MANUFACTURING AND MINING

(Jul-Mar FY2025)

LSM Growth Rate	-1.5% ▼
Textile Growth	2.2% ▲
Wearing Apparel	7.6% ▲
Food	-0.5% ▼
Coke & Petroleum Products	4.5% ▲
Chemicals	-5.5% ▼
Pharmaceutical	2.3% ▲
Mining & Quarrying	-3.4% ▼

Chapter 3

MANUFACTURING AND MINING

The Manufacturing and Mining sectors remain critical for Pakistan's industrial base, jointly contributing 13.2 percent to GDP. Within manufacturing, Large-Scale Manufacturing (LSM) plays a dominant role, accounting for 67.5 percent of the manufacturing sector and 8.0 percent of GDP, followed by Small-Scale Manufacturing (SSM) and Slaughtering, which contribute 2.4 percent and 1.4 percent to GDP, respectively.

Over the past few years, Pakistan's manufacturing sector, particularly LSM, has faced significant headwinds amid a challenging macroeconomic environment. The country has grappled with a precarious current account position and a high fiscal deficit, necessitating stabilization measures under the IMF program. While these adjustments were critical for restoring macroeconomic stability, they resulted in import compression, exchange rate hike, elevated policy interest rates, and energy constraints, adversely impacting industrial performance.

Macroeconomic conditions began to stabilize in FY 2025 as reflected in easing inflation, a declining policy rate, and improvements in fiscal and external indicators. Despite this, overall manufacturing growth slowed to 1.3 percent in FY 2025, compared to 3.0 percent last year. This deceleration was primarily driven by a contraction of 1.5 percent in LSM, compared to a modest growth of 0.9 percent in the previous year. In contrast, SSM and Slaughtering grew by 8.8 percent and 6.3 percent, respectively, providing some support to the sector.

Meanwhile, the Mining and Quarrying sector continued to face difficulties, contracting by 3.4 percent in FY 2025; an improvement compared to the 4.0 percent decline recorded in the previous year. This subdued performance across both manufacturing and mining signals the need for targeted policy interventions to address persistent structural bottlenecks and unlock the sectors' growth potential.

Section 3.1 presents an overview of LSM's recent performance and key drivers, while the following sections (3.2 to 3.5) explore the dynamics of key industrial segments, namely textiles, automobiles, fertilizers, and cement, highlighting sector-specific developments, challenges, and emerging trends.

3.1 Performance of Large-Scale Manufacturing: Gradual Stabilization with Persistent Headwinds

The trajectory of LSM during July-March FY 2025 remained subdued, with a contraction of 1.47 percent compared to a contraction of 0.22 percent in the same period last year. Despite visible signs of stabilization in key macroeconomic indicators, the recovery in industrial output has been uneven and slower than anticipated. As depicted in Figure 3.1, this marks the third consecutive year of negative growth in LSM, following a steep contraction in FY 2023 and near-stagnation in FY 2024. The trend reflects persistent structural and cost-side challenges that continue to weigh on LSM.

High input costs, and elevated tax rates, continued to pose headwinds to LSM growth. At the same time, supportive measures were introduced on both the monetary and fiscal fronts, most notably, a cumulative reduction of 850 basis points in the policy rate by the State Bank of Pakistan during July-March, and a targeted winter electricity tariff relief package by the government, to ease financial constraints and reduce energy costs for industrial units. While

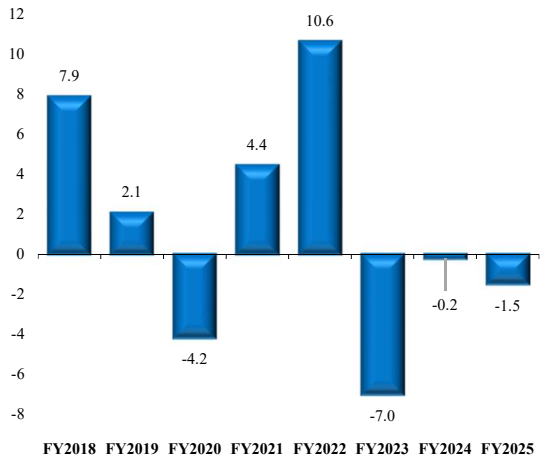
these interventions helped improve business confidence and liquidity in selected sectors, their full impact on production activity is still unfolding.

Nearly half of the LSM basket (48.8% weight of QIM) recorded positive growth during the period, reflecting resilience in industries such as textiles, automobiles, wearing apparel, tobacco, and transport equipment. However, the overall index growth remained negative due to pronounced output declines in sectors like food, chemicals, non-metallic minerals, iron & steel, and electrical equipment. The contraction in these sectors, many of which have substantial backward and forward linkages, exerted a disproportionately large drag on aggregate LSM growth.

Localized disruptions, such as law and order concerns in parts of Khyber Pakhtunkhwa, led to temporary closures of some production units, though their overall impact remained marginal. In parallel, certain plants permanently ceased operations due to sustained un-competitiveness or a market shift toward imported alternatives, further weighing on industrial output.

The disparity between financial relief measures and real sector recovery suggests a time lag in the transmission of macroeconomic policy to production outcomes. With improving credit availability, declining inflation, and enhanced investor sentiment, the outlook for LSM recovery remains cautiously optimistic provided that stability is sustained and structural bottlenecks continue to be addressed.

Fig-3.1: LSM Growth % (July-March)



On a year-on-year (YoY) basis, LSM's growth was 1.8 percent in March 2025, compared to a growth of 1.7 percent in the same month last year. Meanwhile, on a month-on-month (MoM) basis, LSM declined by 4.6 percent in March 2025, compared to 5.6 percent decline in February 2025.

Table 3.1 presents group-wise growth trends in the manufacturing sector for July–March FY 2024 and FY 2025. Out of 22 industrial groups, 12 recorded positive growth during July–March FY 2025, indicating a modest recovery in selected segments of the manufacturing sector.

Table 3.1: Group-wise growth for July-March 2023-24 vs July-March 2024-25

S.No.	Manufacturing Items	Weight	% Change (July-March)		(%) Point Contribution (July-March)	
			2023-24	2024-25	2023-24	2024-25
1	Food	10.69	1.84	-0.49	0.34	-0.09
2	Beverages	3.84	-3.94	0.88	-0.17	0.04
3	Tobacco	2.07	-33.59	13.12	-0.66	0.17
4	Textile	18.16	-8.81	2.15	-1.57	0.35
5	Wearing Apparel	6.08	5.41	7.62	0.77	1.14
6	Leather Products	1.23	5.32	1.30	0.04	0.01
7	Wood Products	0.18	12.09	0.89	0.00	0.00
8	Paper & Board	1.63	-2.10	0.34	-0.05	0.01
9	Coke & Petroleum Products	6.66	4.85	4.48	0.31	0.30
10	Chemicals	6.48	8.07	-5.51	0.61	-0.45
	- Chemicals Products	2.55	-3.16	-12.28	-0.10	-0.38
	- Fertilizers	3.93	16.40	-1.34	0.71	-0.07
11	Pharmaceuticals	5.15	23.19	2.32	1.08	0.13
12	Rubber Products	0.24	3.60	-2.92	0.01	-0.01

Table 3.1: Group-wise growth for July-March 2023-24 vs July-March 2024-25

S.No.	Manufacturing Items	Weight	% Change (July-March)		(%) Point Contribution (July-March)	
			2023-24	2024-25	2023-24	2024-25
13	Non-Metallic Mineral Products	5.01	-4.35	-10.45	-0.30	-0.68
14	Iron & Steel Products	3.45	-2.20	-10.94	-0.11	-0.51
15	Fabricated Metal	0.42	-5.42	-17.16	-0.02	-0.06
16	Computer, electronics, and Optical products	0.03	-15.99	2.55	0.00	0.00
17	Electrical Equipment	2.05	-7.48	-15.89	-0.24	-0.47
18	Machinery and Equipment	0.39	61.43	-32.74	0.20	-0.17
19	Automobiles	3.10	-37.38	40.00	-1.01	0.68
20	Other transport Equipment	0.69	-9.89	32.83	-0.05	0.14
21	Furniture	0.51	23.13	-61.07	0.60	-1.94
22	Other Manufacturing (Football)	0.32	1.34	-13.41	0.01	-0.06

Source: Pakistan Bureau of Statistics

The output of the food group recorded a moderate contraction of 0.5 percent during July-March FY 2025 against the growth of 1.8 percent last year. Notable declines were recorded in sugar, bakery products, and chocolate & sugar confectionery (7.1 percent), tea blended (3.7 percent), and vegetable ghee (2.0 percent). In contrast, wheat and rice milling increased by 6.4 percent, and starch and its products rose by 0.4 percent, supported by better crop harvests. The decline in sugar production was primarily attributed to the deregulation of the Minimum Indicative Price of sugarcane by provincial governments, which created uncertainty for farmers. This was compounded by adverse environmental conditions, pest attacks, and low sucrose content, all of which significantly affected crop yields and sugar recovery rates. Moreover, imposing a Federal Excise Duty (FED) of Rs 15 per kg at the beginning of FY 2025 further escalated production costs, adding pressure to an already struggling sugar industry.

The textile sector witnessed a growth of 2.2 percent during July-March FY 2025, compared to a contraction of 8.8 percent in the same period last year. Growth in cotton yarn (8.4 percent), cotton cloth (0.8 percent), and terry towels & bathrobes (4.0 percent) were key contributors. This turnaround was supported by improved macroeconomic conditions and a shift in the policy rate, which lowered borrowing costs and encouraged investment. Furthermore, political unrest and labour disputes in Bangladesh between December 2024 and March 2025 led to the redirection of some export orders to textile producers in other Asian countries, including Pakistan. Although domestic cotton production declined during FY 2025, rising imports of raw cotton bridged the supply gap, ensuring continuity in production. Additionally, increased imports of textile machinery and higher working capital borrowing signal the industry's intent to expand and modernize operations, reinforcing positive growth momentum for the coming months. However, challenges persist in jute and woolen-related products, with output of jute goods and woolen & worsted cloth declining sharply by 25.1 percent and 24.9 percent, respectively. The woolen industry remains constrained by the poor quality of domestic wool, while the jute sector continues to face operational inefficiencies (Table 3.7).

The wearing apparel sector sustained its growth momentum, recording a 7.6 percent increase during July-March FY 2025, up from 5.4 percent in the same period last year. The continued expansion reflects the strengthening position of the readymade garment industry, driven by improved competitiveness and rising demand in both domestic and international markets. This is further evidenced by a 7.8 percent increase in export volumes and a notable 19.1 percent rise in export values (Table 3.4).

Coke and Petroleum products posted a growth of 4.5 percent in July-March FY 2024, slightly lower than 4.8 percent last year. The main contributors to this performance were high-weighted products such as high-speed diesel (9.3 percent), motor spirit (2.0 percent), furnace oil (2.7 percent), and solvent naphtha (14.6 percent), reflecting increased demand from the transport, industrial, and power generation

sectors. Additionally, low-weighted products like jet batching oil and kerosene oil, which grew by 43.4 percent and 33.1 percent, respectively, also contributed to the overall growth.

The automobile sector witnessed a strong rebound, recording a growth of 40.0 percent during July-March FY 2025, in contrast to a sharp contraction of 37.4 percent in the same period last year. This robust performance reflects improved macroeconomic fundamentals, including declining inflation, exchange rate stability, and a lower policy rate, which collectively reduced borrowing costs and restored consumer and investor confidence. The introduction of 31 new vehicle models, including 11 electric and hybrid variants (e.g., Seres3 EV, Hyundai EV, MG PHEV, EGO Green EV), expanded consumer choice and revitalized market dynamics. Additionally, the industry achieved around 90 percent localization in the motorcycle and tractor segments and generated approximately 8,200 jobs during the period. However, tractor production declined by 35.3 percent, mainly due to agriculture sector-specific challenges and delays in government procurement.

In parallel, Pakistan's Electric Vehicle (EV) ecosystem is steadily gaining momentum under the Automotive Industry Development and Export Policy 2021–26. To date, 57 manufacturers have been granted licenses for producing electric two- and three-wheelers, supported by fiscal incentives, tax exemptions, and reduced charging tariffs aligned with the government's 'Clean Green Pakistan' and 'Make in Pakistan' initiatives. During July-March FY 2025, 13 new manufacturing certificates were issued, and production of EV 2/3 wheelers reached 32,923 units, making the total production since FY2022 reach 76,979 units. In a further boost to the sector, Chinese EV giant BYD, in partnership with Mega Motors, is set to establish an EV assembly plant in Karachi by 2026, targeting annual sales of 100,000 electric vehicles by 2030. These developments highlight Pakistan's growing commitment to a greener and more sustainable automotive future.

The pharmaceuticals sector recorded a modest growth of 2.3 percent during July–March FY 2025, compared to a substantial 23.2 percent increase in the same period last year. This deceleration reflects a more subdued expansion in key product categories, with tablets growing by 2.5 percent, liquids/syrups by 2.9 percent, and galenicals by 23.8 percent. Meanwhile, the beverages sector showed signs of mild recovery, posting a growth of 0.9 percent after a decline of 3.9 percent last year. The contraction of 4.0 percent in juices, syrups, and squashes was offset by an 8.1 percent increase in the production of soft drinks and mineral water.

Tobacco, paper & board, computer, electronics & optical products, and other transport equipment showed signs of recovery during July–March FY 2025. Tobacco grew by 13.1 percent, rebounding from a significant contraction last year. Paper & board recorded a modest growth of 0.34 percent, while computer, electronics & optical products and other transport equipment posted stronger recoveries of 2.6 percent and 32.8 percent, respectively. Although their weights in the manufacturing index are relatively small, their positive contributions, particularly from other transport equipment, reflect improving industrial activity in these segments.

The chemicals sector contracted by 5.5 percent during July-March FY 2025, reversing the growth momentum of last year. Within this group, chemical products declined sharply by 12.3 percent, driven by reduced output in industrial chemicals and basic materials, while fertilizer production saw a marginal drop of 1.3 percent. This decline was largely attributed to subdued demand, operational disruptions at certain plants, limited availability of key raw materials, and sufficient inventory levels that reduced the need for new production. The sector collectively contributed a negative 0.45 percentage points to cumulative LSM growth, making it one of the major drags on industrial output during the period.

The construction-allied sectors, including non-metallic mineral products, iron & steel, and electrical equipment, continued to underperform, reflecting subdued activity in housing, infrastructure, and public investment. Non-metallic mineral products declined by 10.5

percent, driven by weak domestic cement demand. In addition, the shift toward imported glass plates and sheets further dampened domestic output. Iron & steel products contracted by 10.9 percent, while electrical equipment fell by 15.9 percent, owing to reduced production of transformers, meters, bulbs, storage batteries, and related components. Together, these sectors collectively dragged down cumulative LSM growth by over 1.6 percentage points, underscoring persistent challenges in the construction and industrial base despite recovery in selected segments.

Furniture production contracted sharply by 61.1 percent during July-March FY 2025, significantly impacting overall growth. Despite its small weight, this decline reduced cumulative LSM growth by nearly 02 percentage points, highlighting its major negative contribution to the sector's performance. The production of selected LSM items is shown in Table 3.2.

Table 3.2: Production of selected industrial items of Large Scale Manufacturing

S. No.	Name of items	Unit of Quantity	Weight	Production (Jul-Mar)		% change (Jul-Mar)	(%) Point Contribution (Jul-Mar)
				2023-24	2024-25	2024-25	2024-25
1	Deep freezers	Nos.	0.167	77,014	60,483	-21.46	-0.04
2	Jeeps and Cars	Nos.	2.715	71,174	96,795	36.00	0.56
3	Refrigerators	Nos.	0.246	604,652	518,101	-14.31	-0.02
4	Upper leather	000 Sq. M	0.398	10,150	8,681	-14.47	-0.03
5	Cement	`000' Tonnes	4.650	30,502	28,546	-6.41	-0.37
6	Liquids/syrups	`000' Litres	1.617	150,253	154,547	2.86	0.09
7	Phos. fertilizers	N. Tonnes	0.501	557,765	563,974	1.11	0.01
8	Tablets	`000' Nos.	2.725	11,809,928	12,109,794	2.54	0.04
9	Cooking oil	Tonnes	1.476	475,541	475,913	0.08	0.00
10	Nit. fertilizers	N. Tonnes	3.429	2,688,369	2,643,314	-1.68	-0.07
11	Cotton cloth	000 Sq. M	7.294	652,748	657,853	0.78	0.05
12	Vegetable ghee	Tonnes	1.375	1,125,062	1,102,620	-1.99	-0.04
13	Cotton yarn	Tonnes	8.882	1,834,338	1,987,851	8.37	0.58
14	Sugar	Tonnes	3.427	6,762,257	6,281,463	-7.11	-0.47
15	Tea blended	Tonnes	0.485	105,676	101,782	-3.68	-0.02
16	Petroleum Products	`000' Litres	6.658	10,208,738	10,631,280	4.48	0.30
17	Cigarettes	Mil. Nos.	2.072	23,315	26,373	13.12	0.17

Source: Pakistan Bureau of Statistics

3.2 Textile Industry

Textiles represent the most vital segment of Pakistan's manufacturing sector, featuring the longest production chain with significant potential for value addition at every stage from cotton cultivation through ginning, spinning, weaving, dyeing, and finishing, to the production of made-ups and garments. The sector accounts for nearly one-fourth of the total industrial value-added and provides employment to approximately 40 percent of the industrial labor force. Textile products maintained a consistent average share of around 55.2 percent in Pakistan's total exports during July–March FY 2025, reflecting the sector's strong and stable export performance.

Ancillary Textile Industry

The ancillary textile industry includes cotton spinning, cotton cloth, cotton yarn, cotton fabric, fabric processing, home textiles, towels, hosiery, knitwear, and readymade garments. These components are being produced both in the large-scale organized sector and in the unorganized cottage / small and medium units. The performance of these various ancillary textile industries is highlighted below:

i. Cotton Spinning Sector

The spinning sector is the backbone of textile production. It comprises 408 Textile Units (40 Composite and 368 Spinning units), 13.409

million Spindles, and 198,800 rotors installed. Out of which 9.5 million spindles and 126,583 rotors are in operation, with capacity utilization of 70.8 percent and 63.7 percent, respectively, during July-March FY 2025.

ii. Cloth Sector

This sector produces comparatively low value-added grey cloth of mostly inferior quality due to poor technology, scarcity of quality yarn, and lack of institutional financing for its development from an unorganized sector to an organized one. The number of Looms installed in cotton textile mills is 9,084, with 6,384 currently in operation. Production of cloth in the mill sector is reported, whereas the non-mill sector is not reported and taken as estimated. The production of cotton cloth has slightly increased while the exports have decreased in terms of quantity, as evident in Table 3.3.

Table 3.3: Production and Export of the Clothing Sector

Production	July-March 2024-25	July-March 2023-24	% Change
Mill Sector (000. Sq. Mtrs)	657,853	652,748	0.78
Non-Mill Sector (000. Sq. Mtrs)	5,248,167	5,245,782	0.05
Total	5,906,020	5,898,530	0.13
Cotton Cloth Exports			
Quantity (Million. Sq. Mtrs)	264.664	278.837	-5.08
Value (M.US $)	1,424.503	1,422.886	0.11

Source: Textile Commissioner's Organization

iii. Textile Made-Up Sector

As a value-added segment of the textile industry, the made-up sector comprises different subgroups: towels, tents and canvas, cotton bags, bedwear, hosiery, knitwear and readymade garments, and fashion apparel. The table below compares the made-up sector's export performance from July-March FY 2025 against the same period last year.

The readymade garment industry has emerged as a key small-scale industry in Pakistan, fulfilling almost the entire domestic demand for garments. Its products are in high demand both locally and internationally. This industry provides employment opportunities to a large number of people with minimal capital investment. It primarily relies on locally produced raw materials, while most of the machinery used is either imported or assembled locally.

Table 3.4: Export of Textile Made-Ups

	Jul-Mar 2024-25	Jul-Mar 2023-24	% Change
Hosiery Knitwear			
Quantity (M.Doz)	195.962	179.448	9.20
Value (M.US$)	3785.369	3240.272	16.82
Readymade Garments			
Quantity (M.Doz)	60.255	55.877	7.84
Value (M.US$)	3091.574	2596.889	19.05
Towels			
Quantity (M Kgs)	173.039	166.353	4.02
Value (M.US$)	818.733	783.799	4.46
Tents/Canvas			
Quantity (M Kgs)	32.723	28.353	15.41
Value (M.US$)	101.135	88.359	14.46
Bed Wears			
Quantity (000 MT)	391.331	348.783	12.20
Value (M.US$)	2374.260	2088.267	13.70
Other Made up			
Value (M.US$)	588.138	535.662	9.80

Source: Textile Commissioner's Organization

iv. Synthetic Textile Fabrics

Synthetic fibers such as nylon, polyester, acrylic, and polyolefin dominate the domestic market in Pakistan. Currently, five major producers operate in the country with a combined production capacity of 636,000 tons per annum. Artificial silk, which imitates the look and feel of natural silk at a significantly lower cost, is manufactured using approximately 9,000 looms nationwide. Table 3.5 shows the exports of synthetic textile fabrics during the period July-March FY 2025.

Table 3.5: Export of Synthetic Textile

	(Jul-Mar) 2024-25	(Jul-Mar) 2023-24	% Change
Quantity (Thousand. Sq. Mtrs)	64.046	61.850	3.55
Value (M.US $)	303.919	273.662	11.06

Source: Textile Commissioner's Organization

v. Woolen Industry

The woolen industry in Pakistan primarily produces carpets and rugs. However, locally available wool is generally not suitable for the production of high-quality woolen fabrics and

hosiery items. The export of carpets during the period July-March FY 2025 are given in Table 3.6:

Table 3.6: Exports of Carpets and Rugs (Woolen)

	(Jul-Mar) 2024-25	(Jul-Mar) 2023-24	% Change
Quantity (Th.Sq.Mtrs)	2.262	2.497	-9.41
Value (M.US$)	42.134	44.640	-5.61

Source: Textile Commissioner's Organization

vi. Jute Industry

The jute industry in Pakistan primarily manufactures jute sacks and hessian cloth, which are widely used for packaging and handling wheat, rice, and other food grains. Table 3.7 presents the installed capacity, operational capacity, and production details of the jute industry.

Table 3.7: Installed and Working Capacity of Jute

	(Jul-Mar) 2024-25	(Jul-Mar) 2023-24	% Change
Total No. of Units	10	10	0
Spindles Installed	25,060	25,060	0
Spindles Worked	15,400	16,815	-8.41
Looms Installed	1,186	1,186	0
Looms Worked	640	763	-16.12
Production			
Total No of Units (000 kg)	22,796	30,440	-25.11

Source: Textile Commissioner's Organization

3.3 Automobile Industry

The performance of the auto industry during July-March FY 2025 represents growth in all subsectors except the Farm Tractor sector, where production and sales were down by 35 percent. In the remaining sectors, there has been worthwhile growth in the range of 29 percent to 88 percent. It may be noted that the Farm Tractor sector, a vital component of the country's agriculture, faced challenges in the first quarter of the current fiscal year, as decisions regarding the refund procedure and the applicable rate of sales tax remained pending during that period. In addition, assemblers and manufacturers have adopted a wait-and-see approach to benefit from the Green Tractor Scheme.

Passenger car production and sales increased by 37.1 percent and 39.4 percent, respectively, during the period under review. For the first time, local production and sales of electric cars were reported at 150 and 132 units, respectively. Introducing this new technology highlights the sector's exposure to technological change and the growing strength of competitive forces within the auto industry.

The production of heavy commercial vehicles - trucks and buses - registered robust growth of 88 percent and 83.8 percent, respectively, during the period under review. Truck production reached 2,822 units during July-March FY 2025, up from 1,501 units in the same period last year. Similarly, bus production rose to 546 units from 297 units over the corresponding period. Despite this growth, the overall volume of locally produced trucks and buses remains modest relative to the size of the domestic market. A significant portion of demand continues to be met through imports, while the local heavy commercial vehicle industry operates at around 80 percent idle capacity, indicating substantial underutilization of existing manufacturing potential.

In the category of other locally produced vehicles - including Light Commercial Vehicles (LCVs), jeeps, and pickups - production and sales witnessed substantial growth, increasing by 80 percent and 70 percent, respectively. In addition to shifting consumer preferences, this surge reflects overall market expansion, driven partly by new entrants capturing market share and the growing presence of Chinese manufacturers in recent years.

In the two/three-wheeler sector, production reached 1,088,493 units during the period under review, compared to 843,504 units in the same period last year, reflecting a growth of 29.0 percent. Similarly, sales increased by 30.7 percent, rising from 833,816 to 1,089,922 units. This represents steady, expected growth, as two- and three-wheelers continue to fulfill the bulk of transportation needs for the general public. Notably, a significant portion of the growing demand is being met by a widespread unorganized sector, often operating as part of the

cottage industry. Due to its informal nature, this report could not capture data from this segment.

The production and the sales of the auto industry during July-March FY 2025 is shown below:

Table 3.8: Production of Automobiles

Category	Installed Capacity	No. of Units		
		2023-24 (Jul-Mar)	2024-25 (Jul-Mar)	% Change
Car*	341,000	55,678	76,339	37.1
LCV/Jeeps/ SUV/Pickup	52,000	14,542	26,147	79.8
Bus	5,000	297	546	83.8
Truck	29,000	1,501	2,822	88.0
Tractor	100,000	36,425	23,581	-35.3
2/3 Wheelers	2,500,000	843,504	1,088,493	29.0

* : Including EV

Source: Pakistan Automotive Manufacturer Association (PAMA)

The auto industry gained some momentum in FY 2025. However, the sector's full supply and demand potential could not be realized due to unforeseen regulatory challenges. Encouragingly, the adoption of new technologies, entry of new market players, and rising investment trends indicate that this fast-growing sector is well-positioned to return to its historical growth trajectory.

3.4 Fertilizer Industry

Fertilizer is the key crop production input contributing 30 to 50 percent towards yield enhancement. At least 60 percent of total fertilizer volume is used for production of cereal crops (wheat, rice and maize) having prime role in national food security. Thus, fertilizer has direct linkage with achieving the objective of "Food Secure Pakistan". Growth of the fertilizer industry is also desirable for economic development and prosperity of farming community.

There are ten urea manufacturing plants, one DAP, three NP, four SSP (out of which one plant is idle), two CAN, two plants of blended NPKs, and three plants of SOP, having a total production capacity of 9,787 thousand product tonnes per annum. In product terms, fertilizer production during Jul-Mar FY2025 was 7,071 thousand tonnes, which was 1.4 percent less than last year. In nutrient terms, fertilizer production was 3,223 thousand tonnes which was 0.9 percent lower compared to last year.

Urea is the main fertilizer having 68 percent share in overall production capacity. Its installed production capacity (6.6 million tonnes per annum) is sufficient to meet domestic demand provided all plants are operational at full capacity year round. Two SNGPL-based plants (Fatima Fert and Agritech) have no permanent gas allocation and were operational on and off during previous years. However, uninterrupted gas supply to two SNGPL-based urea manufacturing plants has been ensured by the Federal Government since April 2023, which has led to sufficient buffer stock (> 300 thousand tonnes) and subsequently price stability in the market. Resultantly, the price of urea decreased by 5.4 percent from Rs 4,705 in July 2024 to Rs 4,453 per 50 kg bag in March 2025.

DAP accounted for 96 percent share in total import volume of fertilizer as almost half of its domestic demand is met through imported supply. DAP import was 623 thousand tonnes during July-March FY 2025 compared to 597 thousand tonnes last year. Import volume in term of fertilizer nutrient was 415 thousand tonnes compared to 524 thousand tonnes the previous year, showing a decrease of 20.8 percent.

Urea and DAP are two major fertilizers having combined share of 83 percent in total fertilizer use. Urea and DAP offtake during the period was 4,639 and 1,229 thousand tonnes, respectively. Urea offtake decreased by 13.6 percent while that of DAP decreased by 9.6 percent compared to last year.

Nutrient offtake during July-March FY 2025 was 3,404 thousand tonnes which was 14.1 percent less than the previous year. Nitrogen and Phosphate offtake were 2,647 and 718 thousand tonnes, respectively, whereas Potash offtake was 39.4 thousand tonnes. Thus, nitrogen and phosphate offtake decreased by 14.3 and 14.1 percent, respectively whereas potash offtake increased slightly by 0.8 percent compared to last year.

3.5 Cement Industry

The cement industry in Pakistan has witnessed a substantial increase in production capacity over the years, rising from 45.62 million tonnes in FY 2016 to 84.58 million tonnes in FY 2025. This

expansion reflects significant investment and growth potential within the sector. However, capacity utilization has declined notably from a peak of 94.4 percent in FY 2018 to just 52.97 percent in the current fiscal year, primarily due to sluggish domestic demand. The slowdown in construction activity is largely attributed to high input costs which have constrained private sector construction.

Amid subdued local demand, the cement industry has increasingly shifted its focus toward international markets. Exports have recorded a notable upward trend, reflecting the industry's resilience and adaptability. This growth underscores Pakistan's competitive edge in regional and global markets, especially as economic conditions in neighboring countries stabilize and construction demand picks up.

Northern Region

Domestic consumption in the north was recorded at 22.791 million tonnes during the first nine months of FY 2025, compared to 24.236 million tonnes despatched last year, thus showing a negative growth of 6.0 percent. Exports from the north grew by 7.8 percent and stood at 1.120 million tonnes during the period, compared to 1.039 million tonnes during the same period last year.

Southern Region

Domestic consumption in the south decreased by 9.6 percent and reached 4.671 million tonnes during July-March FY 2025, compared to 5.166 million tonnes last year. Exports from the region increased by 33.3 percent, from 4.061 million tonnes to 5.412 million tonnes last year.

Cumulative

Cumulatively, the Cement industry recorded a decline of 1.5 percent during the period under review, with total dispatches standing at 33.994 million tonnes compared to 34.503 million tonnes last year, primarily due to subdued domestic demand. Domestic consumption contracted by 6.6 percent, reaching 27.462 million tonnes compared to 29.403 million tonnes last year. Despite the challenges, there was a positive aspect with an uptick in export shipments, surging 28.1 percent from 5.100 million tonnes to 6.532 million tonnes over the same period.

Table 3.9: Cement Production Capacity & Despatches Million Tonnes

Years	Production Capacity	Local Despatches	Exports	Total Despatches	Capacity Utilization% age
2015-16	45.62	33.00	5.87	38.87	85.21
2016-17	46.75	35.65	4.66	40.32	86.23
2017-18	48.61	41.15	4.75	45.89	94.40
2018-19	55.90	40.34	6.54	46.88	83.88
2019-20	63.53	39.97	7.85	47.81	75.26
2020-21	69.14	48.12	9.31	57.43	83.07
2021-22	69.29	47.64	5.26	52.89	76.33
2022-23	72.24	40.01	4.57	44.58	61.71
2023-24	78.90	38.18	7.11	45.29	57.40
2024-25 (July-March)	84.58	27.46	6.53	33.99	52.97

Source: All Pakistan Cement Manufacturers Association (APCMA)

3.6 Small and Medium Enterprises

SMEs are a cornerstone of inclusive economic growth, contributing significantly to employment generation, poverty reduction, and a more balanced income distribution. Small and Medium Enterprises Development Authority (SMEDA) is dedicated to nurturing the growth of the SME sector through a comprehensive set of services, including business development support, the establishment of common facility centers for enhancing access to infrastructure, resources and services, industry assistance to enhance productivity and energy efficiency, human capital development through training programs, and collaboration on SME-focused projects with national and international development partners. The subsequent section outlines the key activities and achievements of SMEDA during the period July-March FY 2025.

Supporting and Developing SME Sector: To adopt a whole-of-government approach toward SME development, the Prime Minister constituted a Steering Committee on SME Development. In line with this vision, the SMEDA has formulated a comprehensive 3-Year Business Plan (2024–27) focusing on five strategic themes: improving access to finance, boosting exports, facilitating SME subcontracting, promoting women entrepreneurship, and enhancing climate resilience. Key developments during July-March FY 2025 include:

Access to Finance:

- A simplified loan application form, developed with the Pakistan Bankers Association and approved by the State Bank of Pakistan, will be rolled out in English and Urdu.
- A capacity-building framework is being devised for improving SME access to government financing schemes and credit risk coverage.
- SMEDA will facilitate SME financing under PMYBALS through the structured Non-Financial Advisory Services desk.
- The Finance Minister formed a working group on rationalizing SME lending rates.
- Revision of SME definitions initiated to account for inflation and currency devaluation, along with the inclusion of the Micro Enterprises category.

Boosting Exports:

- SMEDA submitted formal proposals to the Export Development Fund for SME export development initiatives, following endorsement by the Ministry of Commerce.

SME Subcontracting:

- The legal framework for SME subcontracting is under development, with the scope of work vetted by the Attorney General of Pakistan.

Women Entrepreneurship:

- A Draft Women Entrepreneurship Policy and Action Plan was developed with support from Revenue Mobilization, Investment & Trade, an FCDO-funded project, UN Women, and ADB.
- A Digital Skills Training Program was launched to train 1,500 women entrepreneurs nationwide.
- A Women Inclusive Finance Program was initiated in collaboration with ADB to improve access to finance for women entrepreneurs, with SMEDA as an implementation partner.

Climate Resilience:

- A Banana Bio-Economy Project, led by FAO and supported by SMEDA, aims to reduce chemical use in textiles by converting banana waste into fiber.
- A Climate Vulnerability Index has been developed for SMEs.
- A study to measure the carbon footprint of manufacturing SMEs in five key export sectors is underway.

Table 3.10: SMEDA Over the Counter (OTC) Services

Sr. No.	Initiatives	Achievements (July–March FY2025)
1.	SME Facilitation	3,831
2.	Thematic Helpdesks	9
3.	Pre-feasibility Studies Development (New & Updated)	35
4.	Business Plans	03
5.	Investment Facilitation (Rs. Million	91.9
6.	Training Programs	86
7.	District Profiles/ Sector Profile/ Sector Reports/ Business Guides (New and Update)	11
8.	SMEDA Web Portal (Download Statistics)	391,947
9.	News letters	2
10.	Industry Support Programs (Energy Efficiency & Productivity)	
	Energy Efficiency	11 Factories Facilitated
	Productivity Improvement	11 Factories Facilitated
	Occupational Health and Safety (OHS) Assessments	02 Factories Facilitated
	Guides Developed	02
	Training & Awareness Sessions	12

Source: SMEDA

Establishment of SME Fund: SME Fund, a key initiative under the National SME Policy 2021, has been approved. The fund will ensure that SMEDA has consistent funding for managing SME grants and innovative enterprise development activities. SME Fund shall be instrumental in implementing the SME Policy Action Plan. The Fund is also a central element in building a self-sustainable SMEDA. The Cabinet Committee for Disposal of Legislative Cases has approved the SME Fund Rules.

Public Sector Development Projects (PSDP) - Demonstration Projects: SMEDA is executing various demonstration projects, i.e., Common Facility Centers (CFCs) in major SME clusters. These projects, strategic in nature, have been set up to revitalize clusters to improve competitiveness and productivity through access to technology, productivity improvement, skill development, matching grants, and provision of services. Presently, the following PSDP projects are under different stages of implementation vis-à-vis providing various services to facilitate the SMEs.

Completed Projects

- Sports Industries Development Center, Sialkot
- Sialkot Business and Commerce Centre

Ongoing Projects

- 1000 Industrial Stitching Units
- Product Development Center for Composites-Based Sports Goods, Sialkot
- Research, Regulatory Insight & Advocacy Assistance for SMEs
- Business Skill Development Centers for Women at Dera Ismail Khan
- SME Facilitation Centers

Mapping of initiatives aimed at reducing informality in enterprises: SMEDA, in collaboration with the International Labour Organization, has conducted a mapping study on initiatives aimed at Reducing Informality in Enterprises. A roadmap for encouraging business formalization is currently being designed.

Growth for Rural Advancement and Sustainable Progress (GRASP): GRASP is a project funded by the European Union and implemented by the International Trade Centre, a joint agency of the United Nations and the World Trade Organization. It is a five-and-a-half-year project to support livestock and horticulture sectors in the Sindh and Balochistan provinces. The following were the achievements during July-March FY 2025:

- Training of Trainers on Business Registration for 30 persons
- Execution of Training Program for 780 MSMEs for Agri Entrepreneurship in 22 districts of Sindh & Balochistan.
- 4 training sessions on Business Registration and Compliance Level 1, attended by 132 participants
- 9 training sessions on Business Registration and Compliance Level 2, attended by 169 participants

3.7 Performance of Mining and Quarrying

Pakistan is endowed with substantial mineral wealth, including some of the world's largest reserves of coal, copper, pink salt, and rock salt, along with significant deposits of gold, chromite, and gemstones. Recognizing the untapped potential of the mining sector, the government, under the platform of the Special Investment Facilitation Council (SIFC), has prioritized mining and minerals as a key area for investment and reform. The SIFC is working to attract both domestic and foreign investment by streamlining regulatory frameworks, improving transparency, and promoting value-added mineral development to transform Pakistan into a regional hub for mining activities.

During July-March FY 2025, the performance of principal minerals extraction in Pakistan was mixed compared to the same period in FY 2024 (Table 3.11). Notable declines were observed in the extraction of crude oil (-14.8 percent), natural gas (-6.8 percent), coal (-5.7 percent), and iron ore (-20.2 percent), indicating a contraction in energy and metallic mineral outputs. However, there were significant

increases in sulphur (341.9 percent), dolomite (43.3 percent), limestone (34.1 percent), marble (20.2 percent), and ocher (70.3 percent), reflecting positive growth in selected minerals. Overall, the trend indicates a shift towards higher output in non-metallic minerals amid subdued performance in energy-related and metallic mineral sectors.

Table 3.11: Extraction of Principal Minerals

Minerals	Unit of Quantity	2022-23	2023-24	July-March		%Change FY2025/FY2024
				2023-24	2024-25	
Coal	000 M.T	15,070	19,260	14,694	13,857	-5.7
Natural Gas	000 MMCFT	1,189	1,141	866.3	807.3	-6.8
Crude Oil	M.Barrels	25.4	25.8	19.6	16.7	-14.8
Chromite	000 M.T	155.6	252.0	200.0	196.0	-2.0
Magnesite	000 M.T	5.0	2.1	1.6	0.8	-52.0
Dolomite	000 M.T	544.3	518.1	412.8	591.6	43.3
Gypsum	000 M.T	1,640.0	2,079.0	1,632.0	1,391.0	-14.8
Lime Stone	000 M.T	58,941.3	47,240.0	36,162.0	48,481.0	34.1
Rock Salt	000 M.T	2,907.4	3,185.0	2,474.0	2,284.0	-7.7
Sulphur	000 M.T	11.7	7.1	7.1	31.4	341.9
Barytes	000 M.T	141.0	139.0	97.0	85.0	-12.4
Iron Ore	000 M.T	377.0	676.3	555.0	442.7	-20.2
Soap Stone	000 M.T	164.2	220.0	174.0	163.0	-6.3
Marble	000 M.T	5,714.4	6,785.0	5,487.0	6,598.0	20.2
Ocher	000 M.T	92.0	53.6	47.1	80.2	70.3

*: Provisional
Source: Pakistan Bureau of Statistics

Each province has its own Mines and Minerals Department tasked with overseeing the exploration and promotion of investments in their mineral resources. These departments play a crucial role in harnessing the mineral endowments within their respective provinces, ensuring that the resources are utilized efficiently and sustainably. In recent years, there has been a concerted effort across all provinces to adopt scientific methods for exploring and exploiting mineral resources. The following initiatives have been taken during the period of July-March FY 2025.

i. Major Initiatives of Punjab:

The Government of Punjab has undertaken a series of strategic reforms, technological upgrades, and exploration initiatives to enhance the efficiency, transparency, and economic potential of the mining sector, aligning with broader goals of sustainable resource utilization and regional development.

- **Collaboration for Resource Exploration:** A Memorandum of Understanding (MoU) was signed between the Mines & Minerals Department, Punjab, and the Geological Survey of Pakistan on March 3, 2025, for collaborative geological surveys and mineral exploration.
- **Regulatory Reforms:** Punjab Mining Concession Rules, 2002, have been re-drafted with updated amendments and notifications to enhance governance and operational efficiency in the mining sector.
- **Targeted Mineral Exploration Initiatives:**
  - Reconnaissance surveys were launched to identify prospective sites for Lithium, Iron, Aluminum, and Titanium exploration in Punjab.
  - A separate survey initiated to locate promising placer gold deposits from paleo deposits in the River Indus sand.
- **Digitization and Transparency:**
  - Implementing an e-auction module to ensure transparent and competitive bidding for mineral concessions.
  - Successful e-auction of 33 blocks for small-scale mining licenses, generating strong investor interest.
- **Revenue Mobilization:** Revision of royalty rates for various minerals resulted in a 58

percent increase in revenue collection compared to the previous year.

- **Support for the Construction Industry:** Regular auctions are conducted to ensure the supply of construction materials such as gravel, sand, and slate stone across Punjab.
- **Feasibility Studies:**
  - Catch drain water management in the mining zones of District Sargodha
  - Evaluation of placer gold potential in the River Indus, District Attock
- **Technology Adoption:** Procurement of drone technology for mineral mapping and survey.

ii. Major Initiatives of the Sindh

The Government of Sindh is actively promoting the sustainable development of the mineral sector through one ongoing and one proposed scheme, aimed at strengthening institutional capacity and enhancing resource mapping and exploration. Details are as follows:

- **Scheme-1:** Strengthening & Rehabilitation of Directorate General Mines & Mineral Development
  - Establishment of a Mineral Testing Laboratory.
  - Procurement of geological and lab equipment to support exploration activities.
  - Purchase of vehicles for field monitoring.
  - Provision of necessary hardware, furniture, and fixtures for operational efficiency.
  - Improved service delivery through better working conditions and staffing capacity.
- **Scheme-2:** Profile Study for Identified Minerals for Reserve Estimation in Sindh
  - Assessment of mineral quantity, quality, and potential new deposits.
  - Generation of reliable data to attract local and foreign investment.
  - Public dissemination of study findings to support informed decision-making.
  - Promotion of modern mining techniques to reduce mineral wastage.
  - Enhancement of small mining operators' capacity.
  - Contribution to local employment generation and socioeconomic uplift.
  - Increased government revenue through optimized extraction and royalty mechanisms.

iii. Major Initiatives of Balochistan

- **The Balochistan Mines and Minerals Act, 2025:** The Balochistan Mines and Minerals Act, 2025, was passed by the provincial assembly and notified on 17th March 2025. The department will now fully transition to the newly enacted Balochistan Mines and Minerals Act, 2025, to develop the Mineral Sector in the Province. The Department will take steps in its implementation, prioritize the notification of all statutory committees, and initiate comprehensive enforcement of the new legal framework in the coming year.
- **Capacity Building of Officers in the Mines & Minerals Development Department:** A project to enhance the skills of the Mines & Minerals Development Department officers was launched with an estimated total cost of Rs 300 million. Recently, four training sessions were conducted, i.e., Occupational Safety & Health Administration (OSHA) International Certification, GIS & Remote Sensing, and Administrative & Financial Skills at BUITEMS, Quetta, and Geological Field Work by the Geological Department, University of Balochistan. Another training, i.e., the Mineral Processing at the Pakistan Institute of Engineering & Applied Sciences (PIEAS) Islamabad, is scheduled in the coming days. Further training sessions are scheduled in the coming three months, including:
  - Second Batch of Mineral Processing at PIEAS Islamabad
  - Hands-on Geophysical Instruments Training for MMD Geologists and Engineers at the University of Balochistan

  - Second batches of OSHA, Geological Field Work, and GIS & Remote Sensing.

- **Automation Software Project:** The Government has revised the total cost of the project "Automation of Royalty Regime in the Mining Sector" from Rs 150 million to Rs 264 million, accordingly, PC-I has recently been approved and the Department will now take steps to procure and install Cloud Server, Hardware, Internet Connectivity across sites, and Surveillance, facilitating ease of doing business and online application.
- **Geo-Resource Survey of Balochistan:** The Geo-Resource Survey Project is a flagship initiative aiming to identify critical mineral zones across Balochistan. Key achievements and next-year targets include:
  - Processing and interpreting legacy magnetic survey data
  - Identifying anomalous mineralization zones
  - Conducting preliminary sampling and surveys in resource-rich areas like Muslim Bagh and Khanozai
  - The department has initiated initial surveys and staff hiring.
- **Reko Diq Project Feasibility Completed:** Reko Diq Mining Company (RDMC) has completed the update of the feasibility study of the project, which has been submitted to the shareholders and is currently under review. Key stats of the project are:
  - Mine life of the project: 38+ years
  - Copper Production: 260 KT (Phase I) and 400KT (Phase II)
  - Gold Production: 300 Koz (Phase I) and 500 Koz (Phase II)
  - Employment Generation: 8000+
- **Exploration License for Lead+Zinc in District Khuzdar:** In the current fiscal year, the Exploration License for Lead-Zinc in Khuzdar has been approved in favor of two companies, National Resources Limited (NRL) and Sky-word International. This will pave the way for economic activity and employment generation in the province.
- **Agreements over Exploration Licenses:** The Government has reached an agreement over EL-302 and EL-303 of BMRL with International Resources Holding of the UAE. The company will now start exploring the areas in District Chagai. In addition, the Government is also in negotiations with international investors for EL-255 and EL-256 of BMEC.

iv. Major Initiatives of Khyber Pakhtunkhwa

- **Insertion of Schedule-IV** to rationalize mineral royalty rates, resulting in additional revenue of Rs 3.5 billion.
- **A separate category for placer gold was** introduced for open auction, including royalty, leading to the successful auction of four blocks worth Rs 4.93 billion.
- **In-house processing of metallic minerals is** mandated for better management of Profit Sharing Projects.
- **Auction jurisdiction expanded** from the divisional level to the Tehsil and Sub-Division levels to encourage local participation.

Concluding Remarks

The outcomes of FY 2025 in manufacturing and mining underline the need for deeper reforms to unlock industrial growth. Pakistan's LSM sector continues to grapple with persistent structural challenges, despite early signs of macroeconomic stabilization. While some sectors have shown resilience, overall recovery remains fragile amid high input costs, weak investment, and uneven policy transmission. Sustained progress hinges on the successful implementation of medium-term reform initiatives.

The Government's National Economic Transformation Plan, under URAAN *Pakistan*, places strong emphasis on export-led growth through interventions in key areas such as energy, infrastructure, SME development, and value-added manufacturing. Complementing this, the SIFC plays a pivotal role in unlocking

private investment, particularly in priority sectors like mining and quarrying, agriculture, IT, defense production, and energy, by streamlining regulatory processes and addressing investor bottlenecks. These coordinated efforts will likely revitalize the manufacturing and mining sectors and lay the foundation for more resilient and broad-based industrial growth over the medium term.

TABLE 3.1 A

RESERVES AND EXTRACTION OF PRINCIPAL MINERALS

Minerals (000 tonnes)	Antimony (tonnes)	Argonite/ Marble (000 tonnes)	China Clay (000 tonnes)	Chromite (000 tonnes)	Coal (000 tonnes)	Dolomite (tonnes)	Fire Clay (000 tonnes)	Fullers Earth (000 tonnes)	Gypsum Anhydrite (000 tonnes)	Lime Stone (000 tonnes)
Years										
2011-12	**12**	**1,751**	**22**	**179**	**3,179**	**198,392**	**408**	**7**	**1,260**	**35,016**
2012-13	**89**	**2,360**	**23**	**136**	**2,813**	**335,819**	**455**	**4**	**1,250**	**38,932**
2013-14	**979**	**2,920**	**16**	**86**	**3,340**	**720,633**	**465**	**6**	**1,326**	**38,787**
2014-15	**114**	**2,874**	**19**	**102**	**3,408**	**222,378**	**405**	**8**	**1,417**	**40,470**
2015-16	**21**	**4,747**	**21**	**69**	**3,749**	**669,920**	**551**	**14**	**1,872**	**46,123**
2016-17	**65**	**4,906**	**29**	**105**	**3,954**	**301,124**	**584**	**18**	**2,080**	**52,149**
2017-18	**-**	**8,813**	**19**	**97**	**4,478**	**488,825**	**842**	**9**	**2,476**	**70,819**
2018-19	**-**	**7,736**	**21**	**138**	**5,407**	**472,474**	**671**	**11**	**2,518**	**75,596**
2019-20	**-**	**5,797**	**15**	**121**	**8,428**	**302,045**	**884**	**3**	**2,150**	**65,810**
2020-21	**-**	**7,917**	**12**	**140**	**9,229**	**388,038**	**1,010**	**2**	**2,527**	**76,632**
2021-22	**-**	**6,626**	**17**	**195**	**9,678**	**487,151**	**675**	**2**	**2,325**	**58,362**
2022-23	**78**	**5,714**	**14**	**156**	**15,070**	**544,298**	**747**	**1**	**1,640**	**58,941**
2023-24	**539**	**6,785**	**15**	**252**	**19,260**	**518,104**	**1,495**	**2**	**2,079**	**47,240**
July-March										
2023-24	**10**	**5,487**	**8**	**200**	**14,694**	**412,805**	**1,126**	**2**	**1,632**	**36,162**
2024-25 P	**816**	**6,598**	**9**	**196**	**13,857**	**591,579**	**823**	**10**	**1,391**	**48,481**

P: Provisional **(Contd.)**

- : Not available

TABLE 3.1 B

RESERVES AND EXTRACTION OF PRINCIPAL MINERALS

Minerals in 000 tonnes	Magne-site (tonnes)	Rock Salt (000 tonnes)	Silica Sand (000 tonnes)	Ochre (tonnes)	Sulphur (tonnes)	Soap Stone (000 tonnes)	Baryte (000 tonnes)	Bauxite/ Laterite (tonnes)	Iron Ore (tonnes)	Crude Oil (m. barrels)	Natural Gas (000 m.cu.mtr.)
Years											
2011-12	5,444	2,136	270	42,107	25,560	56	49	323,848	384,893	24.57	44.15
2012-13	6,705	2,160	356	37,769	20,610	93	118	353,355	412,108	27.84	42.65
2013-14	4,130	2,220	298	32,634	35,672	89	134	480,054	197,074	31.58	42.3
2014-15	4,581	2,136	268	33,909	19,730	116	205	451,818	328,702	34.49	41.51
2015-16	35,228	3,553	387	68,352	14,869	126	158	773,289	432,156	31.65	41.96
2016-17	19,656	3,534	338	86,080	23,740	152	92	719,030	501,664	32.27	41.68
2017-18	23,596	3,654	376	75,939	22,040	142	89	995,855	677,206	32.56	41.32
2018-19	42,996	3,799	805	81,502	20,715	157	116	779,118	627,464	32.50	40.68
2019-20	16,165	3,369	780	132,144	19,948	150	55	639,890	573,695	28.09	37.29
2020-21	15,120	3,366	466	106,704	19,398	289	52	1,085,913	805,696	27.56	36.22
2021-22	5,886	2,716	637	90,731	16,288	301	128	514,164	717,281	28.09	37.03
2022-23	4,954	2,907	734	92,002	11,692	164	141	627,202	376,970	25.36	33.68
2023-24	2,078	3,185	518	53,565	7,096	220	139	525,517	676,322	25.81	32.3
July-March											
2023-24	1,630	2,474	452	47,067	7,096	174	97	432,783	555,008	19.65	24.53
2024-25 P	782	2,284	379	80,171	31,357	163	85	472,186	442,661	16.75	22.86

P: Provisional

Source: Pakistan Bureau of Statistics

TABLE 3.2

PRODUCTION INDEX OF MINING AND MANUFACTURING

Year	Mining	Manufacturing
	Base Year 2005-06 = 100	
2010-11	108	111.1
2011-12	113.7	112.4
2012-13	115.3	117.4
2013-14	118.5	123.7
2014-15	120.5	127.9
2015-16	121.6	131.9
	Base Year 2015-16 = 100	
2016-17	101.9	104.23
2017-18	108.3	111.51
2018-19	109.4	115.32
2019-20	101.0	102.62
2020-21	104.1	114.50
2021-22	117.4	127.96
2022-23	120.7	114.78
2023-24	111.9	115.67
July-March		
2023-24	114.5	117.7
2024-25 P	128.0	116.01

P: Provisional

Source: Pakistan Bureau of Statistics

TABLE 3.3

COTTON TEXTILES STATISTICS

Year	No. of Mills	Installed Capacity		Working at the end of the period		Spindle Hours Worked (million)	Loom Hours Worked (million)	Consump-tion of Cotton (bln. kg)	Total Yarn Pro-duced (mln. kg)	Surplus Yarn (000 tonnes)	Total Pro-duction of Cloth (mln. sqmtr.)
		Spindles (000 Nos)	Looms (000 Nos)	Spindles (000 Nos)	Looms (000 Nos)						
2010-11	524	11,762	7	10,757	5	76,835	23.0	3,405.7	2,939.5	2,851.2	1,020.3
2011-12	212	11,762	7	10,653	5	76,933	23.0	3,427.1	2,954.6	2,857.3	1,023.4
2012-13	526	11,946	8	10,872	5	76,757	23.0	3,539.3	3,060.0	2,960.9	1,029.1
2013-14	538	13,269	8	10,999	6	78,207	24.0	3,675.5	3,323.7	2,669.5	1,036.1
2014-15	411	13,184	8	11,058	5	79,184	24.0	2,732.7	3,360.0	3,256.2	1,037.0
2015-16	408	13,142	8	11,263	5	78,548	28.0	2,732.5	3,405.6	3,301.6	1,039.2
2016-17	408	13,409	9	11,338	6	77,213	30.0	2,733.1	3,428.1	3,315.3	1,043.3
2017-18	408	13,409	9	11,313	6	51,280	19.0	1,825.0	3,430.1	2,190.3	1,043.7
2018-19	408	13,409	9	11,338	6	86,871	29.6	2,735.2	3,431.4	3,314.4	1,046.0
2019-20	408	13,409	9	11,338	6	19,897	9.0	2,467.3	3,059.9	2,945.6	934.5
2020-21	408	13,409	9	11,338	6	80,315	30.2	2,743.1	3,441.6	3,324.7	969.8
2021-22	408	13,409	9	11,338	6	82,685	34.6	2,743.5	3,445.8	3,328.9	1,050.7
2022-23	408	13,409	9	11,338	6	69,487	29.6	2,138.6	2,694.8	2,609.6	920.6
2023-24	408	13,409	9	9,700	6	50,614	17.1	1,455.7	1,834.3	1,531.9	652.8
2024-25 P	408	13,409	9	9,500	7	53,156	16.8	1,578.1	1,987.9	1,705.5	657.9

P: Provisional (Jul-Mar)

Source: Textile Commissioner Organization

TABLE 3.4

PRODUCTION OF FERTILIZERS, VEGETABLE GHEE, SUGAR AND CEMENT

(000 tonnes)

Year	Fertilizers					Vegetable Ghee	Sugar	Cement
	Urea	Super Phosphate	Ammonium Nitrate	Dia-Ammonium phosphate	Nitro Phosphate			
2010-11	4,552.1	173.3	275.1	663.8	252.3	1,092	4,169	28,716
2011-12	4,470.7	114.7	432.3	622.6	337.6	1,103	4,634	29,557
2012-13	4,215.1	79.3	401.3	729.9	291.9	1,139	5,074	31,055
2013-14	4,930.3	87.8	519.1	693.1	447.2	1,185	5,582	31,418
2014-15	5,073.1	63.6	569.2	754.9	501.9	1,185	5,150	32,185
2015-16	5,846.9	89.5	647.4	787.6	594.6	1,241	5,115	35,432
2016-17	5,912.7	81.6	664.7	802.4	630.2	1,280	7,049	37,022
2017-18	5,405.2	65.2	518.9	758.4	471.4	1,347	6,566	41,148
2018-19	5,957.9	78.1	448.9	785.1	443.9	1,392	5,260	39,924
2019-20	6,159.8	55.8	545.7	737.7	602.7	1,454	4,881	39,121
2020-21	6,294.9	104.6	786.1	788.7	876.4	1,455	5,694	49,797
2021-22	6,442.4	97.6	827.9	896.6	835.7	1,403	7,921	48,011
2022-23	5,993.7	70.7	819.9	635.3	740.8	1,559	6,709	41,448
2023-24	6,591.0	86.4	888.0	812.4	823.6	1,491	6,796	39,566
July-March								
2023-24	5,108.2	65.9	674.1	597.8	615	1,125	6,762	30,502
2024-25 P	5,041.1	61.2	645.4	619.3	636.1	1,103	6,281	28,546

P: Provisional

Source: Pakistan Bureau of Statistics

TABLE 3.5

PRODUCTION OF SELECTED INDUSTRIAL ITEMS

Year	Food and Tobacco		Jute	Rubber			
	Beverages (Million liters)	Cigarettes (Million Nos)	Textiles (000 tonnes)	Motor Tyres (000 Nos)	Motor Tubes (000 Nos)	Cycle Tyres (000 Nos)	Cycle Tubes (000 Nos)
2010-11	1,492	65,403	93	9,222	19,108	2,879	6,534
2011-12	1,813	61,954	94	7,011	20,338	3,431	6,846
2012-13	2,079	67,377	103	7,864	20,269	3,429	7,746
2013-14	2,552	64,482	102	8,802	20,825	4,038	8,061
2014-15	2,956	62,667	94	9,058	22,001	4,633	8,391
2015-16	3,137	53,522	55	9,735	24,467	4,205	7,285
2016-17	3,565	34,341	60	9,710	24,635	3,930	7,577
2017-18	3,440	59,058	74	10,392	24,665	3,753	7,717
2018-19	3,459	60,729	67	10,807	25,514	4,584	9,907
2019-20	3,232	46,085	65	11,128	24,550	4,438	9,058
2020-21	3,449	51,527	70	9,458	22,447	3,519	6,795
2021-22	3,385	59,695	58	7,906	22,391	3,846	7,030
2022-23	3,424	42,766	63	7,587	22,927	3,974	6,728
2023-24	3,220	32,925	41.109	7,449	23,658	4,286	6,657
July-March							
2023-24 R	2,196	23,315	30	5,627	17,605	3,174	4,928
2024-25 P	2,342	26,373	22.794	5,438	18,296	3,480	5,316

P: Provisional R: Revised (Contd.)

TABLE 3.5

PRODUCTION OF SELECTED INDUSTRIAL ITEMS

Year	Chemicals						Transport, Machinery & Electrical Appliances		
	Soda Ash (000 tonnes)	Sulphuric Acid (000 tonnes)	Caustic Soda (000 tonnes)	Chlorine Gas (000 tonnes)	Paints & Varnishes (tonnes)	Polishes & Creams for Footwear (mln. grams)	Bicycles (000 Nos.)	Sewing Machines (000 Nos.)	Total TV Sets (000 Nos.)
2010-11	378.0	114.8	172.0	15.2	25,673	1,018.6	345.3	47.0	425.6
2011-12	370.7	100.4	179.1	15.8	23,026	1,028.8	262.1	39.6	268.8
2012-13	366.2	89.4	182.9	15.5	28,048	1,039.1	233.0	32.9	462.9
2013-14	409.1	85.3	167.5	15.0	37,236	1,049.5	203.7	19.8	426.6
2014-15	437.1	70.2	184.0	17.4	48,631	975.7	210.9	19.3	428.2
2015-16	468.5	75.1	225.3	16.4	53,651	985.5	199.0	13.5	453.2
2016-17	479.7	56.0	223.9	16.3	49,173	995.3	200.2	18.3	438.9
2017-18	509.8	49.0	270.1	16.6	51,930	1,005.3	200.3	23.4	400.3
2018-19	572.1	49.4	246.6	17.5	52,265	1,015.3	173.5	35.4	380.7
2019-20	550.6	40.3	342.4	15.8	51,761	1,025.5	141.1	28.6	282.1
2020-21	594.3	72.5	394.1	17.1	90,166	1,035.7	79.3	20.2	209.7
2021-22	651.3	111.3	405.1	19.1	88,234	1,046.1	141.2	14.7	217.2
2022-23	736.7	71.5	475.7	20.5	86,455	1,056.5	146.5	4.0	151.3
2023-24	785.3	63.8	497.2	17.2	88644	1,067.1	159.0	3.0	132.5
July-March									
2023-24	564.2	49.4	379.7	13.6	66,292	738.4	117.7	2.3	99.1
2024-25 P	523.2	34.1	354.8	12.4	65,127	745.7	126.5	2.4	101.6

P: Provisional

(Contd.)

TABLE 3.5

PRODUCTION OF SELECTED INDUSTRIAL ITEMS

Year	Electrical Appliances		Paper & Board		Steel Products		
	Electric Bulbs (Mln.Nos)	Electric Tubes (000 metres)	Paper Board (000 tonnes)	Paper (All Types) (000 tonnes)	Coke (000 tonnes)	Pig Iron (000 tonnes)	Billets (000 tonnes)
2010-11	79.6	1,180	206.1	228.7	301.7	433.1	1,628.9
2011-12	79.0	1,266	283.0	246.3	192.9	249.1	1,616.4
2012-13	79.7	-	381.9	232.4	203.4	201.5	1,638.5
2013-14	75.1	-	465.8	218.7	31.9	89.4	2,128.3
2014-15	64.6	-	415.7	204.0	275.8	265.5	2,731.0
2015-16	73.9	-	376.9	233.1	57.4	1.5	3,183.3
2016-17	72.4	-	404.6	263.9	0.0	0.0	4,099.0
2017-18	76.4	-	457.3	273.9	0.0	0.0	5,186.0
2018-19	63.7	-	447.3	256.7	0.0	0.0	3,874.0
2019-20	57.8	-	448.9	257.6	0.0	0.0	3,164.0
2020-21	51.3	-	501.2	229.0	0.0	0.0	4,777.0
2021-22	46.6	-	544.1	322.5	0.0	0.0	6,358.0
2022-23	25.9	-	438.0	353.7	0.0	0.0	5,338.0
2024-24	7.2		420.5	366.2	0.0	0.0	4,914.0
July-March							
2023-24	6.0	-	322.5	278.7	0.0	0.0	3,964.0
2024-25 P	1.7	-	332.1	271.1	0.0	0.0	2,905.0

P: Provisional **Source: Pakistan Bureau of Statistics**

-: Not available

TABLE 3.6

PERCENT GROWTH OF SELECTED INDUSTRIAL ITEMS

(in %)

Year	Cotton Yarn	Cotton Cloth	Jute Goods	Veg.Ghee	Cigarettes	Fertilizers	Cement	Soda Ash	Caustic Soda	Sugar
2010-11	5.46	1.08	(12.30)	1.57	0.17	(8.88)	(8.43)	(7.70)	(5.62)	32.62
2011-12	0.52	0.30	0.98	1.01	(5.27)	0.08	2.93	(1.93)	4.11	11.16
2012-13	3.57	0.56	9.28	3.25	8.75	(4.02)	5.07	(1.22)	2.11	9.48
2013-14	8.62	0.68	(1.07)	4.08	(4.30)	16.50	1.17	11.72	(8.42)	10.03
2014-15	1.09	0.08	(7.21)	(0.04)	(2.81)	4.56	2.44	6.83	9.85	(7.75)
2015-16	1.36	0.22	(41.33)	4.78	(14.59)	13.87	10.09	7.18	22.45	(0.68)
2016-17	0.66	0.40	8.15	3.12	(35.84)	1.68	4.49	2.39	(0.62)	37.80
2017-18	0.06	0.04	23.86	5.21	71.98	(9.87)	11.14	6.26	20.67	(6.85)
2018-19	0.04	0.22	(9.54)	3.34	2.83	7.59	(2.97)	12.22	(8.70)	(19.89)
2019-20	(10.83)	(10.66)	(3.08)	4.50	(24.11)	4.32	(2.01)	(3.75)	38.85	(7.20)
2020-21	12.47	12.19	7.33	0.01	11.81	7.41	27.29	7.93	15.10	16.66
2021-22	0.50	0.22	(17.38)	(3.55)	15.85	2.73	(3.59)	9.59	2.79	39.11
2022-23	(22.09)	(12.39)	9.88	11.13	(28.36)	(9.00)	(13.67)	13.11	17.41	(15.31)
2023-24	(8.07)	(5.34)	(35.13)	(4.39)	(23.01)	11.58	(4.54)	6.60	4.54	1.30
July-March										
2023-24 R	(12.19)	(7.27)	(36.67)	(3.48)	(33.59)	16.40	(4.14)	3.07	9.70	1.74
2024-25 P	8.37	0.78	(25.12)	(1.99)	13.12	(1.34)	(6.41)	(7.25)	(6.56)	(7.11)

P: Provisional **Source: Pakistan Bureau of Statistics**

Note: Figures in parenthesis represent negative growth