Prime Minister's Secretariat (Public)
Board of Investment

WHY INVEST IN IN IRON, STEEL & COPPER SECTION OF PAKISTAN?

SECTOR POTENTIAL

- **Copper Reserves:** 4.5B tons (Reko Diq, Saindak)
- **Iron Ore Reserves (Total):** 1,400–1,600M tons (30–65% Fe)
- **Coal Reserves:** 186B tons
- **Steel Market Size:** USD 6.2B
- **Copper & Aluminum Exports (2024):** USD 996M
- **Steel Imports (Annual):** USD 3–4B
- **Import Substitution Potential** (Copper/ Aluminum)**:** USD 548M
- **Steel Consumption (2030 forecast):** 8M MT
- **Per Capita Steel Consumption:** 45 KG (World Avg: ~220 kg)

DOMESTIC DEMAND DRIVERS

- Population: **240M**
- Youth Share: **65% UNDER 30**
- Urban Households: **42M+**
- Sectors Fueling Demand: **CONSTRUCTION, POWER, AUTOMOTIVE, CPEC**

GEOGRAPHIC ADVANTAGE

Strategic Trade Location: Links South, West & Central Asia

Seaports: Karachi, Port Qasim, Gwadar

Export Transit Times (40ft Container)

- **China** 15–22 days | $950–1,200
- **US** 35–40 days | $4,500–7,000
- **Europe** 30–35 days | $4,000–5,000
- **Africa** 30–55 days | $4,500–8,000

KEY INDUSTRY PLAYERS

Pakistan Steel Mills	Mughal Steel	Agha Steel
FF Steel	Sheikhoo Steel	MCC China (Saindak Copper Project)

FLAGSHIP PROJECTS (OPEN FOR INVESTMENT)

DRI–HRC Steel Plant (Port Qasim / Gwadar)	Gujrat Copper Smelting Zone
Alloy Steel Unit with Chinese Tech (Punjab / KP)	Karachi Non-Ferrous Export Hub (Foils, Containers)
Re-rolling Mill Cluster (KP or Punjab)	Mardan SME Foundry Hub (Light Metals)

POLICY INCENTIVES

- Duty-Free Plant & Equipment (Greenfield)
- 10-Year Tax Holiday (SEZ-based units)
- 100% Foreign Equity & Repatriation
- Tariff Differential for Import Substitution
- One-Window Operations: BOI, MoIP, SIFC

INVESTMENT OPPORTUNITIES

- Electric Arc Furnace (EAF) Steelmaking, DRI-HRC
- Copper Smelting & Refining
- Rolling, Casting & Conductor Manufacturing
- EPC Joint Ventures for Mining-to-Metals Industrial Parks
- Secondary Smelting, Alloying & Wire Production
- Recycling & Circular Economy Value Chains

Targeted Export Growth (Iron, Steel, Copper) **USD 5–10B over 5–10 Years**