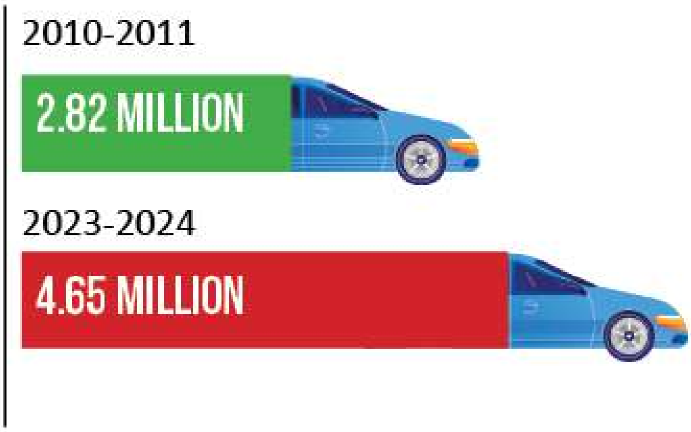
Gallup Pakistan's Analysis of
Pakistan's Economic Survey 2023-24

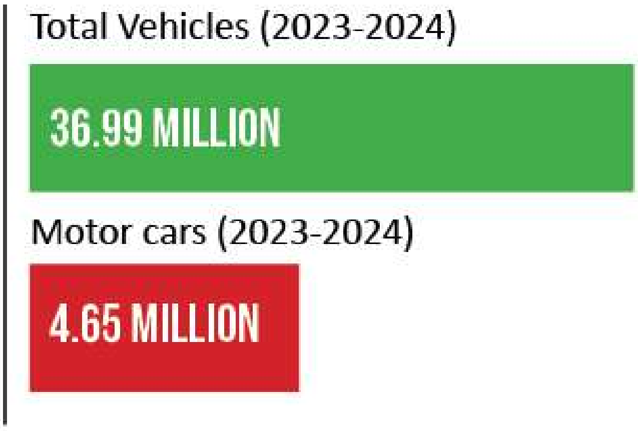
Growth of Motor Cars on Pakistan's Roads

GROWTH OF MOTOR CARS ON PAKISTAN'S ROADS



Motor cars on Pakistan's roads have fluctuated greatly, starting at 2.82 million cars in 2010-11, peaking in 2018-19 at 7.47 million, and closing at 4.65 million in 2023-24.

DIFFERENCE IN TOTAL VEHICLES AND MOTOR CARS ON THE ROADS:



The total vehicles on the roads have risen steadily at a rate of 3.5 times while motor cars on the roads have only grown by 1.6 times.

INCREASE IN MOTORCYCLES ON ROADS:

Motorcycles constitute a large part of the total vehicles on the roads (77.8% in 2023-24) and contribute to the rise in total vehicles on the roads.

GALLUP PAKISTAN
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Source: Pakistan Economic Survey 2023-24
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PRESS RELEASE

Gallup Pakistan's Analysis of Pakistan's Economic Survey 2023-24

While motor cars were steadily rising in usage from 2010-11 till 2018-19, they experienced a sharp drop in 2019-20, where motorcycle usage has only increased steadily without any declines – **Gallup Pakistan's Analysis of Pakistan's Economic Survey 2023-24 Data**

(Islamabad), 12th July, 2024

Gallup Pakistan, as part of its Big Data Analysis initiative, is looking at the Growth of Motor Cars on Pakistan's Roads (2023-24). This data is part of the Pakistan Economic Survey of 2023-24, shared by the Finance Ministry of the Government of Pakistan.

The complete Economic Survey 2023-24 is available here.

Gallup Pakistan has not conducted the survey work. We are only analyzing the publicly disclosed data and reports provided by the Government of Pakistan. This is a public service activity done on individual initiative of Gallup Pakistan and not in any way endorsed, commissioned, or supported by the Government of Pakistan.

What is the Big Data Analysis Series by Gallup:

Gallup Pakistan's Big Data series was started by Bilal I Gilani, Executive Director of Gallup Pakistan. Bilal explains the rationale of the series: "The usual complaint from academics and policy makers is that Pakistan does not have data availability. Our experience negates that. Pakistan has lots of data, but it is not available in a usable form and not widely accessible. At Gallup we plan to bridge this gap in terms of accessibility and use of data. The Gallup Big Data series has earlier worked with data sets such as PSLM, Labor Force Survey, and Economic Survey reports as well as National Census Reports and Election Commission Data sets. The current series is using the Pakistan Economic Survey 2023-24, a yearly publication which reports facts of the economic state of Pakistan in each sector for one fiscal year. We hope that these series are useful, and we welcome both feedback as well as possible collaborations as we create a public good in the form of useful data sets in Pakistan."

What data points this current edition covers:

This series aims to present the important learnings from the Economic Survey 2023-24 for policy makers, the public, as well as for marketers in an easy and understandable way. In particular, this edition looks at the Growth of Motor Cars on Pakistan's Roads from 2010-11 to 2023-24. Cars are a widely used form of personal transport for Pakistani households, but current figures suggest that motorcycles are growing steadily in popularity as compared to cars. The series' main aim is to provide data. These data points may be used in a number of ways, including by the manufacturing sector, or to study wider socio-political ramifications of the decrease in car usage and an increase in motorcycle usage.

Key Findings

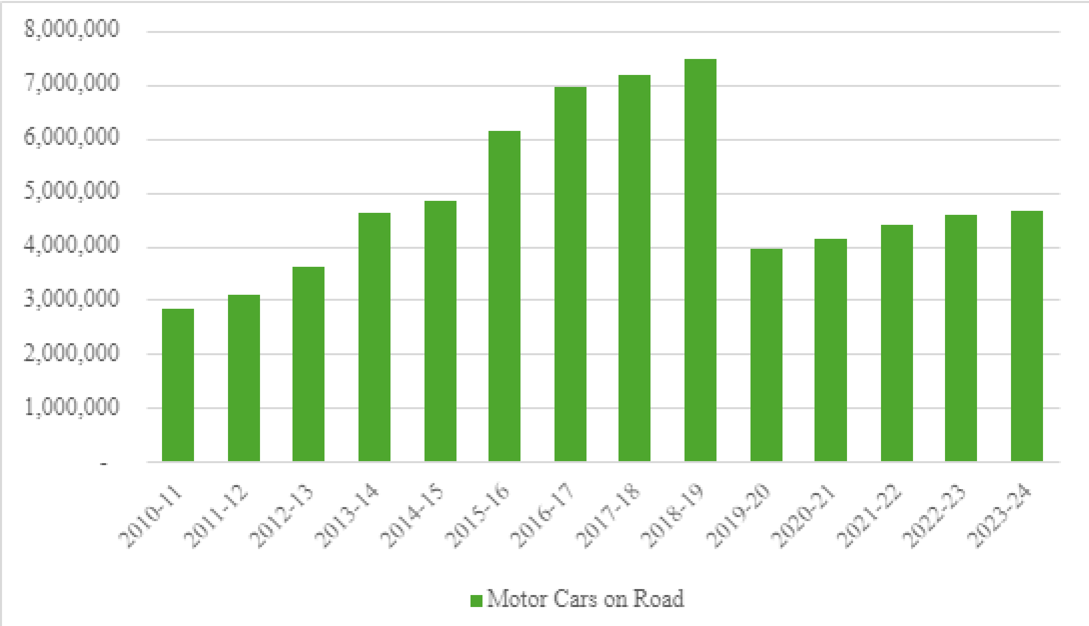
1. **Growth of Motor Cars on Pakistan's Roads:** Motor cars on Pakistan's roads have fluctuated greatly, starting at 2.82 million cars in 2010-11, peaking in 2018-19 at 7.47 million, and closing at 4.65 million in 2023-24.
2. **Difference in Total Vehicles and Motor Cars on the Roads:** The total vehicles on the roads have risen steadily at a rate of 3.5 times while motor cars on the roads have only grown by 1.6 times. This makes the rise in total vehicles attributable to growth of other vehicles.
3. **Increase in Motorcycles on Roads:** Motorcycles constitute a large part of the total vehicles on the roads (77.8% in 2023-24) and contribute to the rise in total vehicles on the roads.

1. Growth of Motor Cars on Pakistan's Roads

Motorcars on the roads of Pakistan have risen consistently during the fiscal years of 2010-11 till 2018-19. 2018-19 has been witness to the highest number of cars on the roads, numbering at 7.47 million. A steep drop is noted in 2019-20, making it the year with the lowest amount of motor cars on the roads, possibly attributable to the lockdown measures due to the COVID-19 pandemic and rising inflation.

Figures have increased slowly but surely from 2019-20 till 2023-24.

Figure 1: Motor Cars on Pakistan's Roads from 2010-11 to 2023-24



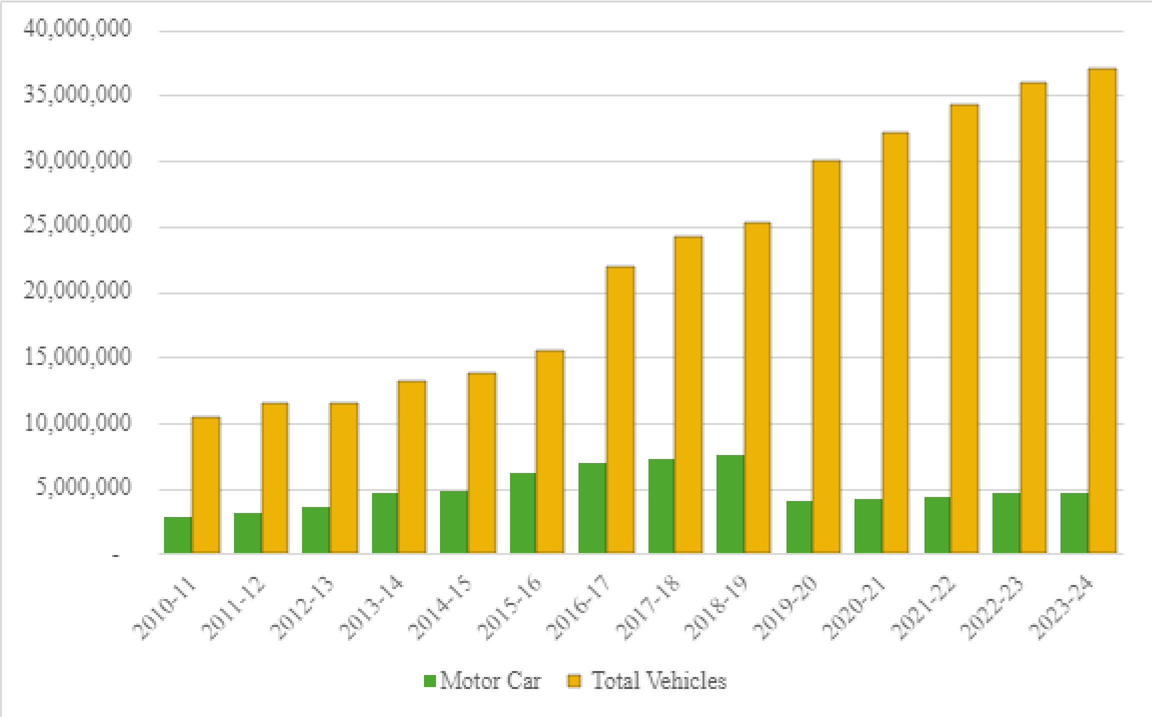
Source: Pakistan Economic Survey 2023-24, Ministry of Communication (NTRC)

During the fiscal year of 2010-11, the number of motor cars on the roads amounted to 2.82 million, which grew steadily over a period of 9 years, peaking at 7.47 million in 2018-19. This peak turned into a steep drop to 3.96 million in 2019-20, a decrease of 3.51 million cars. This number started rising again slowly afterwards, with the figures from 2023-24 showing 4.65 million cars on the roads.

2. Increase in Total Vehicles on the Roads vs a Decrease in Motor Cars

While motor cars saw a decrease during the fiscal year of 2019-20, the total vehicles on the roads of Pakistan only increased steadily. This rise is thus attributable to vehicles other than motor cars.

Figure 2: Increase in Total Vehicles vs Decrease in Motor Cars; 2010 to 2024



Source: Pakistan Economic Survey 2023-24, Ministry of Communication (NTRC)

Figure 2 visualizes the data for motor cars on the roads as compared to total vehicles on the roads. While the motor cars on the roads have risen steadily till 2018-19, they experienced a sharp drop in 2019-20, after which they started rising again slowly. However, the total vehicles have only been rising throughout this 14-year period. What started as 10.44 million vehicles on the road during 2010-11 rose to 36.99 million vehicles in 2023-24, a jump of 26.55 million vehicles, or 3.5 times. Meanwhile, motor cars on the roads have only grown by 1.6 times.

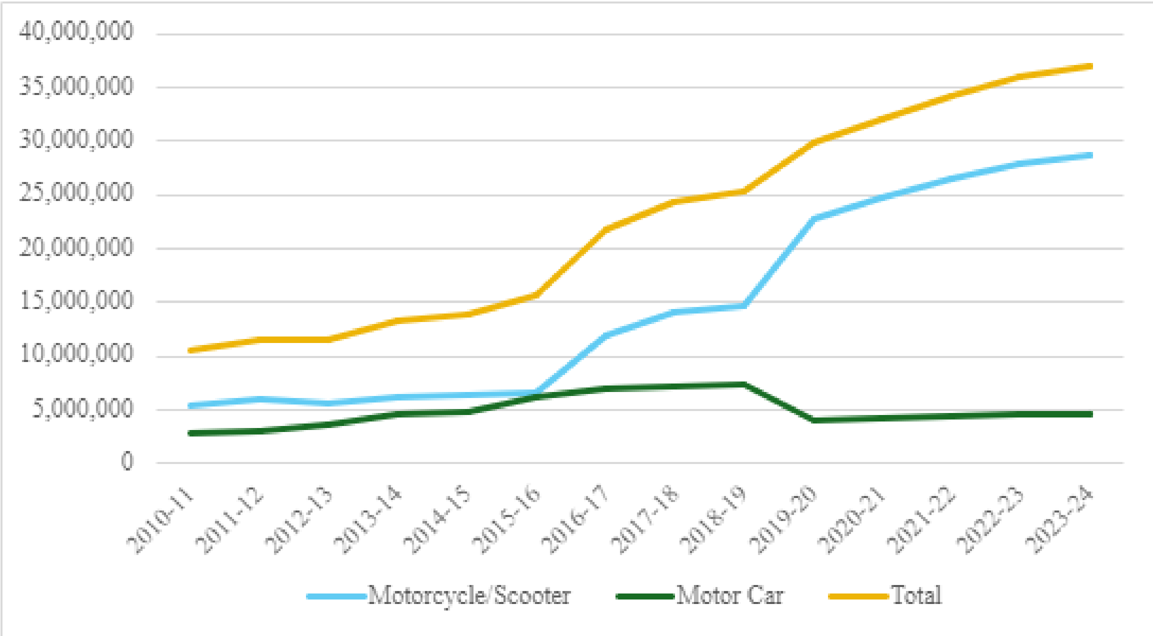
The most significant increases in total vehicle increase have been witnessed during 2016-17, where at 21.86 million, they experienced a notable jump of 6.29 million from the previous year. In 2019-20 again, at 29.97 million, an increase of 4.73 million from 2018-19. These increases are more significant if we interpret them along the scale of the usual 1-3 million incremental increases that have taken place.

3. Increase in Motorcycles on Roads

Total vehicles on the roads in Pakistan include light commercial vehicles such as motorcycles, motor cars, taxis, motor rickshaws, vans, pickups, jeeps and station wagons. Other vehicles on the road constitute the heavy commercial vehicles category which includes ambulances, buses, trucks, tractors, oil and water tankers, and other heavy vehicles.

From these categories of vehicles, motorcycles/scooters constitute a large amount of the total amount of the vehicles on the roads (52.4% in 2010-11 and growing to a solid 77.8% in 2023-24).

Figure 3: A comparison of motorcycles, cars and total vehicles on Pakistan's roads during the fiscal years of 2010-11 to 2023-24



Source: Pakistan Economic Survey 2023-24, Ministry of Communication (NTRC)

As Figure 3 depicts, the rise in total vehicles on the roads can be attributed to the rise in motorcycles/scooters. Motorcycles are the cheapest form of personal transport that a Pakistani household can acquire, which can also compete with a motor car in terms of the distance covered and the speed with which they can transport passengers. The above graph also shows the decline in motor cars on the roads while motorcycles only grew; rising inflation has made it harder for Pakistani households to invest in cars.

Analysis

The rise in motorcycle usage as compared to motor cars can be explained in terms of the rising rates of inflation post COVID-19. This has made cars more expensive and motorcycles more affordable for Pakistani households. A lack of a robust public transport system further aggravates the issue, forcing people to own vehicles for mobility when a public transport system would have reduced environmental damage and prevented the dents in the wallets of several million Pakistani households.

In a more favorable light, we must note that motorcycles take up less space on roads, and an increase in electric scooters and government schemes for their distribution lowers the carbon footprint of all auto vehicles on the roads.

The above analysis has been written by Ayman Fuad, a Research Executive at Gallup Pakistan, and reflects the views of the author herself.

Wish to Contribute to Gallup Big Data Analysis?

Gallup Pakistan is looking for collaboration with researchers to expand both the Big Data Analysis project as well as this study of national level data. If you have any ideas, please write to Bilal I Gilani, Project Director of the Big Data Analysis Series at Gallup Pakistan.

Methodology:

The data for this analysis is based on the *"Pakistan Economic Survey 2023-24"* by the Economic Adviser's Wing within the Finance Division of the Government of Pakistan.

The "*Pakistan Economic Survey 2023-24*" by the Ministry of Finance can be accessed at: https://www.finance.gov.pk/survey_2024.html

For more survey data, see out website http://www.gallup.com.pk/ or contact Gallup Pakistan at caf@gallup.com.pk