strategies across preferential and non-preferential markets, said Jillur Rahman, adding that firms, on average, charge more than 10 per cent lower prices in the US market than in the EU.

➤ Firms obtain 5-18 pc higher prices in the EU than in the US for top apparel items

➤ Firms exporting to both the EU and US generate over 66 pc of Bangladesh's apparel export value, though 43.4 pc of exporters serve only the EU market

"High US tariffs compel exporters to absorb a significant share of the tax burden within their own margins in order to remain price-competitive at the border," he explained.

The findings also reveal incomplete exchange-rate pass-through, with exporters absorbing about 55 per cent of currency depreciation when exporting to the US, compared with around 40 per cent for the EU suggesting that firms operating in the non-preferential US market have stronger incentives to retain exchange-rate gains in local-currency margins rather than fully transmitting them into lower export prices.

Citing Bangladesh Customs data, the study observes that 43.4 per cent of firms exported only to the EU in 2023, while 11.8 per cent served the US market exclusively, with the remaining 44.8 per cent firms exporting to both destinations. However, firms operating in both markets accounted for more than 66 per cent of total apparel export value in 2023, indicating that most export earnings are generated by firms with simultaneous access to both markets.

Firm-level characteristics also play an important role in shaping export pricing as the study found that large firms charge about 30-35 per cent higher prices than small and medium-sized exporters

across both EU and US markets, reflecting stronger bargaining power, higher product quality, and better access to lucrative buyers.

This advantage is even more pronounced in the US market, compared to the EU market.

Firms exporting to a more diversified set of destinations obtain relatively higher price premiums--around 1.0 to 3.0 per cent in the EU and 5.0 to 8.0 per cent in the USA.

The results indicate that firms concentrated in knitwear exports receive 10-13 per cent lower prices, indicating relatively lower unit values for knitwear products.

By contrast, technological intensity does not significantly affect export prices, suggesting that it mainly contributes to cost efficiency and export volume expansion rather than price premiums. Firm characteristics such as size, technology, or export concentration do not appear to influence firms' pricing-to-market responses to exchange-rate changes.

The results further highlighted the role of product diversification in shaping firms' pricing strategies across destinations.

Single-product exporters show no statistically significant difference in pricing between the EU and US markets, indicating limited ability to adjust markups and have a greater tendency to behave as price takers.

In contrast, multi-product firms possess greater pricing flexibility allowing them to differentiate prices across markets with different trading conditions.

This distinction clearly separates more vulnerable single-product exporters from more resilient multi-product firm that can strategically manage destination-specific pricing, according to the findings.

Speaking as the chief guest, Abdur Rahim Khan laid stress on export-led investment to bring both technology and investment.

Bangladesh is still largely dependent on cotton-based garment items while the global scenerio is reversed to non-cotton or manmade fibre-based apparel. Over LDC graduation, he said Bangladesh might get three years' extension to be graduated.

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# Bangladesh RMG exporters get 10% lower prices in US market than EU: Study

APPAREL - BANGLADESH

## TBS REPORT

Bangladesh's apparel exporters receive, on average, about 10% lower prices in the United States market than in the European Union, mainly due to the absence of duty-free access in the US, according to a new study.

The study also finds that large exporting firms receive more than 30% higher prices than small exporters in both markets, mainly due to stronger bargaining power and product quality.

The research, conducted by the organisation Research and Policy Integration for Development (RAPID), analysed around 25 million export data entries from the Customs ASYCUDA World system covering the period from 2010 to 2023.

The findings were presented at a consultation event held at the conference room of the Department of Development Studies in Dhaka yesterday.

"On average, firms charge more than 10% lower prices in the US market than in

▶ Bangladeshi RMG exporters get 10% lower prices in US market than EU

▶ Lack of duty-free access to US market identified as key reason

▶ Large exporters earn 30-35% higher prices than others



▶ Knitwear exporters receive 10-13% lower than average prices

▶ Findings based on analysis of 25m export data from 2010-2023

the EU," said Jillur Rahman, deputy director of RAPID, while presenting the keynote.

He also said that high tariffs force exporters without preferential access to absorb a large portion of the tariff burden

within their own profit margins to remain price-competitive at the border.

"More favourable trade regimes may support better price realisation at the firm level," he added.

According to the analysis of 10 apparel products, prices in the EU market were found to be 5% to 18% higher than those in the US market.

Citing an example, he said exporters receive around 20% to 27% higher prices for T-shirts in Germany than in the US, while trousers fetch 9% to 15% higher prices in the German market.

Bangladesh enjoys duty-free export access to the EU market under the Everything But Arms scheme as a least developed country. The EU also offers relatively flexible rules of origin, including single-stage transformation requirements for garments.

In contrast, Bangladeshi apparel exports to the US face tariffs ranging from 12% to 15%.

About 66% of Bangladesh's total apparel exports are destined for the markets of the 27 EU countries and the US.

The report also

finds that large firms set prices 30% to 35% higher than small and medium-sized firms across both the EU and US markets, largely due to stronger bargaining power, higher product quality, and access to more lucrative buyers.

"Firm size is more strongly associated with price-setting advantages in the US than in the EU," the report noted. It also adds that firms concentrated on knitwear apparel exports receive 10% to 13% lower average prices, suggesting relatively lower prices for knitwear items.

The programme was moderated by Abu Eusuf, executive director of RAPID. Among others who spoke at the event were Abdur Rahim Khan, additional secretary of the commerce ministry; Taiabur Rahman, dean of the Faculty of Social Sciences at Dhaka University; and Doulot Akter Mala, president of the Economic Reporters' Forum.



# NBR moves to ease raw material sourcing for 1,100 non-bonded RMG factories

RMG - BANGLADESH

REYAD HOSSAIN

Exporters believe that the proposed decision will mark a significant step towards improving ease of doing business

The National Board of Revenue is set to remove restrictions preventing non-bonded exporters from sourcing raw materials locally through back-to-back letters of credit (LCs), a move expected to ease exports and improve access to inputs for hundreds of garment factories.

NBR Chairman Abdur Rahman Khan confirmed to The Business Standard that the board is actively working to remove these barriers.

"We are working to remove existing barriers preventing non-bonded exporters from sourcing raw materials from deemed exporters operating under bonded facilities," he said.

Officials at the revenue authority say an order on the matter may be issued soon after the necessary legal changes are completed.

A senior official of the NBR's VAT division, speaking on condition of anonymity, said a summary seeking approval from the finance ministry has already been prepared as part of

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## REFORMING EXPORT BARRIERS FOR NON-BONDED RMG FACTORIES

THE CORE CHANGE

- ▶ NBR set to allow non-bonded exporters to source raw materials locally via back-to-back LCs
- ▶ Previously, only factories with a bonded warehouse licence could access duty-free raw materials from other bonded firms
- ▶ Legal amendments are underway; formal orders expected shortly

### WHAT THE CHANGE MEANS

- Over 1,100 RMG units operating without bonded licences
- These factories contribute \$6.5b in annual exports
- They support livelihoods of about 7 lakh workers
- Reliance on expensive 'open market' cash purchases to be reduced



Production costs to be lowered

### WHY MANY EXPORTERS LACK BONDED LICENCES

- ▶ Strict requirements
  - Large warehouse space
  - Wide access roads
  - Minimum Tk1 crore paid-up capital
- ▶ Lengthy approval process
- ▶ Allegations of corruption in licence issuance

TBS Insights by IPDC FINANCE



the legal amendment process.

Once approved, the VAT Policy Division will issue a formal order, based on which the Customs Bond Wing will publish a separate order outlining the conditions under which the facility will operate. If implemented, the measure is expected to benefit more than 1,100 ready-made garment exporters that currently operate without bonded licences but rely on locally sourced inputs for exports.

According to the Bangladesh Garment Manufacturers and Exporters Association, these factories export garments worth around \$6.5 billion annually and employ nearly seven lakh workers.

Responding to concerns about possible irregularities once the facility is allowed, the NBR chairman said automation and integration of data systems would help reduce misuse.

"We are moving towards automation. With integration among relevant institutions, it will be possible to collect information and monitor activities, which will reduce the scope for irregularities," he said.

### A long-standing bottleneck

Garment industry leaders have been lobbying the NBR for several years to resolve the issue.

When asked why these complexities had not been resolved sooner, a senior official from the NBR Customs Wing said, "It is relatively straightforward to identify irregularities when bonded firms trade raw materials amongst themselves without exporting or by committing other breaches.

However, he said, detecting such issues when they supply raw materials to non-bonded institutions is difficult under the current system.

The official added, "This arrangement has persisted primarily due to a lack of capacity within Customs to detect these specific irregularities."

After the ouster of the government led by Sheikh Hasina in August 2024, the BGMEA raised the matter again. In a letter sent to the NBR on 30 November 2024, the association warned that more than a hundred factories had already shut down due to their inability to open back-to-back LCs or procure raw materials and accessories from bonded companies.

"The remaining factories are also losing capacity and are on the verge of closure," the letter read.

Exporters believe that the proposed decision will mark a significant step towards improving the ease of doing business in Bangladesh.

Md Shehab Udduza Chowdhury, vice presi-

dent of BGMEA – who has been liaising with the NBR on behalf of the association for the past year to resolve this issue – welcomed the new initiative.

He said, "Discussions on this matter began back in 2021. Multiple committees were formed to solve the problem, yet no progress was made. Although the NBR took action after our letter 11 months ago, the process eventually stalled.

"It was only during a meeting two weeks ago that a final decision was reached."

Shehab added, "The question remains: if this could be resolved now, why did it take so long? Action should also be taken against those responsible for obstructing the process for so long."

### Obstacles faced by non-bonded exporters

Under existing regulations, exporters holding bonded licences can collect yarn, fabrics or accessories from other bonded companies through back-to-back LCs against their master LCs. However, factories without bonded licences are not allowed to use this facility.

Exporters say banks often hesitate to open such LCs for non-bonded companies due to concerns over potential legal complications with the NBR.

As a result, many small exporters are forced to purchase raw materials and accessories in cash from the local market, often at higher prices.

During export procedures, customs authorities frequently ask for proof that VAT has been paid on those inputs. In addition, factories face further complications during annual VAT audits.

Consequently, non-bonded exporters often incur additional costs both in sourcing materials and in dealing with customs and VAT procedures, leaving them at a competitive disadvantage.

RL Apparels Limited, a knitwear exporter based in Badda in the capital, is one such company struggling under the current system.

Its Managing Director Md Rokonuzzaman told this newspaper that banks refuse to open back-to-back LCs due to the lack of permission under existing rules.

"As a result, we have to purchase raw materials and accessories from the open market in cash at higher prices," he said. "This increases our costs, and we also face difficulties during export clearance at ports and during VAT inspections."

According to him, the factory's workforce has already fallen from 160 to about 100 workers due to these challenges.

Rokonuzzaman noted that exporters of sweaters and woven garments without bonded licences face the most difficulties.

However, he said the removal of the restriction would significantly ease business operations for such factories.

### Why exporters avoid bonded licences

Entrepreneurs say obtaining a bonded warehouse licence is often difficult for small and medium-scale exporters.

According to Rokonuzzaman, applicants must meet several strict conditions, including maintaining a specific warehouse size, having wide access roads nearby and holding paid-up capital of at least Tk1 crore.

"Even if these conditions are met, applicants often have to wait months or even years after submitting their application," he said. Beyond these requirements, entrepreneurs have

also alleged corruption in the process. One garment exporter, requesting anonymity, said he had once planned to apply for a bonded warehouse licence but later learned that obtaining it would require paying around Tk30 lakh in bribes at different stages.

"If the bribe is paid, whether the conditions are actually met becomes less of a concern," he alleged. According to NBR data, around 6,000 factories across sectors, including garments and plastics, currently enjoy duty-free raw material sourcing under the bonded warehouse facility.

Data from the Export Promotion Bureau shows that Bangladesh exports around 87 types of manufactured goods. In the 2024-25 fiscal year, total exports of manufactured goods amounted to about \$48 billion, with more than 80% coming from the ready-made garment sector.

### Tackling irregularities through automation

Officials said one of the key reasons the government had previously been reluctant to extend this facility was the risk that duty-free raw materials might be diverted to the domestic market instead of being used for exports, which could result in revenue losses and create unfair competition for regular importers.

However, NBR officials now believe the risk can be mitigated through

digital monitoring systems. A senior official said several government processes have already moved online, including the e-VAT system and the Customs Bond Management System.

These systems will be integrated enabling data sharing among customs, VAT authorities, banks and other relevant institutions.

"With online data sharing among the relevant institutions, it will become easier to track whether non-bonded companies are purchasing raw materials from bonded companies and whether those inputs are ultimately used for exports," the official said.

He added that such integration would significantly reduce the chances of false export declarations or misuse of duty-free inputs.

The Business Standard

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