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INVESTMENT POTENTIAL & OPPORTUNITIES IN

BALUCHISTAN

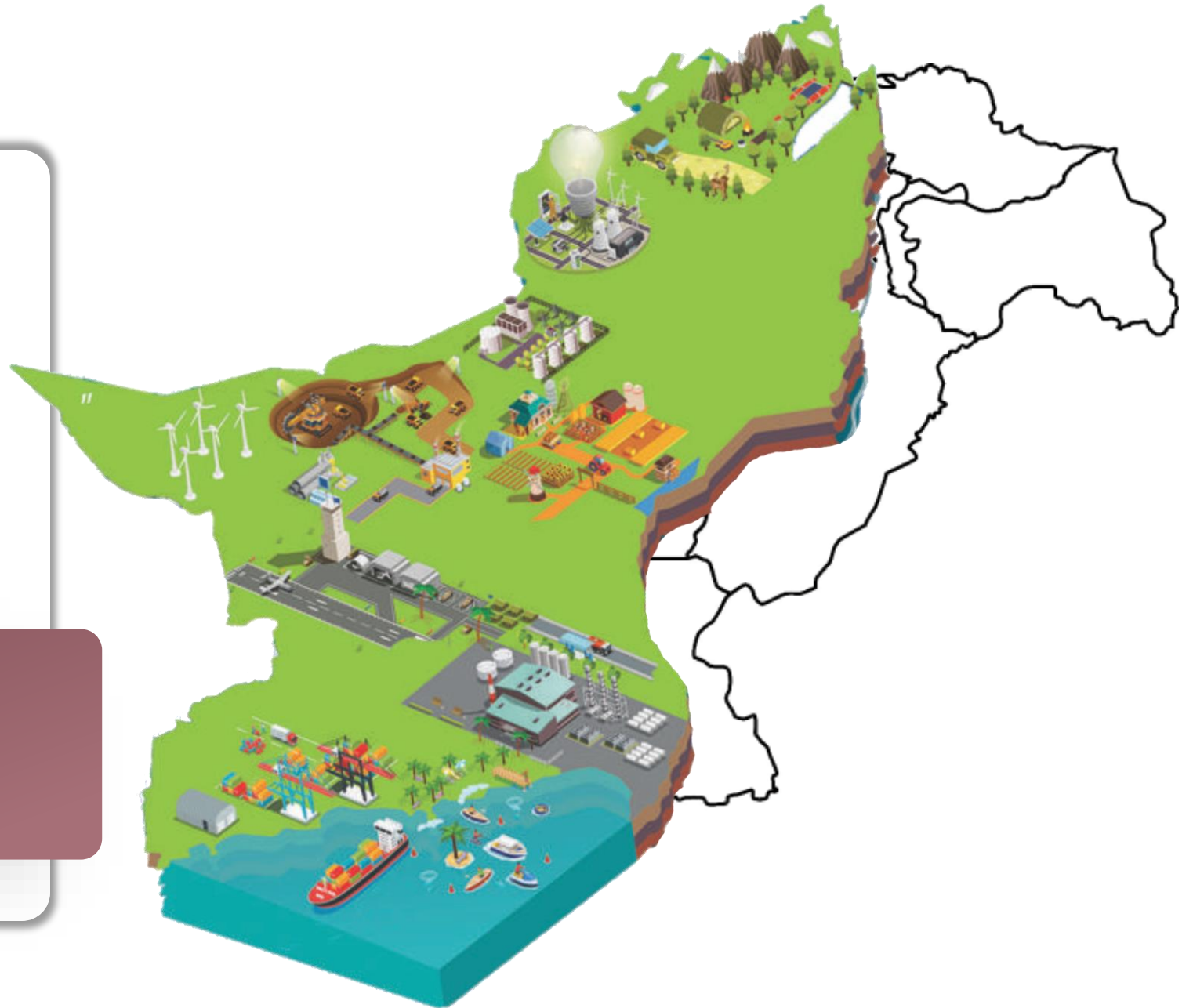
Pakistan Investment Seminar



# Balochistan

Pakistan's Largest Province

**44%** Landmass



# About Balochistan

*The Land of Countless Opportunities*

**6**

Types of  
Landscapes

Mountains, Uplands, Piedmont,  
Desert, Food Plains and Coastal  
Plains

**73%**

Coastline of  
Pakistan  
(720 km)

**2,200** km

International  
Borders  
(Afghanistan +  
Iran)



# About Balochistan

*Cultural Hub of Pakistan*

**8**

Religions

**10**

Ethnicities

**14**

Languages

# The Economy of **Balochistan**



**30+ Foreign  
Owned  
Companies**

**Development  
driven Budget**

**Numerous Blue  
Economy  
Initiatives**

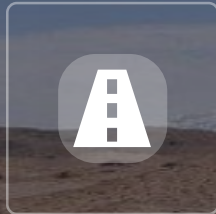
**The nucleus Of  
Pakistan-China  
Economic  
Corridor (CPEC)**

**5 Functional  
Chamber of  
Commerce**

**Leading  
exporter of  
Minerals and  
Fruits**

**Agriculture  
driven  
Economy**

# Infrastructure



**5,000 km**  
Highway  
Network



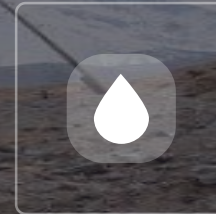
**3 Major**  
International  
Airports



**1,000 km**  
Railway  
Network



**Worlds**  
**Deepest**  
**Sea Port**



**Natural**  
**Underground**  
**Water**

# Balochistan: Hub of Regional Connectivity



# China-Pakistan Economic Corridor

Strategic Game Changer

Will link 3 Billion  
People of Europe, Asia  
and Africa

13,000MW Electricity  
to be added

USD 75 billion +  
Estimated Cost

Framework of  
regional  
connectivity

3,218 kilometer  
long route (Gwadar  
to Kashgar)





# China-Pakistan Economic Corridor

**Cross Border  
Optical Fiber  
Cable**

**Quetta Mass Transit**

**Pilot Project of  
Digital Terrestrial  
Multimedia  
Broadcast (DTMB)**

**HUBCO Coal  
Power Project,  
Hub Balochistan  
(2,920 MW)**

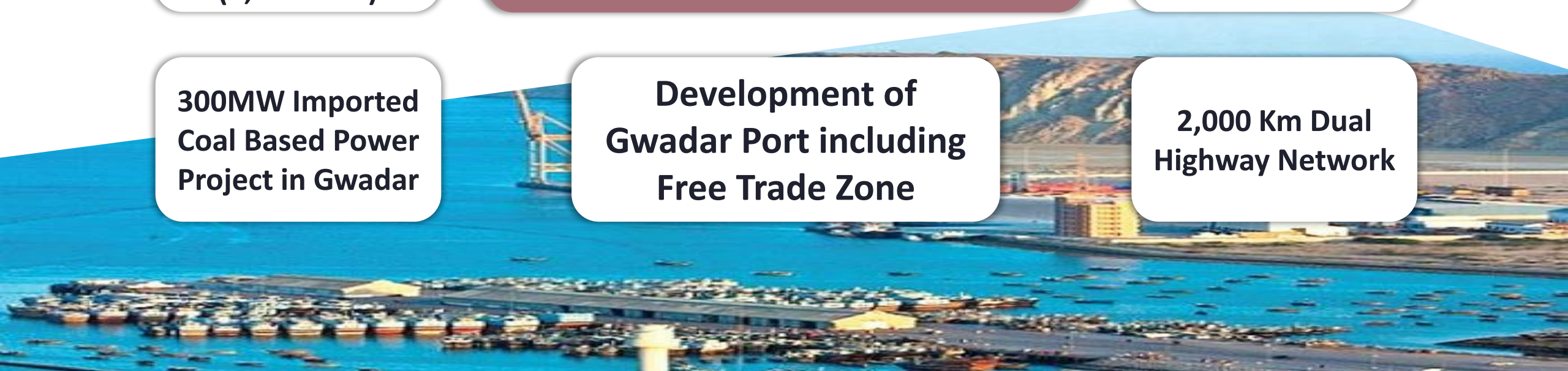
**Balochistan – Heart of CPEC**

**USD 700 million  
only for Gwadar  
Projects**

**300MW Imported  
Coal Based Power  
Project in Gwadar**

**Development of  
Gwadar Port including  
Free Trade Zone**

**2,000 Km Dual  
Highway Network**



# Highway Network



# China-Pakistan **Economic Corridor**

**Gwadar  
Desalination Plant**

**New Gwadar  
International  
Airport**

**Construction of  
Breakwaters**

**Dredging of  
berthing areas  
& channels**

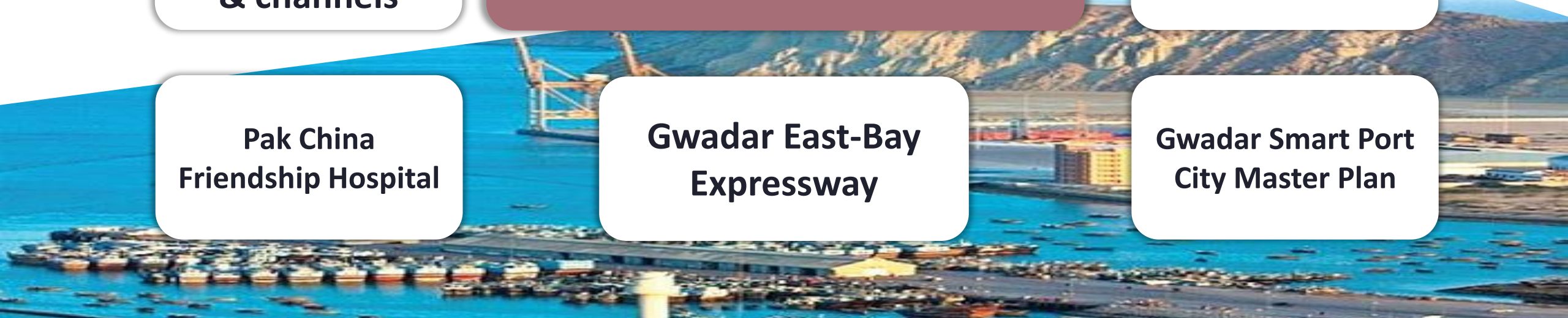
**Projects in Gwadar**

**Development of  
Free Trade Zone**

**Pak China  
Friendship Hospital**

**Gwadar East-Bay  
Expressway**

**Gwadar Smart Port  
City Master Plan**



# Balochistan Board of Investment & Trade

## Liaison Offices in Islamabad & Karachi

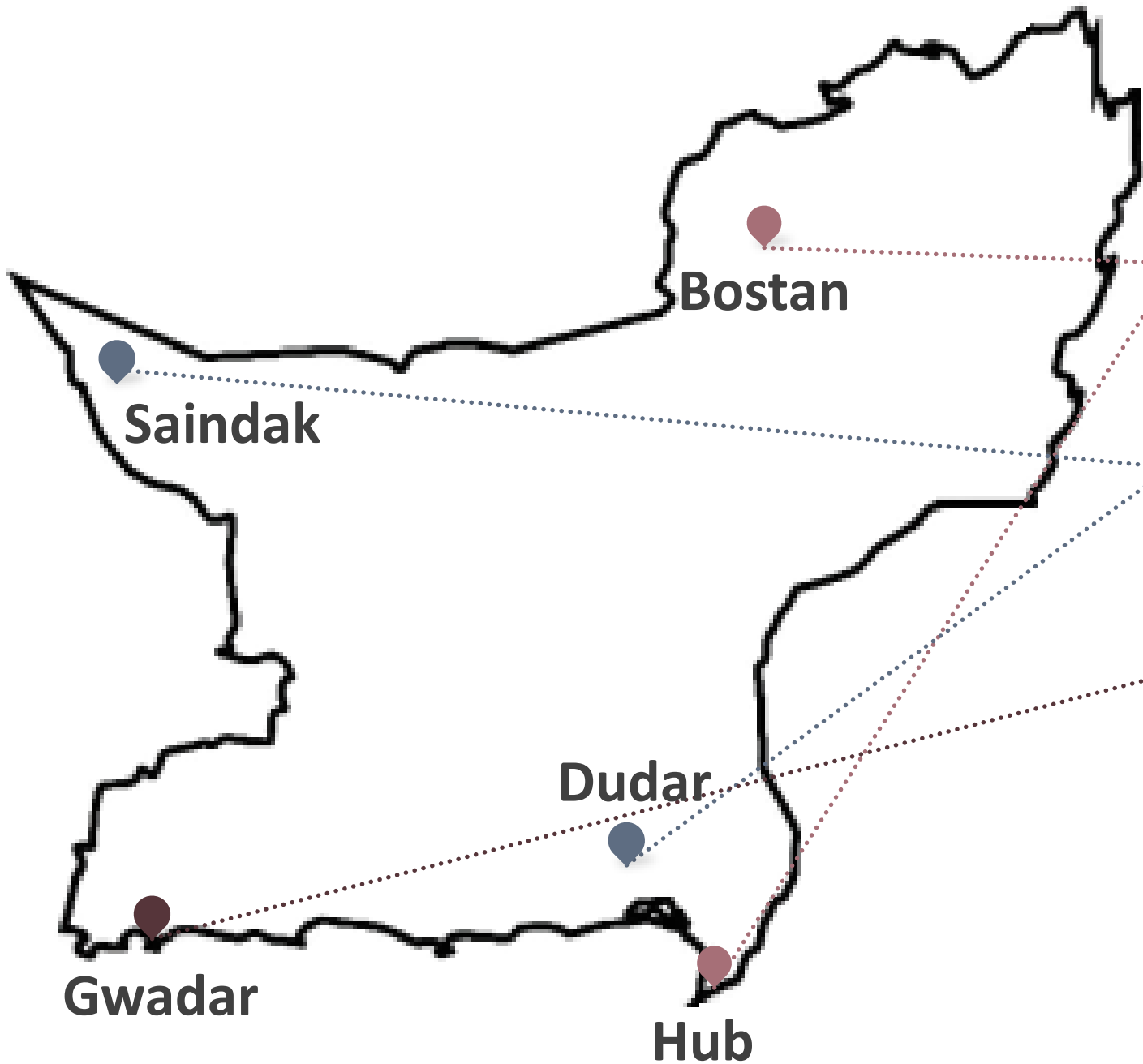
Sub Offices at Islamabad and Karachi to facilitate investors in achieving all regulatory and legal requirements of both Federal & Provincial nature

## One Window Facilitation

Single point of contact to provide all facilitation to investors from the Government and support organizations



# INVESTMENT ZONES



## Investment Zones

2 Special Economic Zones

2 Export Processing Zones

1 Free Trade Zone

7 Industrial Estates

# BOSTAN

## Special Economic Zone

Central Asia ⇄



Area: 4,000,000 m<sup>2</sup>

Quetta International Airport – 23 Km

Afghanistan Border – 94 Km

Connected to National Motorway

CPEC Western Corridor



**HUB**

**Special Economic Zone**



**Area: 1,700,000 m<sup>2</sup>**

**Economic Capital Karachi – 23 Km**

**100+ Operational Units (LIEDA)**

**14 Km from National Motorway**

**Karachi International Airport - 51 Km**

**Karachi**

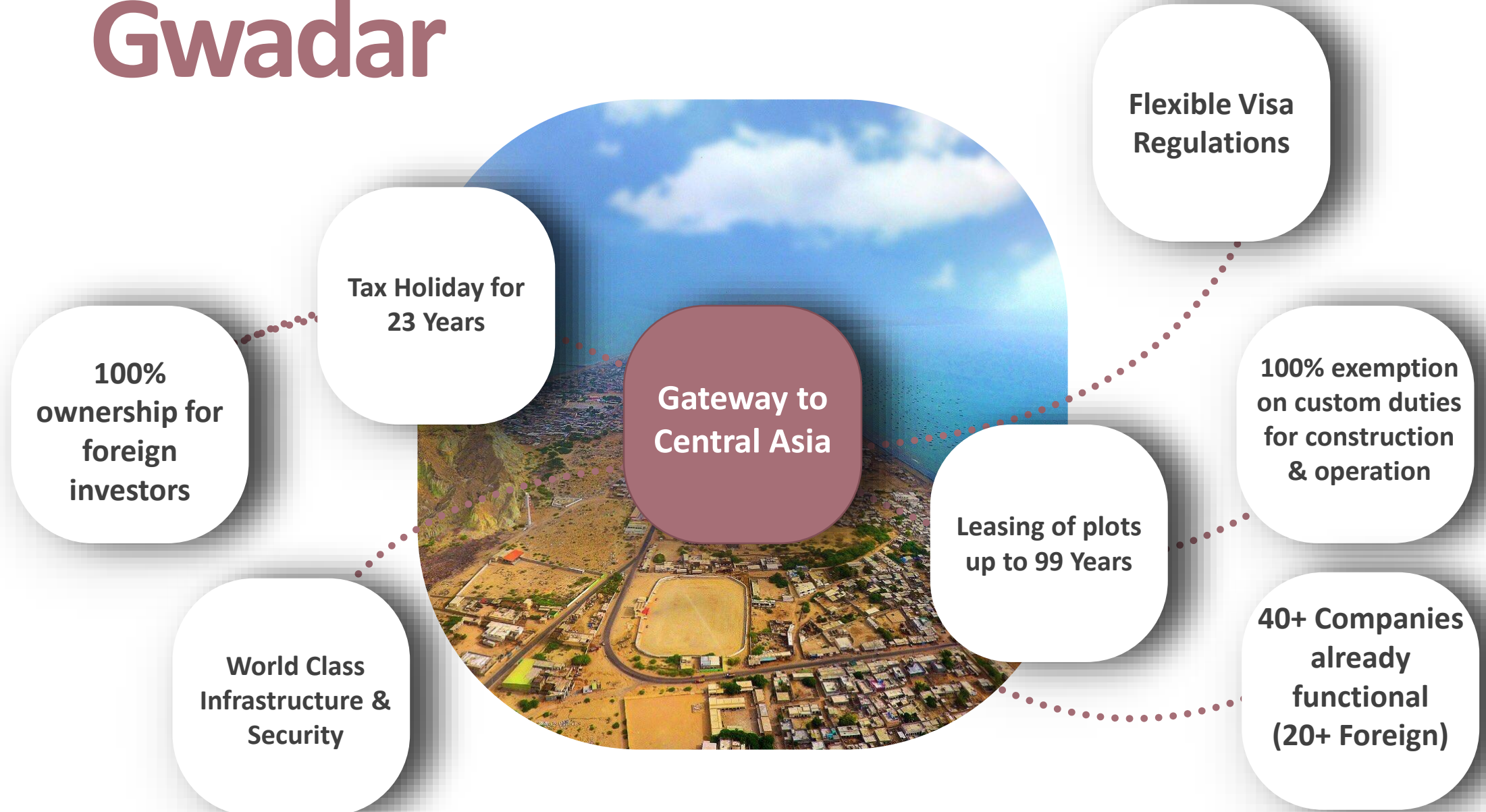




**Free Trade Zone**

***Worlds Largest Deep Sea Port***

# Gwadar



# Export Processing Zones

## Saindak & Duddar

**Development on  
Competitive rates for 30  
years**

**Duty-free import of  
machinery, equipment and  
materials**

**Freedom from national  
import regulations**

**Exchange control  
regulations of Pakistan not  
applicable**

**Registration of capital and  
profits**

**No sales tax in input goods  
including electricity/gas  
bills**

**Duty-Free vehicles allowed  
under certain conditions**

**Domestic market available  
to the extent of 20%.**

**Presumptive tax @ 1%**



# Balochistan Land Lease Policy for Foreign Investors 2018

- Special Policy to assist and promote Foreign Investment
- A specialized committee to approve allotment of land
- Only an NOC required from the Ministry of Foreign Affairs
- Mode of Transfer: Lease for a period of 33 years (Extendable)



# PRIORITY SECTORS

# Information Technology





## E-Commerce

- Pakistan's E-commerce industry estimated at PKR 99.3 Bn in 2018 with a YoY growth of 92%
- 43% of Pakistan's Population use Smartphone
- Successful E-Commerce Businesses in Balochistan Include
  - Careem (Car Rental – Subsidiary of Uber)
  - Daraz (Online Shopping)
  - Food Panda (Food Delivery Service)
  - OLX (Sale and Purchase)
- Amazon.com, Inc. has recently established a company in Pakistan

# National Incubation Center - Quetta



- **First of its kind Incubation & Acceleration platform, launched under the Public – Private Partnership of Ministry of Information Technology, IGNITE, LUMS & BUIEMS**
- **Provides state of the art Facility established to nurture startups during their early phases.**
- **Program that includes mentorship and edification where entrepreneurs pitch their ideas to the big names within the business community**
- **Working Space facilities available for Star-ups with all utilities and an environment to promote innovation**

# Registration with Pakistan Software Export Board

## Incentives

**Tax exemption on exports of IT products and services till 2025**

**5% Sales Tax in Technology Specialized Zones**

**3000+ active companies registered with Pakistan Software Export Board**

**100% Repatriation of profits**

**Voice traffic legalized for call centers**

**Subsidized participation in International exhibitions and roadshows**

**Inbound and outbound visa facilitation of customers, investors, and company employees**

**Incubation Program for IT entrepreneurs/startups**

**100% foreign ownership**





# Potential

Low Cost  
Labor

English  
Speaking  
Workforce

10+ IT  
Universities in  
Balochistan



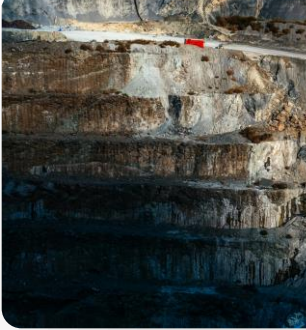
# Opportunities

Start-Up  
Financing

Software Houses

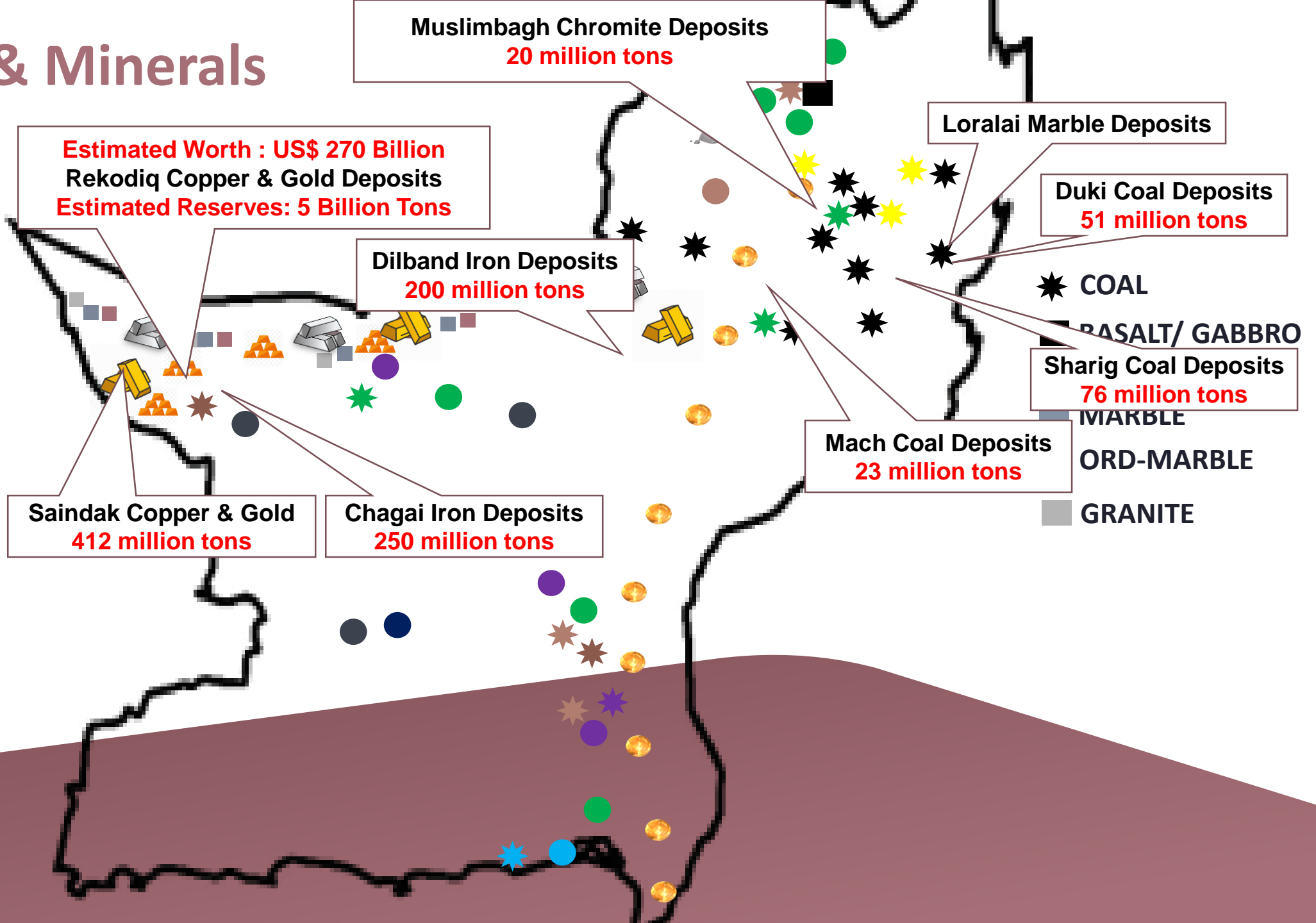
Information  
Technology Parks

# Mining & Minerals



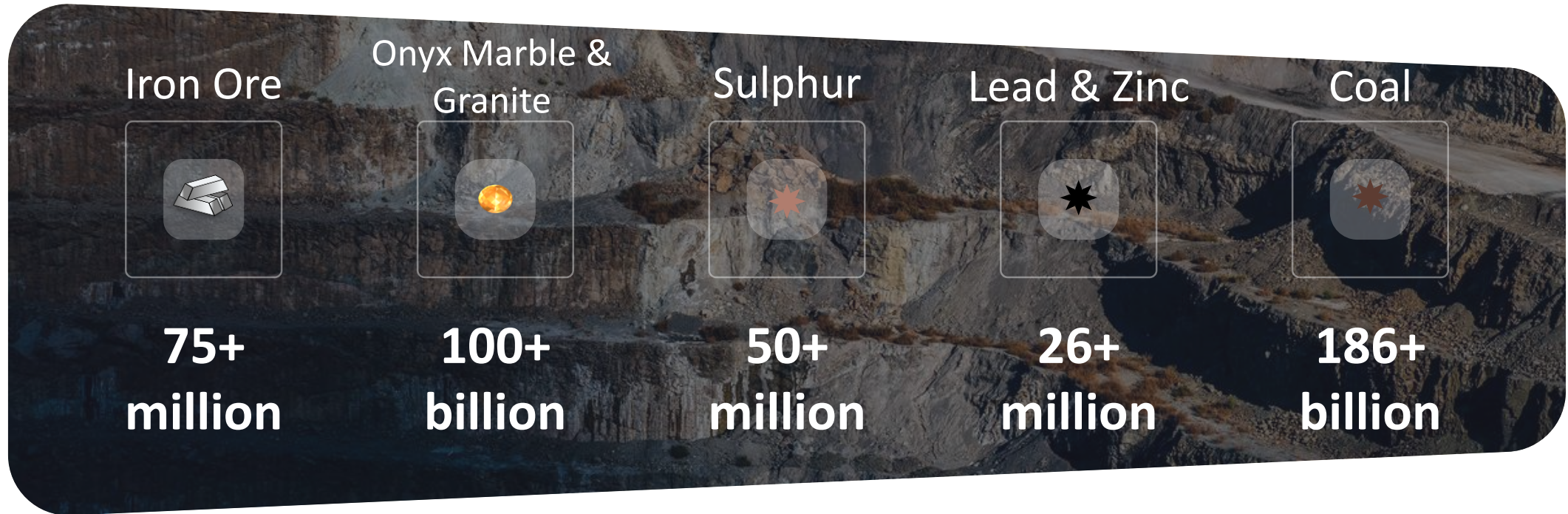
# Mining & Minerals

-  GOLD
-  COPPER
-  LEAD & ZINC
-  CHROMITE
-  ANTIMONY
-  TITANIUM
-  MANGANESE
-  ALUMINUM
-  IRON
-  SULFUR
-  BARITE
-  ZIRCON
-  GYPSUM
-  MAGNESITE
-  SOAP STONE
-  CALCITE



# Mining & Minerals

Reserves (Tonnes)





## Mining & Minerals

- The Saindak Copper-Gold Project worth \$350 million development project by Metallurgical Corporation of China Ltd. with a lease of 10 years

# Opportunities

## Modernized Mining

There is huge potential for mining, using modern technology and techniques

## Processing Plants

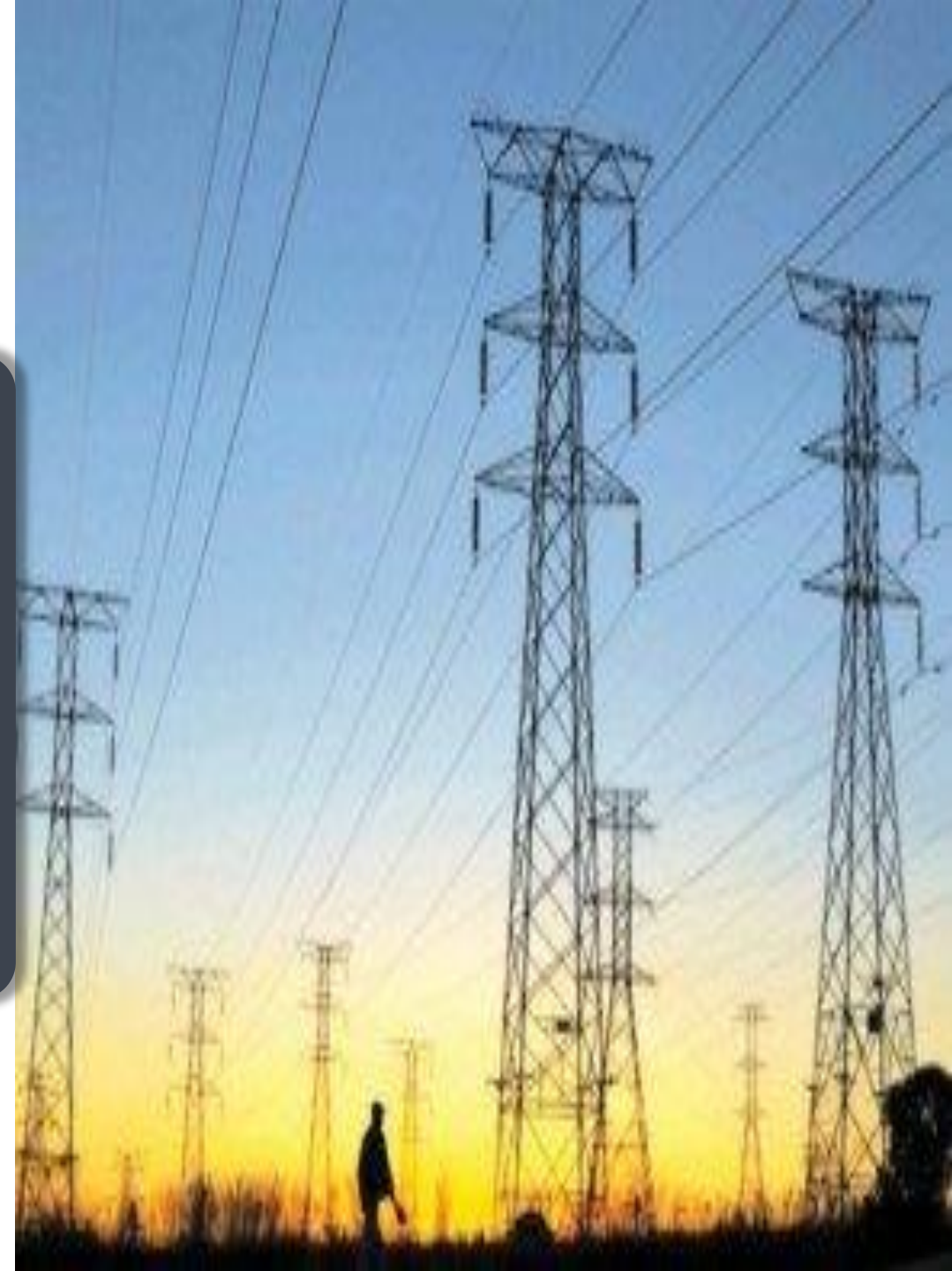
All minerals extracted from the province is either exported or sent to other provinces for processing

## Coal Washing Plants

With huge reserves of coal, washing and processing plants of coal can increase the quality of coal to be used and exported

# Thermal power Station Near Coal Fields of Balochistan

- **To Generate Electricity form Coal in Balochistan Province**
- **The location will be near the coal hotspots of the province and with easy access to the raw materials**
- **It will result cater to the power requirement of the nearby regions and will be able to supply to other regions.**





# Cement Manufacturing Plant

- A cement plant will allow the use of the resources already available in the provinces and instead to sending them to other provinces for processing
- The plant can be located near the sites with Deposits of Limestone, Gypsum and shale as there are already large deposits throughout the province
- Currently only one Company functional in this sector (DG Cement)



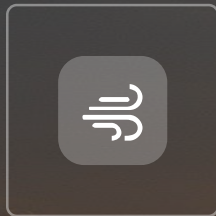
# Energy & Power



# Energy & Power

## Balochistan Potential

### Wind



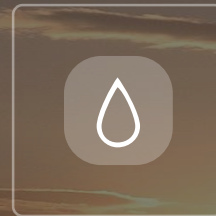
The Worlds  
largest wind  
corridor

### Solar



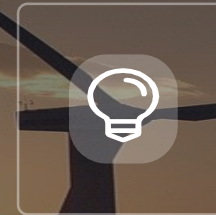
Highest  
average solar  
radiations in  
the World

### Oil City



80,000 acres  
in Gwadar  
being  
established

### Power Generation



Highest FDI in  
Power Generation

A photograph of an industrial refinery or power plant facility, featuring several tall, cylindrical towers and complex piping structures against a clear sky. The image is partially framed by a dark red, wavy border.

# Energy & Power

- Largest FDI into Pakistan in Power Sector, Approx. USD 997 million
- USD 9 billion ARAMCO Refinery agreement with Saudi Arabia at Gwadar
- USD 10 billion Pak Arab Refinery with UAE at Gaddani
- 3,000MW Power Plant under CPEC from HUBCO
- CK Solar (South Korea) had signed MOA with Government of Balochistan for 300 MW solar power plant near Quetta

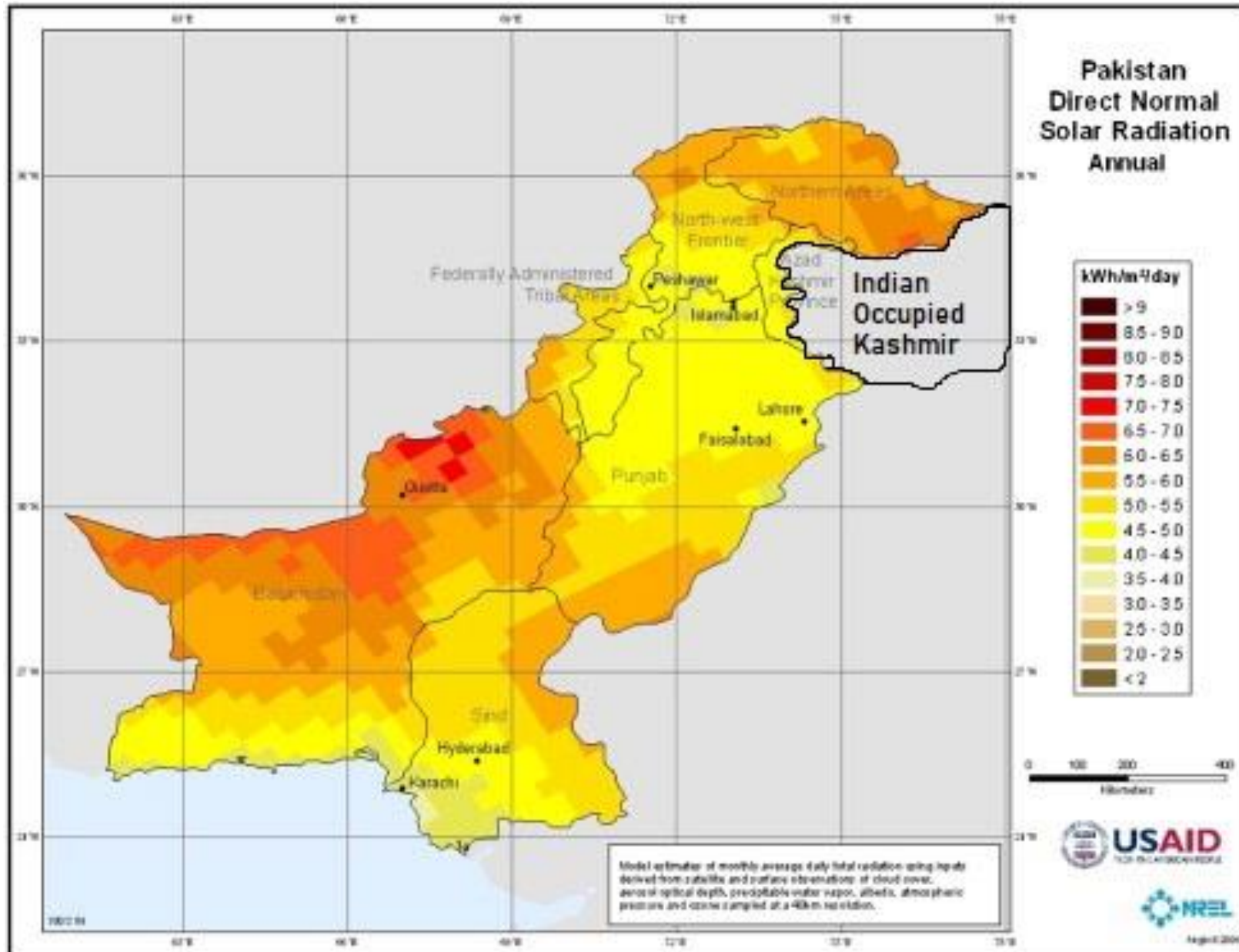


## Pakistan

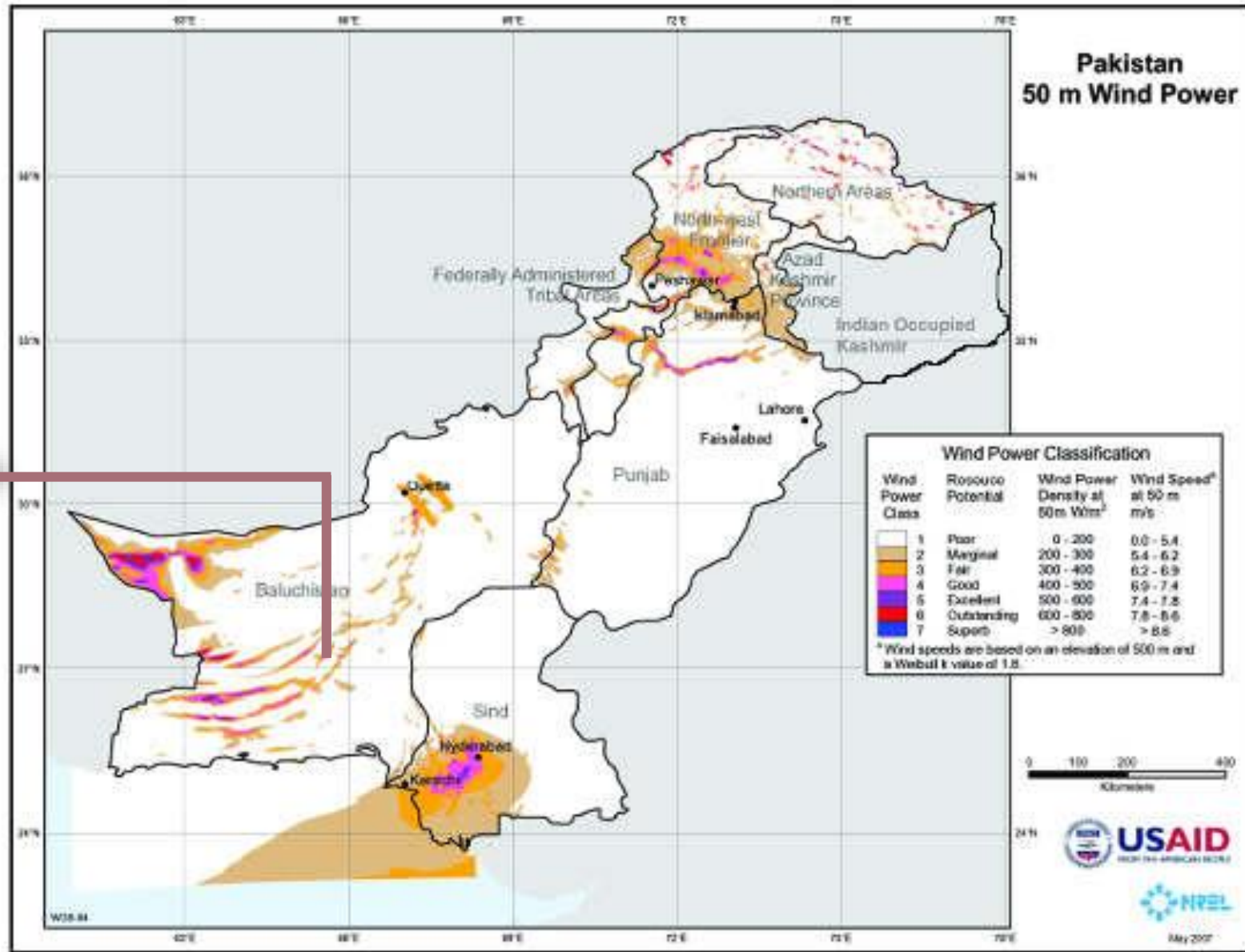
# Alternate & Renewable Energy Policy

- Unveiled in August 2020
- Generous tax facilities to investors
- Open competitive bidding for lowest tariff and technology transfer
- Goal to become 20% renewable by 2025 and 30% by 2030 (Currently 5%)
- Aim to reduce tariff to 4 cents
- B2B & B2G Mechanisms for Investors
- **0% Tax on Renewable Equipment**

# Solar Potential



# Wind Potential



Worlds Largest Wind Corridor

# Energy & Power Opportunities



**Solar Power  
Generation**



**Concentrated  
Solar Power  
Generation**



**Small Hydel  
Power  
Generation**



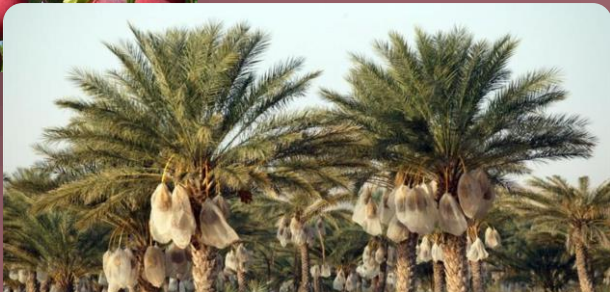
**Wind Power  
Plants**



**Tidal Power  
Plants**



# Agriculture & Livestock



# Agriculture

0.5 million tonnes



Pakistan's  
**Apples**  
Production

20,000 tonnes



Pakistan's  
**Almonds**  
Production

28,000 tonnes



Pakistan's  
**Plums**  
Production



# Agriculture

0.2 million tonnes



Pakistan's  
**Apricot**  
Production

32,000 tonnes



Pakistan's  
**Pomegranates**  
Production

63,000 tonnes



Pakistan's  
**Grapes**  
Production



# Agriculture

**Pakistan sixth largest producer of dates and third largest exporter**

- Balochistan contributes 70% to national date production with 130 varieties

- 5 Major and **25 Minor Agro-Ecological Zones** for cultivating **71+** field crops, fruits and vegetables

- 11.1 MAF flood water available for runoff farming

- 120,000 tonnes of Dry Fruit Exports

**Considered to be the Fruit Garden of Pakistan**

- Conductive ecology floriculture based industries

- Adaptive climate for introduction of new crops

- Fertile soil with low disease vectors

- Kachi Canal & Miri Dams for irrigation

- 3.83 million Hectares Cultivable Fertile Land available

# Opportunities

## Fertilizer and Pesticide Industry

Currently no local industry in the area and is purchased from other Provinces

## Cold Storages & Packaging

Required for keeping fruit produce fresh for longer periods making them marketable and exportable

## Tunnel Farming

The climate makes a suitable place for tunnel farming with low investment and high return on investment

## Farm Service Machinery

Traditional farming techniques used due to expensive modern machinery Farm Servicing can enhance the productivity of the industry,

## Fruit Processing

Processing fruits to make them more marketable e.g. Apple Polishing etc.

# Livestock

0.42 million



Pakistan's  
**Camel**  
Production

14.5 million



Pakistan's  
**Sheep**  
Production

14.1 million



Pakistan's  
**Goat**  
Production



# Livestock

- 28,000 tons Beef and 204,000 tons mutton annual production

- 8.22 million domestic poultry
- 5.29 million cattle
- 16.14 million sheep
- 16.42 million goats
- 1.09 million buffaloes
- 0.46 million camels

- Pastoral Society - Cradle of precious livestock breeds part of the socio-economic culture of the province

- Grazing Fields available to provide organic feed

- Contributes 47% to the Provinces Agricultural Output Value

- Consumers include leather, carpet and pharmaceutical industries

**97% Land classified as Rangeland**

- 70 percent population directly or indirectly involved in livestock rearing activities

# Facilities Available



110 Civil Veterinary Hospitals

841 Civil Veterinary  
Dispensaries

60 Animal Breeding Canters

Semen Production Unit

Embryo Transfer Technology

Epidemiology

18 Disease Investigation Labs



# Opportunities

## Fodder Production

With 5 Agro-Ecological zones, year round production can be ensured and exported to the middle east

## Slaughter Houses & Cold Storage

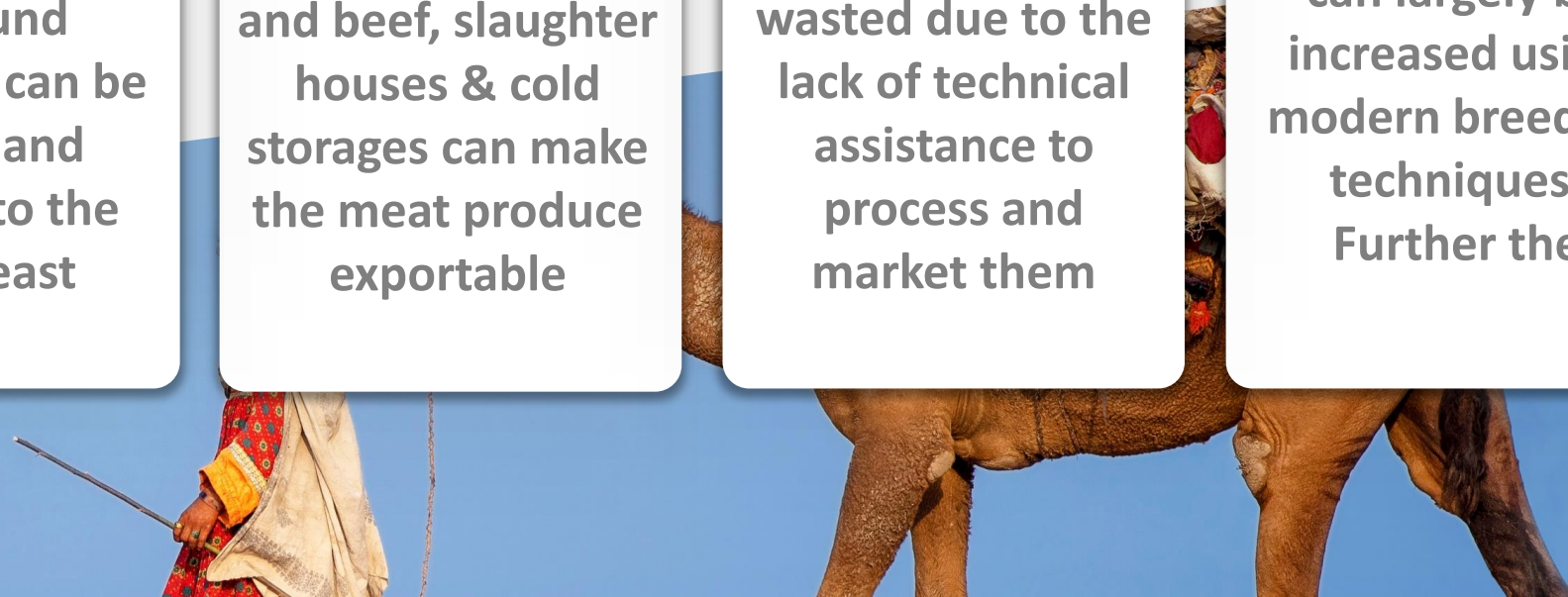
With the high quality of mutton and beef, slaughter houses & cold storages can make the meat produce exportable

## Hide & Skin Processing

Large amounts of Hide and Skin are wasted due to the lack of technical assistance to process and market them

## Milk, Dairy & By-Products

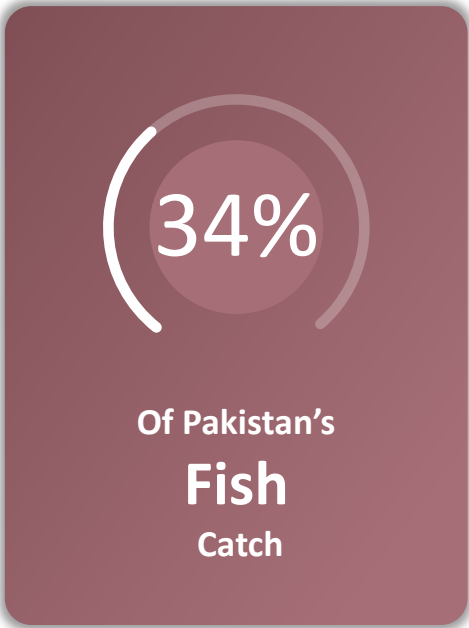
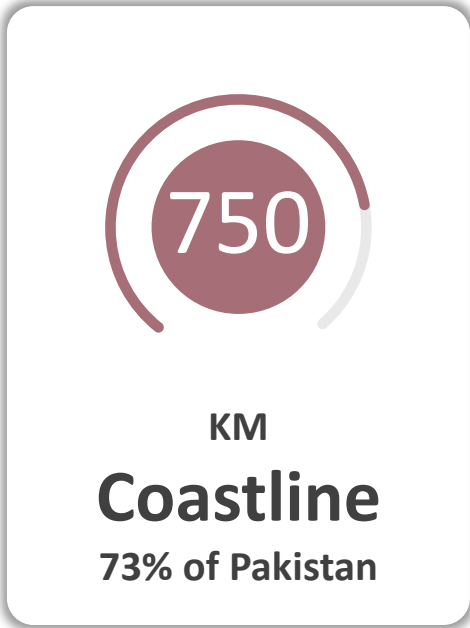
Milk production can largely be increased using modern breeding techniques. Further the



# Fisheries & Coastal Development

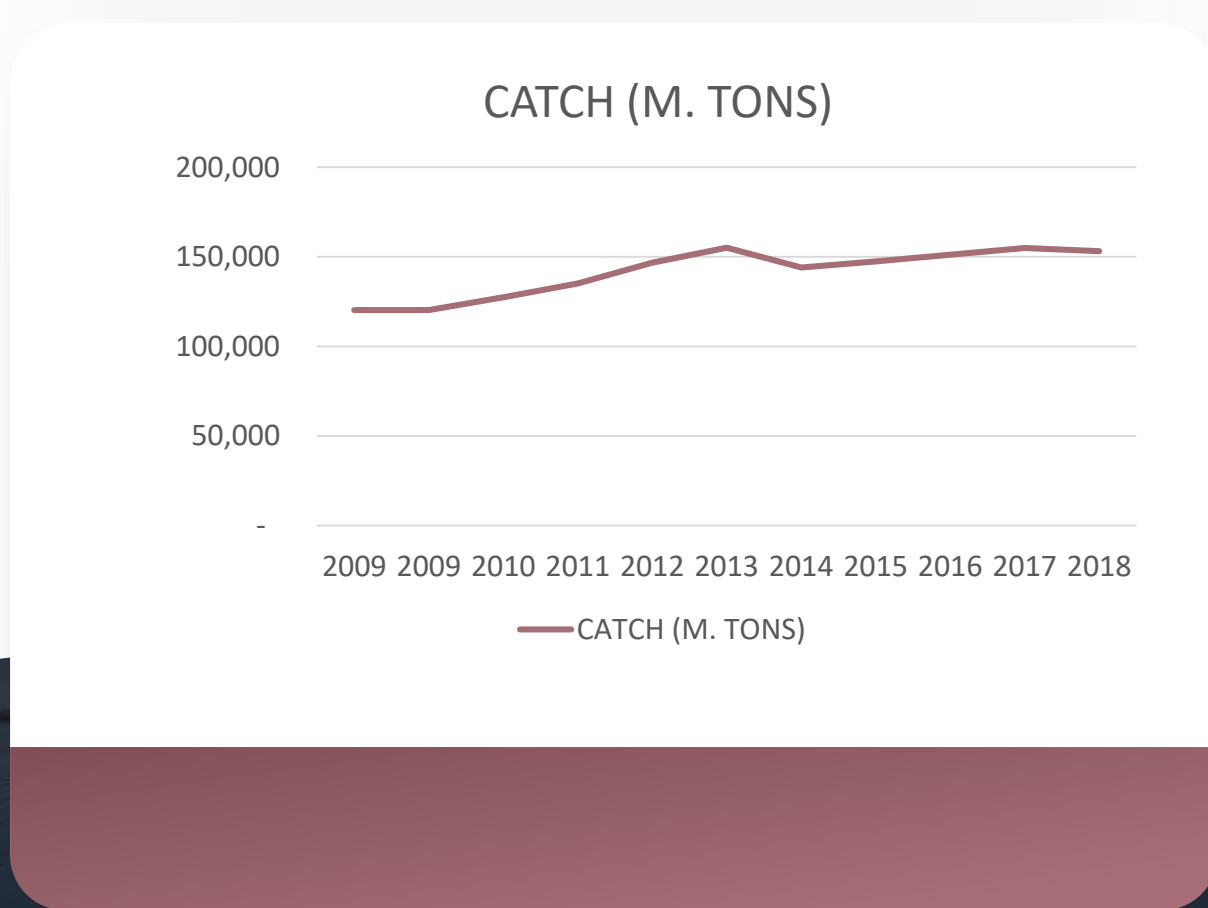


# Fisheries & Coastal Development



# Fisheries & Coastal Development

## Fish Catch



- ✓ **0.15 billion tonne fish catch in 2018**
- ✓ **38 Landing Sites**
- ✓ **36+ Species of Fish**

# Fisheries & Coastal Development

## Boats



- ✓ 70,000+ Fishermen Population
- ✓ 10,000+ Fishing Licences
- ✓ Handmade Fishing Vessels

# Fisheries & Coastal Development





**Types of Fish in Balochistan**

# Opportunities

## Fish Processing & Storage Plant

With the high quality of fish breeds, processing, canning & cold storages can make the catch exportable to other countries

## Fish Hatchery

With availability of natural lakes and water bodies in the province, huge potential for developing fish farms and hatchery

## Boat Manufacturing

Currently the boats used are locally hand made with potential for industrialization of the sector

## Shipbreaking

With competition from Bangladesh and India, Shipbreaking can be a viable industry in terms of its role of providing iron & steel



# Gaddani Ship Breaking Yard

- World's 3<sup>rd</sup> biggest ship-breaking yard across 10km coastline and the most efficient in the region
- Consists of 132 ship-breaking plots with a Capacity to break-up 125 ships of all sizes with an LDT of 1,000,000 tonnes
- Provided employment to more than 30,000 workers at its peak
- Germany and Greece dumped the most amount of vessels at Gadani in 2016



# 2020 – Declared Year of Blue Economy by Prime Minister

## BLUE ECONOMY

The Blue Economy is sustainable use of ocean resources for economic growth, improved livelihoods and jobs, and ocean ecosystem health.

The Blue Economy encompasses many activities...

### RENEWABLE ENERGY

Sustainable marine energy can play a vital role in social and economic development.

### FISHERIES

Marine fisheries contribute more than **US\$270 billion** annually to global GDP. More sustainable fisheries can generate more revenue, more fish and help restore fish stocks.

### MARITIME TRANSPORT

Over **80%** of international goods traded are transported by sea, and the volume of seaborne trade is expected to double by 2030 and quadruple by 2050.

### TOURISM

Ocean and coastal tourism can bring jobs and economic growth. Coastal Least Developed Countries and Small Island Developing States receive more than **41 million visitors** per year.

### CLIMATE CHANGE

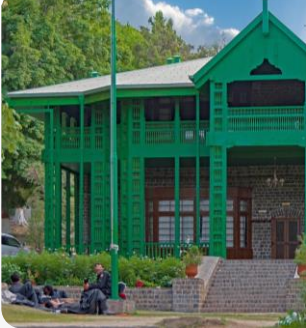
The impacts of climate change on oceans—rising sea-levels, coastal erosion, changing ocean current patterns, and acidification—are staggering. At the same time, **oceans are an important carbon sink** and help mitigate climate change.

### WASTE MANAGEMENT

**80%** of litter in the ocean is from land-based sources. Better waste management on land can help oceans recover.



# Tourism





**Hannah Lake Quetta**



**Pir Ghaib**



**Nushki – Golden  
Desert**



**Ziarat  
Juniper Forests**



## Coastal Tourism



# Coastal Highway



# Opportunities

## Hotel Industry

Currently only 2 five star hotels operate in the province with limited capacity providing opportunities to new chains

## Resorts and Recreational Parks

Multiple scenic locations with a variety of landscapes offer opportunities for resorts and recreational parks at all locations

## Food Chains

US has already introduced a lot of Fast Food Chains with few also in Balochistan. There is potential for more food chains that can be explored in Balochistan

## Entertainment Centres

Huge potential in the entertainment sector with cinemas, sports and recreational arenas etc.

# Urban Development







## Gwadar Smart City

- Gwadar to become the 3rd largest city in Pakistan by economic output
- Projects include a man-made island, central business district, Pakistan's tallest building etc.
- Four mega desalination to be installed in Gwadar at \$1 Billion USD



## Construction Relief

- Government has provided extensive relief to the Construction sector
- Exemption from all taxes from raw materials except cement and steel
- Government Scheme to build 5 million affordable housing units
- Opportunities for foreign companies to establish residential and commercial societies and engage in construction.



# Construction Potential

- Second Largest FDI into Pakistan in the Construction Sector, Approx. USD 708 million
- Huge areas of undeveloped land
- Underdeveloped urban centers open to innovative urban planning mechanisms
- 180,000 Urban Work Force
- 60,000 Rural Work Force
- Population Growth rate at of 2.1% resulting in growing need of Urban Planning



# Other Projects

# Waste Management & Recycling Plant

- The urban population caused a huge increase in demand for waste management service
- Government of Balochistan shall provide land, Logistics and other incentives for the firms to go for the project
- Recycled material will be used as raw material for various industries in Pakistan and abroad
- Special Rebate on import of Recycling equipment



# Logistics & Supply Chain

- Growing need for modern logistics and supply chain companies
- Opportunities arising in CPEC and increase in Trade volumes
- Balochistan nucleus of trade routes
- Currently monopoly of local trucks for goods transfer



# National Electric Vehicle Policy

- **Passenger Vehicles: EV sales to constitute 30% of new sales by 2030 and 90% of new sales by 2040**
- **Trucks: EV sales to constitute 30% of new sales by 2030 and 90% of new sales by 2040**
- **Buses: EV sales to constitute 50% of new sales by 2030 and 90% of new sales by 2040**
- **2 & 3 wheelers: EV sales to constitute 50% of new sales by 2030 and 90% of new sales by 2040**
- **U.S. had the world's third largest stock of plug-in passenger cars after China (47%) and Europe (25%)**





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# THANK YOU

# QUESTIONS & ANSWERS



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