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Gallup Pakistan Analysis of Economic Census 2024

Workforce in Establishments

PRESS RELEASE

Gallup Pakistan Analysis of Economic Census 2024

Over 99% of Establishments Employ Fewer Than 50 Workers – The "Missing Middle" Challenge

Islamabad, September 16th, 2025

Gallup Pakistan, as part of its Big Data Analysis initiative, presents the second release in its series on the Economic Census 2023/24, conducted by the Pakistan Bureau of Statistics (PBS). This release highlights the provincial distribution of Pakistan's 7.14 million economic establishments, underscoring both economic concentration and regional disparities.

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, Labour Force Survey, and Economic Survey reports as well as National Census Reports and Election Commission Data sets. The current series is using the Global Burden of Disease dataset, which provides a variety of health-related statistics. 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:

The Economic Census provides, for the first time, a detailed provincial breakdown of all establishments. This distribution is crucial for policymakers and researchers to understand regional economic strengths, disparities, and opportunities.

Over 99% of Establishments Employ Fewer Than 50 Workers – The "Missing Middle" Challenge

Overall:

99.5% Small Scale Establishments

Pakistan hosts **7.14 million** establishments, of which over 7.1 million (**99.5%**) are small-scale (**1–50** workers). This overwhelming dominance of micro and small units defines the structure of the economy.

0.5% Medium Scale Establishments

Medium establishments (**51–250** workers) are just **35,351** nationwide (**0.5%**),

0.1% Large Scale Establishments

Large establishments (**250+**) number only **7,086** (**0.1%**). This confirms Pakistan's structural gap: the 'missing middle'.

BY PROVINCE:

PUNJAB:

4.34 million small, **16.7k** medium, and **3.2k** large establishments.

SINDH:

Sindh follows with **1.38m** small, **7.8k** medium, and **1.7k** large.

KP:

KP records **1.0m** small, **7.3k** medium, and **1.4k** large establishments.

BALOCHISTAN:

Balochistan has just **300k** small, **2.4k** medium, and **505** large establishments.

ICT, though small in size, has 85k small, 1.1k medium, and 254 large units.

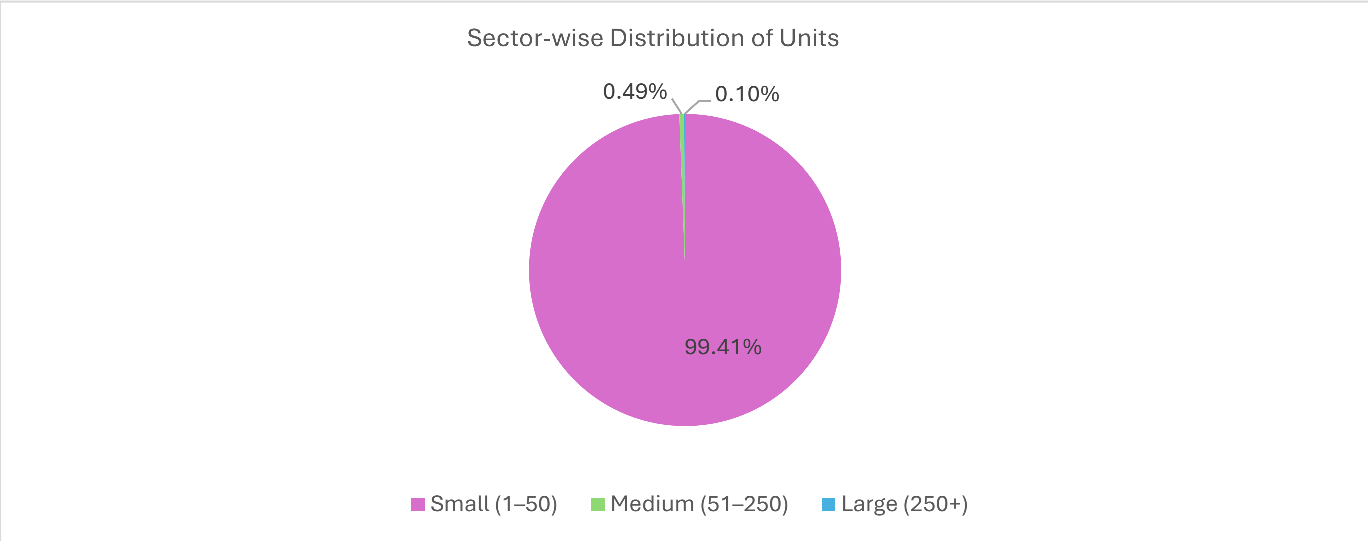
This structure reflects an economy where employment is highly fragmented, dominated by informal and subsistence units.

Key Findings:

1. Pakistan hosts 7.14 million establishments, of which over 7.1 million (99.5%) are small-scale (1–50 workers). This overwhelming dominance of micro and small units defines the structure of the economy.
2. Medium establishments (51–250 workers) are just 35,351 nationwide (0.5%), while large establishments (250+) number only 7,086 (0.1%). This confirms Pakistan's structural gap: the 'missing middle'.
3. Punjab dominates across all categories, hosting 4.34 million small, 16.7k medium, and 3.2k large establishments. Sindh follows with 1.38m small, 7.8k medium, and 1.7k large.
4. KP records 1.0m small, 7.3k medium, and 1.4k large establishments. Balochistan has just 300k small, 2.4k medium, and 505 large, the weakest performance nationally. ICT, though small in size, has 85k small, 1.1k medium, and 254 large units.
5. This structure reflects an economy where employment is highly fragmented, dominated by informal and subsistence units, with few medium or scalable enterprises capable of driving growth and productivity.

1. Small Establishments Dominate with 99.5% of All Units

The national distribution of establishments by workforce size demonstrates an overwhelming dominance of micro and small enterprises. Out of 7.14 million units, more than 7.1 million fall into the "small" category (1–50 workers), accounting for 99.5% of all establishments. This pattern reflects the fragmented, subsistence-driven structure of Pakistan's economy, where most economic activity is concentrated in small family businesses, retail shops, and household-based enterprises. While these small units provide livelihoods to millions, they also tend to operate in the informal economy, with limited access to credit, technology, and markets. The scarcity of medium and large establishments indicates that Pakistan's enterprise landscape lacks the scale and institutional backbone needed to support sustained industrial growth, productivity improvements, and export competitiveness.

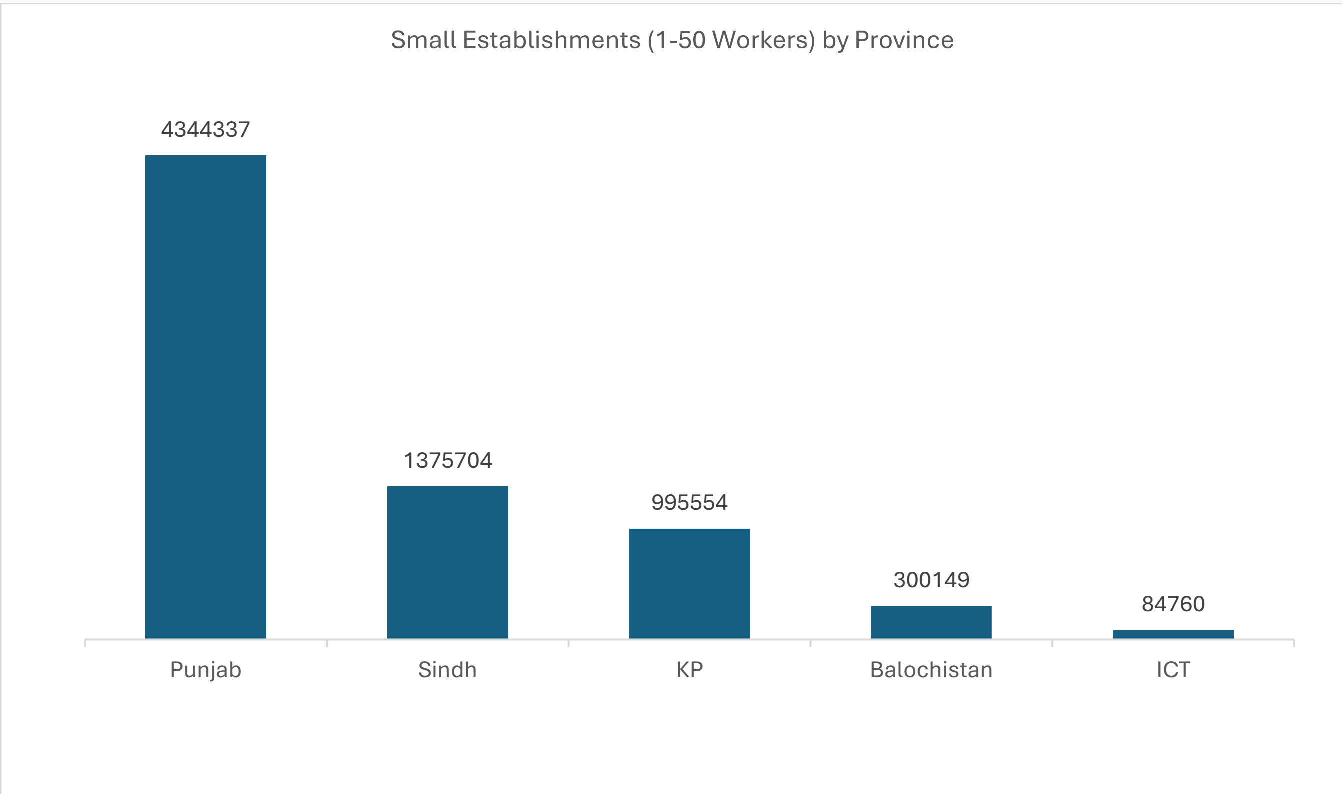


Source: Pakistan Bureau of Statistics, Economic Census 2024 – Main Findings Report

2. Punjab Hosts 61% of Small Establishments Nationwide

A provincial breakdown of small establishments shows Punjab's dominance, with 4.34 million units — more than all other provinces combined. Sindh follows with 1.38 million, while KP contributes just under 1 million, and Balochistan lags with only 300,000. ICT, despite its small population, records 85,000 small units, mostly clustered in urban services. Punjab's predominance reflects both its population size and its relatively stronger infrastructure and market integration, making it more conducive for small businesses to flourish. By contrast, Balochistan's weaker numbers highlight structural bottlenecks such as limited connectivity, lack of investment, and lower levels of urbanization. KP's reliance on retail and household businesses reveals the limited scope for scaling up. Overall, the provincial disparities underline how geography, governance, and resource allocation shape opportunities for small enterprises across the federation.

Punjab leads with 4.34 million small establishments, more than all other provinces combined. Sindh follows with 1.38m, while KP (996k) and Balochistan (300k) lag behind. ICT, with 85k small units, reflects its urban services-driven economy.

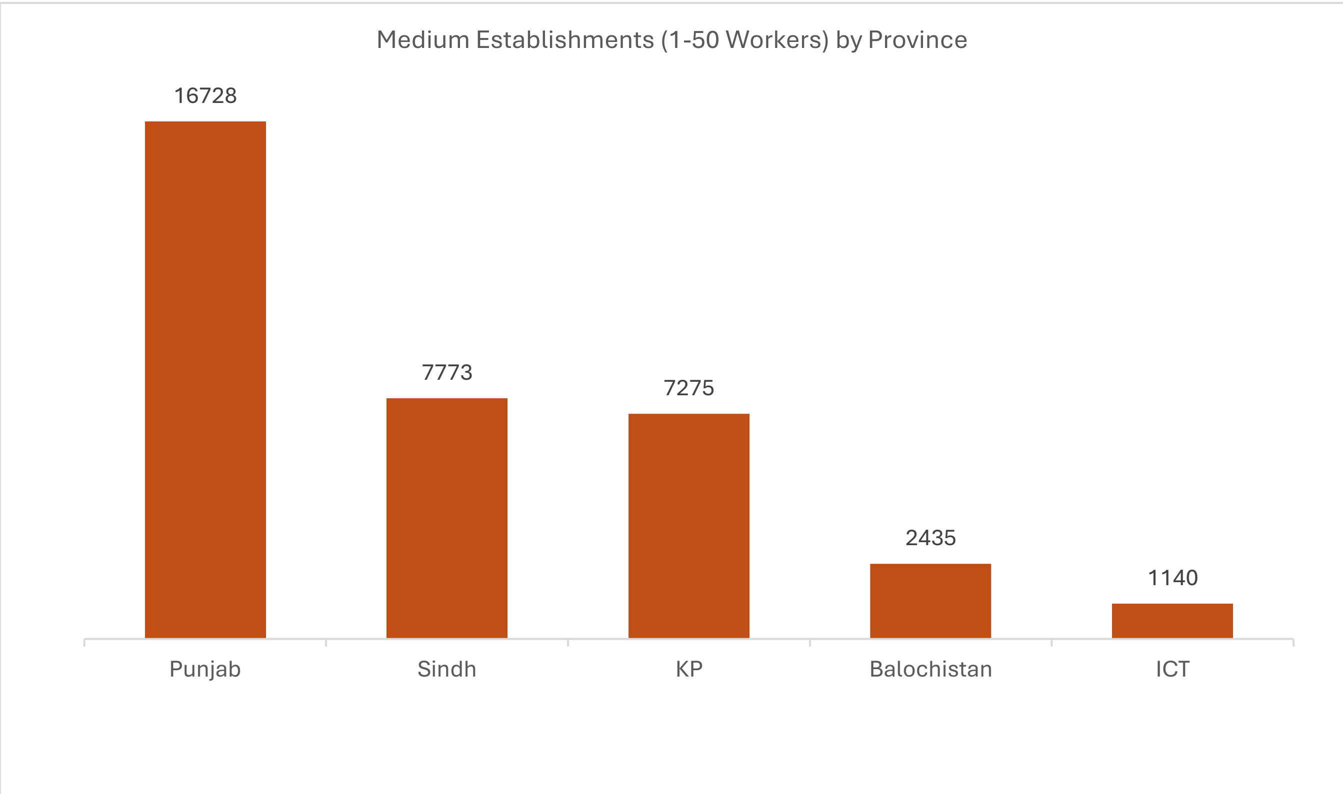


Source: *Pakistan Bureau of Statistics, Economic Census 2024 (Main Findings Report)*

3. Medium Establishments Concentrated in Punjab and Sindh

Medium-sized establishments (51–250 workers) are often considered the backbone of a thriving SME sector, bridging the gap between small informal units and large formal enterprises. Yet in Pakistan, only 35,351 such establishments exist — a meager 0.5% of the national total. Punjab leads with 16,728 (47% of the total), followed by Sindh with 7,773 (22%), while KP has 7,275, Balochistan only 2,435, and ICT 1,140. The concentration of medium establishments in Punjab and Sindh reflects the provinces' stronger industrial and service ecosystems. However, the overall scarcity of medium units highlights Pakistan's "missing middle" problem: too few enterprises grow beyond the small stage due to barriers such as limited financing, lack of institutional support, energy shortages, and poor access to value chains. Without a strong medium enterprise base, Pakistan's economy remains stuck between micro subsistence and a thin layer of large firms.

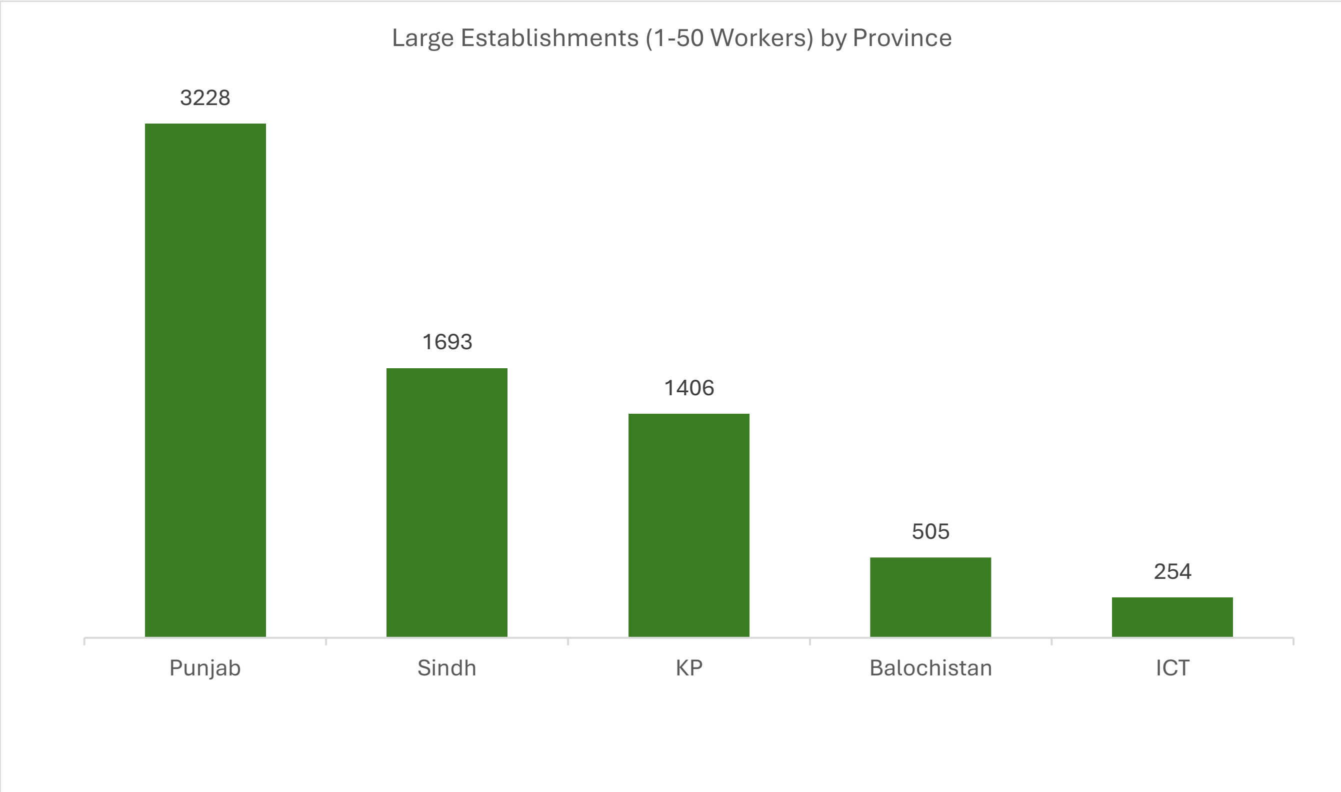
Medium enterprises (51–250 workers) are sparse nationwide, numbering just 35k. Punjab hosts nearly half (16.7k), Sindh one-fifth (7.8k), KP 7.3k, Balochistan 2.4k, and ICT 1.1k. Their small numbers highlight the structural absence of a strong SME sector in Pakistan.



Source: Pakistan Bureau of Statistics, Agricultural Census 2024 (Main Findings Report)

4. Punjab and Sindh Concentrate the Few Large Enterprises

Large-scale establishments (250+ workers) are virtually absent in Pakistan's enterprise landscape. With only 7,086 nationwide, they make up just 0.1% of all establishments. Punjab accounts for nearly half (3,228), while Sindh follows with 1,693. KP has 1,406, Balochistan 505, and ICT 254. These numbers reveal not only the scarcity of large firms but also their provincial concentration: Punjab and Sindh together host 70% of the total. This concentration mirrors historical industrial investment patterns and infrastructure development, which have largely bypassed smaller provinces. The near absence of large firms in KP, Balochistan, and ICT means fewer formal jobs, weaker tax bases, and reduced opportunities for economies of scale. A thin industrial backbone also exposes Pakistan to vulnerabilities, as a small number of large firms bear disproportionate responsibility for exports, tax revenues, and formal employment. Expanding the footprint of large-scale enterprises is essential for inclusive and sustainable growth.



Source: Pakistan Bureau of Statistics, Agricultural Census 2024 (Main Findings Report)

5. Implications: The "Missing Middle" Restrains Growth

The dominance of small units and scarcity of medium/large enterprises reflects Pakistan's structural imbalance. Without a robust SME base, productivity, exports, and wage growth remain constrained. The few large-scale units are heavily concentrated in Punjab and Sindh, deepening regional disparities.

Policymakers must address the 'missing middle' by strengthening SME support systems, expanding access to finance, establishing industrial clusters, and incentivizing small enterprises to scale up.

6. Policy Implementation

1. Expand SME financing and credit programs to enable scaling of small firms into medium enterprises.
2. Invest in industrial estates and business parks outside Punjab and Sindh to reduce regional imbalance.
3. Support entrepreneurship and innovation hubs in KP, Balochistan, and ICT to foster new mid-sized businesses.
4. Strengthen regulatory frameworks and reduce barriers to formalization, encouraging micro-units to enter the formal SME ecosystem.

About the Economic Census

The **Economic Census** is Pakistan's most comprehensive and authoritative statistical exercise on business and enterprise activity. Conducted by the **Pakistan Bureau of Statistics (PBS)**, it provides policymakers, researchers, and the public with a detailed snapshot of the structure of economic establishments across the country. The Census records information directly from enterprises and institutions, covering critical aspects such as establishment type, sectoral classification, workforce size, and location.

The 2023/24 Economic Census marks the country's **first integrated enumeration of economic activity**, conducted alongside the 7th Population and Housing Census. By merging these efforts, PBS not only achieved significant cost savings but also created Pakistan's first geo-coded **Business Register** — a foundational dataset for understanding enterprise dynamics nationwide.

This inaugural round represents an important milestone in Pakistan's statistical history. It incorporates methodological innovations such as **digital data collection, GIS-based mapping, and geo-tagging of establishments**, resulting in more reliable and timely results. The Census thus provides insights not only into the size and distribution of enterprises but also into the emerging challenges and opportunities facing Pakistan's economy — from the dominance of small-scale units to regional disparities in business activity and the rise of service-oriented enterprises.

Ultimately, the Economic Census stands as the **foundation for enterprise statistics in Pakistan**. Its findings guide ministries, provincial departments, and regulators in designing SME policies, industrial strategies, and regional development initiatives. They also serve as a valuable reference for academics, investors, and development partners seeking to understand Pakistan's business landscape. By documenting both continuity and change in enterprise structure, sectoral composition, and regional distribution, the Census underscores the vital role of establishments in the country's economic and social development.

Wish to Contribute to Gallup Big Data Analysis?

Gallup Pakistan is looking for collaboration with researchers to expand the Big Data Analysis project. If you have any ideas, please write to Bilal I Gilani, Project Director, Big Data Analysis at Gallup Pakistan.

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