



PUNJAB

*Heart Land of Investment
in PAKISTAN*

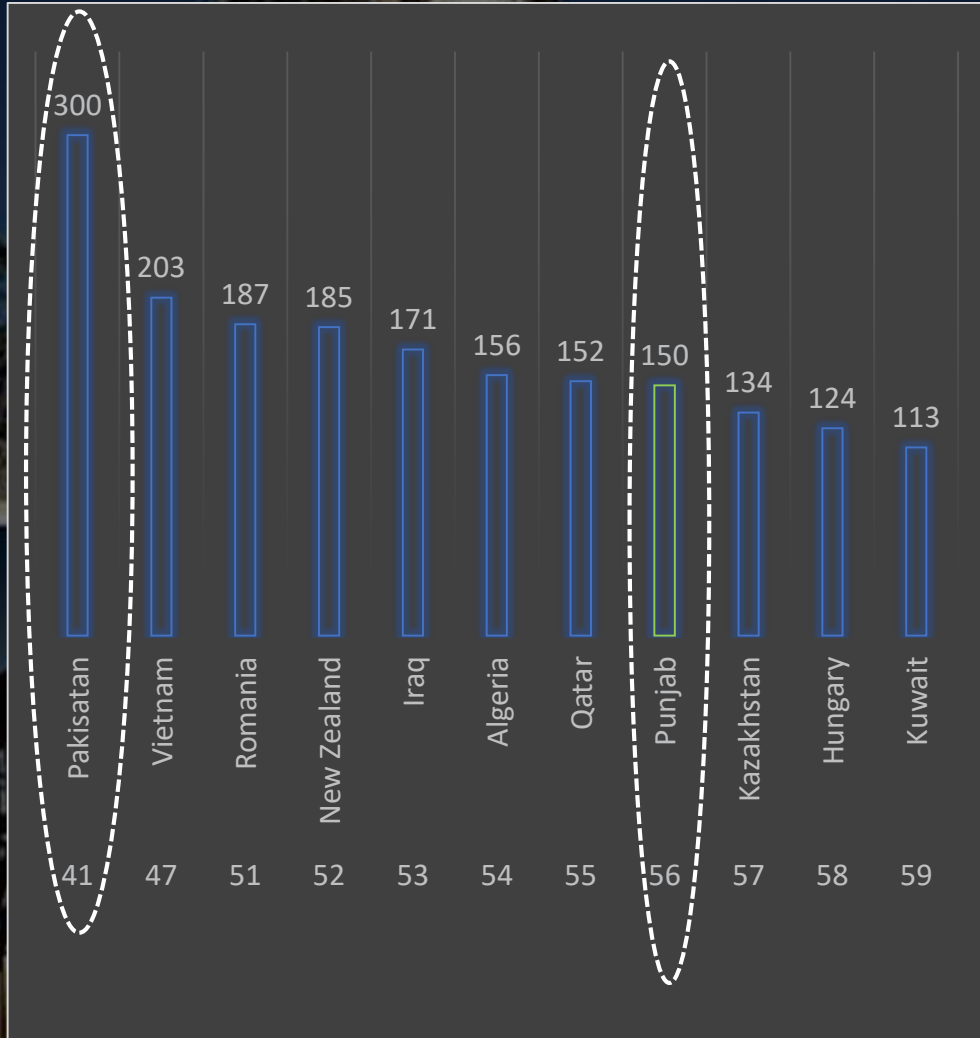
Punjab Board of
Investment &
Trade



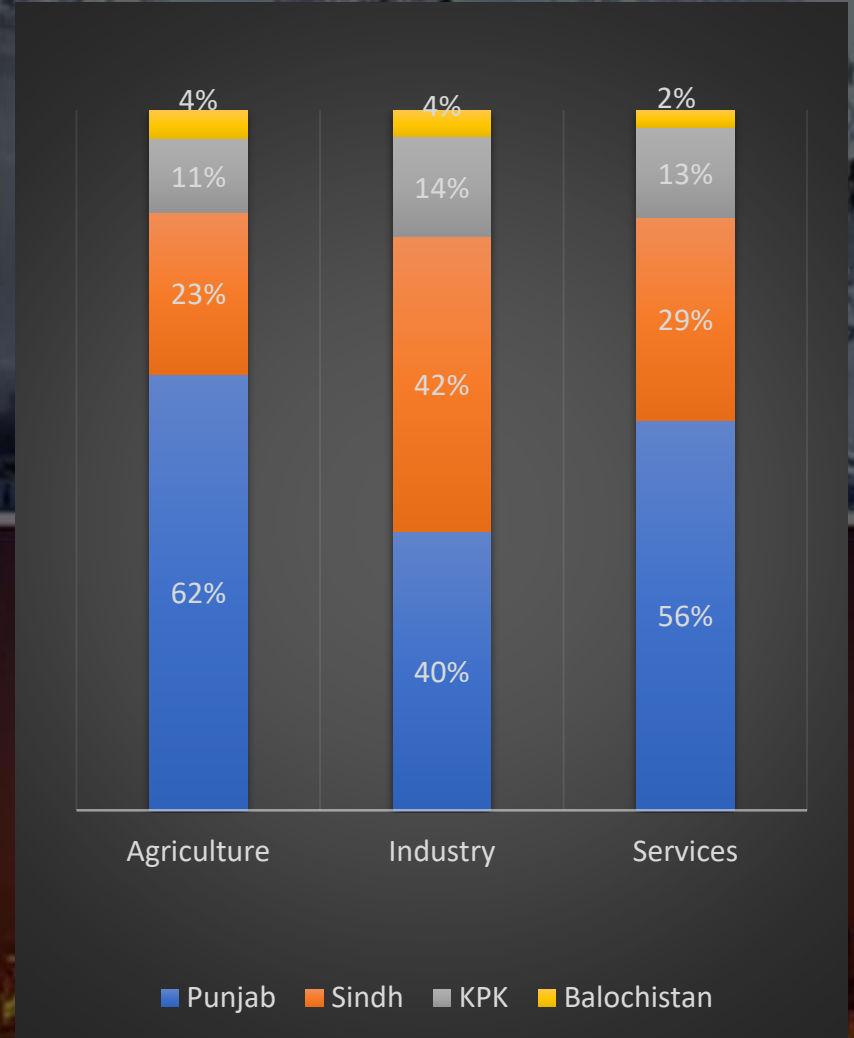
**PUNJAB BOARD
OF INVESTMENT & TRADE**

Government of The Punjab

Punjab's GDP (USD billion)



Punjab: Lion's share in Pakistan economy



PUNJAB INFRASTRUCTURE



11 Airports



107,973 km Road Network



3,116 km Railway Network



Strong Logistics Network



75% Tele-density



Broad Band Internet

Punjab: Future's Global Investment Hub



55% of Population of Pakistan. Around 43% population is under 20 years of age in Punjab



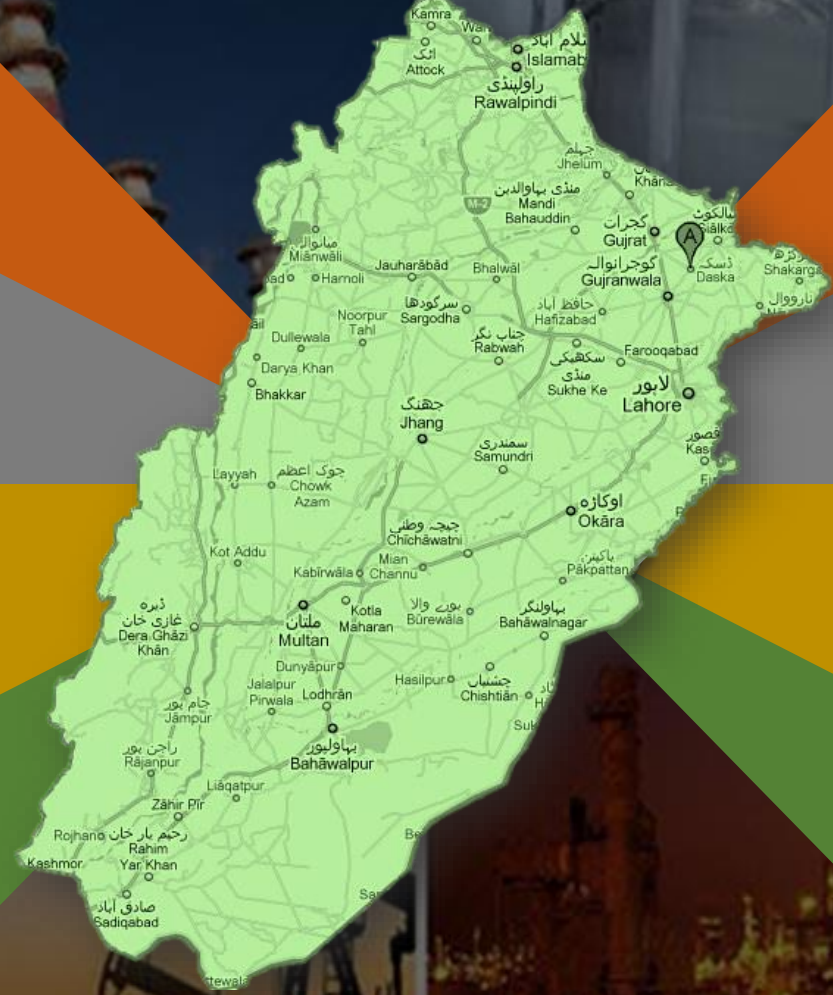
32% Population Living in Urban Cities. 5 out of 7 major urban centers located in Punjab



54% share in Pakistan GDP



68,000 industrial Units



58% contribution to National manufacturing sector



Home to regional offices and head offices of MNCs and local corporates total no of MNC



Punjab is a dominant producer of major crops like wheat (80%), cotton (75%), sugarcane (64%) & rice (58%)



72% of the irrigated land of Pakistan is in Punjab



NOTIFIED SPECIAL ECONOMIC ZONES (SEZS)

	Name	Ownership	Location	Acres
1	M – 3 Industrial City	Public	FAISALABAD	4356
2	Value Addition City	Public	FAISALABAD	225
3	Allama Iqbal Industrial City	Public	FAISALABAD	2800
4	Quaid E Azam Business Park	Public	SHEIKHUPURA	1536
5	Bhalwal Industrial Estate by PIEDMC	Public	SARGODHA	427
6	Vehari Industrial Estate by PIEDMC	Public	VEHARI	277
7	Rahim Yar Khan Industrial Estate by PIEDMC	Public	RAHIM YAR KHAN	456
8	Rachna Industrial Park by NIP	Public	SHEIKUPURA	178
9	SEZ Oil Village by FOC – I (FWO)	Public	RAWALPINDI	100

IN-PROCESS SPECIAL ECONOMIC ZONES (SEZS)

	Name	Ownership	Location	Acres
1	Bahawalpur Industrial Estate	Public	BAHAWALPUR	483
2	Masan Daud Khel SEZ	Private	MAINWALI	238
3	JW China Pakistan SEZ	Private	LAHORE	231
4	Zaamin SEZ (Private)	Private	LAHORE	200
5	Roshan Sun Tao Paper Mills	Private	SHIEKHUPURA	56

Key Sectors

AGRICULTURE

Punjab : Share of Total Production

63%
Sugarcane



66%
Mango



83%
Cotton



78%
Maize



80%
Wheat



95%
Potato



82%
Guava



95%
Citrus



95%
Aromatic
Rice



National Outlook

Growth (YOY)	2.67 (FY-2020)
% of GDP	19.50%
Labor Force	42.30%

Agriculture-based products for export from Pakistan is 60% contributed by Punjab.

TOTAL HORTICULTURAL PRODUCTION IN PUNJAB
67% OF TOTAL NATIONAL PRODUCTION

79% OF EDIBLE OILSEED IN PAKISTAN IS GROWN IN
PUNJAB

Key Sectors

INVESTMENT OPPORTUNITIES: AGRICULTURE

Pulp Processing Unit

**Juice Manufacturing
Unit**

Grain Storage Silos

**Centifolia
(plantation of Surkha
Ghulab)**

Punjab Board of Investment & Trade

Key Sectors



Punjab Board of Investment & Trade



LIVESTOCK , DAIRY

Punjab contributes 70% to the national livestock and dairy subsector of Pakistan

Dairy sector of Pakistan employs more than 35Mn people of Pakistan

The total processed milk consumption in Pakistan is 5% of the total milk while loose milk consumption is 95%

59 Bn liters of milk annually produced in Pakistan, 20% of the milk goes to waste, of which 15% wastage is due to less chilling facilities



Poultry:

- Sub-sector with PKR 700 Bn worth
- 8 % growth per annum
- 1,163Mn broiler production annually
- 11th top producer

Species	2018-19	2019-20
Cattle	47.8 MN	49.6 MN
Buffalo	40 MN	41.2 MN
Sheep	30.9 MN	31.2 MN
Goat	76.1 MN	78.2 MN
Camel	1.1 MN	1.1 MN

The provincial government has allocated USD78Mn, approximately, for livestock and dairy sector in the province.

(L&DD Punjab, Economic Survey of Pakistan 2019-20)

Key Sectors



Punjab Board of Investment & Trade



INVESTMENT OPPORTUNITIES: LIVESTOCK , DAIRY

Dairy Farming

**Pharmaceutical
Industry**

Disease Free-Zone

Meat Processing

Key Sectors

AQUACULTURE

Asia contributes more than 90% of world aquaculture Production.

China, India and Bangladesh collectively produce c.64% of Inland Aquaculture production in Asia

Pakistan's Average per capita fish consumption is about 1.9 kg per year, only a 1/10th of the global average of 20 kg per capita in 2015 " the lowest of any ocean-facing nation"

Punjab and Sindh Provinces are the dominant aquaculture producers.

Pakistan's fisheries contribute modestly to economic growth and remained unexplored to achieve its optimal potential, despite favorable agro-climatic conditions.

Key Sectors

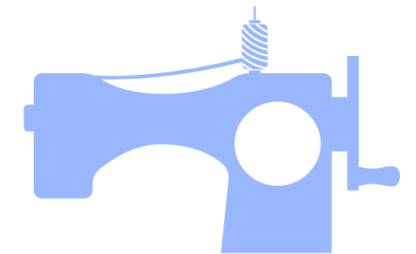
INVESTMENT OPPORTUNITIES: AQUACULTURE

- Establishing of aquaculture fish farming.
- There is a huge potential for extensive Tilapia aquaculture in the province which would eventually be sold in local and foreign market
- The private sector need to start joint venture with the Fisheries Development Board (FDB) using imported seed and feed to grow shrimp farming culture as well as Sea bass.
- Due to the developing China-Pakistan Economic Corridor, a new ready market will be created for new aquaculture products.

Key Sectors

TEXTILE

Pakistan	8th Largest in Asia
Cotton	4th Largest Producer
Export	62% Of Pakistan USD13.2Billion
GDP	8.5% Contribution
Textile Units	517
Yarn Units	21 (Capacity- 100,000)
Industry	423
Spindles	11.3Million
Domestic Stitching Machines	700,000
Installed Looms	9084
Hosiery Industry Jobs	1-Million
Major Products	Raw Cotton, Cloth, Hosiery, Knitwear, RMG, Towels, Tents, Bedwears



**USD 1.97Bn Exports
Ready Made Garments**



**517 Textile Units
13.414mn Spindles**

Key Sectors

INVESTMENT OPPORTUNITIES: TEXTILE

Nylon Manufacturing

**Demin Jean
Manufacturing**

Sports Apparel Unit

**Viscose
Manufacturing**

Punjab Board of Investment & Trade



Key Sectors

LEATHER & ARTICLE OF LEATHER

Third top export sector of Pakistan

- Total exports of USD862.89Mn
- Direct employment of 500,000 people
- 5pc Contribution to GDP
- More than 800 tanneries in Pakistan
- 5 Tanneries are member of Leather Working Group
- Average animal skin/hide size is 40-44sq/ft
- USD135Mn exports of footwear in 2019-2020

Livestock Population in Pakistan

(Pakistan Tanners Association- PBIT Research)

Key Sectors

INVESTMENT OPPORTUNITIES: LEATHER

Skill training centers

Fancy & formal shoes manufacturing

Aviation & Auto mobile leather

Value addition in tanning industry

Key Sectors



Punjab Board of Investment & Trade



ENERGY

The installed electricity generation capacity is approximately 21000 MW, presently out of which 6599 MW comes from hydropower.

Power generation companies are allowed to import plants and equipment @ 5% duty (0 % for renewable energy) with exemption on sales tax

Full repatriation of profit plus investment

Hydrological risk borne by the government

The identified hydropower potential in the country is approximately 41,722 MW

Income tax exemption for life

International arbitration awards enforceable under law

Minimum 15% ROE guaranteed net of taxes (US\$ based)

Key Sectors



Punjab Board of Investment & Trade



INVESTMENT OPPORTUNITIES: ENERGY

**Waste To Energy
Management**

**Solar Power
Generation**

**Wind Power
Generation**

Hydel Power

Key Sectors

TOURISM

- The direct contribution of Travel & Tourism to GDP was PKR930.9bn (USD 832.1mn)
- Travel & Tourism directly supported 1,493,000 jobs
- The direct contribution of Travel & Tourism 7.4% of GDP in 2017, and is forecast to rise by 5.8% in 2018,
- Visitors exports 3.7% of total exports in 2017 and is expected to rise by 6.4% in 2018 Visitor exports generated PKR98.7bn (USD936.4mn)
- Travel & Tourism investment in 2017 was PKR410.4 Mn

Multiple location available for lease in collaboration with Government of Punjab

Key Sectors

INVESTMENT OPPORTUNITIES: TOURISM

Multiple Lease Location

Amusement Parks

Hotels

Restoration of Heritage

Punjab Board of Investment & Trade



Key Sectors



Punjab Board of Investment & Trade

ECOMMERCE & DIGITAL SECTOR

Internet Users are 76Mn

44Mn people purchase online

Average revenue per online transaction is USD44

Online buyers have 12pc male and 3.3pc female users

Online purchases of USD923Mn for fashion & beauty products by Pakistani's in 2019-20

Online purchases of USD429Mn for electronics products by Pakistani's in 2019-20

Online purchases of USD185Mn for food & personal care products by Pakistani's in 2019-20

Key Sectors

INVESTMENT OPPORTUNITIES: ECOMMERCE

**Electronical
appliances Supply
chain**

**Online Shopping
market**

E-Hospital

Data collection

Punjab Board of Investment & Trade

Key Sectors

EDUCATION

Punjab government allocated a total budget of PKR **382.98n** for education which is 16.64% of the total budget for the province.

Total Public sector schools in Punjab are 52470 (2018)

Total number of Private Schools in Punjab in 2020 is 117,810

Out of 117,810 private schools, around 90% of the schools are operating in rented buildings which spotlights the number of 106,029 schools in Punjab

There are 45 public sector universities while 28 private sector universities in Punjab

There are 303 Private sector colleges in 30 cities of Punjab.

Key Sectors

INVESTMENT OPPORTUNITIES: EDUCATION

Ed-Tech

Hi-Tech Institutes

**Lahore Knowledge
Park**

**Skill Development
Centers**

Punjab Board of Investment & Trade

Public Private Partnership (PPP)

Overview/Mandate

- The PPP cell is serving as a focal point for supporting all PPP initiatives in the province.
- The mandate of the PPP Cell is to promote and facilitate PPP development in Punjab and assist line departments and local governments in preparing and executing high-quality PPP projects.
- The PPPs help in attracting private capital investment, increasing efficiency through the profit motivation of the private sector, and helping reform the selected sectors through the reallocation of roles and risks.

Operational Projects

- Punjab Vehicle Inspection Certification System (VICS)
- Flyover Over Railway Crossing Khana Kachha Lahore
- Lahore Ring Road Southern Loop (SL-I & SL-II)

Public Private Partnership (PPP)

Awarded Projects

- Lahore Ring Road Southern Loop (SL-III)
- Dualization of Sheikhupura Gujranwala Road
- Establishment of Food Grain Silos in Punjab

Bidding Stage

- Procurement, Installation, and Operation & Maintenance of Water Meters in Lahore
- Establishment Of Weaving City At M-3 Industrial Estate, Faisalabad
- Establishment Of Combined Effluent Treatment Plant (CETP) at Sundar Industrial Estate (SIE)
- Establishment Of Combined Effluent Treatment Plant (CETP) at Quaid-e-Azam Industrial Estate (QIE)