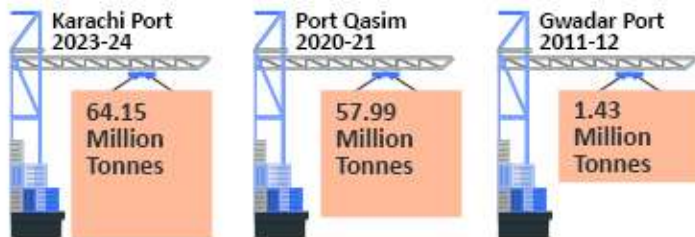


Performance of Pakistan's Ports from 2010-11 to 2023-24

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



PERFORMANCE OF ALL 3 MAJOR PORTS OF PAKISTAN:

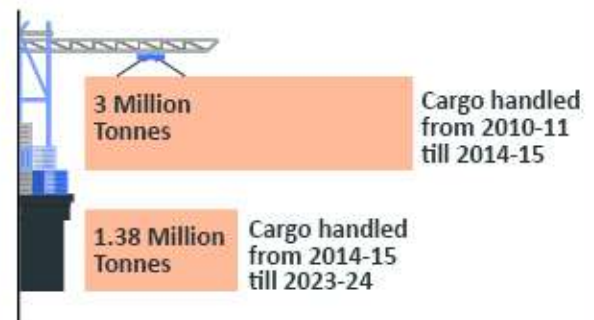


The **Karachi Port's** best performance was in 2023-24 with 64.15 million tonnes of cargo handled, and with the highest share held among all 3 ports for the most time.

Port Qasim's peak was in 2020-21 with 57.99 million tonnes of cargo and numbers improving steadily during these 14 years.

Gwadar Port's best figures were during 2011-12 at 1.43 million tonnes, and overall performance declined over time, especially after 2014-15.

DECLINE IN GWADAR PORT'S PERFORMANCE IN THE LAST DECADE



Gwadar's performance has declined substantially from 2014 onwards. Imports amounted to a total of 3.06 million tonnes from 2010-11 to 2014-15, and only 1.38 million in the decade proceeding 2014-15 (inclusive), a net negative change of 1.68 million.

A COMPARISON OF KARACHI PORT AND PORT QASIM'S IMPORTS AND EXPORTS:

Karachi Port has seen a higher volume of imports and exports both, relative to Port Qasim. Karachi Port's total imports have been higher by a rate of **29 million tonnes**, while their total exports (**205 million tonnes**) have been double those of Port Qasim's (**101 million tonnes**) during this **14-year** time period.

PRESS RELEASE

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

Performance of Pakistan's Ports from 2010-11 to 2023-24: A decline in Gwadar's performance in the past decade, total volume of 1.4 million tonnes moved only – **Gallup Pakistan's Analysis of Pakistan's Economic Survey 2023-24 Data**

(Islamabad), 22nd July, 2024

Gallup Pakistan, as part of its Big Data Analysis initiative, is looking at the Performance of Pakistan's Ports from 2010-11 to 2023-24, Gwadar's decline in cargo handling during the past decade, and a comparison of Karachi Port and Port Qasim's performances in these 14 years. This data is part of the Pakistan Economic Survey of 2023-24, shared by the Finance Ministry of the Government of Pakistan.

The complete Pakistan 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 Pakistan 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 performance of Pakistan's ports from 2010-11 to 2023-24. **Pakistan's ports are vital for the country's economy, serving as crucial gateways for international trade and commerce. These ports support industrial and economic activities, generate employment, and contribute significantly to the national GDP.** The series' main aim is to provide data. These data points may be used in a number of ways by policymakers, industry specialists and other sector stakeholders to study wider socio-political ramifications of individual port performances.

Key Findings

1. Performance of all 3 Major Ports of Pakistan:

- The Karachi Port's best performance was in 2023-24 with 64.15 million tonnes of cargo handled, and with the highest share held among all 3 ports for the most time.
- Port Qasim's peak was in 2020-21 with 57.99 million tonnes of cargo and numbers improving steadily during these 14 years.
- Gwadar Port's best figures were during 2011-12 at 1.43 million tonnes, and overall performance declined over time, especially after 2014-15.

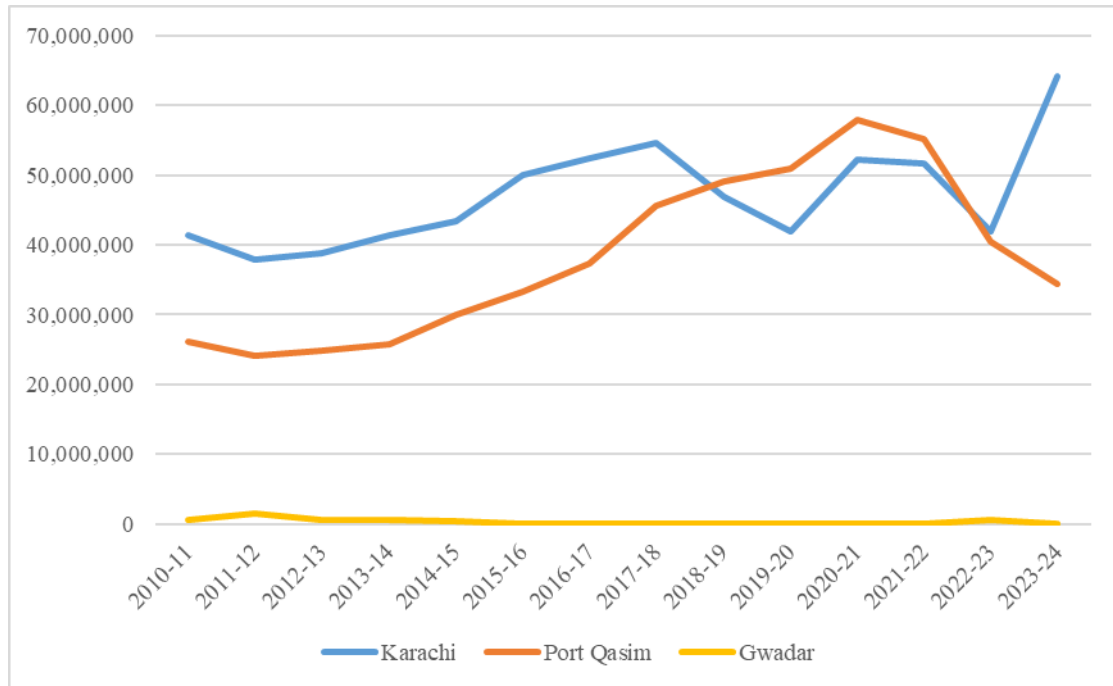
2. Decline in Gwadar Port's Performance in the Last Decade: Gwadar's performance has declined substantially from 2014 onwards. Imports amounted to a total of 3.06 million tonnes from 2010-11 to 2014-15, and only 1.38 million in the decade proceeding 2014-15 (inclusive), a net negative change of 1.68 million.

3. A Comparison of Karachi Port and Port Qasim's Imports and Exports: Karachi Port has seen a higher volume of imports and exports both, relative to Port Qasim. Karachi Port's total imports have been higher by a rate of 29 million tonnes, while their total exports (205 million tonnes) have been double those of Port Qasim's (101 million tonnes) during this 14-year time period.

1. Performance of all 3 Major Ports of Pakistan

Within the ports management sector of Pakistan, there are three major ports: **Karachi Port¹**, **Port Qasim²**, and **Gwadar Port³**. These ports are necessary points of contact for import-export operations. The Karachi Port has been operating since the 19th century (1854, to be exact) while Port Qasim has been operational since 1980, and the Gwadar Port is much more recent, having been inaugurated in 2007. Figure 1 depicts the performance of these 3 major ports during the fiscal years of 2010-11 till 2023-24.

Figure 1: Performance of all 3 major ports of Pakistan



Source: Pakistan Economic Survey 2023-24, Karachi Port Trust, Port Qasim Authority, Gwadar Port Authority

The Karachi Port, owing to two centuries of operational experience and location in the country's industrial hub in Karachi, has the best performance over the given timeframe, where it started with a share of 60.86% in all ports, and it was also able to regain the foothold that it lost to Port Qasim during the fiscal years of 2018-19 till 2022-23. It closed its fiscal year of 2023-24 successfully with a total share of 65.11%. Port Qasim has been a strong contender in the import-export business during this 14-year period. It had a share of 38.44% in 2010-11, which decreased slightly to 34.85% in 2022-23. Gwadar Port, in comparison, has been unable to find its footing in this business yet, as shown by the yellow line which is almost touching the axis in Figure 1. Gwadar began its journey in 2010-11 with a share of 0.7% only, which reduced further to 0.03% in 2023-24.

The operations of the Karachi Port exhibited high numbers in 2010-11, and it maintained these numbers even while experiencing a slight decrease between 2010-11 and 2011-12. The numbers for total imports and exports increased steadily till 2017-18, when this port underwent

¹ https://en.wikipedia.org/wiki/Port_of_Karachi

² https://en.wikipedia.org/wiki/Port_Qasim

³ https://en.wikipedia.org/wiki/Gwadar_Port

a decrease of 7.79 million tonnes of cargo in 2018-19. **During this period, Port Qasim's performance overtook that of the Karachi Port.** The Karachi Port's numbers declined by a further 5.05 million tonnes in 2019-20. Karachi's output was competitive in 2020-21, showing an increase but not enough to retake their spot from Port Qasim. 2021-22 showed a slight decrease, while 2022-23 showed a sharper fall of 9.86 million tonnes (almost 10 million). This sharp fall was felt in the entire economy, and Port Qasim's productivity also faltered during this year. **However, 2023-24 was a promising year for Karachi Port, with a stunning increase of 22.29 million tonnes.**

Port Qasim's performance has risen steadily over the years, and even though it started out as the underdog, it eventually overtook Karachi Port during 2018-19, with a lead of 2.14 million tonnes. **The total cargo that was handled at Port Qasim kept increasing until it peaked at 57.99 million tonnes in 2020-21,** after which it saw a slight decrease of around 2 million tonnes in 2021-22 to 55.15 million. Subsequently, a steeper fall was experienced in 2022-23 of 14.65 million tonnes when it fell slightly below Karachi Port, which had also experienced a drastic reduction in its exports and imports. **Port Qasim's numbers further declined in 2023-24, closing at 34.36 million tonnes.**

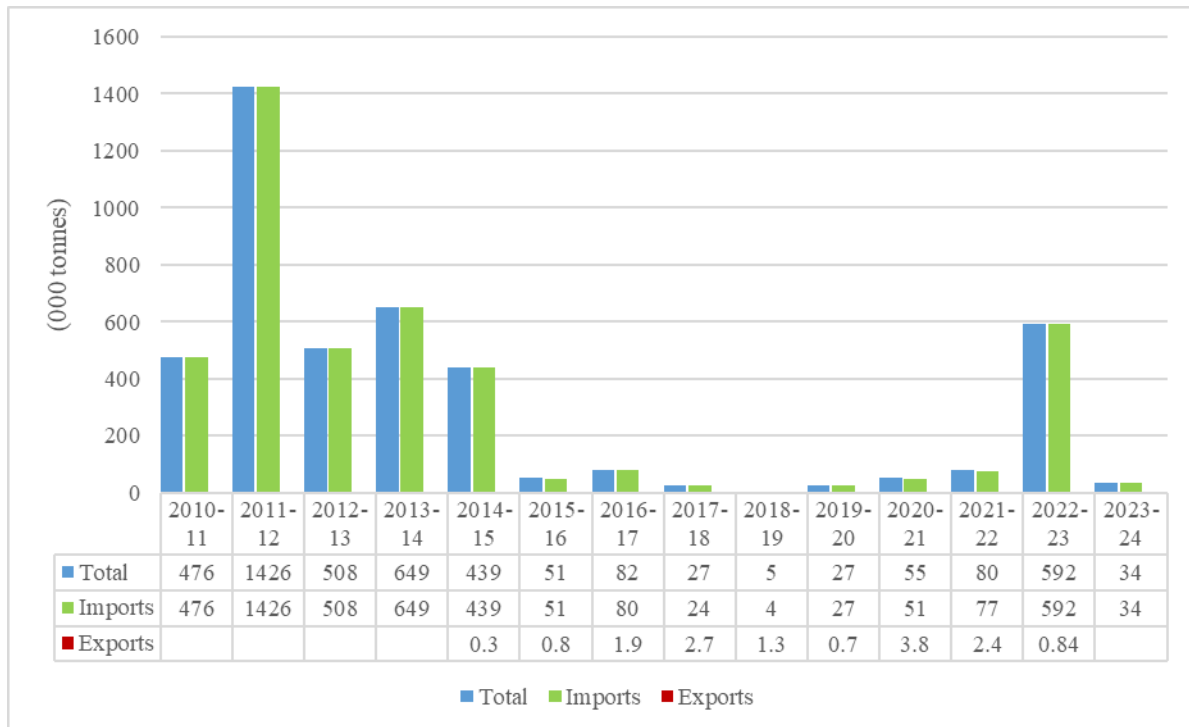
The Gwadar Port is the newest port, with its first phase being inaugurated in 2007. This accounts for the relatively lower productivity it has exhibited. In 2011-12, we see an uptick in the numbers from 476,000 tonnes in 2010-11 to 1.43 million tonnes in 2011-12, an increase of 950,000 tonnes (almost 1 million). This is also a year where the other two ports have had relatively lower numbers. This could be because business was diverted to the Gwadar Port during this year. **During 2012-13, Gwadar Port was not able to maintain the increase it experienced in the previous year, and cargo handled here fell to 507,600 tonnes.** These numbers saw slight fluctuations during the following two years.

Gwadar Port experienced a steeper drop in 2015-16, where the imports and exports handled at the port fell all the way to 51,400 tonnes only, even while business was improving at the other ports). These low numbers persisted in the subsequent years, and fell all the way down to 5,000 tonnes in 2018-19, a drastic reduction of 21,800 tonnes. It increased to 27,300 tonnes in 2019-20, then 54,700 tonnes in 2020-21, and 79,700 tonnes in 2021-22. A significant increase was seen during 2022-23, where imports and exports increased to 592,400 tonnes, a positive net change of 512,700 tonnes. **Notably, this was the year where Karachi Port and Port Qasim displayed lower rates as compared to their previous year's results. This might be explained by a redirection in business to Gwadar Port.** Another sharp fall during 2023-24 closed out Gwadar Port's business for the year at 34,000 tonnes.

2. Decline in Gwadar Port's Performance in the Last Decade

The Gwadar Port is the most recent port established in Pakistan and has only been operational for 17 years. Figure 2 shows a detailed breakdown of the imports and exports that were handled at Gwadar Port, from the fiscal years of 2010-11 to 2023-24. **A decade ago, the performance of the Gwadar Port was much better compared to its performance post 2014-15.** The total volume of imports and exports handled at the Gwadar Port from 2010-11 till 2023-24 is 4.45 million tonnes, while the total volume from 2014-15 to 2023-24 is only 1.39 million. This data highlights the deterioration in the Gwadar Port's performance during the past decade.

Figure 2: Variation between Imports and Exports at Gwadar Port



Source: Pakistan Economic Survey 2023-24, Gwadar Port Authority

Figure 2 highlights the variability in the port's performance during these 14 years, where figures are shown in 000's of tonnes. There is a lack of data availability of export figures for the years 2010-11 till 2013-14 consecutively, and also for 2023-24.

At first glance, what is notable is the fact that the total cargo handled has figures similar to the import figures and export figures barely contribute to the total. This can be attributable to the regular trade deficit Pakistan experiences, where imports are much higher than the exports. The highest number of exports were during the year 2020-21, when the Port handled 3800 tonnes of exported materials.

Figure 2 underscored the Gwadar Port's peak performance in 2011-12 at 1.43 million tonnes of imports. Demand for imported goods was thus the highest during this year. However, lower figures in subsequent years do not mean lower demand for imports, as other ports are also operational. **The peak performance shown in 2011-12 could also point towards higher**

government support for redirecting trade traffic to this port in particular to boost the operations of Gwadar Port.

Gwadar Port has not had a lot of business during the years 2015-16 till 2021-22, which might be due to several factors such as the distance from the industrial hub of Karachi which allows the Karachi Port to benefit; a lower preference for use because of the historically well-established Karachi Port and Port Qasim; location in a politically unstable and insecure region of Pakistan i.e. Balochistan; and higher operational costs.

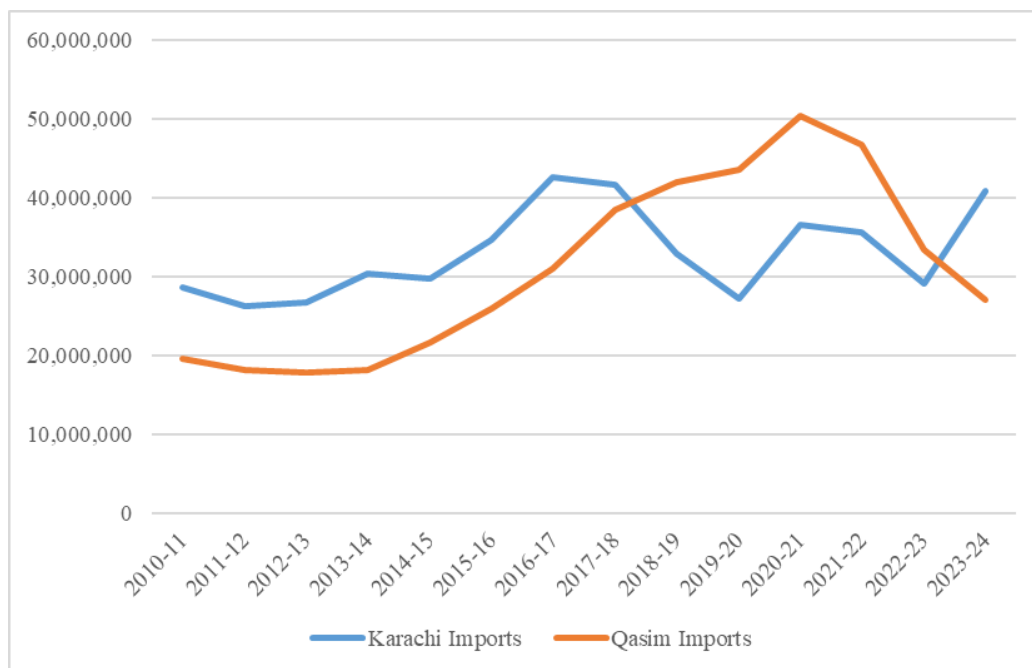
After a sharp recovery in 2022-23, where imports rose till 591,500 tonnes while exports amounted to 834 tonnes, **Gwadar Port closed the 2023-24 year with abysmally low numbers of 34,000 tonnes of imports, and no data for exports.**

3. A Comparison of Karachi Port and Port Qasim's Imports and Exports

i. Imports at Karachi Port and Port Qasim:

Karachi Port and Port Qasim are the two main well-established ports of Pakistan which serve as docking homes to some of the busiest maritime traffic. Both are located in Karachi, the industrial hub of Pakistan and the country's former capital. **The total volume of imports did not vary by a great deal between the two ports during this 14-year period**, with Karachi Port boasting 462 million tonnes of imports, and Port Qasim's total imports amounting to 433 million tonnes, a difference of only 29 million tonnes.

Figure 3: Comparison of Karachi Port's and Port Qasim's Imports



Source: Pakistan Economic Survey 2023-24, Karachi Port Trust, Port Qasim Authority

Figure 3 shows Karachi Port's import figures starting out at 28.59 million tonnes in 2010-11, which is 9 million tonnes more than the cargo handled at Port Qasim during that year. The total imports decrease during the next year, but start rising again for Karachi Port while Port Qasim experiences incremental decreases till 2013-14. In 2014-15, while figures are still rising gradually for Karachi Port, Port Qasim also starts seeing higher than usual increases in the number of imports handled, until 2017-18. **This fiscal year sees the highest amount of growth in the number of imports handled at Port Qasim, from 31 million tonnes in 2016-17 to 38.47 million tonnes in 2017-18, amounting to a net positive change of 7.48 million tonnes.**

Simultaneously, Karachi Port undergoes a slight decrease in 2017-18 of 0.97 million tonnes, which starts plummeting further in bigger drops till 2019-20. **A very sharp fall of 8.8 million tonnes is recorded in 2018-19, where imports amount to 32.86 million tonnes for Karachi Port and 41.88 million tonnes for Port Qasim, thus allowing the latter to surpass Karachi Port's lead.** The downward trend for Karachi Port and upward trend for Port Qasim continues in 2019-20.

2020-21 allows Karachi Port's imports to rise again to 36.47 million tonnes, a recovery of 9.26 million tonnes, while Port Qasim's imports rise steadily to 50.34 million tonnes, making a net gain of 6.83 million. Port Qasim's imports decrease to 46.67 million tonnes the very next year (2021-22) while Karachi Port also witnesses a slight decrease, with imports amounting to 35.54 million tonnes during this year. **Further reductions in imports at both ports are noted during 2022-23, with Port Qasim experiencing a particularly sharp drop of 13.28 million.**

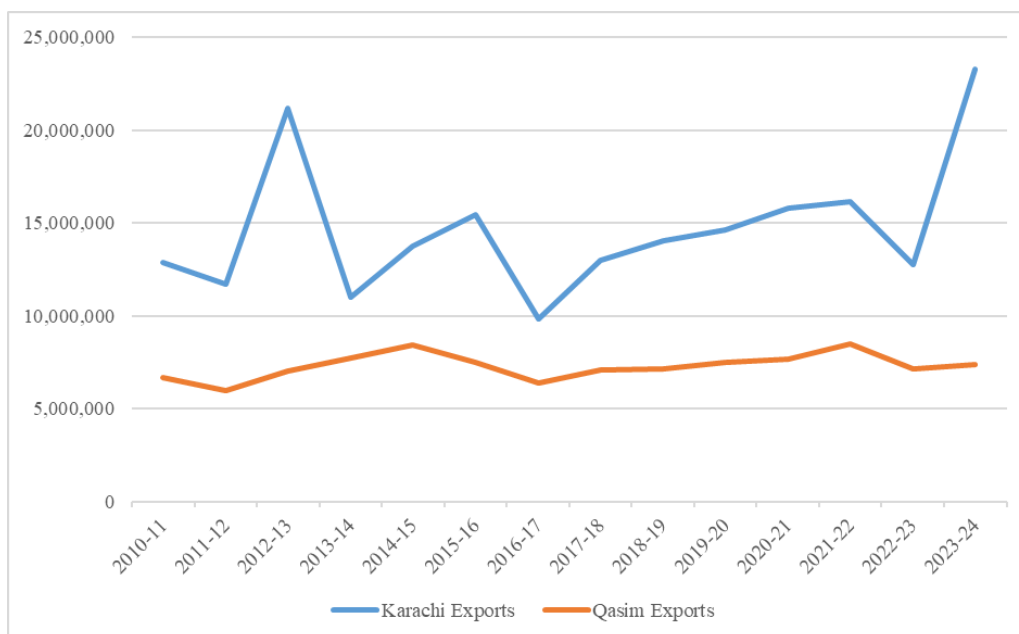
The Karachi Port makes a fantastic recovery from 29.08 million tonnes of imports in 2022-23 to 40.84 million tonnes in 2023-24, a positive net gain of 11.77 million. With this surge in imports, **Karachi Port takes back its lead from Port Qasim**, which experiences another decline with 26.99 million tonnes, down from 33.38 million tonnes in 2022-23.

The Karachi Port has sustained a higher share of imports handled for a higher amount of time, which can be due to higher operational efficiency, government support, better inland transport linkages, and a longer history of operations which allows this port to maintain its client base. Port Qasim is relatively newer and thus does not have the same advantages, which is compounded by the problem of being located in Malir which has the effect of further distancing this port from the main business district.

ii. Exports at Karachi Port and Port Qasim:

Figure 4 depicts the difference between the exports handled at Karachi Port and Port Qasim. **The Karachi Port has maintained a higher rate of export handling throughout this time period.** This is possible due to several factors mentioned in the previous section: as compared to Port Qasim, Karachi Port benefits from a long, reputable history of operations and resultantly an established client base and consistent traffic, and it is located in proximity to the city's main business district and industrial areas which means that it has better inland transportation connections. It also has higher capacity for handling different types of cargo and has benefited from government and private sector investments in the improvement of its infrastructure. Thus, exporters prefer using the Karachi Port in Pakistan as a trusted port for their global trading needs.

Figure 4: Comparison of Karachi Port's and Port Qasim's Exports



Source: Pakistan Economic Survey 2023-24, Karachi Port Trust, Port Qasim Authority

As seen in Figure 4, Karachi Port's exports have maintained a consistent lead over Port Qasim's exports. **Karachi Port has also seen dramatic increases in exports in the years of 2012-13, and again in 2023-24.** During these two years, 2012-13 recorded 21 million tonnes of exports while 2023-24 recorded 23.3 million tonnes of exports. Comparatively, **Port Qasim has not demonstrated any dramatic surges in the amount of cargo exports being handled at their docks.** The tonnes of exports at this port have remained quite stable, with figures remaining below 10 million tonnes, but consistently above 5 million tonnes.

Karachi Port witnessed a dramatic increase in its exports in 2012-13, with a positive net gain of 9.48 million tonnes, after which numbers decreased to 11 million in 2013-14, almost the same number as in 2011-12. After experiencing incremental increases during the subsequent two years, there was a drastic reduction of 5.57 million tonnes in 2016-17, with exports amounting to 9.86 million tonnes, the lowest amount during these 14 years. Port Qasim's exports were also the lowest during this year, at 6.36 million tonnes, but the reduction was not as drastic for Port Qasim as their export numbers have consistently remained between 5.9

million and 8.5 million tonnes. **This composite reduction during 2016-17 could be explained due to a lower amount of goods produced in Pakistan for exporting, socio-economic changes at the global scale, as well possible changes in trade agreements.**

After making a recovery to 13 million in 2017-18, Karachi Port's export numbers varied incrementally and shifted between 12 to 16 million till 2022-23. **In 2023-24, there was another substantial rise of 10.53 million, with exports amounting to 23.3 million at Karachi Port, the highest number of exports at either port during the recorded period.**

Unlike the Karachi Port, Port Qasim has not experienced any similar conspicuous rises or falls in the volume of exports handled at their docks. **Port Qasim's total volume of exports handled during these 14 years has been 101 million tonnes while Karachi Port's total volume has been 205 million, more than double of Port Qasim's volume.** Thus, it makes sense that Karachi Port would be impacted more directly by any macroeconomic changes in the global world which may affect Pakistan's international trade.

Analysis

The maritime industry provides ancient trading routes from which Pakistan currently benefits. Investing in Pakistan's ports will allow trade to flourish. The Gwadar Port was an ambitious partner project between China and Pakistan, and it has failed to show substantial results, especially during the past decade.

Competition from Karachi Port and Port Qasim, a lack of investment, as well as the insecurity in Balochistan are three of the major reasons contributing to the lower number of ships that are docked at the Gwadar Port. According to DW, the port boasts a natural ability to host bigger ships compared to Karachi, and being built as part of CPEC means that the infrastructure of the port itself is high quality. However, surrounding infrastructure in Balochistan which connects the port to the inner regions of Pakistan is poor, and the project has faced severed backlash from the Balochis. Effective management and a skilled workforce can also not be employed at this Port due to these reasons.

Investing in maintenance and upgradation of the facilities available at Karachi Port and Port Qasim could be more advantageous for the government in the short- and long-term, while it grapples with deeper issues persisting in the Balochistan province.

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

The DW article on the Gwadar Port can be accessed at: <https://www.dw.com/en/pakistans-gwadar-port-shows-chinas-belt-and-road-can-fail/a-68992914>

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

Disclaimer: Gallup Pakistan is not related to Gallup Inc. headquartered in Washington D.C. USA. We require that our surveys be credited fully as Gallup Pakistan (not Gallup or Gallup Poll). We disclaim any responsibility for surveys pertaining to Pakistani public opinion except those carried out by Gallup Pakistan, the Pakistani affiliate of Gallup International Association. For details on Gallup International Association see website: www.gallup-international.com

Disclaimer: The views and inferences expressed in the article are that of the author themselves and Gallup Pakistan does not take any responsibility in this regard. This series, and many such initiatives, are internally funded by Gallup Pakistan and Gilani Research Foundation. No outside country or local funding has been received for this current activity.