Overview of

Pakistan Logistics industry

presented by

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Chairman - All Pakistan Shipping Association (APSA)

PAKISTAN LOGISTICS KEY STATISTICS

Ports (3)
Karachi | Bin Qasim | Gwadar

Container Terminals (5)
DP World (Bin Qasim)
KICT | PICT | SAPT (Karachi)
GITL (Gwadar)

Cargo Handling
100.26 Million Tons
3.42 Million TEUs
(per annum)

National Carriers (11)
6 Tankers Vessels
5 Bulk Carriers

Railway Tracks
7791 km

Dry Ports
14

Cargo Handling
8.4 million Tons
38,413 TEUs
(per annum)

Share in Transport
3~4%

Road Length
12,743 km

Trucks
291,000

Tankers
15,800

Share in Transport
96%

Airlines
3-Domestic
26-International

Airports
23-Domestic
11-International

Cargo Handling
323,209 M.Tons
(per annum)

Share in Transport
<0.5 %

Transport Share in

Service Sector 22%

National GDP 13%

Labour Force Employment 5.4%

2500 Freight Forwarding & Logistics Companies

PAKISTAN LOGISTICS KEY STATISTICS

LOGISTICS PERFORMANCE INDEX

Ranks **122** *Out of 160*

THE WORLD BANK
IBRD • IDA

MEMBER TIR CARNET SINCE 2015

Foreign Direct Investment

Transport Sector

US$ 150 Million

per annum

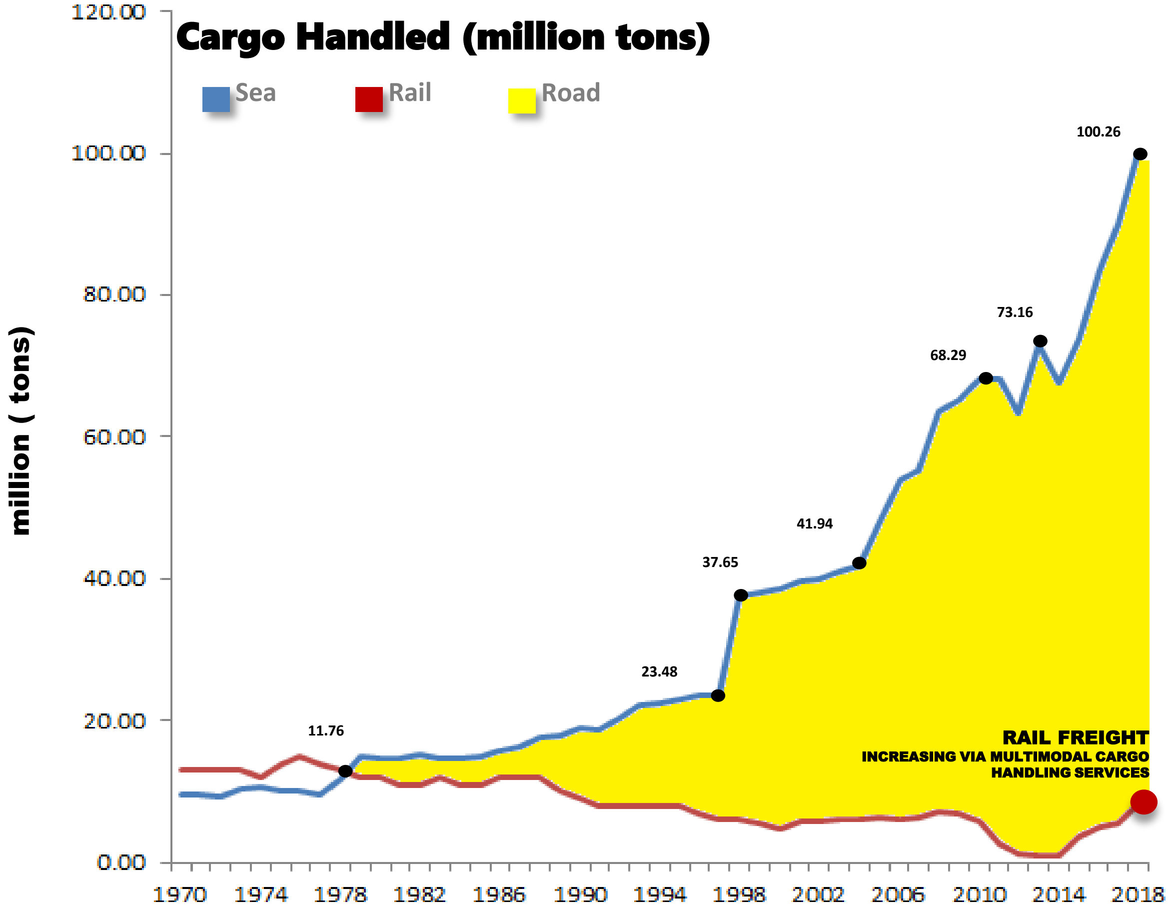
CPEC
CHINA PAKISTAN ECONOMIC CORRIDOR

Transport Sector Investment Projects

US$ 17.68 Billion

CARGO DISTRIBUTION

SEA | RAIL | ROAD



PHASE-I (1947-1960)

Rail Connectivity for mass transit and freight movement

PHASE-II (1960-1990)

Industrialization & Exports demands for road networks and private sector transport become more competitive and efficient over public sector transport

PHASE-III (1991-Todate)

National Transport Policy was envisaged and recognized the emerging role of the private sector for investment and as operator to various logistics services

Ports

GROWTH & DEVELOPMENT

Shipping

PORTS LANDLORD PORT AUTHORITIES

Since 1887	Since 1973	Since 2007
KARACHI PORT TRUST (KPT)	PORT QASIM AUTHORITY (PQA)	GWADAR PORT AUTHORITY (GPA)
33 BERTHS	13 BERTHS	3 BERTHS
70 Million Tonnes	**58** Million Tonnes	**4.8** Million Tonnes

CARGO HANDLING CAPACITY (TOTAL) **132 MILLION** **TONNES PER ANNUM**

CONTAINER TERMINALS

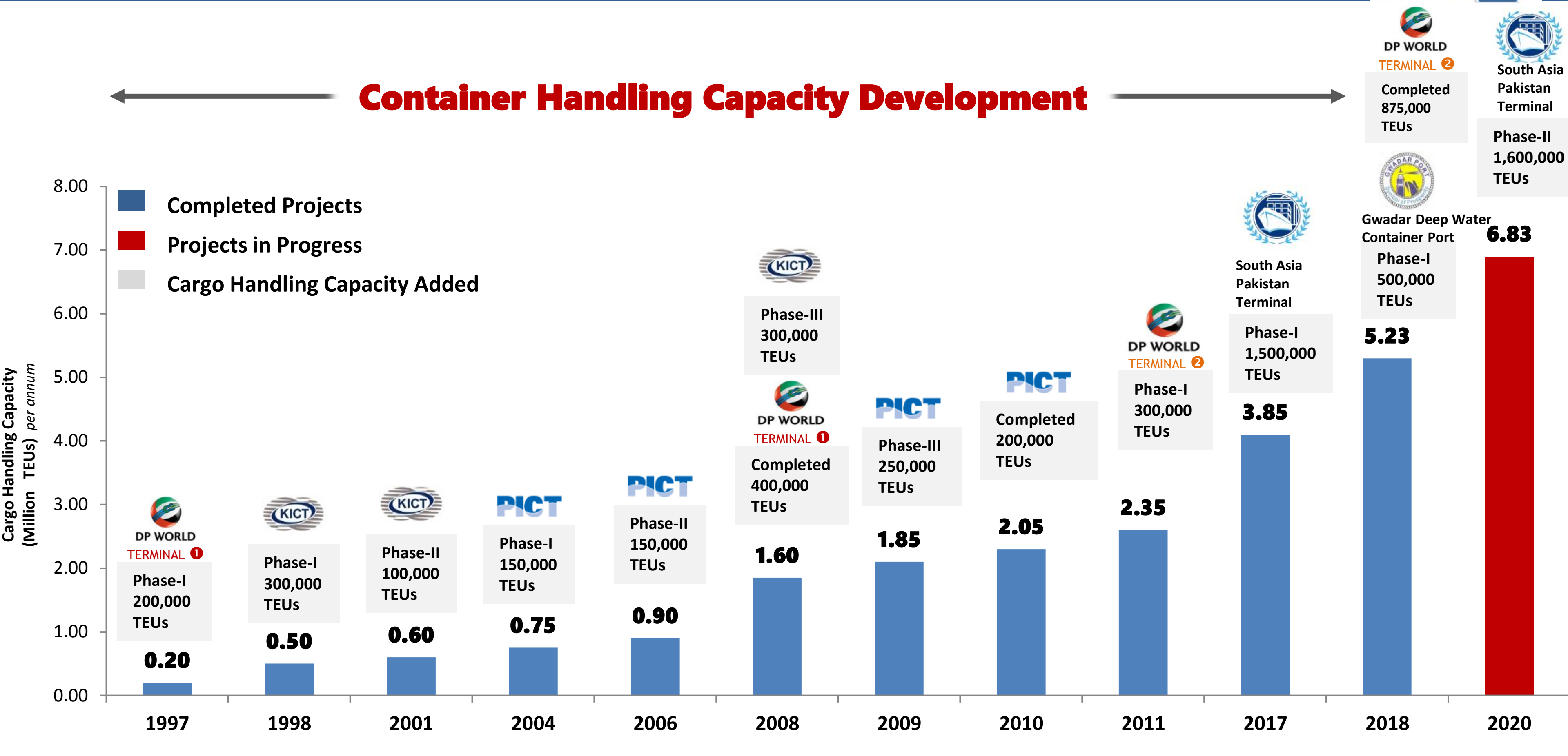
Terminals' Container Handling Capacity (4.73 Million TEUs per annum)

1,775,000	700,000	750,000	1,500,000
Since 1997	Since 1998	Since 2002	Since 2018
Qasim International Container Terminal (QICT)	Karachi International Container Terminal (KICT)	Pakistan International Container Terminal (PICT)	South Asia Pakistan Terminal (SAPT)

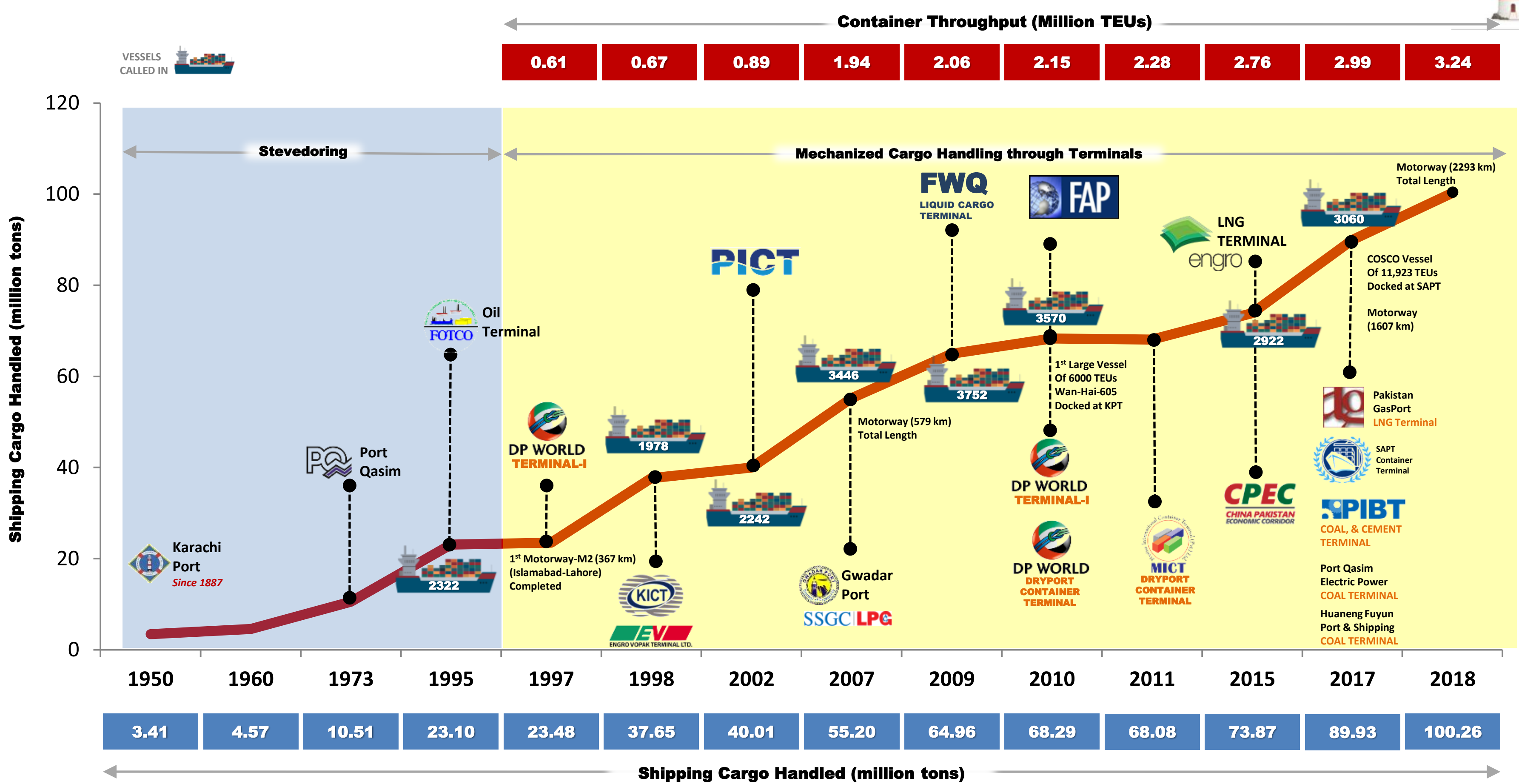
Terminals' Throughput in 2018 (3.42 Million TEUs per annum)

1,227,205	796,415	654,303	748,918

CONTAINER TERMINALS

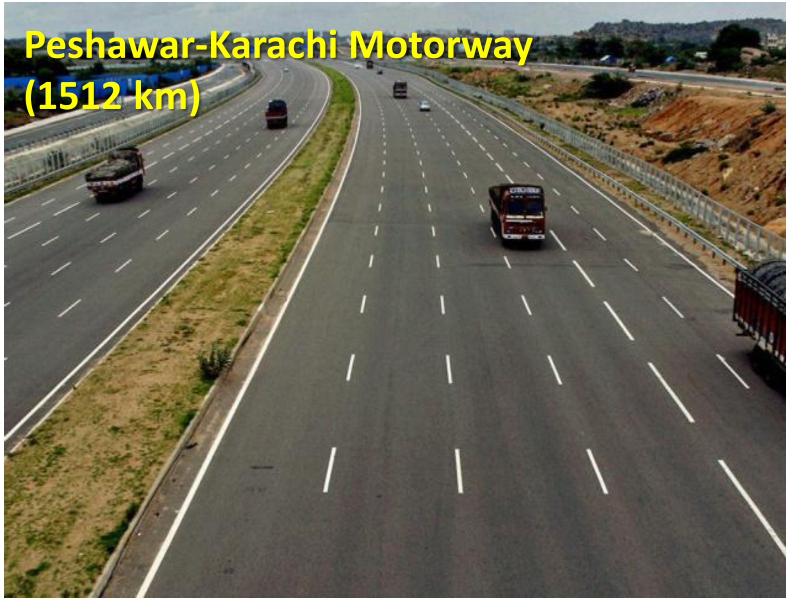


PORTS PUBLIC-PRIVATE PARTNERSHIP (Infrastructure Development)



Road
GROWTH & DEVELOPMENT
Transport

ROAD TRANSPORT



ROAD TRANSPORT

Motorway	Length (km)	Route	Year of Completion	CPEC Development
M-1	155	Peshawar-Islamabad	2007	
M-2	367	Islamabad-Lahore	1997	
M-3	230	Lahore-Abdul Hakeem	2018	☑
M-4	286	Pindi Bhatian-Multan	2018	☑
M-5	387	Multan-Sukkur	2019 (April)	☑
M-6	296	Sukkur-Hyderabad	2019	☑
M-7	270	Dadu-Hub	TBA	
M-8	892	Rotodero-Gwadar	2017	☑
M-9	136	Hyderabad-Karachi	2017	☑
M-10	57	Karachi-Northern By-Pass	2007	☑
M-11	89	Sialkot-Lahore	2018	☑
M-13	81	Swabi-Chakdarah	2018	☑
M-14	280	Hakla-Dera Ismail Khan	2019	☑

Out of 3526 km (13 motorways) around 2464 km (9 motorways) was completed on fast-track during CPEC Regime compared to 522 km (2 motorways) which were completed in 10 years

Travel Time Reduced by 60%

Freight

GROWTH & DEVELOPMENT

Trains

FREIGHT TRAINS

- Expansion and reconstruction of existing Line ML-1 (1872 kms of track) at cost of US$ 8.17 billion (Dec 2022)

  Salient Features
  - increase in speed from 65km per hour to105km per hour to 120km/h to 160 km/h
  - increase in line capacity from 34 to 171 trains each way per day
  - increase in freight volumes from 6 to 35 million tons per year by 2025
  - increase in passenger trains from 20 to 40 each way per day
  - increase in railway share of freight transport volume from the current less than 4% to 20%

- Havelian Dry port at cost of US$ 65 million

FREIGHT TRAINS

Block Train

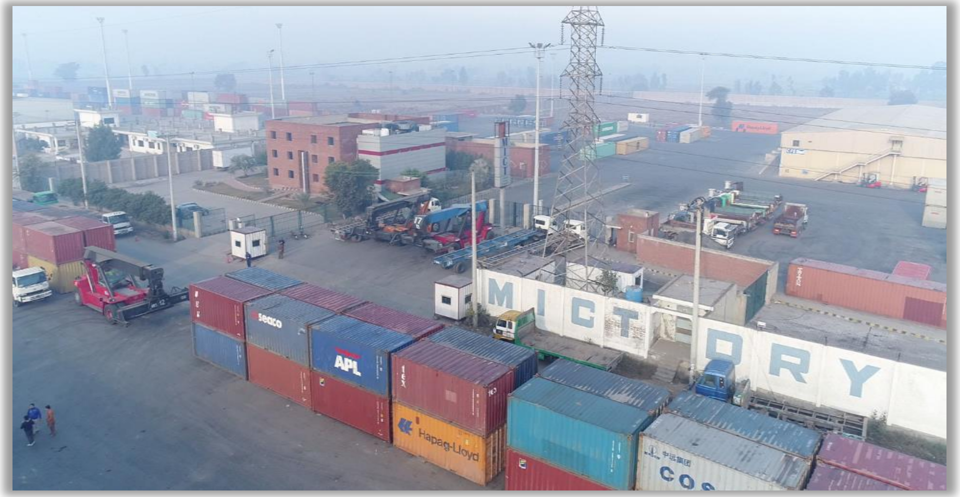
(Public Private Partnership)

Completed & Running

- Door-to-Door Transportation Service: Multimodal movement of cargo (truck-train-truck) from customer's door step to final delivery point.

In-Progress

- Track Access Project: Private Sector own rolling stock with right to use Pakistan Railway Track for movement of containerized cargo and bulk cargo (coal, clinker & cement)



NATIONAL FREIGHT & LOGISTICS POLICY (NFLP)

MULIMODAL TRANSPORTATION MODEL

NATIONAL FREIGHT & LOGISTICS POLICY (NFLP)

<table>
<tr><th>NATIONAL POLICY</th><th>SECTORIAL POLICY</th><th>PUBLIC SECTOR</th><th>AREA OF LOGISTICS</th><th colspan="2">PRIVATE SECTOR</th></tr>
<tr><td rowspan="5">National Freight & Logistics Policy

(integrating key stakeholders of logistics under one policy to facilitate efficient multimodal domestic and international cargo movement)</td><td>National Trucking Policy (2007)

Automobile Development Policy (2016)</td><td>Ministry of Communications</td><td>National Highways & Motorways</td><td>Truckers</td><td rowspan="4">Forwarding Agents</td></tr>
<tr><td>National Maritime Policy (2002)</td><td>Ministry of Maritime Affairs</td><td>Ports & Shipping</td><td>Shipping Lines, Terminals, Stevedores</td></tr>
<tr><td>Pakistan Railway Strategic Plan (2018).</td><td>Ministry of Railway</td><td>Freight Trains</td><td>Dry Port Terminals</td></tr>
<tr><td>National Aviation Policy (2019)</td><td>Aviation Division</td><td>Air Freight</td><td>Airlines</td></tr>
<tr><td>Pakistan Single Window Project</td><td>Ministry of Finance</td><td colspan="3">Customs</td></tr>
</table>

NATIONAL FREIGHT & LOGISTICS POLICY (NFLP)

OBJECTIVES

- Improve Level of Customer service
- Lower Costs
- Increase the Speed & Reliability

National Freight & Logistics Policy

ROLE OF GOVERNMENT

COMPETITION

Standards
Certifications
Transparency
Safety & Security
International Conventions

CAPACITY

Training
Institution
Infrastructure
Skill Development
Technological Innovation

CAPITAL & FINANCE

Loans
Insurances
Guarantees

ENCOURAGE PRIVATE ENTERPRISES & COMPETITION

Bringing Efficiency

In Global Supply Chain

THANK YOU