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Bottled Drinking Water Industry in Bangladesh:

Insights on Market and Consumers' Attitudes

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EDITOR
Mr. Arifur Rahman, FCCA, FCA, CSAA
Chief Executive Officer

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Bottled Drinking Water Industry in Bangladesh: Insights on Market and Consumers' Attitudes

*Nabihatul Afrooz**

Abstract

This study examines the bottled water industry in Bangladesh, highlighting its growth, market players, and consumer preferences. With a rising population in Dhaka and water contamination concerns, the demand for Groundwater is the primary source, but surface water treatment projects are needed to address sustainability challenges. Pricing strategies are competitive, and regional consumption patterns are significant in Dhaka, Narayanganj, and Gazipur. The study underscores growing demand due to urbanization, health consciousness, and higher incomes, with brand differentiation and packaging innovations as key strategies. This study surveyed consumers' attitudes toward mineral water consumption and purchase considering age, gender, income, availability, etc. The findings reflected that consumers prioritize hygienic bottled water and express satisfaction but are open to switching for better quality or price.

Keywords: *Bottled water industry, Bangladesh, consumer attitudes, market growth, groundwater, surface water treatment, pricing strategies.*

1. Introduction

The demand for bottled drinking water has risen over the years. The evolving lifestyles of both urban and rural populations, coupled with a heightened public awareness of waterborne illnesses, have played a significant role in driving the expansion of the bottled drinking water market. Dhaka is Bangladesh's capital and largest city, one of the most populous and densely inhabited urban centers globally, boasting a staggering 20.20 million residents in the Greater Dhaka Area. With the rising population, water contamination has also grown. Even after the water undergoes a treatment process by Dhaka Water Supply and Sewerage Authority (DWASA), city residents are suggested to boil water before drinking as 95% of the quality of the potable water from DWASA is ensured (H. M. Shofiul Islam Molla Jamal et al., 2020).

Additionally, with the urbanization and globalization, the lifestyle of people has changed over the years. People have become conscious of healthy and safe drinking and food habits. The bottled drinking water industry's growth is fueled by the increasing health consciousness among consumers and changing lifestyles resulting from economic advancement and higher purchasing power among the masses. Furthermore, bottled water has found its place in the rural market. It has become a common choice for serving guests at large gatherings, parties, and social events (Muhammad Ayub Ali, 2022).

Changing consumer preferences, increased health consciousness, rising disposable incomes, packaging innovations, brand differentiation, digital platforms, and seasonal demand fluctuations contribute to evolving market dynamics. A consumer survey of 55 respondents revealed that regardless of age, gender, and income, people prioritize hygienic bottled water. Even while traveling, mineral drinking water is preferable to local tap water.Key factors affecting brand choice include the Brand, packaging, bottle size, and cost considerations. Respondents expressed satisfaction with their current brands but were willing to switch for better quality, price, or convenience. This analysis also delves into the bottled drinking water industry in Bangladesh, examining its growth, market players, water sources, pricing strategies, and consumer attitudes, offering insights into the evolving dynamics of this vital sector.

**The author is Senior Research Associate, ECRL*

2. Market Overview in Bangladesh

2.1. Market Size and Growth

The bottled water industry emerged in Bangladesh during the 1990s, initially gaining popularity among affluent individuals. Over time, the landscape has evolved, and bottled water has now found favor among a broader cross-section of the population. Nowadays, people routinely opt for bottled water in various settings, including hotels, restaurants, offices, ceremonies, and during travel. Bangladesh's packaged drinking water market exceeded BDT 1,000 crore (approximately USD 118 million) in 2022 (Muhammad Ayub Ali, 2022). Forecasts indicate that the global market is poised for continued growth, with a projected compound annual growth rate (CAGR) of 5.9% from 2023 to 2030 (Grand View Research, 2022). Beverage companies supply 63 million liters of bottled water each month nationwide, with the sector consistently achieving a year-on-year growth rate of 10-12% (The Financial Express, 2022). Several key factors drive this growth, including rising concerns about health issues linked to contaminated water consumption, the scarcity of safe drinking water sources, and a growing preference among consumers for nutrient-enriched water.

BDT 1000 crore
packaged drinking
water market exceeded

40-42 crore liters annual demand locally for bottled drinking water

annual growth rate (CAGR) from 2023 to 2030 **5.9%**

Beverage companies supply
63 million liters
of bottled water each month nationwide

2.2. Market Share and Key Players

At present, Bangladesh boasts a multitude of over 30 water brands (Shawkat Ali, 2020). Among these, notable brands include Mum by Partex Beverage, Fresh by Meghna Group, Pran under the Pran-RFL Group, Shanti by Dhaka WASA, Jibon from City Group, Acme Premium Drinking Water by Acme Group, Spa by Akij Group, Mukta by Maitri Shilpa, Aquafina by PepsiCo, and Kinley by Coca-Cola (Muhammad Ayub Ali, 2022). Mum and Fresh drinking water stands out with a market share of approximately 60-65%, and the rest is dominated by other bottled drinking water manufacturers (Shawkat Ali, 2020).

3. Sources of Water and its Cleaning Process

For treating the water, the water is sourced from various sources and goes through a filtration process before bottling. There are three sources of water for processing for drinking in Bangladesh (Rahman, 2011).

- **Surface water treatment:** This process involves taking water from rivers, lakes, or ponds and treating it to remove contaminants, such as bacteria, viruses, parasites, arsenic, iron, manganese, and turbidity.
- **Groundwater extraction:** This process involves drilling wells or boreholes into the aquifers and pumping out the water for drinking or irrigation purposes. Groundwater is usually less contaminated than surface water, but it may contain high arsenic, iron, salinity, fluoride, etc., in some areas of Bangladesh.
- **Rainwater harvesting:** This process involves collecting and storing rainwater from rooftops or other catchment areas and using it for drinking or other domestic purposes. Rainwater is generally free of arsenic and salinity, but dust, bird droppings, insects, or chemicals from the roof materials may contaminate it. Therefore, rainwater may need to be filtered and disinfected before use.

On a global scale, approximately 980 cubic kilometers (km³) of groundwater are withdrawn each year, and Bangladesh's groundwater usage, at 32 km³, accounts for roughly 3% of this total (Sadiqur Rahman, 2023). Nevertheless, the groundwater level is depleted by 2-3m per year, according to the Ministry of Local Government, Rural Development and Co-operatives (LGRD). Thus, the Government is planning to implement water treatment projects for surface water so that reliance on groundwater sources is reduced as DWASA supplies 66% of its water from underground, while 34% from the surface level (Star Digital Report, 2023).

MUM AND FRESH DRINKING WATER STANDS OUT WITH
60-65%
MARKET SHARE

YEAR-ON-YEAR GROWTH RATE
10-12%

4. Bottled Water Price Strategy in Bangladesh

There has been a price hike in the ingredients imported for manufacturing packaged mineral water, and with the gas crisis, the production cost has increased. Thus, the market players are increasing the pricing of bottled water. The largest market share holder, MUM, and others like Fresh, Kinley, Aquafina, Pushti, and Jibon have adopted the price change (Yasir Wardad, 2023). Others are moving in the same direction.

The bottled players are following a competitive pricing strategy by adopting a similar price for the same quantity of bottles. Theoretically, there are three competitive pricing options (Indeed, 2022):

- Set prices below competitor prices
- Set prices the same as competitor prices
- Set prices above competitor prices

A price analysis was conducted for various bottled water brands, focusing on popular bottle sizes. This analysis drew information from online sources and in-store surveys, as summarized in Table 1. It was observed that while the prices of certain brands used to vary for the same bottle size in the past, recent data indicates that the prices of the most sought-after bottle sizes have become quite similar. Notably, brands like MUM and Fresh are widely accessible across different regions. However, despite their popularity, brands such as Kinley, Mukta, Pran, Jibon, and Aquafina are still not as readily available in every region of the country.

Table 1. Pricing of Popular Brands and Availability

SL	Organization	Brand	Popular Package	Price (BDT)	Availability in Retail Stores
1	Partex Beverage	MUM	500ml, 1.5 & 2 L	20, 30, 40	Widely available
2	Coca-Cola	Kinley	500ml, 1 L	20, 25	less available in remote areas
3	Meghna Group	Fresh	330 & 500ml, 1.5 L	15, 20, 30	Widely available
4	Maitri Shilpa	Mukta	500ml	20	less available
5	Pran-RFL Group	Pran	500ml, 1 L	20, 25	less available
6	City Group	Jibon	500ml	20	less available
7	Transcom Beverages Ltd	Aquafina	500ml	20	less available in remote areas

Source: *ECRL Survey*

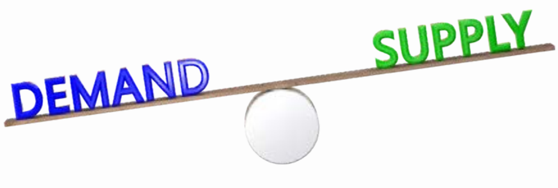
According to the Bangladesh Competition Commission, nearly 40-50% of the bottled drinking water is consumed in Dhaka, Narayanganj, and Gazipur (Yasir Wardad, 2023). People prefer to buy water bottles of 1 to 2 liters during intercity or long-distance traveling. Thus, the Dhaka-Chattogram Highway and Dhaka-Sylhet Highway are the second-largest consumption areas. Water bottles of 500 ml account for 45-50% of the total commercial water supply by the companies (Yasir Wardad, 2023).

5. Dynamics of Supply, Demand, and Consumption

5.1. Supply Dynamics

A complex interplay of market forces, regulations, consumer preferences, and competition shapes Bangladesh's bottled mineral water supply dynamics. As the market continues to evolve, suppliers will need to adapt and innovate to remain competitive and meet the changing demands of consumers.

- **Growing Market Demand:** The demand for bottled mineral water in Bangladesh has been on the rise due to factors like increasing urbanization, population growth, changing lifestyles, and rising concerns about water quality. Consumers are increasingly turning to bottled water as a safer and more convenient source of drinking water.
- **Competitive Landscape:** The bottled water market in Bangladesh is competitive, with numerous brands and suppliers operating in the sector. Domestic and international brands are vying for market share, leading to various consumer choices.
- **Regulatory Environment:** The Government of Bangladesh regulates bottled water quality and safety standards through agencies like the Bangladesh Standards and Testing Institution (BSTI). Suppliers must adhere to these standards to ensure the safety and quality of their products. Compliance with these regulations is a crucial factor affecting the supply dynamics.
- **Distribution Networks:** Bottled water suppliers must establish an efficient distribution network. It involves ensuring that the products reach both urban and rural areas effectively. Companies may employ various distribution channels, including wholesalers, retailers, and direct delivery to consumers.
- **Consumer Preferences:** Consumer preferences for the type of bottled water, such as mineral water, purified water, or flavored water, can impact the supply dynamics. Suppliers must adapt to changing preferences and introduce new products to meet consumer demands.
- **Price Sensitivity:** Price sensitivity among consumers is a factor that suppliers must consider. In a price-sensitive market like Bangladesh, finding the right balance between quality and affordability is crucial for market success.



5.2. Demand and Consumption Dynamics

The annual demand locally for bottled drinking water is approximately 40 to 42 crore liters (about 10.5 to 11.1 billion gallons) (Muhammad Ayub Ali, 2022); beverage companies supply 63 million liters of bottled water each month nationwide (The Financial Express, 2022). As consumer preferences and market dynamics continue to evolve, bottled mineral water suppliers in Bangladesh must adapt and innovate to meet changing demands and maintain competitiveness.

- **Increasing Health Consciousness:** As people become more health-conscious, there is a growing demand for clean and safe drinking water. Bottled mineral water is perceived as a healthier alternative to tap water, which has led to increased consumption. People prefer bottled water while traveling as they do not want to carry bottles and heavy luggage. Moreover, with the safety awareness of drinking water, people usually rely on packaged drinking water.
- **Rising Disposable Income:** Rapid urbanization in Bangladesh has driven the demand for bottled water. Urban areas often face water quality and infrastructure challenges, making bottled water a convenient and trusted option for city dwellers. As the economy of Bangladesh continues to grow, disposable income levels are rising. This has enabled more consumers to afford bottled mineral water, which is often priced higher than tap water.
- **Packaging Innovation:** Suppliers are exploring innovative packaging options to attract consumers. This includes offering bottled water in different sizes, eco-friendly packaging, and convenient packaging formats for on-the-go consumption.
- **Brand Differentiation:** Competition in the market has led to a focus on brand differentiation. Companies are investing in marketing, branding, and product quality to stand out in a crowded marketplace.
- **Digital Platform:** The rise of e-commerce platforms and online grocery stores has made it easier for consumers to purchase bottled mineral water online, contributing to the market's growth.
- **Seasonal Demand and Occasions:** é Demand for bottled water can be seasonal, with increased consumption during hot and dry months. Companies may adjust their marketing and distribution strategies accordingly. Nowadays, people provide bottled drinking water at meetings, conferences, wedding functions, and all kinds of social gatherings, which has created a seasonal increase in demand.

6. Survey Findings

6.1. Materials and Methods

In this industry analysis, primary data was acquired through a non-probability sampling approach known as convenience sampling. The data was collected within the Dhaka metropolitan area of fifty-five samples, employing a structured questionnaire. Due to time constraints and to reduce survey costs, this study has chosen a convenience sampling method and fifty-five individuals. In the data analysis process, summary statistics and cross-tabulation techniques were employed. Finally, this study determined the weighted scores for purchase occasions, brand preferences, size preferences, and related variables.

6.2. Results and Discussion

This study presents an overview of the data through Table 2. The respondents were categorized based on various parameters, including age, gender, income, preference for water over other beverages, hygiene preferences, frequency of water purchases, brand preferences, satisfaction levels, and the likelihood of switching brands. The age categories encompass three groups, with 61.8% of respondents falling in the 20-30 years age category, 32.7% in the 31-40 years age category, and 5.5% in the 41-50 years age category. It can be inferred that the primary consumers of bottled drinking water belong to the younger age group.

Regarding gender, males constitute 67% of the total responses, while females account for the remaining 33%. Monthly income has been divided into six groups, with the first three groups consisting of 41.8% of respondents in the BDT15000 to 25000 income range, 25.5% in the BDT26000 to 35000 range, and 16.4% in the BDT36000 to 45000 range. The remaining three groups each have 5.5% of the respondents, encompassing income ranges from BDT46000 to 55000, BDT56000 to 100000, and 100000 and above.
Irrespective of income, age, and gender, 71% of the respondents indicated a preference for water over other beverages, while only 9% favored carbonated drinks, and 20% expressed a preference for both. Among the respondents, 86% considered mineral water to be more hygienic and safe than tap water, encompassing all income levels. This suggests a growing demand for hygienic and safe drinking water in the future.

The findings also revealed that 16% of the respondents purchased bottled water on a daily basis, 31% made a weekly purchase, and 22% bought it every three days. In contrast, 9% did not prefer to buy bottled water at all, and 22% made rare purchases. Among the various brands, Mum was the preferred choice for 51% of the respondents; Fresh was favored by 20%, Aquafina by 14%, Kinley by 9%, while Acme and Sakura each had a 2% preference. Additionally, 2% of respondents did not express a specific brand preference.

However, the result of brand preference does not reflect the overall market of Bangladesh due to the small sample size. Moreover, Tables 3 and 4 represent the brand preference based on the respondents' age group and income distribution, respectively. Furthermore, the data shows that 71% of respondents have high likelihood to switch to a new brand, 9% have a low probability of switching, and 20% are indifferent to changing brands.

Table 2. Summary Statistics

Variables	Mean	Std. Dev.
Age		
20-30	0.618	0.490
31-40	0.327	0.474
41-50	0.055	0.229
Gender		
Female	0.327	0.474
Male	0.673	0.474
Monthly Income		
15000 to 25000	0.418	0.498
26000 to 35000	0.255	0.440
36000 to 45000	0.164	0.373
46000 to 55000	0.055	0.229
56000 to 100000	0.055	0.229
100000 & above	0.055	0.229
Prefer to Buy Bottled Water When Thirsty		
Water	0.709	0.458
Carbonated Drinks	0.091	0.290
Both	0.200	0.404
Mineral Water Hygienic than tap water		
Yes	0.855	0.356
No	0.145	0.356
Frequency of Bottled Water Purchase		
Everyday	0.164	0.373
Not prefer to buy bottled water	0.091	0.290
Once a week	0.309	0.466
Once every 3 days	0.218	0.417
Rarely	0.218	0.417
Prefered Brand		
Acme	0.018	0.135
Aquafina	0.145	0.356
Fresh	0.200	0.404
Kinley	0.091	0.290
Mum	0.509	0.505
Sakura	0.018	0.135
No specific brand	0.018	0.135
Satisfaction of Brand		
Highly Satisfied	0.382	0.490
Moderate	0.491	0.505
Indifferent	0.127	0.336
Probability of Switch		
High	0.709	0.458
Low	0.091	0.290
Indifferent	0.200	0.404
N	**55**	

Table 3. Brand Preference by Age Group

Age	Acme	Aquafina	Fresh	Kinley	Mum	Sakura	No Specific Brand	Total
20-30	1	3	6	4	20	0	0	34
	2.94%	8.82%	17.65%	11.76%	58.82%	0.00%	0.00%	100%
31-40	0	4	5	1	7	0	1	18
	0.00%	22.22%	27.78%	5.56%	38.89%	0.00%	5.56%	100%
41-50	0	1	0	0	1	1	0	3
	0.00%	33.33%	0.00%	0.00%	33.33%	33.33%	0.00%	100%
Total	**1**	**8**	**11**	**5**	**28**	**1**	**1**	**55**

Table 4. Brand Preference by Income Distribution

Monthly Income Range (BDT)	Acme	Aquafina	Fresh	Kinley	Mum	Sakura	No Specific Brand	Total
15000 to 25999	1	2	5	3	11	0	1	23
	4.35%	8.70%	21.74%	13.04%	47.83%	0.00%	4.35%	100%
26000 to 35999	0	3	3	1	7	0	0	14
	0.00%	21.43%	21.43%	7.14%	50.00 %	0.00%	0.00%	100%
36000 to 45999	0	1	1	0	6	1	0	9
	0.00%	11.11%	11.11%	0.00%	66.67%	11.11%	0.00%	100%
46000 to 55999	0	0	2	0	1	0	0	3
	0.00%	0.00%	66.67%	0.00%	33.33%	0.00%	0.00%	100%
56000 to 99999	0	0	0	1	2	0	0	3
	0.00%	0.00%	0.00%	33.33%	66.67%	0.00%	0.00%	100%
100000 & above	0	2	0	0	1	0	0	3
	0.00%	66.67%	0.00%	0.00%	33.33%	0.00%	0.00%	100%
Total	**1**	**8**	**11**	**5**	**28**	**1**	**1**	**55**

Additionally, the study revealed that 72.73% of the respondents displayed a preference for purchasing bottled drinking water when dining in restaurants (refer to Table 5). Approximately 67.27% favored acquiring bottled water during their travels, while 49.09% of respondents indicated a preference for purchasing bottled water in situations where drinking water from other sources was unavailable. In addition, 14.55% of individuals chose to purchase bottled water while visiting a doctor or a hospital, and 7.27% made such choices when experiencing sickness or illness.

Table 6 highlights the primary sources of information to choose a brand. Notably, advertisements in newspapers (49.09%), TV channels (49.09%), posters (49.09%), social media posts (18.18%), in-store displays (49.09%), and distribution events (12.73%) were identified as common sources of information. Regarding the choice of reusable bottled water brands, cost minimization played a significant role, influencing 56.36% of the respondents (refer to Table 7). Reducing plastic waste was another substantial motivator, with 40% of participants expressing a preference for eco-friendly options. Additionally, 20% of respondents indicated a reluctance to reuse plastic bottles. Finally, it is evident that consumers prioritize the quality and availability of safe drinking water, influencing their purchase behaviors and potentially leading to brand switching. Furthermore, factors such as bottle size, durability, and reusability are additional considerations that influence the selection of drinking water brands.

Table 5. Occasions for Bottled Water Purchase

Particulars	Percentage
Eating in Restaurants	72.73
When drinking water is not available	49.09
While Travelling	67.27
Doctor's Visit or Hospital	14.55
During Illness or Sickness	7.27

Table 6. Information Sources for Bottled Water

Particulars	Percentage
Advertisements in Newspaper	49.09
TV channels	49.09
Posters	49.09
Distributed in an even	12.73
The Beverage Aisle of shops	49.09
Social Media Post	18.18

Table 7. Motives for Opting for Reusable Bottles Instead of Purchasing New Ones

Particulars	Percentage
Reducing plastic waste	40.00
Prefer not to reuse plastic bottle	20.00
Cost minimization	56.36

7. Conclusion

The report provides a comprehensive analysis of the bottled drinking water industry in Bangladesh, highlighting key factors influencing its growth and market dynamics. Several prominent brands, such as Mum, Fresh, and Aquafina, dominate the market. These brands have adopted competitive pricing strategies, aligning their prices with competitors, reflecting the price sensitivity of consumers. The report discusses the sources of water and the water treatment process, highlighting the need to reduce reliance on groundwater sources due to depletion. However, sustainability challenges loom large as the groundwater level depletes at an alarming rate, necessitating a shift towards surface water treatment projects to reduce reliance on underground sources (Star Digital Report, 2023).

Nevertheless, the report conducted a primary research to understand the drinking water market, consumer preference, timing of purchase, frequency of purchase, current usage satisfaction level, probability of switch and so forth. Findings show that consumers, regardless of age, gender, or income, prioritize hygienic bottled water. Most consumers are willing to switch brands for better quality, price, or convenience. The findings underscore the importance of quality, brand recognition, and advertising in influencing consumer choices in this dynamic market.

To remain competitive, industry players must continue to innovate, address consumer preferences, and adapt to evolving market dynamics. As people prioritize health and convenience, bottled drinking water is poised to remain a vital part of daily life in Bangladesh, meeting the growing demand for clean and safe drinking water.

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About ECRL

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Dhaka Office

Shams Rangs, House 104, Park Road Level-A1, A2 & A5 Baridhara, Dhaka-1212
Tel: +880 2222260911,
+880 2222260897
Fax: +880 2222260828
Email: info@emergingrating.com

Chattogram Office

Al Madina Tower, 6th Floor 88-89, Agrabad C/A, Chittagong
Tel: +880 1833 330059,
+880 1833 330061

Bogura Office

MA Complex, 3rd Floor, East Side. Tin Matha Railgate. Bogra- 5800

Khulna Office

Mollick Shopping Complex 99 Khan –a- Sabur Road, Khulna-9100
Tel: +880 1833 330060

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