



***All Pakistan Marble Industries
Association***

Background



- **Most Deposit along Border areas**
- **Lack of Socio Economic Conditions**
- **No organize Business activity**
- **Industrialization was never taken seriously**
- **Lack of Education Facilities**
- **No body identified the potential of the areas which is full of mineral resources and particularly dimensional stone.**

Potential of Pakistan



- **More than 200 types of Marble & Granite**
- **More than 1225 Operational Quarries**
- **More than 4000 processing Units**
- **Over 300 billion tons (estimated) reserves**

Marble Quarrying by Blasting -85 %



85% Wastage



Old Methods of Processing- 85% Wastage



International Standards

International Quarrying Practices



International Quarrying Practices



Supply Management

Warehouse



Supply Management

Warehouse

International Processing Unit

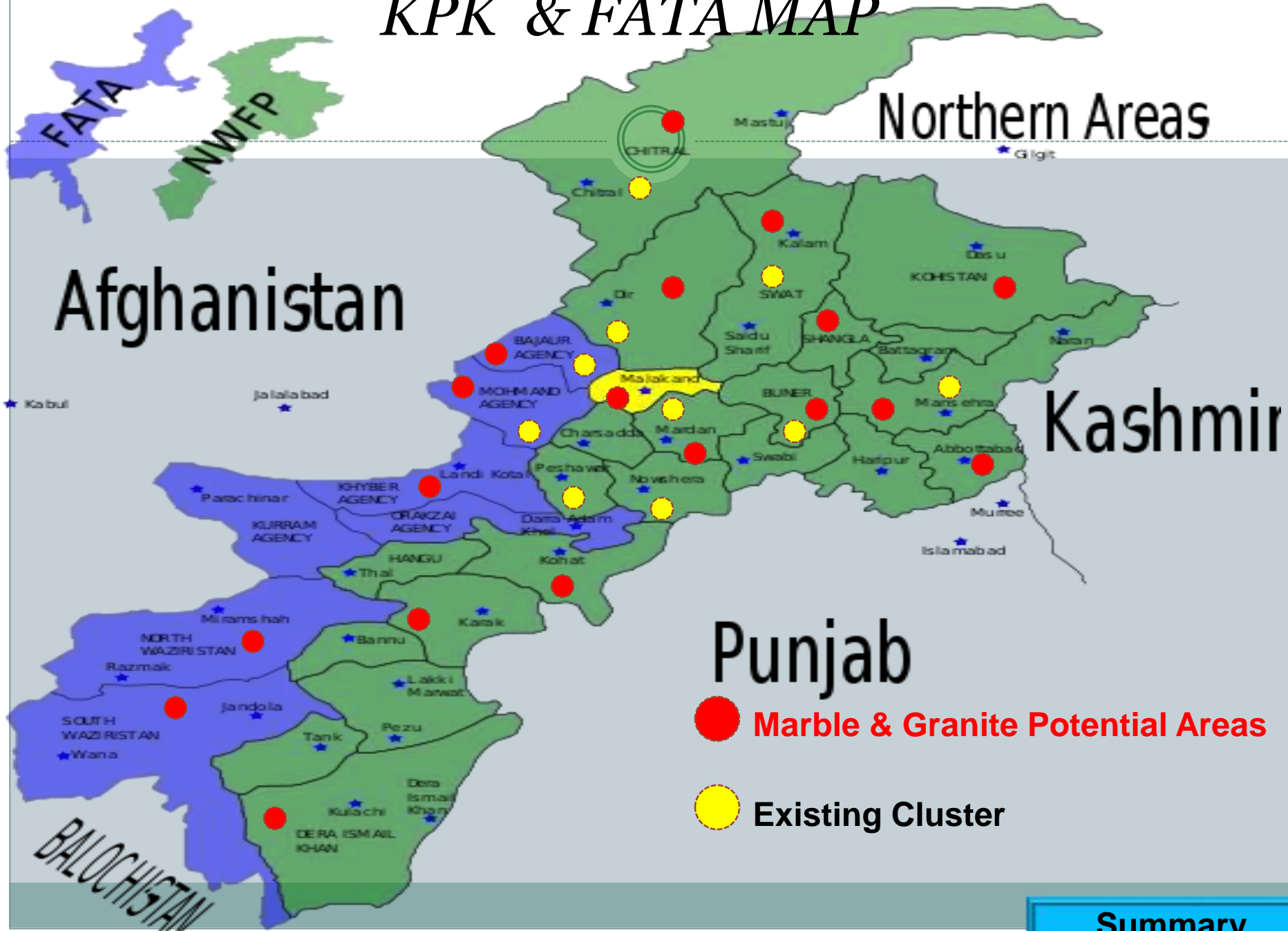


Province Wise Potential



ITS TIME TO TAPE POTENTIAL OF AREA

KPK & FATA MAP



Northern Areas

Afghanistan

Kashmir

Punjab

● Marble & Granite Potential Areas

● Existing Cluster

Summary

● Marble & Granite Potential Areas

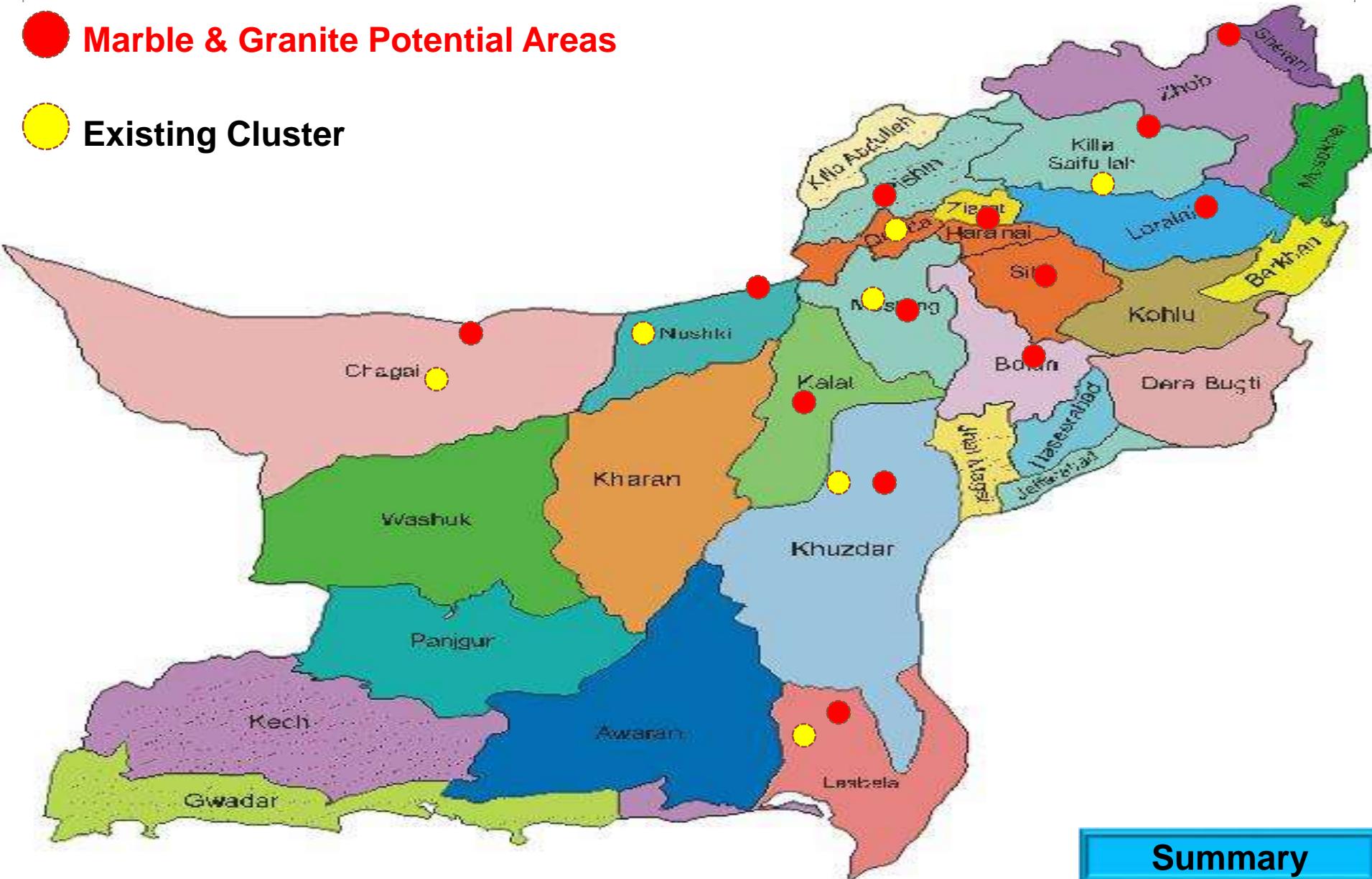
● Existing Cluster



District Map Baluchistan

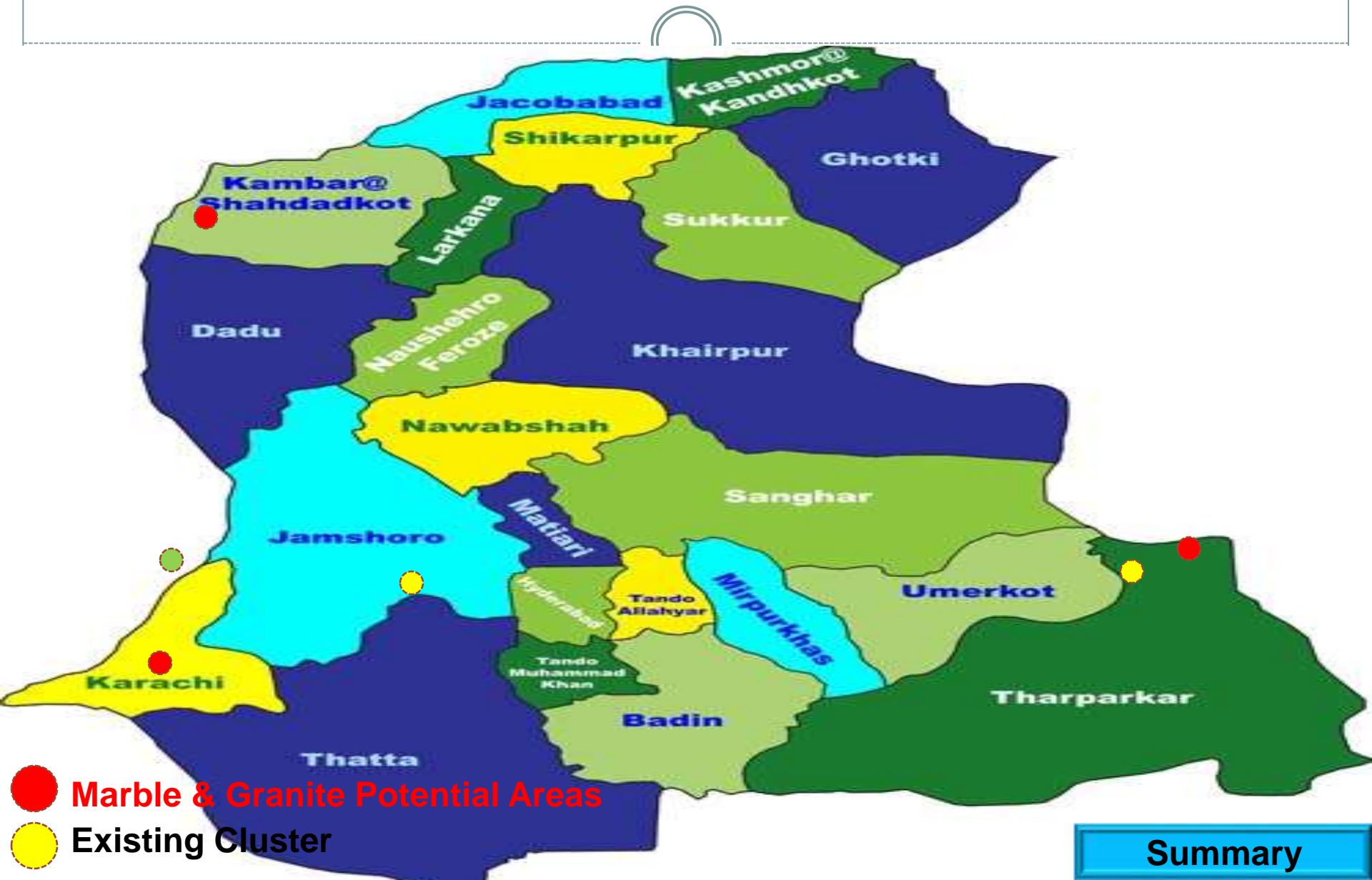
 Marble & Granite Potential Areas

 Existing Cluster



Summary

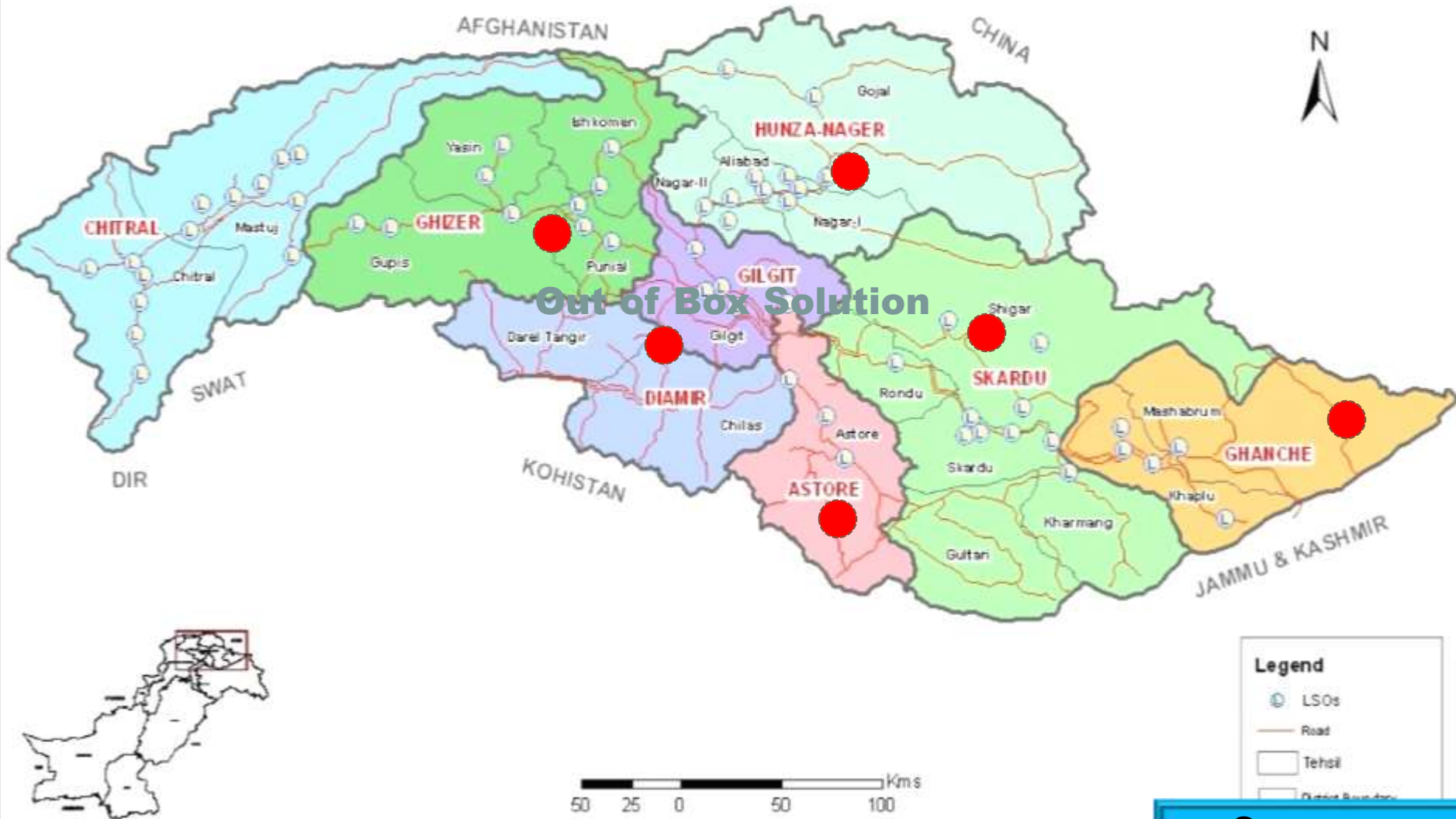
Map of Sindh



Gilgit Baltistan Map

● Marble & Granite Potential Areas

● Existing Cluster



Summary

SWOT Analysis

Strength

- 80% Marble & Granite Reserves
- Population
- Already in Marble Business
- High Value Marble Deposits
- High Local Demand
- High International Demand

Weakness

- M& G Bearing Areas are underdeveloped
- Unemployment
- Lack of Economic Activity
- Lack of education Faculties
- Non existence of Skilled Labor
- No Business Environment
- Electricity Shortage
- Lack of Infrastructure

Opportunities

- China is the Biggest importer of M& G
- Fast Mine to Market Transportation
- Easy Access to Chinese Markets
- Investment Opportunities from world
- Development of New Clusters
- Industrialization in remote areas
- Socio-Economic Development
- Environmental Up gradation
- Link to Mainland
- Community development

Threats

- Law and Order Situation
- Insurgency
- Depletion of Resources
- Continued Alienation to International market
- Loss of Value able foreign exchange



Potential of Some Areas

District Wise Potential of GB



District	Area (km²)	Population (1998)	Most Potential
<u>Ghanche</u>	6,400	88,366	Marble & Granite
<u>Skardu</u>	15,000	214,848	Marble & Granite
<u>Astore</u>	8,657	71,666	Marble & Granite
<u>Diamer</u>	10,936	131,925	Marble & Granite
<u>Ghizer</u>	9,635	120,218	Marble & Granite
<u>Gilgit</u>	1155	243,324	Marble & Granite
<u>Hunza–Nagar</u>	25,145	165,355	Marble & Granite
Gilgit Baltistan	72971	1,800,000	



Gilgit /Baltistan



Marble Potential (million tons)	2000
Granite Potential (million tons)	2000
Population	1800000
No of Quarries	2
No of Processing units	1
Existing Employment	225

Chitral -KPK



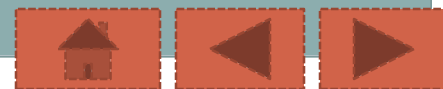
Marble Potential (million tons)	180
Granite Potential (million tons)	200
Population	318689
No of Quarries	18
No of Processing units	12
Existing Employment	750



SWAT -KPK



Marble Potential (million tons)	300
Granite Potential (million tons)	2000
Population	1257602
No of Quarries	3
No of Processing units	25
Existing Employment	1250



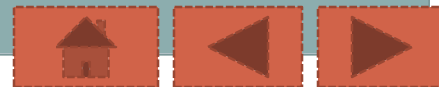
Buner -KPK

Marble Potential (million tons)	1700
Granite Potential (million tons)	1500
Population	506048
No of Quarries	200
No of Processing units	250
Existing Employment	22500



Manshera/Abbotabad/Hazara -KPK

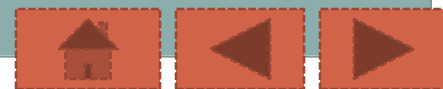
Marble Potential (million tons)	400
Granite Potential (million tons)	1600
Population	1152839
No of Quarries	20
No of Processing units	50
Existing Employment	3500



Mardan -KPK



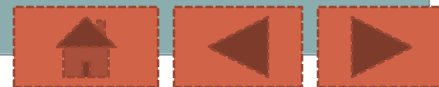
Marble Potential (million tons)	200
Granite Potential (million tons)	50
Population	1460100
No of Quarries	20
No of Processing units	300
Existing Employment	16000



Peshawar -KPK

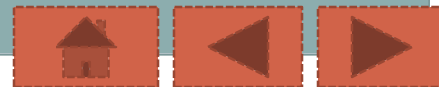


Marble Potential	-
Granite Potential	-
Population	
No of Quarries	-
No of Processing units	120
Existing Employment	6000



Sawabi -KPK

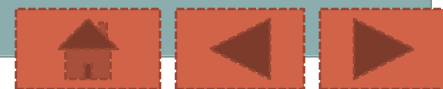
Marble Potential (million tons)	500
Granite Potential (million tons)	
Population	
No of Quarries	20
No of Processing units	30
Existing Employment	2500



Cherat -KPK



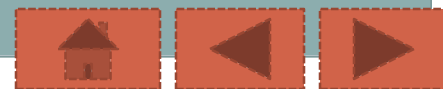
Marble Potential (million tons)	400
Granite Potential (million tons)	
Population	874373
No of Quarries	2
No of Processing units	45
Existing Employment	3500



DIR -KPK



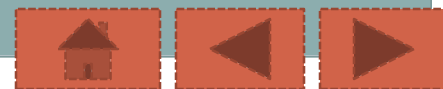
Marble Potential (million tons)	200
Granite Potential (million tons)	2200
Population	575858
No of Quarries	4
No of Processing units	25
Existing Employment	1450



Malakand -KPK



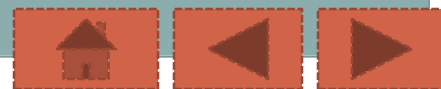
Marble Potential (million tons)	500
Granite Potential (million tons)	1000
Population	452291
No of Quarries	2
No of Processing units	2
Existing Employment	300



Shangala -KPK



Marble Potential/Surpentinite (million tons)	300
Granite Potential (million tons)	-
Population	434563
No of Quarries	4
No of Processing units	-
Existing Employment	200



Mohamand Agency FATA



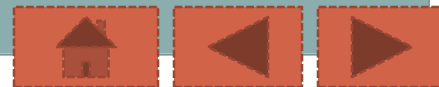
Marble Potential (million tons)	2000
Granite Potential (million tons)	-
Population	334453
No of Quarries	400
No of Processing units	700
Existing Employment	55000



Bajore Agency -FATA



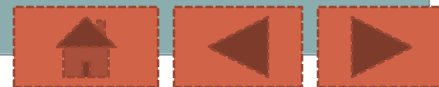
Marble Potential (million tons)	500
Granite Potential (million tons)	-
Population	595227
No of Quarries	10
No of Processing units	50
Existing Employment	3000



Khyber Agency -FATA



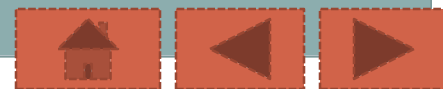
Marble Potential (million tons)	1000
Granite Potential (million tons)	-
Population	546730
No of Quarries	10
No of Processing units	325
Existing Employment	16750



South Waziristan /North Waziristan



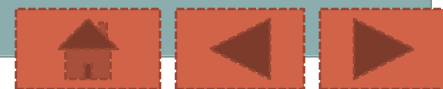
Marble Potential (million tons)	300
Granite Potential (million tons)	-
Population	664924
No of Quarries	2
No of Processing units	2
Existing Employment	50



Khuzdar – Baluchistan



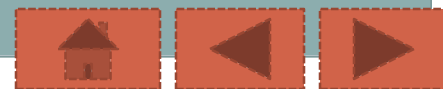
Marble Potential (million tons)	100
Granite Potential (million tons)	-
Population	417466
No of Quarries	200
No of Processing units	30
Existing Employment	11500



Loralai/Duki–Baluchistan



Marble Potential (million tons)	4500
Granite Potential (million tons)	-
Population	297555
No of Quarries	10
No of Processing units	25
Existing Employment	1750



Thatta /Dadu-Sindh



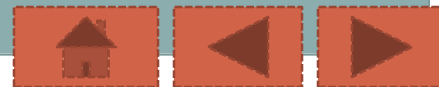
Marble Potential (million tons)	300
Granite Potential (million tons)	-
Population	2802005
No of Quarries	20
No of Processing units	5
Existing Employment	1250



Nagarparkar -Sindh



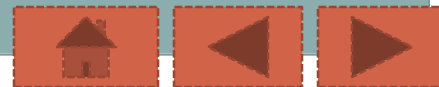
Marble Potential (million tons)	10000
Granite Potential (million tons)	-
Population	914291
No of Quarries	2
No of Processing units	-
Existing Employment	100



Khushab /Mianwali -Sindh



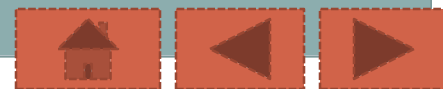
Marble Potential (million tons)	300
Granite Potential (million tons)	-
Population	1962331
No of Quarries	5
No of Processing units	5
Existing Employment	500



Lahore - Punjab



Marble Potential (million tons)	-
Granite Potential (million tons)	-
Population	6318745
No of Quarries	-
No of Processing units	400
Existing Employment	20000



Rawalpindi - Punjab



Marble Potential (million tons)

-

Granite Potential (million tons)

-

Population

3363911

No of Quarries

-

No of Processing units

400

Existing Employment

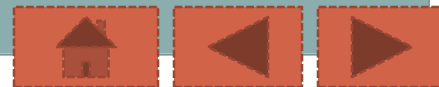
20000



Gujaranwala -Punjab



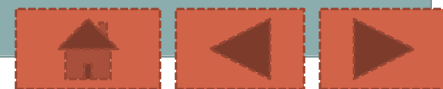
Marble Potential (million tons)	-
Granite Potential (million tons)	-
Population	3400940
No of Quarries	-
No of Processing units	150
Existing Employment	7500



Sahiwal - Punjab



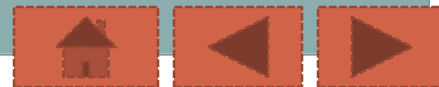
Marble Potential (million tons)	-
Granite Potential (million tons)	-
Population	1843194
No of Quarries	-
No of Processing units	50
Existing Employment	2005



Multan - Punjab



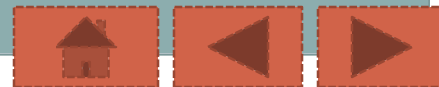
Marble Potential (million tons)	-
Granite Potential (million tons)	-
Population	31168851
No of Quarries	-
No of Processing units	150
Existing Employment	5000



DG Khan - Punjab



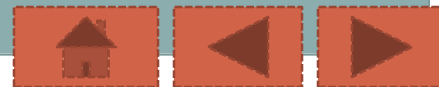
Marble Potential (million tons)	10
Granite Potential (million tons)	-
Population	1643118
No of Quarries	-
No of Processing units	5
Existing Employment	250



Attock - Punjab



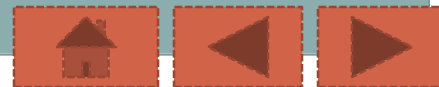
Marble Potential (million tons)	-
Granite Potential (million tons)	-
Population	1274935
No of Quarries	-
No of Processing units	30
Existing Employment	900



Faisal - Punjab



Marble Potential (million tons)	-
Granite Potential (million tons)	-
Population	3000000
No of Quarries	-
No of Processing units	100
Existing Employment	5000



Reason for Special procedure



- FATA & PATA Exempted from Tax
- Un organized sector
- Huge improvement in last couples of years
- Around 20% growth in Export for last 8 years
- Sector has moved from unorganized to semi organized
- Potential of Pakistan on surface

Reason for Special procedure



- Impact in most backward areas
- Local raw material based industry
- Baluchistan Exempted/ no go area
- No go area in some part of Karachi
- Non traditional Sector
- GST Collected by govt. is negative

Settle area vs. Tribal/B area



S.no	Tax	Settle Area	Tribal /B areas
1	Electricity	Full Bill	No Bill/Fix Bill
2	Income Tax	Yes	No
3	Social security	Yes	No
4	Old age benefits	Yes	No
5	Labor Department	Yes	No
6	Labor	Expensive	Cheap
7	Access to mine	Difficult	Easy
8	Raw mat.Selection	Risk	Easy
9	Carriage	High	Low
10	Cost of living	High	Low

Settle area vs. Tribal/B area



- 1) Fundamental right of equality
- 2) Equality in Taxation
- 3) Equal business opportunity
- 4) Free market economy
- 5) Right of fair competition

Cost Analysis



○ Input

- Electricity 35%GST paid
- Consumable 10%..... GST Paid
- Raw material 35%.....can not be claimed
- Profit 10%income Tax
- Labor & mis. . 10%Social Security

Out of Box Solution



- Electricity Bill Example
- Factory Total Electricity Bill 300921
- Sale tax paid 39105
- Other taxes 30365
- Bill amount after deduction 231451
- Total units consumed 14194

Out of Box Solution



-
- If Per Unit increase is1.25
- Average Units consumed is.....14194
- GST increase per month.....17742
- Total GST..... .56847
- Per year increase.....212904

Out of Box Solution



-
- Most bill are between 500 to 50000
- Average Units consumed is.....20000
- Per consumer increase at avg.....25000
- Factory Register in first year3000
- Per month GST increase75000000
- Per Year Increase.....900 million

Out of Box Solution



If we consider that no increase in register entity

- Total GST increase 900 million
- Growth in industry 20%
- Next year 1080 million
- Five year projection.....2070million

Win. Win Situation



APMIA

- Respect Govt. initiative in areas specially FATA.
- Is for incentives in under developed areas .

BUT

- Wants to protects its member's business.
- Against de-employment of workers
- Smooth relation with government.
- Encourage FBR efforts in tax collection

Win. Win Situation



- APMIA request is based on ground realities
- Wants to increase govt. revenue
- Out of box solution
- Fair game
- No interference of some anti business mindset



Legends:
Major Cities on PCTC

- A= Khunjerab
- B= Gilgit
- C=Thakot
- D=Abbotabad
- E=Haripur
- F=Pindi Gheb
- G=Essa Kel
- H=Mianwali
- I=Kot Addu
- J=DG Khan
- K=Dera Bugti
- L=Jacobabad
- M=Khuzdar
- N=Basima
- O=Panjgur
- P=Hoshab
- Q=Turbat
- R= Gawadar

Legends:
Cities in 100 KM of PCTC

- AB=Buner
- AC=Risalpur
- AD=Islamabad/Rawalpindi
- AE=DI Khan
- H AF=Malakwal
- AG=Khuzhab
- AH=Multan
- AJ=Sibi
- AK=Sukkur
- AL=Khairpur
- AM=Larkana