The Pakistan Business Council
FOSTERING ECONOMIC GROWTH

Enhancing the Export Competitiveness of Pakistan's Aluminum Utensils Sector

MAKE-IN-PAKISTAN

April 2026

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The Pakistan Business Council:
An Overview

The Pakistan Business Council (PBC) is a research-based business advocacy platform established in 2005. It is now supported by over 100 private sector local and multinational businesses with significant investment in, and long-term commitment to sustainable growth of the country. They come from 14 countries, have leading roles in 17 major sectors of the formal economy, generate 40% of annual exports, contribute a third of Pakistan's total tax revenues and employ three million. Their combined sales represent every 6th Rupee of Pakistan's GDP.

PBC's major objectives are to advocate polices that lead to creation of jobs, value-added exports and reduction in import reliance through improved competitiveness of manufacturing, services and the agriculture sectors. It also promotes formalization of the economy.

PBC's over-arching theme, "Make-in-Pakistan" consists of three pillars: "Grow More/Grow Better", "Make More/Make Better" and "Serve More/Serve Better." Its evidence-based advocacy is backed by over a hundred studies to date, through its full-time research team, supplemented by collaborative research with renowned industry experts and economists. Through its Centre of Excellence in Responsible Business (CERB), PBC works to build capacity and capability of businesses beyond its membership, to adopt high environmental, social and governance standards. PBC holds conferences, seminars and webinars to facilitate the flow of relevant information to all stakeholders in order to help create an informed view on the major issues faced by Pakistan. Through its presence in Islamabad and Karachi, it works closely with relevant government departments, ministries, regulators and institutions, as well as other stakeholders including professional bodies, to develop consensus on major issues impacting the economy.

PBC is a pan-sectoral, not-for-profit, Section 42 entity. It is not a trade body; therefore, it does not advocate for any specific business sector. Rather, its key advocacy thrust is on easing barriers that thwart competitiveness of businesses in Pakistan.

Further information on the PBC is available on: www.pbc.org.pk.

The PBC's Founding Objectives

- To provide for the formation and exchange of views on any question connected with the conduct of business in and from Pakistan.
- To conduct, organize, set up, administer and manage campaigns, surveys, focus groups, workshops, seminars and fieldwork for carrying out research and raising awareness in regard to matters affecting businesses in Pakistan.
- To acquire, collect, compile, analyze, publish and provide statistics, data analysis and other information relating to businesses of any kind, nature or description and on opportunities for such businesses within and outside Pakistan.
- To promote and facilitate the integration of businesses in Pakistan into the World economy and to encourage in the development and growth of Pakistani multinationals.
- To interact with governments in the economic development of Pakistan and to facilitate, foster and further the economic, social and human resource development of Pakistan.

The PBC Member Companies


Jubilee
GENERAL INSURANCE


K&Ns


KE


LIBERTY


LIPTON
Teas and Infusions


LOTTE


LUCKY CEMENT


MACPAC
FILMS


Martin Dow


CHANGAN AUTO


MEGA


MAHMOOD GROUP


National
FOODS


NAVEENA


Nestlé
Good food, Good life


NIMIR


OLP


Packages Limited


jazz


Pakistan
Oxygen


PSL
PAKISTAN SERVICES LTD.


PSX
PAKISTAN
STOCK EXCHANGE
LIMITED


PEPSICO


reckitt


MASOOD
ROOMI


SAIF GROUP


SAP


Sapphire


Servis


Shan


Atlas


SICPA


SIEMENS


Soneri Bank


SOORTY


SPEL
Synthetic Products
Enterprises Limited


Standard
Chartered


systems


TAPAL


TG


TCS
WE MOVE YOU!


PROTECTS
Tetra Pak
WHAT'S GOOD


Coca-Cola


TPL


TTE


Tufail


Unilever


UBL
where you come first


KHAADI


Young's

The PBC Affiliates

The Engineering Development Board

The Engineering Development Board (EDB) was established in 1995 with the primary objective to promote growth of Pakistan's engineering sector. The primary mandate assigned to the Board is policy formulation and putting in place a mechanism for implementing these policies. The objective being facilitating and encouraging the development & growth of Pakistan's Engineering Industry.

The EDB is organized under four operational groups: Tariff Group, Policy Development Group, Sector Development Group and Business Development Group. The key objective as stated above is to formulate and implement strategies for developing the engineering sub-sectors. This objective is planned to be achieved by integrating Pakistan's engineering sector into global supply chains by focusing on tariff rationalization, promoting indigenization, vendor development, giving international exposure to industry, handholding of industry, and creating a comprehensive databank of industry capabilities through benchmarking, trainings etc.

EDB provides policy advice and technical support to the Ministry of Industries and Production. It also engages with the Ministry of Finance / FBR on fiscal policy, the Ministry of Commerce / NTC for tariff rationalization, and with the Ministry of Science & Technology for standards, testing and quality.

EDB maintains an export directory of local engineering companies for dissemination of information relating to the capabilities of these companies. It also identifies local manufacturing capabilities in each sector and verifies manufacturing capabilities / facilities through field visits.

Regular sector studies are carried out by the EDB to identify sectoral needs for technological upgradation, especially for entering export markets.

The All-Pakistan Aluminum Utensils Manufacturers Association

The All-Pakistan Aluminum Utensils Manufacturers Association (APAUMA) was established in 1992. Main objective behind forming an aluminum utensils association was to cater to all the issues that hindered production and growth. APAUMA is responsible for Sales tax, Social security, Labor tax, Income tax and other business-related issues.

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Acronyms

APAUMA	All Pakistan Aluminum Utensils Manufacturers Association
CBM	Covalent Bond Metallization
CFC	Common Facility Center
EDB	Engineering Development Board
EDF	Export Development Fund
FATF	Financial Action Task Force
GBC	Gujranwala Business Centre
GTDMC	Gujranwala Tools, Dies & Moulds Centre
NPO	National Productivity Organization
PAEC	Pakistan Atomic Energy Commission
PBC	Pakistan Business Council
PPP	Public Private Partnership
PSW	Pakistan Single Window
PUF	Polyurethane PU Foam
PTFE	Polytetrafluoroethylene
SASO	Saudi Standards, Metrology and Quality Organization
SBP	State Bank of Pakistan
SME	Small & Medium Enterprises
SMEDA	Small & Medium Enterprises Development Authority
SOPs	Standard Operating Procedures
TDAP	Trade Development Authority of Pakistan
TERF	Temporary Economic Refinance Scheme
TT	Telegraphic Transfer

Limitations of the Study

One of the main limitations of this study is the availability and accessibility of data. Comprehensive and up-to-date statistics on production volumes, export performance, and market trends in the aluminum utensils sector are limited. In many cases, secondary sources and estimates have been used to fill data gaps, which may affect the precision and completeness of the analysis.

Another limitation is the geographic and sectoral scope. The study primarily focuses on major industrial clusters and registered producers in Pakistan, while smaller or informal manufacturers operating in remote areas may not be fully represented. Similarly, certain niche products and emerging market segments may not have been captured in the analysis.

Lastly, while the study incorporates qualitative insights from stakeholder consultations, these perspectives may be subjective and influenced by individual experiences or expectations. Additionally, although technology adoption and production practices are assessed, a detailed technical audit of all facilities was beyond the study's scope. Despite these limitations, the research provides valuable strategic guidance for policymakers and industry stakeholders to enhance the competitiveness of Pakistan's aluminum utensils sector.

Executive Summary

Executive Summary

Study Objectives

The key objective of this study is to analyze the competitiveness of Pakistan's aluminum utensils sector across the production, trade, and export value chains. The study evaluates market dynamics, the product mix, labor and raw material dependencies, and export potential in key international markets. It further seeks to identify structural and policy-related challenges faced by the industry and recommends strategic measures to improve quality standards, promote technology upgradation, support SMEs, and facilitate a shift towards value-added and export-oriented growth.

1. Overview of Aluminum Utensils Sector

This study highlights the potential of Pakistan's Aluminum utensils sector in export markets. Aluminum cookware comprises of pots and pans that are commonly used for stovetop food preparation and baking. This type of cookware is suitable for use on electric-powered or gas cooktops. Its popularity lies in its attributes which include good thermal conductivity, light weight, and resistance to numerous forms of corrosion. Other types of competing cookware include stainless steel, cast iron, copper etc.

According to the All-Pakistan Aluminum Utensils Manufacturers Association (APAUMA), the total number of units engaged in the manufacture of aluminum utensils is estimated at between 500 & 600 having an annual production of 140,000 tons and employing nearly 25,000 persons. Most units are medium to small sized with only a few units employing between 500- 600 employees.

2. The Product Mix

Aluminum cookware manufactured in Pakistan consists of pressed aluminum utensils, cast- aluminum utensils and anodized aluminum utensils. The aluminum utensils industry is classified under HS-761510 as "Table, kitchen or other household articles and parts thereof, and pot scourers and scouring or polishing pads, gloves and the like, of aluminum (excluding cans, boxes and similar containers of heading 7612, articles of the nature of a work implement, spoons, ladles, forks…".
Aluminum utensils manufactured in Pakistan include cooking casserole sets, frying pans, sauce pans, woks, baking trays, pressure cookers, tawas, BBQ units, mixing bowls etc. These products are widely used in households, hotels, hospitals, canteens among others.

3. Global Aluminum Production

Table 1 shows top ten global producers of Aluminum in 2019 and then again in 2023 and the growth in aluminum production during the given period. China is the world's largest producer of aluminum followed by India, Russia, Canada, the UAE and Bahrain.

Table 1: Top 10 Aluminum Producers in the World 2019 & 2023

Rank	Producer	Production (Million Metric Tons)		CAGR % Growth 2019 to 2023	% of Global Production in 2023
		2023	2019		
1	China	41.00	35.95	3.34	59%
2	India	4.10	3.42	4.62	6%
3	Russia	3.80	3.55	1.68	5%
4	Canada	3.00	3.26	-2.03	4%
5	UAE	2.70	2.84	-1.22	4%
6	Bahrain	1.60	1.02	12.00	2%
7	Australia	1.50	1.44	1.03	2%
8	Norway	1.30	1.23	1.47	2%
9	Brazil	1.10	0.68	12.59	2%
10	United States	---	0.65	---	---

Source: World Population Review, Nation Master Database, US Geological Survey (USGS)

4. Top 10 Global Exporters of Aluminum Utensils

The global exports of aluminum utensils increased from $4.53 billion in 2015 to $6.40 billion in 2024, recording a CAGR of 0.04 percent during this period. China ranked first, with its exports rising from $2.32 billion in 2015 to $3.91 billion in 2024. Meanwhile, Pakistan was ranked 23rd, with exports increasing from $25.97 million in 2015 to $26.76 million in 2024.

Table 2: Top Global Exporters of Aluminum Utensils

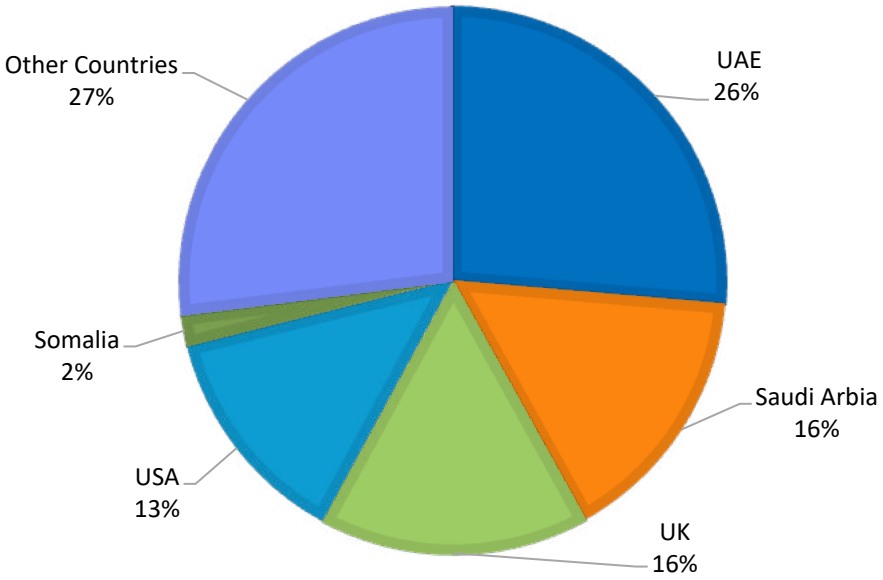
Rank	Country	Exports value 2015 (US$ in Million)	Exports value 2024 (US$ in Million)	Quantity Exported 2024 (Tons)	CAGR (%) (2015-2024)
---	World	4,530.38	6,400.06	---	0.04
1	China	2,324.28	3,906.90	697,478.00	0.06
2	France	263.76	327.08	25,520.00	0.02
3	Italy	320.85	317.06	29,777.00	0.00
4	Germany	131.45	168.37	13,458.00	0.03
5	Turkey	114.64	140.28	26,266.00	0.02
6	Viet Nam	39.42	130.76	*11,469.00	0.14
7	Brazil	45.24	125.62	17,923.00	0.12
8	India	74.29	122.92	25,354.00	0.06
9	Thailand	229.36	109.95	16,446.00	-0.08
10	USA	122.27	103.59	---	-0.02
23	Pakistan	25.97	26.76	7,881.00	0.00

Source: ITC, Note: Viet Nam 2023*

5. Pakistan's Major Export Markets

Almost 41 percent of the total aluminum utensils exported from Pakistan in 2024 were destined for the UAE and Saudi Arabia. The top five importers of Pakistani aluminum utensils accounted for 73.02 percent of the total aluminum utensils exported.

Figure 1: Major Markets for Pakistan's Aluminum Utensils



Source: ITC

6. Opportunities in the Aluminum Utensils Sector

Based on industry discussions and review of secondary data, the aluminum utensils sector in Pakistan presents several important opportunities, primarily driven by existing production capacity, export presence, and unmet international demand for specialized aluminum utensil products.

i. A Strong Employment and Industrial Base:

- The sector comprises approximately 500 – 600 industrial units across Gujranwala in Pakistan.
- These units employ around 25,000 workers.
- The industry has the capacity to absorb additional labor and expand production with adequate support.

ii. Existing Export Capability and Market Presence:

- Current exports include aluminum cookware, anodized products, and metal-finished utensils.
- Key export markets are the UAE, Saudia Arabia, the UK, Belgium, France, the USA, Afghanistan, and some European countries.
- There is potential to expand into regional markets such as Bangladesh, Sri Lanka, and selected Central Asian countries.

iii. High Demand for Specialized Aluminum Utensil Products:

Several aluminum products from Pakistan have a strong international demand but are currently not being manufactured in the required quantities.

- **Non-stick aluminum products**, coated with PTFE or ceramic, are popular for healthier and easier cooking and are sought after locally and in markets such as Afghanistan, the UK, and regional destinations.

- **Anodized products**, which offer enhanced durability, corrosion resistance, and food safety, have strong potential in Europe and other high-income markets, while **metal-finish products** are suited to price-sensitive markets in developing countries like Sri Lanka, Bangladesh, and Central Asia.
- **Pressure cookers** also show broad market demand across income groups, with high consumption in Pakistan, developing countries, and emerging interest in Central Asia, as well as steady demand in developed markets.

7.1 Challenges Face by Pakistan's Aluminum Utensil Manufacturers

i. Limited Access to Technology and Finance:

Most firms lack affordable financing for machinery and automation, keeping production labor-intensive; reducing productivity, and increasing quality inconsistencies. Manufacturers are also hesitant to use bank financing due to religious considerations and collateral issues, thus limiting access to support programs like SBP's TERF.

ii. Developing Skilled Labor Shortages:

The sector suffers from a growing shortage of skilled labor. Existing workers rely on outdated machinery and traditional methods, while younger workers avoid the physically demanding work, leading to a gradual loss of critical skills.

iii. Limited Research & Development (R&D):

R&D receives minimal attention, with only 5–6% of manufacturers investing in innovation or monitoring global demand patterns. Most firms prioritize operational costs over product development, resulting in low innovation and reliance on copying large firms' designs.

iv. Weak Institutional Support and Service Delivery:

Despite contributions to social security schemes; healthcare and welfare services for workers remain inadequate, increasing operational costs and weakening trust between industry and government.

v. Harassment and Arbitrary Government Actions:

Manufacturers frequently face unjustified tax notices and inspections from authorities like the FBR, creating fear, uncertainty, and discouraging long-term investments, with no accountability for officials misusing their powers.

vi. Export-Related Challenges:

Termination of the FASTER tax refund system has caused refund delays exceeding more than two years, limiting liquidity. Additional banking inefficiencies, delayed export documentation, and port congestion increase shipment timelines, financial costs, and security risks, reducing global competitiveness.

vii. Policy Bias Toward Raw Material Exports (EFS):

The EFS disproportionately benefits investors exporting aluminum ingots with minimal processing, while manufacturers of finished utensils—who generate more employment and higher value addition — face raw material shortages, higher costs, and reduced competitiveness.

viii. High Energy Costs and Unreliable Supply:

Rising energy costs, limited gas connections, and frequent power outages disrupt production, forcing manufacturers to rely on alternative fuels and increasing both costs as well as operational uncertainty.

ix. Environmental Challenges:

Extensive burning of aluminum scrap to produce ingots has deteriorated air quality in Gujranwala. While

some firms have installed purifiers, large-scale adoption is limited, and cost concerns may discourage SMEs from implementing environmentally friendly practices.

8. Policy Recommendations

i. Enhancing Product Variety and Innovation:

Industry needs to modify existing products and introduce advanced varieties of pressure cookers, anodized, and die-cast aluminum utensils to meet global demand for healthier and more durable products.

ii. Encouraging Technological Upgradation:

Promote automation in family-owned businesses, replace old machinery with environmentally friendly equipment, and improve production efficiency.

iii. Promoting Export-Focused Growth:

Focus on innovation aligned with international demand and increase the share of production dedicated to exports.

iv. Limit Export of Recycled Aluminum Ingots:

Restrict export of aluminum ingots in primary form to ensure availability for domestic manufacturers while allowing imports intended for re-export.

v. Environmental Sustainability:

Subsidize air purifying plants for SMEs through government support or public-private partnerships to reduce pollution from aluminum scrap burning.

vi. Upgrading Common Facility Centers (CFCs):

Improve technology and machinery at CFCs, introduce circle-cutting facilities, and provide access to advanced tools for standardized production.

vii. Industry Development Programs:

SMEDA and APAUMA should collaborate on productivity and export enhancement initiatives, including training, consultancy, and market development programs.

viii. Skilled Labor Development:

Establish vocational and technical training programs focused on modern production techniques, machinery operation, and safety standards.

ix. Market Access and International Exhibitions:

Support participation in TDAP and single-country exhibitions, organize B2B meetings, and provide guidance for visas and costs to promote exports.

x. Institutional Financing for SMEs:

Establish an SME Development Fund (SDF) under a public–private partnership to provide accessible financing, enhance CFC capacity, and support small and medium enterprises in upgrading technology and expanding exports.

Chapter 1

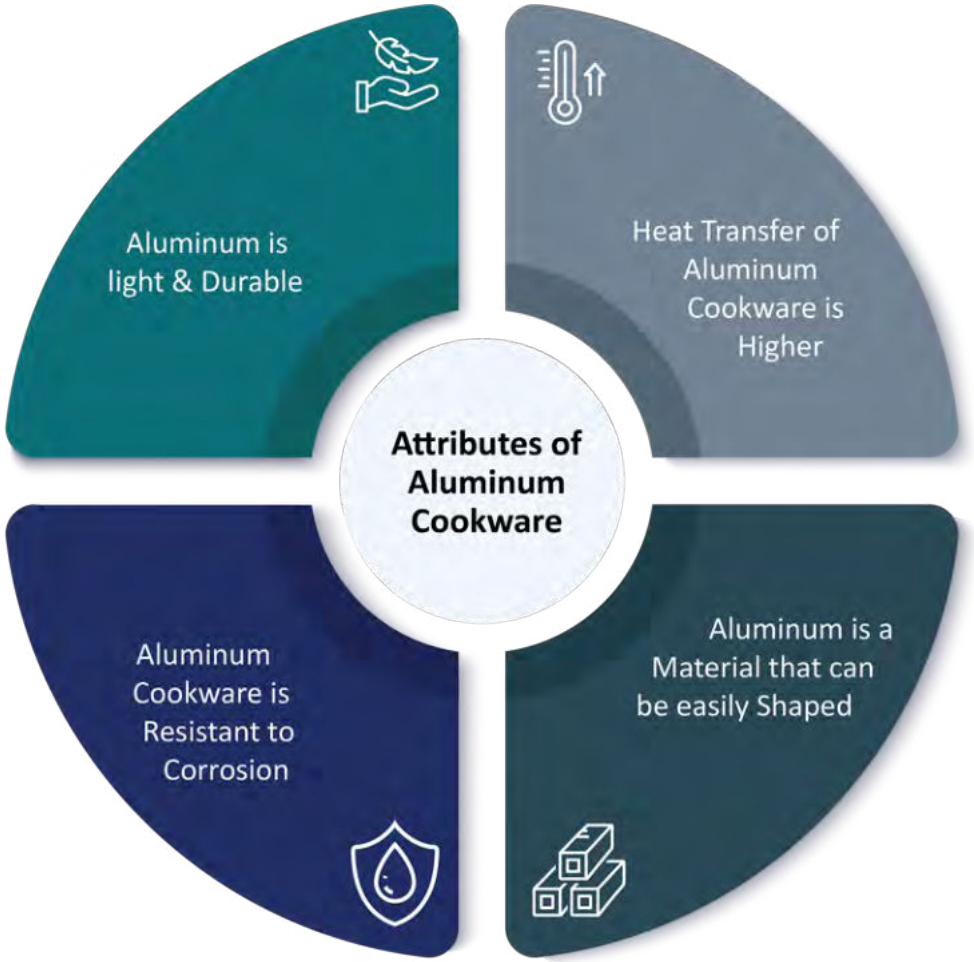
Overview of the Aluminum Utensils Sector

Overview of the Aluminum Utensils Sector

1. What are Aluminum Utensils?

Aluminum utensils or aluminum cookware comprises of pots and pans that are commonly used for stovetop food preparation and baking. This type of cookware is suitable for use on electric-powered or gas cooktops. Its popularity lies in its attributes which include good thermal conductivity, light weight, and resistance to numerous forms of corrosion. Other types of competing cookware include stainless steel, cast iron, copper etc.

Figure 1.1: Attributes of Aluminum Cookware[1]



According to the All-Pakistan Aluminum Utensils Manufacturers Association (APAUMA), the total number of units engaged in the manufacture of aluminum utensils is estimated at around 500-600 having an annual production of 140,000 tons and employing nearly 25,000 persons. Most units are medium to small sized with only a few units employing more than 500-600 employees

1. https://www.innerwellcooker.com/article/What-are-the-Characteristics-of-Aluminum-Cookaware

Figure 1.2: Aluminum Cookware Market Trends

Post the Covid-19 pandemic, a significant change in the buying habits of consumers has been witnessed with people preferring online shopping over the traditional brick & mortar stores. This has led to a rapid growth in e-commerce platforms as people have started making purchases online and have started spending more time cooking at home and eating healthy.

Online sale of cookware, globally has, as a result witnessed an impressive growth. The following figure shows the distribution channel of cookware in 2023.

Figure 1.3: Cookware Market Share Distributions by Channel (%)

Source: Mordor Intelligence

The Asia-Pacific region accounts for the highest share of the cookware market, driven by increased use of gas and electric stoves, particularly in emerging economies such as India and China. This trend is contributing significantly to the market's growth in the region.

Figure 1.4 shows the share of the global cookware market by regions in 2023.

Figure 1.4: Global Market for Cookware Market, Share by Region in 2023

Source: Mordor Intelligence

1.3: Product Mix

Aluminum cookware manufactured in Pakistan consist of pressed aluminum utensils, cast- aluminum utensils and anodized aluminum utensils. The aluminum utensils industry is classified under HS-761510 as "Table, kitchen or other household articles and parts thereof, and pot scourers and scouring or polishing pads, gloves and the like, of aluminum (excluding cans, boxes and similar containers of heading 7612, articles of the nature of a work implement, spoons, ladles, forks…".

Aluminum utensils manufactured in Pakistan include cooking casserole sets, frying pans, sauce pans, woks, baking trays, pressure cookers, tawas, BBQ units, mixing bowls etc. These products are widely used in households, hotels, hospitals, canteens among others.

1.3.1: Aluminum Utensils

Food preparation in kitchen involves tasks like cutting food items to size, cooking food on an open fire or on a stove, baking, grinding, mixing, blending, and measuring, boiling, stirring, frying; etc. and utensils are made for each specific task. Also, different containers are required for storing the processed and cooked food. Besides the utensils are also required for serving meals and for eating meals.
Utensils may be classified as cooking utensils that are put on a fire i.e., cooking containers, or Kitchen processing utensils and Dining utensils consisting of containers and cutlery items and finally the food storage containers. Liquids like water and beverages require a separate design class of utensils.

1.3.2: Types of Aluminum Utensils:

Several sizes and shapes of utensils and containers like pans, boiling cookers, frying pans, baking pans, etc. are used in cooking. Serving utensils consist of containers, trays, etc. Dining utensils include various sizes of plates, bowls and cutlery items like spoons, fork, spatula, knives etc. the following figure shows the different type of Kitchin aluminum utensils used in Pakistan.

Figure 1.5: Commonly Used Aluminum Utensils in Pakistan

1.3.3: Uses of Aluminum Utensil in the kitchen

Aluminum is one of the preferred metals for cooking, making it one of the most common items in the household and in the professional kitchen. A look into any kitchen, will lead to at least a few pieces of aluminum tools. This is due to its many advantageous that the metal possess. In its raw form, it is a lightweight metal that is an excellent conductor of heat. After additional treatment, it can take on other beneficial properties that make it suited for the kitchen. The following figure shows the use of aluminum in kitchen.

Figure 1.6: Use of aluminum utensils in household kitchens

1.3.4: Types of aluminum cookware commonly used in a kitchen

There are three types of aluminum commonly used in a kitchen.

- **Pressed aluminum** is the simplest and most affordable type of aluminum cookware available. It's very lightweight and usually made with a basic, thin design. This makes it ideal for quickly cooking simple dishes because it heats up fast. However, it isn't very durable and can feel quite flimsy when used regularly.

- **Cast aluminum** is made using a slower and more expensive process. Cookware from cast aluminum is usually thicker and heavier than pressed aluminum products. Because it's porous, it holds heat for a longer time. However, cast aluminum can have uneven thickness, especially in pots, which can sometimes lead to uneven cooking—even though it's less likely to warp over time.

- **Anodized or hard anodized aluminum** is produced through a more advanced and costly process. Cookware made from this material features a hard, nonstick surface that resists scratches and dents. The anodization process also prevents reactions with salty or acidic foods, making it suitable for various cooking applications. Although more expensive, it offers excellent durability and longevity.

1.4: Types of Coating Used on Aluminum Utensils

Ceramic Coated Aluminum Utensils

Cooking with aluminum is not only safe, but also an excellent choice. With its superb thermal conductivity, cooking with aluminum allows for even heat distribution, resulting in perfectly cooked meals[2].

Figure 1.7: Ceramic Coating on Aluminum Utensil

Anodized Aluminum Utensils

Anodized cookware refers to kitchen utensils made from aluminum that has been treated through an electrochemical process known as anodization. This process hardens and strengthens the aluminum surface, making it non-reactive, highly durable, and resistant to scratches. The result is cookware that offers excellent heat conductivity along with long-lasting performance. It is widely appreciated for its sleek appearance, versatility, and safe use in everyday cooking[3].

2. https://www.camry-cookware.com/news/is-ceramic-coated-aluminum-cookware-safe-69680829.html
3. https://shopwithpraylady.com/blogs/news/what-is-anodizedcookware?srsltid=AfmBOorPLIRnVwMManhkaFrSIFRH79s8-cR0iWvt_0ZZqnnTOdE-7Y0H

Figure 1.8: Anodized Aluminum Utensils

Seasoned Cast Iron Coating

A seasoned cast iron coating is a natural, self-made protective layer created by cooking oil on cast iron, which makes the cookware more durable, rust-resistant, and easier to cook with. It's an essential part of caring for and maintaining traditional cast iron pans[4].

Figure 1.9: Rub the Pan with a Neutral Oil

Polytetrafluoroethylene (PTFE) coating

Polytetrafluoroethylene (PTFE) coating is widely used in aluminum cookware to create a smooth, non-stick surface. This coating prevents food from sticking, makes cleaning easier, and allows for low-fat cooking. PTFE is chemically inert and heat-resistant under normal cooking conditions[5].

Figure 1.10: Polytetrafluoroethylene (PTFE) coating on Aluminum Utensils

4. https://www.foodnetwork.com/how-to/packages/food-network-essentials/how-to-season-cast-iron
5. https://www.teflon.com/en/consumers/teflon-coatings-cookware-bakeware/color-options

Silicone Coating

Silicone coating is a flexible, food-safe layer often applied to aluminum or steel cookware and bakeware. It creates a smooth, non-stick surface that resists sticking and makes cleaning easier. Unlike some non-stick coatings, silicone is heat-resistant (usually up to around 230–260 °C / 450–500 °F), free from harmful chemicals, and doesn't react with food. It's commonly used on baking mats, molds, and some cooking utensils for its durability, ease of use, and safety[6].

Figure 1.11: Silicone coating on Aluminum Utensils

Polyurethane Foam (PUF) Coating

Polyurethane Foam (PUF) coating is typically used as an insulating layer rather than a direct cooking surface. When applied to aluminum utensils or cookware, PUF helps reduce heat losses and keeps the food warm for longer time periods of time by providing thermal insulation. It is lightweight, durable, and has good heat resistance. It is however, not used on the interior cooking surface because it isn't food-contact safe. Instead, it's often applied on the outer layer or body of utensils[7].

Figure 1.12: Polyurethane Foam (PUF) Coating on Utensils

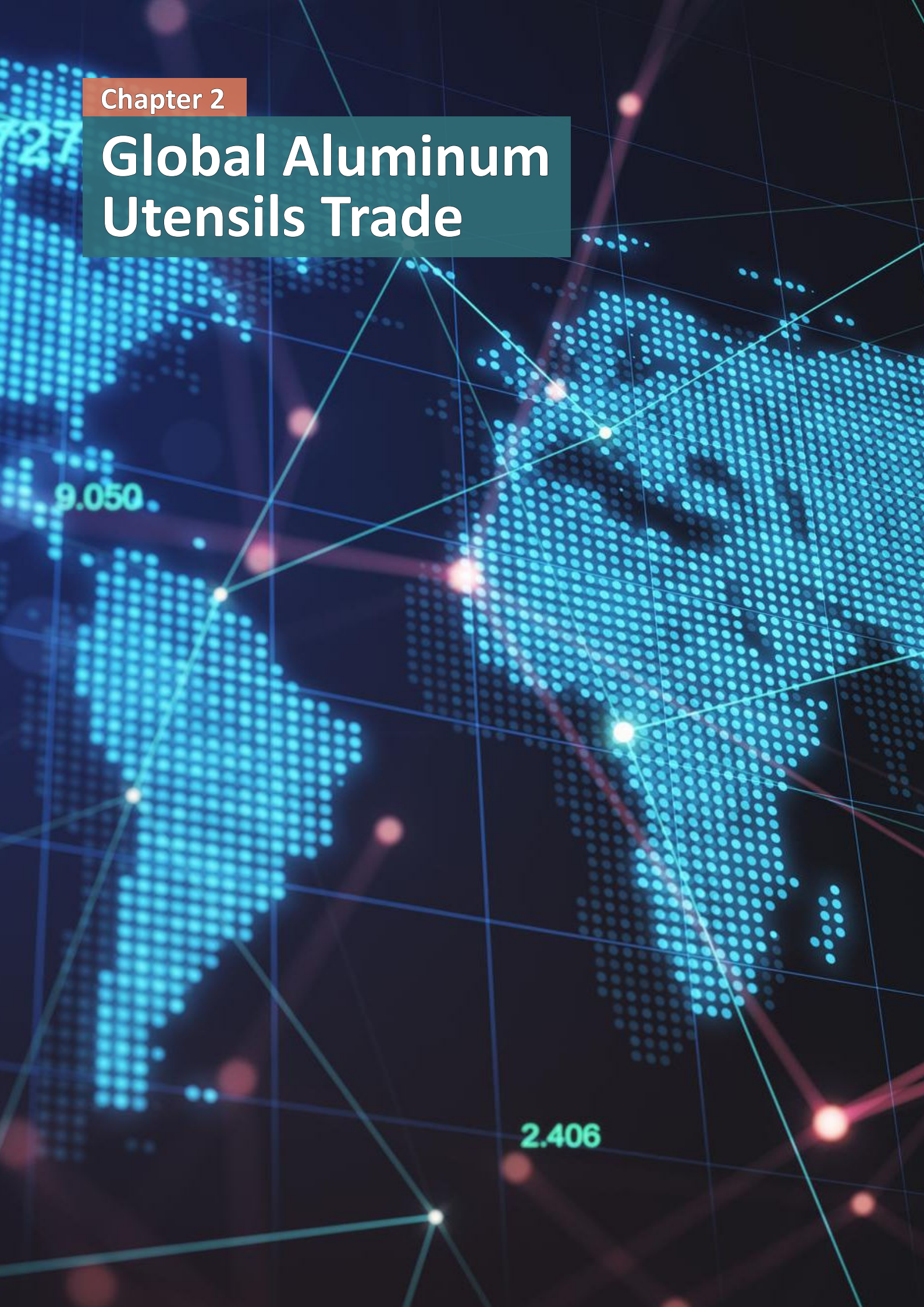
6. https://www.amazon.com/Silicone-Cooking-Utensils-Whisk-Kitchen-Cookware-Dishwasher/dp/B08VJ1LDFH?th=1
7. https://www.amazon.com/Aluminium-Insulated-Container-Leakproof-Containers/dp/B0CZNPX14B

Stone Coating

Stone coating is a type of non-stick coating used on aluminum or steel cookware that mimics the appearance and texture of natural stone. This coating makes cookware durable, scratch-resistant, and naturally non-stick, allowing for cooking with less oil. It's also valued for its attractive, modern look and is free from harmful chemicals. Stone-coated pans combine the quick heating of aluminum with the toughness and style of stone[8].

Figure 1.13: Stone Coating on Aluminum Utensil

8. https://www.amazon.in/Granitestone-Nonstick-Cookware-Diamond-Dishwasher/dp/B09K1NTQ3J?th=1



Chapter 2

Global Aluminum Utensils Trade

Global Aluminum Utensils Trade

2. Aluminum Utensils Trade

This chapter presents a comprehensive analysis of the global trade in aluminum utensils. It begins with an overview of global aluminum production, followed by trends in the international trade of aluminum utensils. The chapter highlights global export performance, identifying the top exporters by value, quantity, and unit value for 2024, along with the market shares of major exporting countries. Additionally, it provides insights into global import patterns, covering total imports and the percentage share of leading importing countries and regions in 2024.

Figure 2.1: HS-Code Classification for Aluminum Utensils Category at HS-06 digit

2.1: Global Aluminum Production

Table 2.1 shows top ten global producers of Aluminum in 2019 and then again in 2023 and the growth in aluminum production during the given period. China is the world's largest producer of aluminum followed by India, Russia, Canada, the UAE and Bahrain.

Table 2.1: Top 10 Aluminum Producers in the World 2023 & 2019

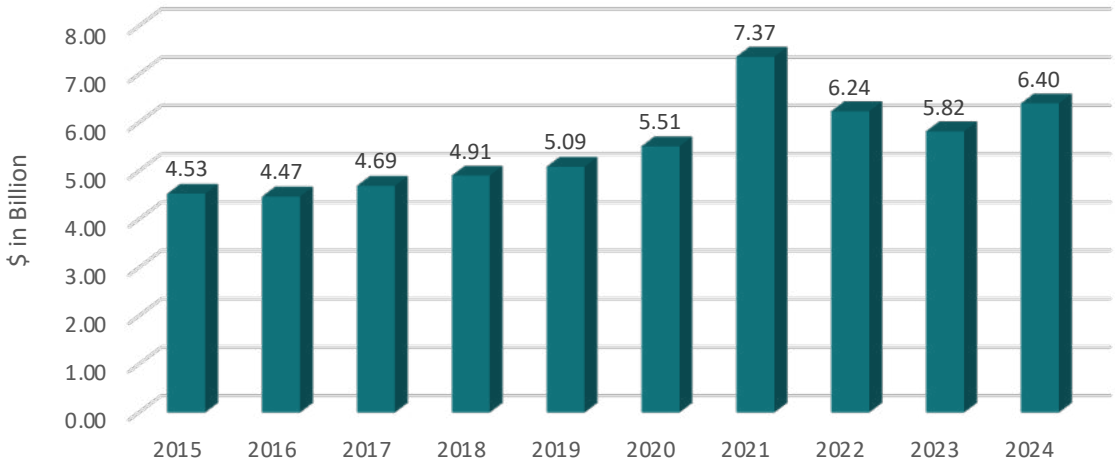
Rank	Producer	Production (Million Metric Tons)		CAGR % Growth 2019 to 2023	% of Global Production in 2023
		2023	2019		
1	China	41.00	35.95	3.34	59%
2	India	4.10	3.42	4.62	6%
3	Russia	3.80	3.55	1.68	5%
4	Canada	3.00	3.26	-2.03	4%
5	UAE	2.70	2.84	-1.22	4%
6	Bahrain	1.60	1.02	12.00	2%
7	Australia	1.50	1.44	1.03	2%
8	Norway	1.30	1.23	1.47	2%
9	Brazil	1.10	0.68	12.59	2%
10	United States	---	0.65	---	---

Source: World Population Review, Nation Master Database, US Geological Survey (USGS)

2.2: Global Aluminum Utensils Exports

The global exports of aluminum utensils (HS-761510) increased from $4.53 billion in 2015 to $7.3 billion in 2021, then slightly decreased to $5.82 billion, and again increased to $6.40 billion in 2024, registering a CAGR of 3.91 percent between 2015 and 2024. Figure 2.2 shows the trend of aluminum utensils export values over the last ten years.

Figure 2.2: Global Aluminum Utensils Export Values (2015-2024)



Source: ITC

2.3: Top 5 Exporters Value wise, Quantity wise and Unit Value wise 2024

China is the largest exporter of aluminum utensils with exports of $3.91 billion in 2024, followed by France and Italy with exports of approximately $327 million and $317 million respectively. In terms of quantity, China also has the largest share in total aluminum utensils exported followed by Italy, Turkey and France. In terms of unit value, Turkey recorded the lowest average export price at 5,341 USD/Ton, followed closely by China at 5,601 USD/Ton.

Figure 2.3 Top 5 Exporters Value wise, Quantity wise and Unit Value wise 2024

Source: ITC

2.4: Top 10 Exporters of Aluminum Utensils

The global exports of aluminum utensils increased from $4.53 billion in 2015 to $6.40 billion in 2024, recording a CAGR of 0.04 percent during this period. China ranked first, with its exports rising from $2.32 billion in 2015 to $3.91 billion in 2024. Meanwhile, Pakistan was ranked 23rd, with exports increasing from $25.97 million in 2015 to $26.76 million in 2024.

Table 2.2: Global Market Shares of Top Aluminum Utensil Exporters – 2024

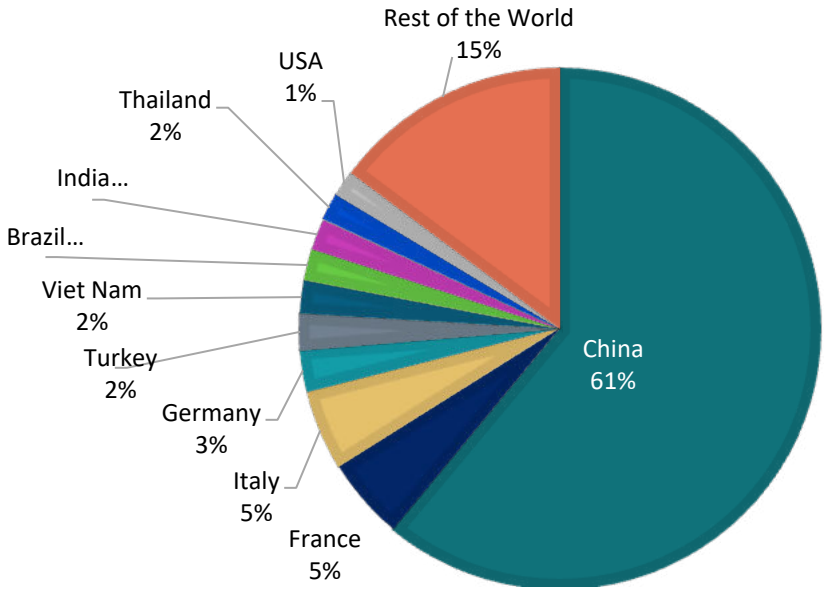
Rank	Country	Exports value 2015 (US$ in Million)	Exports value 2024 (US$ in Million)	Quantity Exported 2024 (Tons)	CAGR (%) (2015-2024)
---	World	4,530.38	6,400.06	---	0.04
1	China	2,324.28	3,906.90	697,478.00	0.06
2	France	263.76	327.08	25,520.00	0.02
3	Italy	320.85	317.06	29,777.00	0.00
4	Germany	131.45	168.37	13,458.00	0.03
5	Turkey	114.64	140.28	26,266.00	0.02
6	Viet Nam	39.42	130.76	*11,469.00	0.14
7	Brazil	45.24	125.62	17,923.00	0.12
8	India	74.29	122.92	25,354.00	0.06
9	Thailand	229.36	109.95	16,446.00	-0.08
10	USA	122.27	103.59	---	-0.02
23	Pakistan	25.97	26.76	7,881.00	0.00

Source: ITC, Note: Viet Nam 2023*

2.5: Market Share of Major Exporters in Global Exports of Aluminum Utensils – 2024

In figure 2.3, it can be seen that the top ten exporters had a combined share of over 85 percent. China, France and Italy were the largest exporters with market shares of 61.04 percent, 5.11 percent and 4.95 percent respectively.

Figure 2.4: Global Market Shares of Top Aluminum Utensil Exporters – 2024



Source: ITC

Table 2.2 and Figure 2.4 reveal the following about the nature of the global trade in aluminum utensils:

- More than half of the world's demand of aluminum utensils is met by exports from China.
- China exported 697,478 tons of aluminum utensils valued at around $3.91 billion in 2024. Even if the quantity exported by the remaining top 9 countries (excluding China) is aggregated (around 166,213 tons), it will not match up to China's exported quantity.
- India, Russia and Canada, who are all top producers of aluminum in the world, were not among the top aluminum utensils exporters.

2.5: Global Aluminum Utensils Imports

The leading importer of aluminum utensils in the world was the USA which imported approximately $1.68 billion worth of aluminum utensils in 2024. Other major importers included Japan and Germany.

Table 2.3 lists the top ten importers of aluminum utensils in the world in 2024 and who combined accounted for over 57.21 percent (or $3.59 billion) of global aluminum utensils imports. Pakistan was the 151st largest importer of aluminum utensils as shown in the table below.

Table 2.3: Top Global Importers of Aluminum Utensils

Rank	Country	Import value 2015 (US$ in Million)	Import value 2024 (US$ in Million)	CAGR (%) (2015-2024)	% Share in Global Imports 2024
---	World	4,081.54	6,280.65	0.05	---
1	USA	1,038.16	1,688.42	0.06	26.88
2	Japan	374.45	372.61	0.00	5.93
3	Germany	227.80	288.30	0.03	4.59
4	France	128.92	219.71	0.06	3.50
5	UK	129.46	193.94	0.05	3.09
6	Canada	169.68	189.28	0.01	3.01
7	Italy	125.79	177.94	0.04	2.83
8	Spain	108.06	170.50	0.05	2.71
9	Mexico	86.07	147.22	0.06	2.34
10	Netherlands	77.14	144.97	0.07	2.31
151	Pakistan	0.63	0.67	0.01	0.01

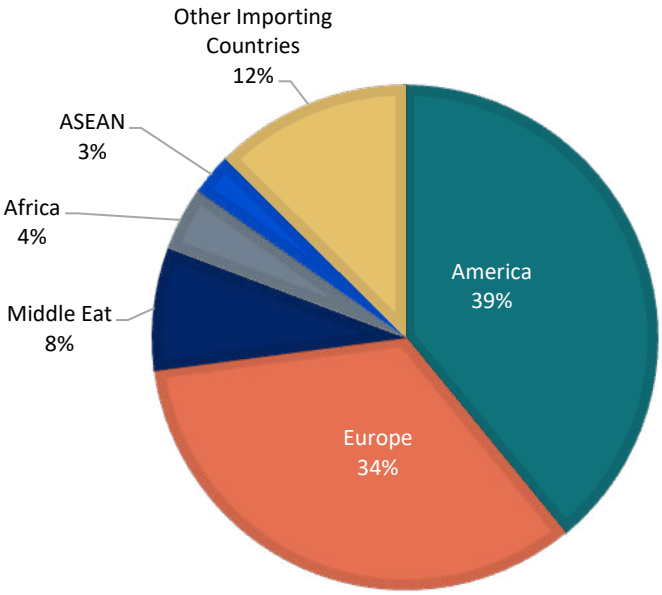
Source: ITC

2.6: Global Aluminum Utensil Imports by Country/Region – 2024

North and South America combined had around 39 percent share in global imports of aluminum utensils in 2024, valued at $2.45 billion. Total imports by the European and American countries in 2024 were approximately $4.58 billion or around 72 percent of the aluminum utensils imported globally.

Figure 2.5 shows percentage shares of regions in global imports.

Figure 2.5: Regional Share in Aluminum Utensil Imports – 2024



Source: ITC, note: America includes both North & South America

Chapter 3

Pakistan's Aluminum Utensils Export Market Dynamics

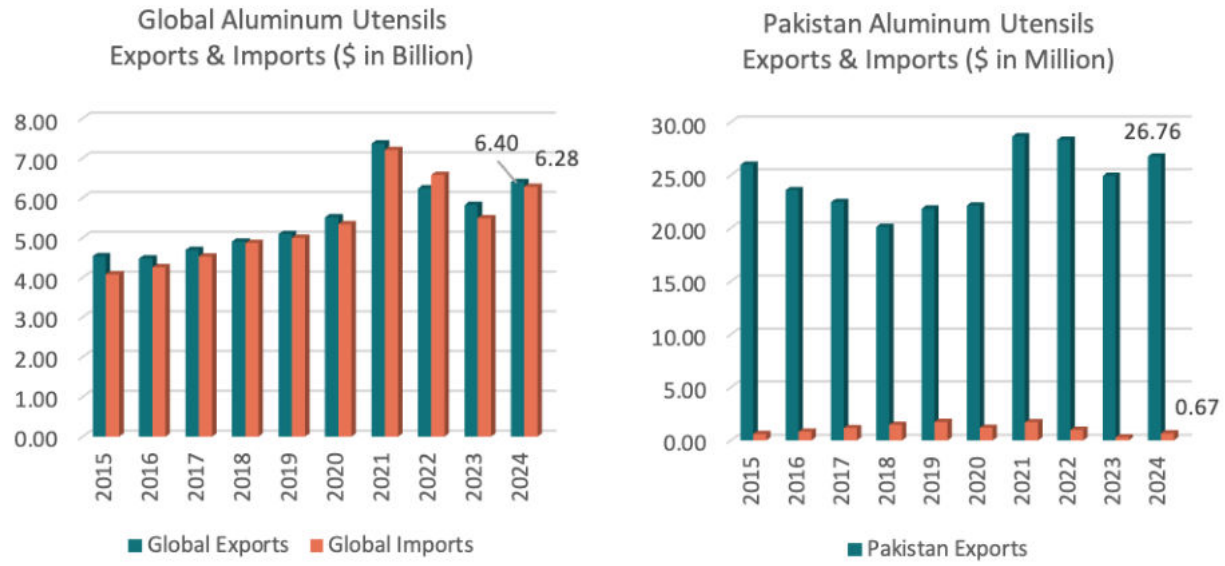
Pakistan's Aluminum Utensils Export Market Dynamics

3. Pakistan's Export Market Dynamics

In 2024, global aluminum utensils exports were worth $6.40 billion, of which Pakistan's share was only $26 million (or 0.41 percent).

Table 3.1 shows global aluminum utensils trade Vs. Pakistan's aluminum utensils exports in the period 2015 to 2024.

Table 3.1: Global Aluminum Utensils Exports VS. Pakistan's Aluminum Utensils Exports



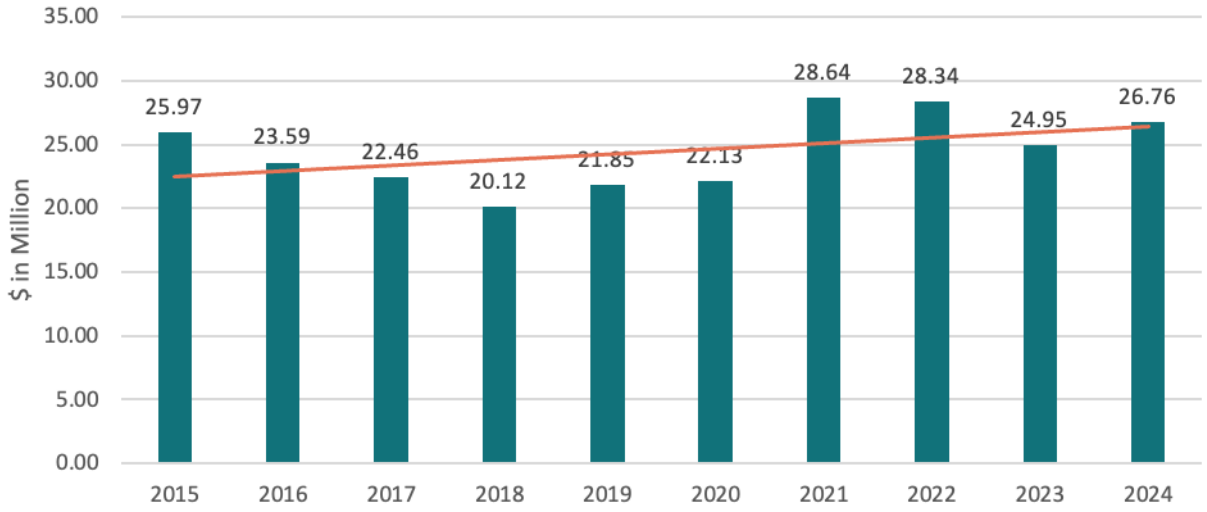
Source: ITC

3.1: Trend of Aluminum Utensils Exports from Pakistan

Pakistan's exports of Aluminum utensils have increase slightly in value from $25.97 million in 2015 to $26.76 million in 2024. Over a period of five years between 2018 and 2022, exports increased by approximately 20.93 percent, increasing from $22.13 million in 2020 to $26.76 million in 2024.

Figure 3.2 shows the trend in the value of aluminum utensils exported by Pakistan from 2015 to 2024.

Figure 3.2: Value of Aluminum Utensils Exported by Pakistan



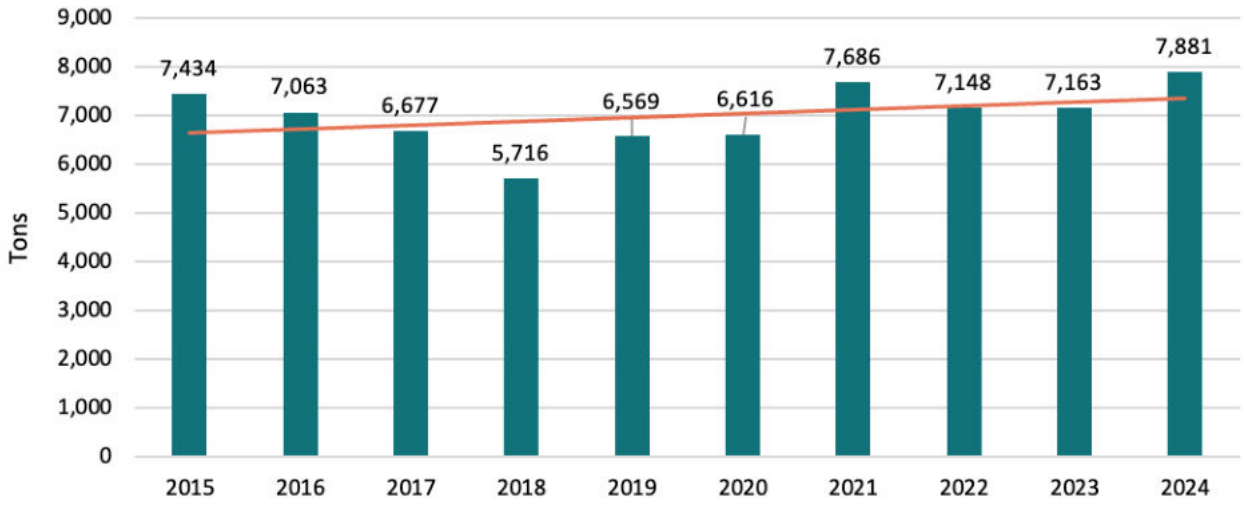
Source: ITC

3.2: Pakistan's Aluminum Utensil Export Quantity

Pakistan exported a record quantity of just over 7,434 tons of aluminum utensils in 2015. Since then, a slight decrease has been witnessed, falling to 5,716 tons in 2018. After that, it began to increase and reached 7,881 tons in 2024.

Figure 3.3 shows the trend in the quantity of aluminum utensils exported by weight by Pakistan from 2015 to 2024.

Figure 3.3: Quantity of Aluminum Utensils Exported by Pakistan



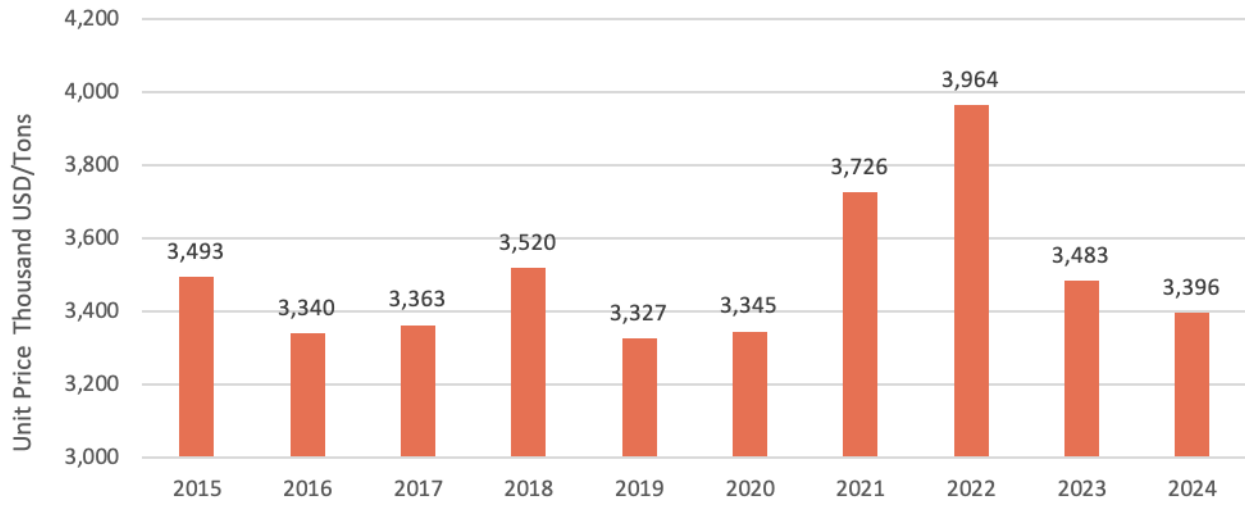
Source: ITC

3.3: Pakistan's Aluminum Utensil Export Unit Value

In 2024, Pakistan's export price per ton of aluminum utensils to the world was $3,396 which was the 5th lowest in the last 10 years (lowest was recorded in 2019 with a price of $3,327).

Figure 3.4 shows the price per ton received by Pakistan in export markets for aluminum exports.

Figure 3.4: Price per Unit of Aluminum Utensils Exported by Pakistan



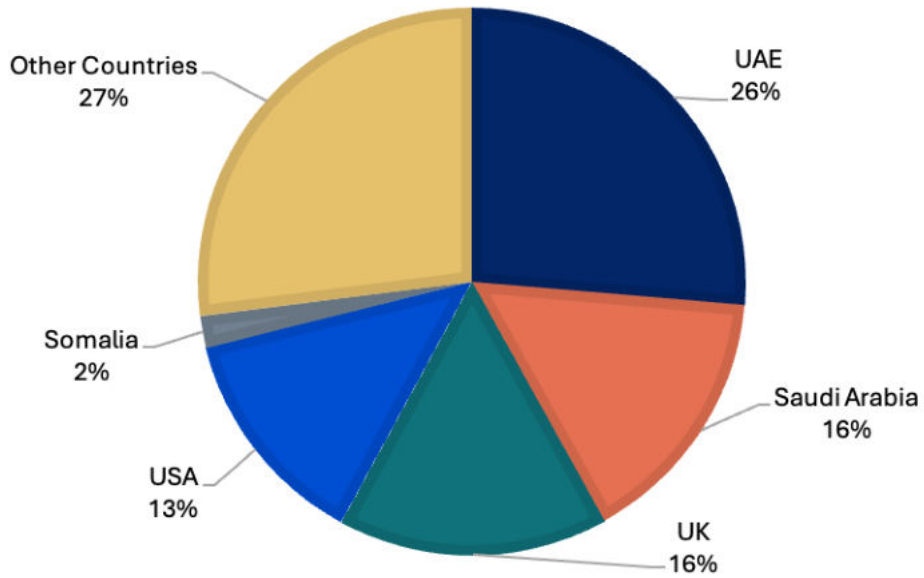
Source: ITC

3.4: Pakistan's Export Markets

Almost 41 percent of the total aluminum utensils exported from Pakistan were destined for the UAE and Saudi Arabia. The top five importers of Pakistani aluminum utensils imported 73.02 percent of the total aluminum utensils exported.

Figure 3.5 shows the shares of the top export markets for Pakistan in 2024.

Figure 3.5 Major Export Markets for Pakistan's Aluminum Utensils



Source: ITC

3.5: Pakistan's Exports Share by Value & Quantity in Top 5 Markets – 2024

Pakistan's market share in its top five export markets is significant. The total aluminum utensils import of the Saudi Arabia were over 19,124.00 tons in 2024 out of which the share of Pakistan was 10.28 percent (over 1,966.00 tons).

Table 3.5 and 3.6 show Pakistan's market share in the total aluminum utensils imports of the top aluminum utensils export destinations of Pakistan by value and quantity. Although Pakistan's share in Somalia is significant, both value-wise and quantity wise, the aluminum utensils import of Somalia is not very significant.

Table 3.2: Market Share of Pakistan in the Top 5 Export Destinations by Value - 2024

Rank	Total Aluminum Utensils Imports (USD Million)	Aluminum Utensils Imports from Pakistan (USD Million)	Share of Imports from Pakistan in Total Aluminum Utensils Import (%)
*UAE	72.02	3.10	4.31
Saudi Arabia	80.26	2.34	2.92
UK	193.94	2.33	1.20
USA	1,688.42	3.58	0.21
Somalia	6.86	0.50	7.28

Source: ITC, Note: UAE *2023 data used.

Table 3.3: Market Share of Pakistan in the Top 5 Export Destinations by Quantity - 2024

Rank	Total Aluminum Utensils Imports (USD Million)	Aluminum Utensils Imports from Pakistan (USD Million)	Share of Imports from Pakistan in Total Aluminum Utensils Import (%)
*UAE	8,650.00	373.00	4.31
Saudi Arabia	19,124.00	1,966.00	10.28
UK	31,677.00	817.00	2.58
USA	319,323.00	701.00	0.22
*Somalia	2,084.00	352.00	16.89

Source: ITC, Note: UAE & Somalia *2023 data used.

3.6 Export Potential

The export potential for Pakistan's aluminum utensils in the Middle East, Europe and North America is high. Globally, aluminum utensils from Pakistan are priced on the average at $3,396 per ton which is the lowest as compared to the top ten exporters. France's aluminum utensils products are priced on the average at $12,817 per ton which is the highest. Reason as to why France is able to fetch such a price is its quality standards that have been achieved due to greater automation and stringent quality controls.

Table 3.4: The Price Fetched by Top 10 Global Aluminum Utensils Exporters 2024

Rank	Exporters	Price Per Ton (Thousand Dollar)	Quantity Exported (Tons)
1	China	5,601	697,478
2	Italy	10,648	29,777
3	Turkey	5,341	26,266
4	France	12,817	25,520
5	India	4,848	25,354
6	Brazil	7,009	17,923
7	Thailand	6,686	16,446
8	Germany	12,511	13,458
9	Netherlands	9,348	10,425
10	Belgium	7,361	9,740
12	Pakistan	3,396	7,881

Source: ITC

Chapter 4

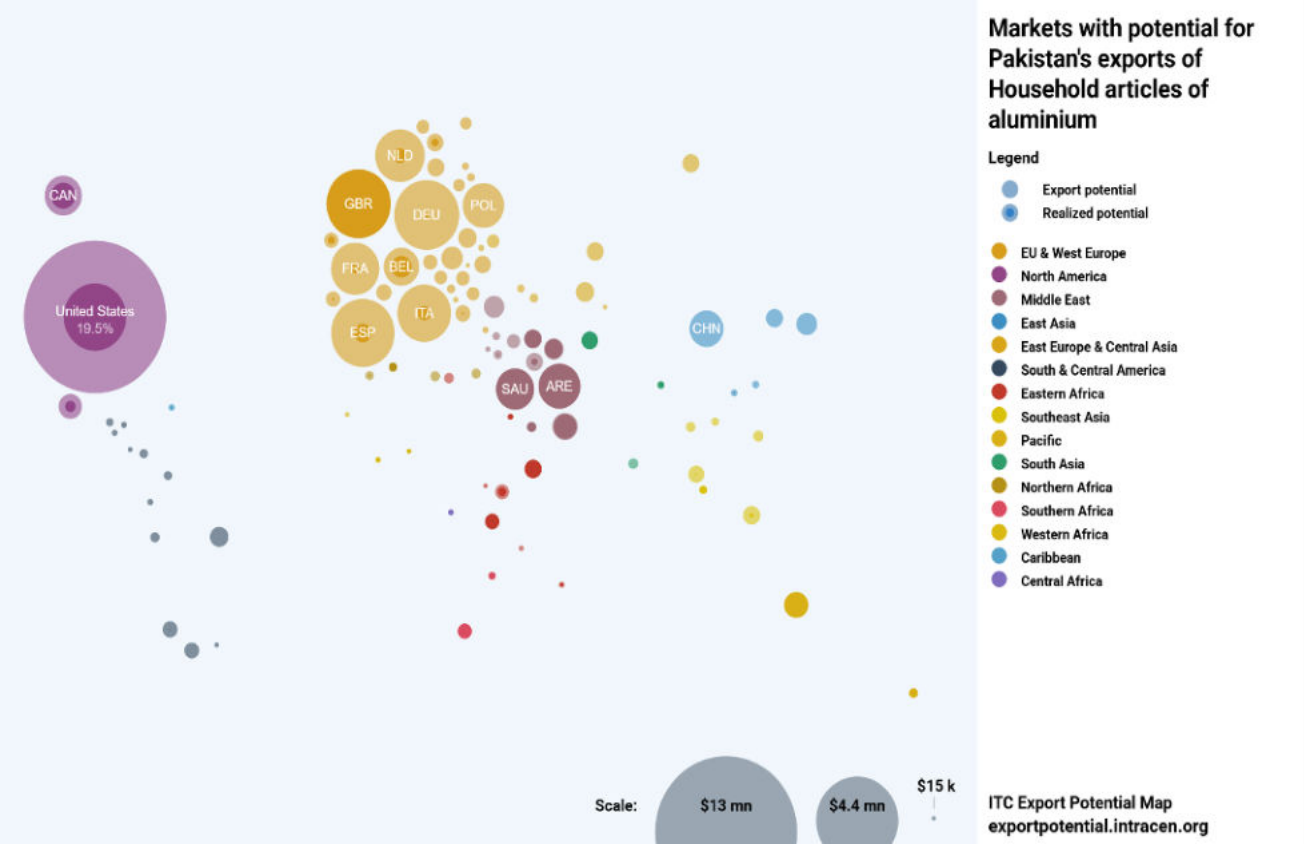
Market Diversification

Market Diversification

4. Market Diversification of Pakistan's Aluminum Utensil Exports (2024)

Although Pakistan's exports of Aluminum utensils have slightly increased in value from $25.97 million in 2015 to $26.76 million in 2024, it has not been successful in fully realizing the potential in its export markets. The USA, Middle East, Germany, Spain and the UK are Pakistan's biggest export destinations. Figure 4.1 shows Pakistan's potential exports and actual exports for aluminum utensils in 2024.

Figure 4.1: Pakistan's Potential and Realized Exports for Aluminum Utensils in 2024



Source: ITC

4.1: Pakistan's Untapped Export Destinations and their Potential for Aluminum Utensils Products

Table 4.1 shows Pakistan's untapped export potential in the top aluminum utensils importing countries of the world. In addition, tariff rates applied by those destinations on Pakistan is also mentioned. As shown, Pakistan's export potential ranges between $24 million to $ 26 million in 2024 to countries including the USA, Japan, Germany, France, UK, Canada, Italy, Spain, Mexico and Netherlands. Of the mentioned countries, all countries have imposed zero-tariffs on imports of aluminum utensils from Pakistan except Canada and Mexico which impose 5 percent and 15 percent tariffs on imports respectively.

Table 4.1: Pakistan's Untapped Export Destinations and their Potential of Aluminum Utensils Products

Rank	Aluminum Utensils Import from World ($ in Million)	Aluminum Utensils Import from Pakistan ($ in Million)	Pakistan's Untapped Export Potential ($ in Million)	Tariffs Applied on Import from Pakistan (%)
USA	1,688.42	7.05	11.00	0.00
Japan	372.61	...	0.30	0.00
Germany	288.30	0.01	2.80	0.00
France	219.71	0.33	1.50	0.00
UK	193.94	4.27	2.90	0.00
Canada	189.28	0.84	0.53	5.00
Italy	177.94	0.08	1.80	0.00
Spain	170.50	0.12	2.50	0.00
Mexico	147.22	0.20	0.29	15.00
Netherlands	144.97	0.09	1.50	0.00

Source: ITC, Note: ITC Export Potential Map[9].

9. The data for export potential have been taken from ITC Export Potential Map; further detailed export potential methodology can be found at ITC website.

Chapter 5

Aluminum Utensils Sector In Pakistan

Aluminum Utensils Sector In Pakistan

5.1: Overview Of the Aluminum Utensils Sector in Pakistan

Currently, 90 percent of Pakistan's aluminum utensils industry is located in Gujranwala. Gujranwala is an industrially developed district in the province of Punjab. In addition to the aluminum utensils industry, Gujranwala division is also home to industries such as electrical home appliances, light engineering goods, kitchen utensils, plastic products, ceramic tiles and sanitary wares, tannery production, large agriculture processing plants, cutlery manufacturing etc. The entire domestic demand for aluminum utensils is met by the local industry.

Aluminum utensils manufacturing businesses in Gujranwala have been operating for generations that date back to the pre-partition era. Majority of the industry is categorized as Small and Medium Enterprises (SMEs) comprising of labor-intensive units with semi-mechanized manufacturing facilities. As per the major players in the industry, capacity utilization is just 40 percent which indicates untapped potential of this industry. In 2019, once again from data collected on the ground from industry players, the aluminum utensils industry employed around 18,000 workers, which increased to approximately 20,500 in 2022, reflecting a growth of about 14 percent. By 2024, labor absorption in the sector further increased to nearly 25,000 workers, indicating a continued expansion in employment generation.

5.2: Raw Materials Used & Labor

Raw materials used in the production of aluminum utensils include aluminum, coatings, glass lids, knobs, handles, tools for buffing and polishing, and packaging material. Aluminum Utensils industry imports 90-95 percent of its raw materials. Aluminum used in the production is imported in the form of secondary aluminum which comes with attachments of plastics and rubber as well as auto-parts scrap and foil.

Primary/pure aluminum, which comes in the form of ingots, is expensive due to which manufacturers prefer importing secondary aluminum which is then recycled through smelting and converted into ingots for industrial use.

Table 5.1 shows Pakistan's imports of aluminum scrap over the past 5 years.

Table 5.1: Pakistan's Import of Aluminum Scrap over the past 5 years (All values in USD Million)

Rank	Code	Item	2020	2021	2022	2023	2024
Secondary Aluminum	7602	Waste and scrap, of Aluminum	100.55	129.01	124.32	111.56	95.52
	7607	Aluminum foil	73.11	83.58	118.58	83.59	88.75
Primary Aluminum	7601	Unwrought Aluminum (incl. ingots)	38.87	65.95	109.63	40.58	39.33

Source: ITC

Other raw material such as knobs, glass lids, handles and tools for polishing can be procured locally but their quality is not up-to the mark which compels the manufacturers to import these as well.

5.2.1: Labor Availability

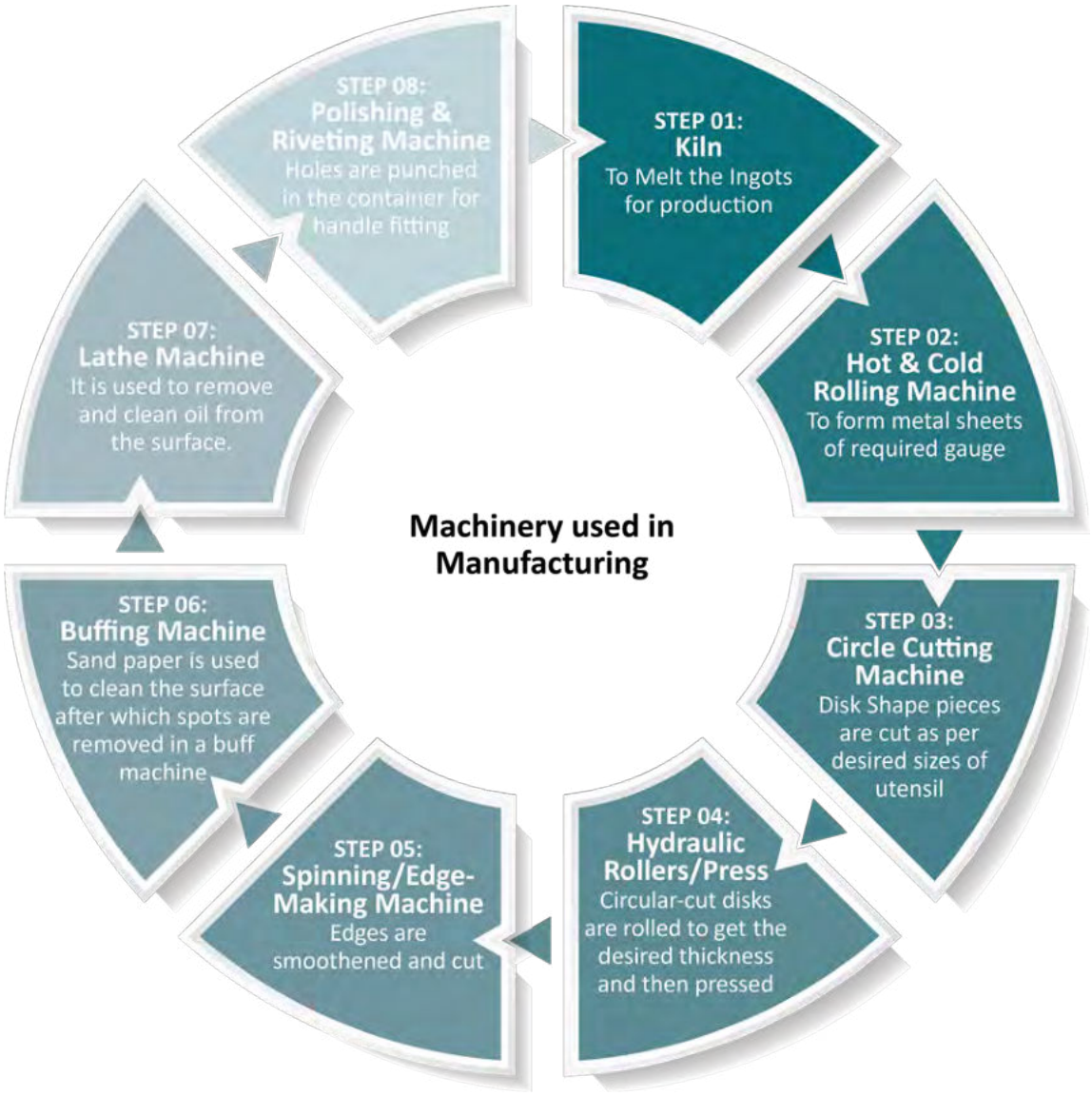
Manufacturing process does not require a high degree of skilled labor as most of the work is labor intensive and requires few learning techniques before being able to produce a utensil. Businesses in this industry are 100 percent family owned and the employees working have been associated with the industry for a very long time. These employees bring along with them their kins and train them under their supervision. This way, the labor availability is met.

Table 5.2: Small, Medium and Large-Scale Employee Estimates

Small Scale	15-30 Employees
Medium Scale	80 - 150 Employees
Large Scale	200-300 Employees

Manufacturing units that involve high-end machineries such as die-casting, require 2-3 skilled machine operators to produce 4,000-5,000 pieces per day working 8-hours a day. Hence, the labor requirement is not much in this sector of the industry.

5.3: Machinery used in Manufacturing



Traditionally, there are 7-8 machines involved in manufacturing an aluminum utensil. However, the machinery used varies from factory to factory depending on the scale of its production – small, medium or large.

Raw material is imported in the form of scrap which is sorted and impurities are removed after which it is converted into aluminum ingots. As per requirement of the utensil, aluminum ingots are melted in the Kiln after which hot and cold rolling machines are used to press it to form metal sheets of the required gauge. A circular cutting machine then cuts the sheets into different sizes of circles depending on the utensil to be made. Disk-shaped sheets are then further pressed and shaped into a utensil (e.g., pots, pans etc.,) using a hydraulic press. Moving forward, Edge-cutting or a Spinning machine is used to cut and smoothen the edges of the aluminum container after which sand paper is used to rub-clean the surface. If any mark/spot still remains, buffing is done using a buff machine. Finally, a lathe machine removes the oil and other impurities from the surface. With this, the pressed aluminum utensils are ready for use.

With die-cast aluminum utensils, manufacturing processes reduce to only 6-7 as compared to 15-16 processes in making traditional cookware. In die-casting, rolling and circling processes are eliminated. Aluminum ingots are inserted in a kiln which melts the ingots and with a single stroke the machine prepares a container. After the pot is shaped, one only needs to cut the edges, color-coat the inner and outer surface, bake the utensil, and finally package it for delivery. Elimination of processes reduces the production time and increases the production output considerably.

For anodized[10] aluminum utensil, anodizing is done to the utensils using chemicals such as Sulphuric acid and nitric acid after which it is washed in boiling water. After this, the inner and outer surfaces of the container are painted either manually or using an automatic spray plant. In the end, a riveting machine punches holes into the utensils and handles are fixed to the utensil.

Box 5.1: Press Aluminum Vs. Die-Cast Aluminum Utensil Manufacturing Difference

10. Anodized aluminum is a cookware which undergoes electro-chemical treatment during engineering process to boost the aluminum surface's natural oxide film making it harder than steel

Figure 5.2: Die-Cast Aluminum Utensils Manufacturing Process

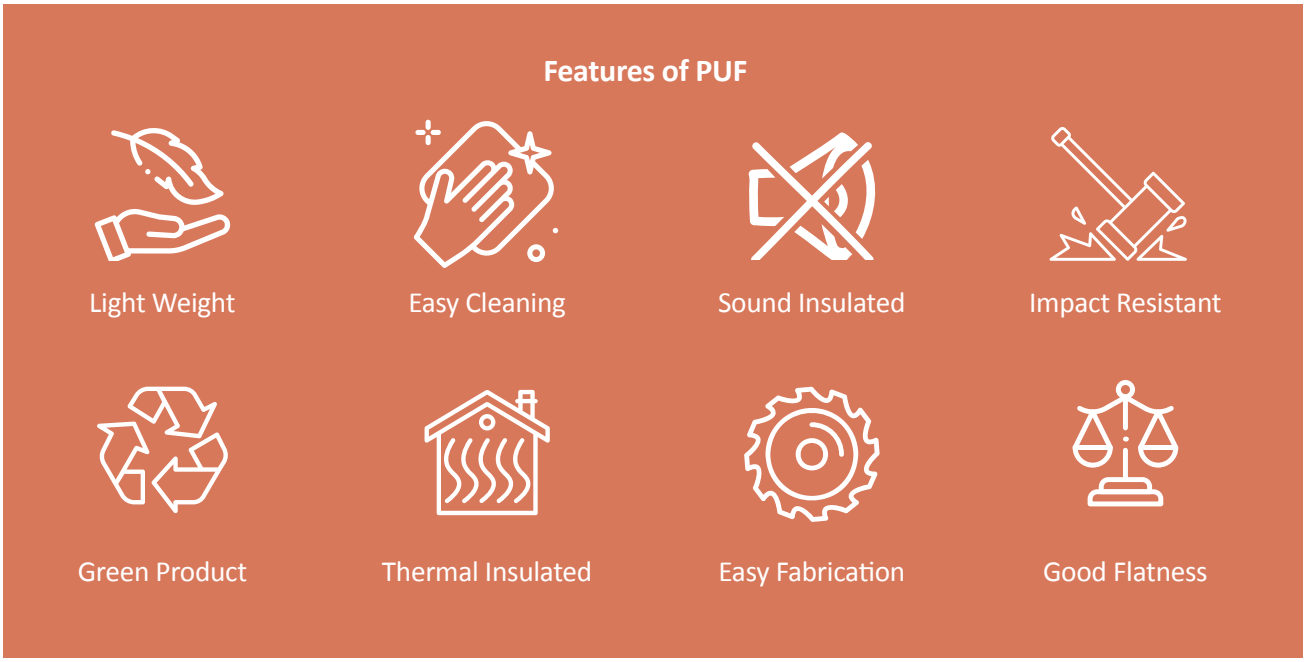
5.4: CBM Coating Vs. PUF Coating

Manufacturers in the aluminum utensils sector of Pakistan usually prefer two types of coatings – Covalent Bond Metallization (CBM) coating and Polyurethane PU (PUF) Foam coating.

5.4.1: Polyurethane PU (PUF) Foam coating:

PUF coating is a low density and light weight material that is used to keep the thermal insulation property of a utensil while cooking. PUF is laminated with different types of surface materials such as color coated aluminum, steel, fiber etc. Figure 5.3 shows benefits of using PUF coating in aluminum utensils manufacturing.

Figure 5.3: Features of PUF Coating



5.4.2: Covalent Bond Metallization (CBM) Coating:

CBM process method involves attaching metals like aluminum, copper, iron etc., to a variety of surfaces such as plastics. This process ensures mechanical adhesion of metal to non-metallic surfaces. In contrast to CBM coating, Chromic Acid (CrVI) technique for electroplating was used which faced several issues due to various EU regulatory requirements as this method exposes workers to carcinogens and mutagens. Figure 5.4 shows benefits of using CBM coating in aluminum utensils manufacturing[11].

Figure 5.4: Features of CBM Coating

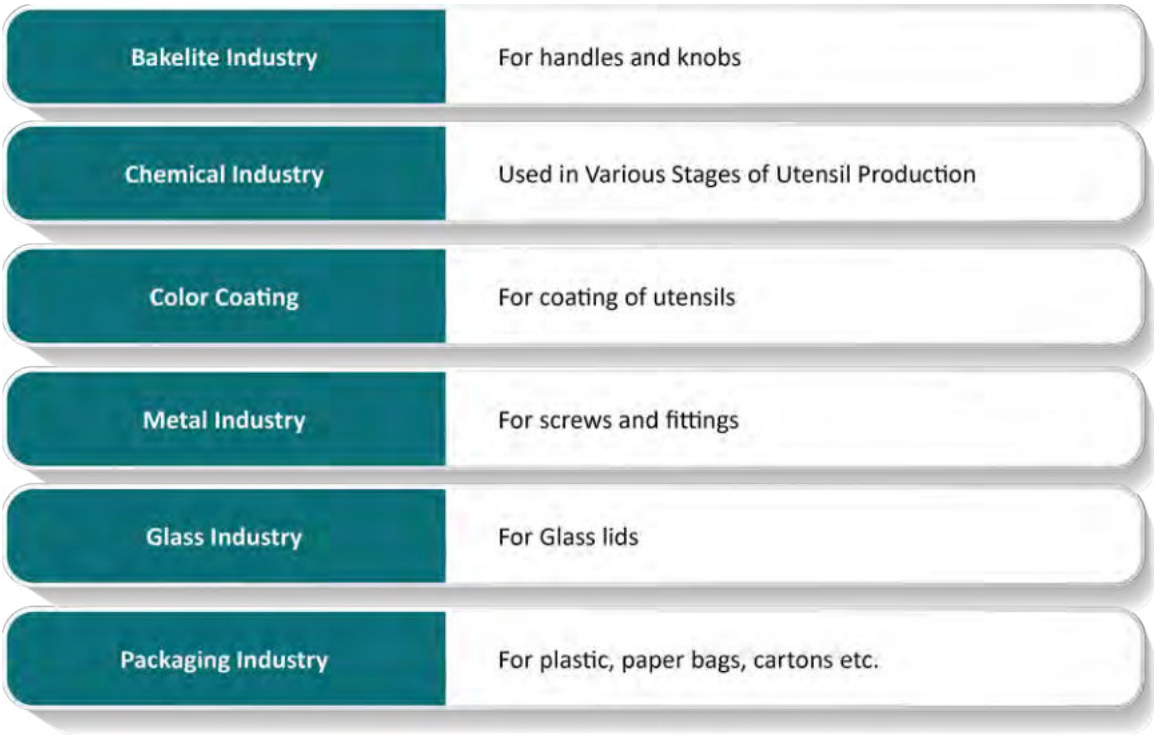
10. Information on the Cuptronic CBM Process

5.5: Other Associated Industries

Aluminum Utensil industry takes support from various other industries which include packaging services, Bakelite suppliers, handle makers, chemical suppliers, color coating services, metal services, glass suppliers, logistics companies12etc.

Figure 5.5 shows associated industries along with the facilities that they provide.

Figure 5.5 Other Associated Industries



5.6: Marketing and Sales Channels

Aluminum Utensils industry in Pakistan does not focus much on marketing as competition is less and demand is more than supply. Thus, manufacturers have been successful in selling their products without any long-term marketing strategies. However, there is an increase in the use of social media as a marketing platform as it is less costly than the traditional marketing methods (e.g., TVC, Billboards etc.).

Manufacturers are not directly involved in the retail side of the business. Distributors are involved who purchase aluminum utensils in bulk from the factories and sell them to the retailers who then sell to customers. Distributor's profit margin ranges between 10-20 percent. Retailers, on the other hand, have a much higher profit margin depending on their ability to charge his customers based on location, displays etc.

5.7: Certifications and Testing

Certain certification requirements such as ISO certification can be done easily in Pakistan. However, for some countries such as Saudi Arabia, one needs a different kind of certification to be able to export to these countries. Saudi Standards, Metrology and Quality Organization (SASO) has introduced Saber (or Saleem Saber) platform which is an electronic certification conformity assessment system which is mandatory for all imports into the country.

To export non-food items to Saudi Arabia, it is mandatory to register products on the Saber platform. Validity of these certificates is only for 1 year after which it has to be renewed. It is also expensive to acquire this certification. Furthermore, in order to get the certificate, products have to be sent to Dubai where testing is done and only after approval shipment can be sent to Saudi Arabia.

Box 5.6: Saudi Arabia Testing, Certification & Inspection

Saudi Arabia Testing, Inspection & Certification

What is Saber?

Saber is an electronic platform that helps the local supplier and factory to register the certificates of conformity required electronically for consumer products, whether imported or locally manufactured.

Platform was developed under supervision of Saudi standards, Metrology and Quality Organization, in cooperation with Thiqa Business Services Company. Entities associated include Saudi Ministry of Commerce, The General authority of Customs, Conformity Assessment Bodies and Saudi Standards, Metrology and Quality Organization.

Why was Saber Created?

- **To Speed up the Procedure**
- **To Upgrade Safe Products**
- **To Reduce Time**

What is the Procedure to Register?

To submit a product for importation, importer has to initiate a certification request by registering the product into Saber system after which SASO approved certification body has to be assigned to the product for conformity. Authorities, after inspection, will provide with the certificate to the importer (Certification of Conformity). Importer is then issued a shipment certificate, and is sent to Saudi customs before product can enter the market. Entire process is done online through Saber system.

Source: Saber - https://saber.sa/; International Trade Administration

Chapter 6

Industry's View on Pakistan's Aluminum Utensils Sector

Industry's View on Pakistan's Aluminum Utensils Sector

6.1: Interviews with Relevant Stakeholders

In this section, we examine the key structure of the aluminum utensils industry in Pakistan, along with its export strategies, opportunities, and challenges. To support this analysis, interviews were conducted with relevant industry stakeholders, including manufacturers, exporters, and sector experts.

Industry stakeholders highlighted concerns related to the rising cost of imported raw materials, informal procurement practices, labor availability, limited R&D, and reluctance to adopt financing and automation. Moreover, shifting global demand patterns, environmental concerns, and difficulties in export markets further add to the sector's constraints. The following section presents key insights from the industry, reflecting both the structural issues within the domestic market and the challenges faced in accessing international markets.

6.2: Industrial Structure and Production Capacity of the Aluminum Utensil Sector

In this section, we discuss the production structure and industry size of the aluminum utensil sector in Pakistan, focusing on its industry composition, employment generation, nature of production, technology use, and skill structure of the workforce. The analysis highlights how the sector contributes to labor absorption while also identifying structural and technological gaps that affect productivity, quality, and competitiveness.

6.2.1: Industry Size and Composition

The Aluminum utensil manufacturing sector in Gujranwala and across Pakistan comprises of an estimated 500–600 industrial units, spanning small, medium, and large-scale enterprises. Of these, approximately 200 units operate at a medium scale, while around 50 units are classified as large-scale manufacturers. The remaining units fall under the small-scale category, which forms the backbone of the industry.

6.2.2: Employment Generation and Labor Absorption

Based on interviews with aluminum utensil manufacturers, exporters, and industry representatives, the sector was found to be a major source of employment and labor absorption. Small-scale units typically employ 15–30 workers per unit, while medium- and large-scale units employ approximately 80–130 and 200–300 workers per unit, respectively. Overall, the aluminum utensil industry provides direct employment to nearly 25,000 workers, highlighting its labor-intensive nature and its important contribution to industrial employment.

6.2.3: Nature of Production and Technology Use

Production in this sector remains largely traditional and labor-intensive, relying on old machinery and conventional techniques. Limited technological upgradation has restricted productivity growth. Skilled workers continue to operate legacy equipment, with minimal exposure to modern manufacturing technologies such as induction-based production systems or automated presses.

6.2.4: Skill Structure and Workforce in Aluminum Utensils

The workforce is predominantly informally trained, relying on skills transferred through experience rather than formal technical education. However, skill renewal is weak, and younger workers are not entering the sector in sufficient numbers. As a result, skills are gradually disappearing, posing long-term sustainability risks for the industry.

6.2.5: Possible shortage of Labor in the Future

Labor supply in the industry is up-to the mark at the moment. However, it is believed that in future there could be a shortage of labor in this industry due to the tough working conditions. Young people prefer working in offices over working in a factory where temperatures get intolerable during summers due to the nature of work (burning of furnaces, machinery etc.). Despite being paid good monetary compensations (Rs. 70-100k in factory vs. Rs. 25-30k in office), people prefer working in offices as work is easier.

6.3 Aluminum and Raw Material Export and Import Strategies

In this section, we examine the strategies for promoting the export of raw materials, with particular emphasis on aluminum. The discussion covers the overall export of raw materials, the role of the Export Facilitation System (EFS) and related policy incentives in supporting exports, and the strategic importance of aluminum ingots as a core raw material in the sector.

6.3.1 Raw materials used in manufacturing is Imported & hence input costs have increased

Aluminum Utensils industry imports around 90-95 percent of its raw materials. These add to working capital requirements of the producers as it impacts timely availability of final product. Aluminum used in the manufacture of utensils is imported in secondary form instead of primary form as later is costlier than the former. Recycling of Aluminum in secondary form allows producers to compete with China in price.

6.3.2 Export of Raw Material

The export of aluminum ingots, which serve as the primary raw material for utensil manufacturing negatively impacts the industry. Aluminum scrap is imported, melted into ingots, and then exported—mainly to China, Afghanistan, Iran, and Dubai under the Export Facilitation Scheme (EFS).

Ingot exports require minimal labor (as few as 4 workers for 1,000 kg), whereas producing finished utensils from the same quantity requires around 150 workers, leading to substantial employment losses.

6.3.2 Export Facilitation System (EFS) and Policy Bias

The Export Facilitation Scheme (EFS) allows exporters to import raw materials duty-free and export them with minimal processing. However, this facility primarily benefits large investors exporting raw materials, while finished-goods manufacturers of aluminum utensils are excluded, creating an uneven playing field.

6.3.3 Role of Aluminum Ingots as a Core Raw Material

Aluminum ingots constitute the basic and most critical raw material for manufacturers in the aluminum utensil sector. However, instead of being directed toward value-added manufacturing, a significant share of ingots is handled by investors who import aluminum scrap, subject it to only a basic melting process to convert it into ingots, and then export these ingots directly. This process involves minimal value addition and limited industrial activity, yet benefit's from existing export facilitation incentives. As

a result, the policy framework unintentionally encourages low-processing exports of ingots rather than promoting their use in downstream manufacturing such as aluminum utensils, where employment generation, skill development, and value addition are substantially higher.

6.4

Opportunities in the Aluminum Utensil Sector

6.4: Opportunities in the Aluminum Utensil Sector

Based on industry discussions, the aluminum utensil sector in Pakistan presents several important opportunities, primarily driven by existing production capacity, export presence, and unmet international demand for specialized aluminum utensil products.

6.4.1: Strong Employment and Industrial Base

The sector already has a well-established industrial base, comprising approximately 500–600 small, medium, and large-scale units across Gujranwala and Pakistan. These units collectively employ around 25,000 workers, indicating that the sector has the capacity to absorb labor and expand further if supported.

6.4.2: Existing Export Capability and Market Presence

The aluminum utensil industry is already engaged in exports, particularly of aluminum cookware, anodized products, and metal-finished utensils. Pakistani aluminum utensils are currently exported to Afghanistan, Belgium, France, and other European markets, demonstrating established market access and buyer confidence. This existing export linkage provides an opportunity to expand volumes and product varieties within the same markets. Pakistan needs to enter into bilateral and regional trade agreements with Bangladesh, Sri Lanka, and selected Central Asian countries, where there is substantial and growing demand for aluminum utensil products, in order to diversify export markets and reduce reliance on a limited number of destinations.

6.4.3: High Demand for Specialized Aluminum Utensil Products

The discussion highlights that several aluminum products are currently in strong international demand and are either under-manufactured or produced at a limited scale in Pakistan. With appropriate government support and export facilitation, these products have significant potential to access international markets. The key products identified fall into the following categories: non-stick, anodized products, metal-finished products, and pressure cookers.

6.4.3.1: Non-Stick Aluminum Products

Non-stick aluminum products are coated with a non-stick layer (such as PTFE or ceramic) applied to the aluminum surface, which prevents food from sticking, enabling cooking with less oil, and it also makes cleaning easier. These products enjoy strong demand in the local market, particularly among urban and middle-income households, due to their convenience and ease of use. At the same time, they offer significant export opportunities, with growing international demand in markets such as Afghanistan, the UK, and other regional and overseas destinations

Casserole

Wok

Frying Pan

Milk Pan

Frying Pan

Sauce Pan

Hot Plate

Tawa

6.4.3.2: Anodized Aluminum Products

Anodized products undergo an electrochemical process that thickens the natural oxide layer on the aluminum surface.

Anodized aluminum products present strong export opportunities, particularly in European and other high-income markets, where consumers and commercial buyers place a high premium on durability, food safety, corrosion resistance, and compliance with international quality standards. Due to the anodizing process, these products are non-reactive with food, long-lasting, and suitable for both household and commercial use, making them especially attractive in developed markets.

The discussion indicates that anodized aluminum cookware and utensils are currently under-manufactured or produced at a limited scale in Pakistan, despite strong international demand. With appropriate government support, export facilitation, and access to modern production technology, Pakistan has the potential to expand exports of anodized products, including Silvano, Round Karahi, Sipri Set, frying pans, sauce pans, cooking pots, Tawa and hotel-grade cookware.

Silvano

Round Karahi

Sipri Set

Frying Pan

Sauce Pan

Hot Plate

6.4.3.3: Metal Finish Aluminum Products

Metal-finish products are mechanically polished or buffed to give a smooth and shiny appearance without a chemical coating process.

Metal-finish aluminum products present notable export opportunities in price-sensitive markets, particularly in developing and emerging economies where affordability is a key consideration. Although these products offer lower value addition than anodized items, they remain in strong demand for conventional household use. Expanding exports to Sri Lanka, Bangladesh, and Central Asian countries, supported by strengthened trade relations and bilateral agreements, could help Pakistan diversify export markets, increase volumes, and reduce reliance on limited destinations. Metal Finish products, including Magno, steamer, tawa, frying pans, sauce pans, milk pan and hotel-grade cookware.

Magno

Steamer

Tawa

Milk Pan

Sauce Pan

Frying Pan

6.4.3.4: Pressure Cookers

Pressure cookers have broad market demand across different income groups and regions. In the local market, demand is strong in Pakistan, where pressure cookers are widely used for everyday household cooking. In developing markets, countries such as Afghanistan, Bangladesh, Sri Lanka, and Nepal show high demand due to affordability and fuel efficiency. Emerging markets including Kazakhstan, Uzbekistan, Azerbaijan, and other Central Asian countries are experiencing growing demand driven by urbanization and changing cooking habits. In developed markets, pressure cookers are in demand in countries such as the United Kingdom, Germany, Italy, and France. The main categories of pressure cookers include: Bakelite Handle, Ultra, Wooden Handle, and Wok-type pressure cookers.

Bakelite Handle

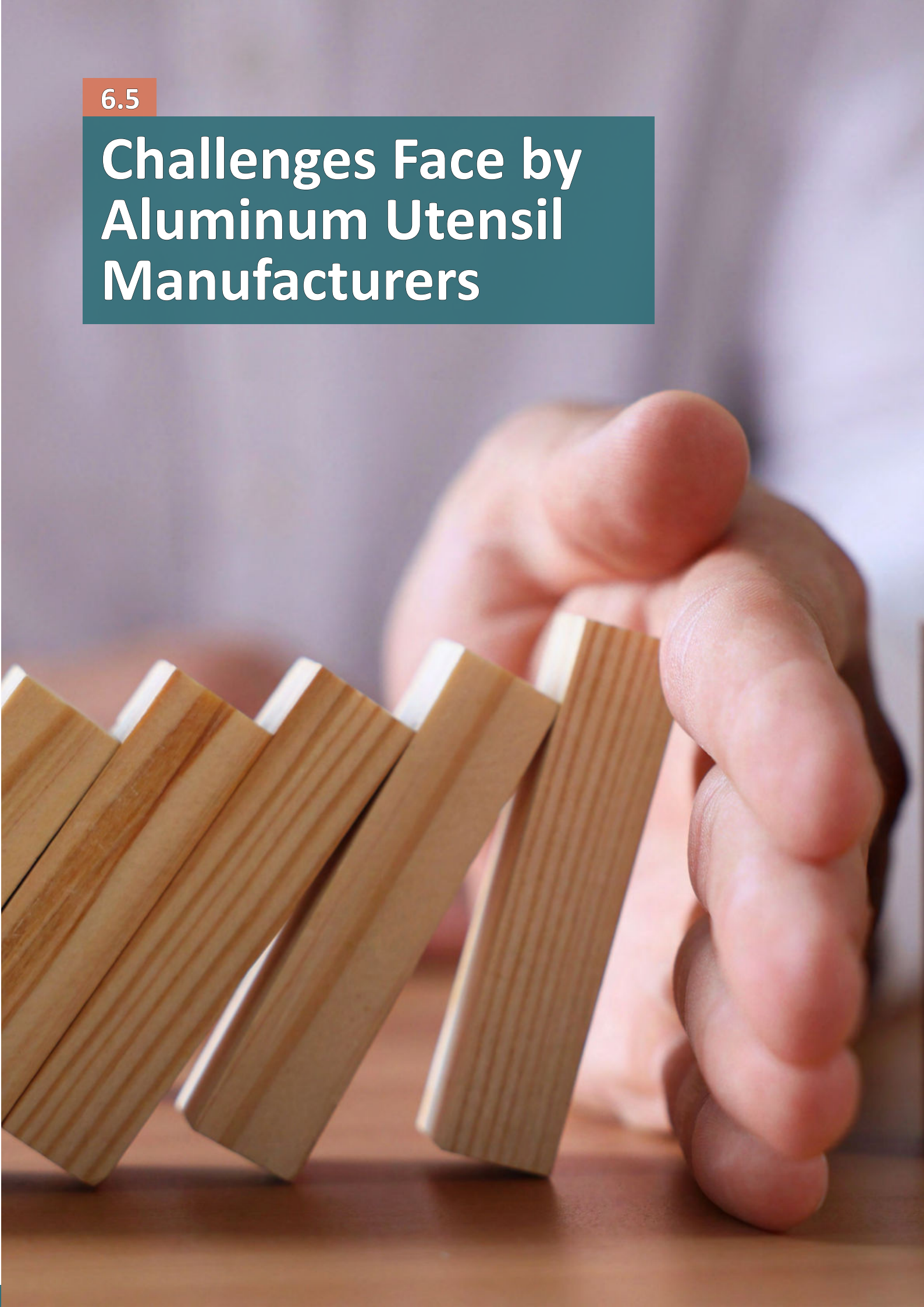
Ultra

Wooden Handle

Wok

6.5

Challenges Face by Aluminum Utensil Manufacturers



6.5: Challenges Face by Aluminum Utensil Manufacturers

Limited Access to Technology and Finance:

Most firms face lack of access to affordable financing for machinery and automation. As a result, the industry remains labor-intensive, with higher rejection rates, quality inconsistencies, and lower productivity.

Severe Skilled Labor Shortage

The sector faces an acute and growing shortage of skilled labor. Existing workers rely largely on outdated machinery and traditional production methods, while no new workforce is being trained to replace them. As a result, skills are gradually disappearing, and younger workers are unwilling to enter the sector due to the physically demanding and unattractive nature of the work.

Not much attention is being given to Research & Development

Research and Development is considered very important in engineering-based industries to modify an existing product or to come up with new products which meet the needs of consumers and the changing environment. However, not much attention is given to research and development which leads to a lack of innovation. Manufacturers prefer investing their resources on issues such as electricity, labor retention, taxes etc., rather than on research and development. Only 5-6 percent of manufacturers invest in innovation and on learning more about world demand. The remaining industry copies the innovation made by these large firms.

Manufacturers are reluctant to avail financing facilities from banks

Manufacturers face financial constraints and are hesitant to use bank financing due to religious considerations and lack of collateral. While alternative interest-free or profit sharing funding is often used, banking support remains limited. Programs like the SBP's Temporary Economic Refinance Facility (TERF) were available but benefited only a few units in the Gujranwala aluminum cluster.

Weak Institutional Support and Service Delivery

Despite mandatory contributions to social security and welfare schemes, stakeholders reported inadequate healthcare and social services for workers. This weak institutional support reduces trust between industry and government and increases the cost burden on employers.

Harassment and Arbitrary Actions by Government Institutions

One of the most serious challenges highlighted is the persistent harassment of industrialists by tax and regulatory authorities, particularly the Federal Board of Revenue (FBR) and other inspection bodies. Firms frequently receive exaggerated tax notices without proper calculation or justification, creating fear, humiliation, and uncertainty. Even when cases are resolved in favor of the industry, no accountability exists for officials who issued wrong notices, leading to erosion of trust and discouraging long-term investment.

Delays in Refunds

Previously, exporters benefited from the FASTER refund system, which ensured timely sales tax refunds within 25–30 days. The termination of this system has resulted in refund delays exceeding two years, severely constraining liquidity for manufacturers.

Banking Delays and Inefficient Export Documentation Clearance

During export transactions, exporters of aluminum products frequently face delays in banking processes, as financial institutions take a prolonged time to process payments, verify documents, and complete foreign exchange settlements. These procedural delays disrupt cash flows, increase transaction costs,

and create uncertainty for exporters. As a result, manufacturers of aluminum utensils are adversely affected, as delayed payments constrain working capital, hinder timely procurement of raw materials, and slow down production cycles. Such inefficiencies in the banking and transaction system ultimately weaken the competitiveness of Pakistan's aluminum industry in international markets.

Port Congestion and Security Risks Due to Export Clearance Delays

Delays in the clearance of export documentation by regulatory authorities often result in export containers remaining stranded outside port premises for extended periods. Such delays increase security risks, as containers parked on roads or outside port boundaries are vulnerable to theft, tampering, and damage. In addition, prolonged detention of containers leads to higher logistics and demurrage costs, increasing the overall cost of exports and reducing the competitiveness of manufacturers. These inefficiencies not only disrupt supply chains but also undermine exporters' ability to meet delivery schedules and maintain trust with international buyers.

Policy Bias Toward Raw Material Exporters (EFS)

The Export Facilitation Scheme (EFS) disproportionately benefits investors exporting aluminum ingots with minimal processing and labor involvement. In contrast, manufacturers of finished aluminum utensils who generate far greater employment are excluded from EFS, resulting in raw material shortages, higher costs, and reduced competitiveness.

High Energy Costs and Unreliable Supply

The sector suffers from limited access to gas connections and rising energy costs, forcing many manufacturers to rely on alternate fuel sources. Frequent power outages, even in designated industrial areas, disrupts production and increases operational uncertainty.

Extensive Aluminum Scrap Burning is not Environment-friendly

The burning of aluminum scrap to convert it into ingots has deteriorated the air quality index in Gujranwala. A few firms have installed small plants of purifiers but this needs to be done on a larger scale. However, if SMEs start investing in the Standard Operating Procedures (SOPs) to minimize environment pollution, it is feared that costs will become uncompetitive.

Chapter 7

Policy Recommendations

Policy Recommendations

Enhancing Product Variety and Innovation

Modification is required in the existing products to meet the global requirements such as introducing advanced varieties of pressure cookers. Moreover, global trends have been shifting towards anodized and die-cast aluminum utensils as people have become more health conscious and prefer products that are not hazardous in the long-run.

Encouraging Technological Upgradation in Family-Owned Business

Manufacturers who are currently operating in the industry are majorly family-owned businesses. Labor practices and the types of machines that are employed have not changed in generations. The need is for improvements especially through automation. Older machinery needs to be replaced with newer environmentally friendlier machines which also reduces the consumption of power.

Promoting an Export-Focused Growth Approach

Currently, manufacturers are meeting demand of the domestic market. Only 15 to 20 percent of what is produced is being exported after meeting the local needs. Innovation should be brought as per the international demand with a focus on increasing the export share.

Export of recycled Aluminum Ingots should be limited

Majority manufacturers are facing issues with the availability of recycled aluminum ingots as these are being exported instead of being sold to the local manufacturers. A limit should be imposed on exporting aluminum ingots in the primary form to facilitate local industry. In addition to that, aluminum imports with the intention of re-export should be allowed.

Government should subsidize air purifying plants for SMEs

Owing to the high cost of installing purifying plants, government should partially subsidize the air purifying plants near aluminum-burning furnaces. Government may partner with the private sector under a Public Private Partnership (PPP) mode and initiate a program for funding environment sustainability measures.

Establish a Bonded Warehouse to facilitate Exporters

Bonded warehouses should be established to store raw materials used in aluminum utensils industry and other associated industries to facilitate exports of finished products. Bonded warehouses defer customs duties & other taxes till the goods are moved out of the warehouse for processing .

Upgradation of Technology & Machinery in the Common Facility Center (CFC)

Common Facility Centers (CFCs) like Gujranwala Tools, Dies & Moulds Centre (GTDMC), Gujranwala Business Centre (GBC) etc., should upgrade their technology and machinery for the betterment of the industries in the Gujranwala cluster. Although GTDMC provides services like designing, machining, manufacturing, training and consultancy etc., that may be useful for some industries such as cutlery

and sanitary fittings, the moulds, dies and tools available are not up-to par for aluminum utensils industry as it undermines quality of the final product.

Circle-cutting facility should be established in the CFCs for aluminum utensils manufacturers ensuring standardization in the product variety. These machines can either be bought from China or made locally and must be equipped with high-pressure gas technology.

Initiate Industry Development Programs under Public-Private Partnership between EDB, SMEDA & APAUMA

Small & Medium Enterprises Development Authority (SMEDA), the Engineering Development Board (EDB) and the All-Pakistan Aluminum Utensils Manufacturers Association (APAUMA) should initiate development projects together to enhance productivity and reliability of the aluminum utensils products. Previously, projects such as Gujranwala Business Center (GBC) have been initiated jointly with SMEDA to help manufacturers identify export markets and providing small enterprises with space to conduct business meetings in a viable environment. The role of the EDB is crucial in technology and process re-engineering.

End Harassment and Ensure Predictable & Fair Tax Administration:

The government should immediately curb arbitrary actions by tax and regulatory authorities, particularly the FBR and allied institutions. Tax notices must be issued only after proper calculation and verification, and officials should be held accountable for unjustified or exaggerated claims. A transparent, rule-based tax administration—free from intimidation, humiliation, and rent-seeking would restore industrialists' confidence, reduce capital flight, and encourage reinvestment within Pakistan.

Restore Export Incentives and Support Industry Upgrading:

The government should remove the advance withholding tax on exports and reinstate a lower, final tax regime for export earnings instead of applying the same high tax rate as applicable on domestic sales. Alongside tax relief, targeted support such as interest-free or subsidized loans should be provided for machinery upgradation, technology adoption, and skill development specific to the aluminum utensil industry. These measures are essential for improving quality, scaling production, and enhancing export competitiveness.

Streamlining Banking and Export Documentation Procedures

To enhance export efficiency and reduce unnecessary costs for manufacturers, the government should streamline banking and export documentation procedures by introducing time-bound approval mechanisms at commercial banks and the State Bank. Export-related documents should be cleared within a clearly defined timeframe through digital and automated systems, reducing reliance on manual approvals from head offices. Strengthening coordination between banks, the State Bank, and port authorities will help ensure faster clearance of shipments, lower transaction costs, and improve the overall competitiveness of exporters in international markets.

Skilled Labor Shortage

To address the severe shortage of skilled labor in the aluminum utensil sector, the Engineering Development Board should help establish sector-specific technical and vocational training programs in

collaboration with industry associations, particularly in major manufacturing hubs such as Gujranwala. These programs should focus on modern production techniques, machinery operation, safety standards, and productivity improvement, rather than generic industrial skills.

Energy Cost Pressures and Supply Instability

The government needs to prioritize the provision of stable, uninterrupted, and cost-effective energy supply to the aluminum utensil sector, particularly within designated industrial zones and established manufacturing clusters. Dedicated industrial feeders and timely upgrades to electricity and gas infrastructure are critical to minimizing production disruptions and operational uncertainty.

State Bank of Pakistan to Facilitate 3rd Party Payments

A Third-party payment system should be established by the State Bank of Pakistan (SBP) to facilitate payments coming for exports made to the markets which are grey/black listed by FATF or lack banking/ payment channels to pay for their imports. Many exporters have been facing issues especially when exporting their products to African countries due to FATF regulations hence they use Dubai channel when making payments for their purchases. In addition to that, manufacturers should also be allowed to make limited cash-dollar deposits when trading with such countries.

Access to International Exhibitions should be facilitated by TDAP

The Trade Development Authority of Pakistan (TDAP) should simplify and facilitate the participation of aluminum utensil manufacturers in international exhibitions by offering clear guidance on visa requirements across different countries, providing detailed information on pavilion and stall costs by product category, and arranging business-to-business meetings with relevant international buyers to promote trade expansion.

Single Country Exhibition Model can boost exports of the Aluminum Utensils industry

In addition to TDAP-organized exhibitions, the single-country exhibition model should also be followed where annual exhibitions can be held in countries where there is potential to increase exports. This should only be open for aluminum utensils manufacturers where they can showcase their products and interact with importers. This can boost their business and bring increase in the exports.

Vocational Training should be provided by creating linkage with the Light Engineering Upgradation Sector

Supply of technical labor in the aluminum utensil industry is less due to which business operations are hindered. Vocational training with support from the EDB should be provided to the labor and allocated to different factories as per the requirement.

Funding is required for advanced machinery in aluminum utensils CFCs

Due to limited financial capacity, exporters in the aluminum utensils sector are unable to invest in high-tech machinery required to enhance product quality and expand production capacity. Therefore, the government should consider extending financial support to the sector through the funds available with the Export Development Fund (EDF) by upgrading Common Facility Centers (CFCs), which would generate shared benefits across the industry. In addition, the Small and Medium Enterprises

Development Authority (SMEDA) could support this initiative by introducing easy-access and quick-loan financing schemes tailored specifically for exporters.

Institutional Financing Support for Small and Medium Enterprises

To strengthen institutional financing for small and medium enterprises, the government should establish an SME Development Fund (SDF), modeled on the defunct Export Development Fund (EDF), with a particular focus on firms operating in the engineering sector. The proposed fund may be financed through the balances available with the EDF, while Industry Associations should be responsible for managing Common Facility Centers in a financially sustainable manner. Furthermore, the SDF could be implemented under a public–private partnership framework to enhance efficiency, accountability, and long-term viability.

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Table: List of Interviews Conducted by Pakistan Business Council Team in Gujranwala.

Firm Name	Contact Person	Address	Cell No
Abdul Latif Group Ind	Liaqat Ali	S.I.E No-II, GRW	0322-8740000
AK International	Asim Ishfaq	Plot 109-III Small Industrial Estate 3, GRW	0321-8642830
Al Karam Enterprises	M. Siddiq Bhatti	Room 15 T Block Trust Plaza GT Road, GRW	0300-8740375
Al Qaim Industry	Naeem Akhtar	Link Mian Sansi Sheikhupura Road, GRW	0300-8685954
Bright Metal Industry	Abid Javaid Butt	Sheikhupura Road Near Allied Bank, GRW	0323-7444444
Casio Metal Industries	Sarfaraz Ahmad	Sheikhupura Road, GRW	0300-6408047
Cherry Pot Cookware	Salman Khalid	Main Sheikhupura Road, Gujranwala.	0321-6443250
Civil Metal Works	M. Sayam	Kacha Sheikhupura Road	0333-4295354
Euro Metal Works	Muzafar Khan	32-A S.I.E No-2, GRW	0321-8445232
Fine Nonstick	Aamir Nadeem	6-Khurshid Alam Estate, Sheikhupura Road Gujranwala.	0321-9646300
Ghani Cookware	Abbas Ghani	76-B Small Industry No.11, GRW	0300-6472200
Sonex Cookware	Ali Raza Butt	60-61/A Small Industrial Estate #2 Khiali Shahpur	0321-7062222
Kiran Metal Works	Sheikh Abdul Rauf	Link Sheikhupura Road, Mian Sansi Road, GRW	0300-8647874
Madina Metal Works	Arif Saleem	5-A Small Industry No-II, GRW	0321-8100532
Nova Cooking Ware	Khalid Ahmed Sheikh	Malik Rafique Street Shekhupura Road, Gujranwala.	0321-7439365
Royal Kitchen	Usman Riaz	AK International 109-111,S.I.E.# 111 G.T. Road, Gujranwala	0321-8647455
Saba Kitchen Ware	M. Saleem	Kacha Khiali Road, GRW	0321-6407405
Seven Star Cookware	Awais Iqbal	Main Sansi Road Wala Gala, Bazaar No.2, Gujranwala.	0300-6445245
Sonex Alloy Casting (Pvt) Ltd	Ikhlaq Ahmad Butt	Plot No.208 S.I.E No-III EPZ Attawa, GRW	0300-8646535
Taj Cook Ware	Umer Shayan	Near Punjab College GT Road Gujranwala Wazirabad	0321-8400000
Teflon Metal Intern	Qadir Ahmad	14-A Small Ind S.I.E No-II, GRW	0301-8641163
Teflon Metal Ware Ind	M. Zaheer	Sialkot Road, GRW	0300-8641163
Unique Industry	Nadeem Abbas	Erusia Fan Gala Karsaz Metal Sheikhupura Road, GRW	0321-6446930
Yonex Cook Ware	Usman Yousaf	Gala Malik Rafique Sheikhupura Road, GRW	0300-6471388

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