

BALUCHISTAN INVESTMENT **GUIDE**

VERSION 3.0



A PITCHBOOK FOR THE INVESTMENT OPPORTUNITIES IN BALUCHISTAN

Pakistan's Largest Province

Province

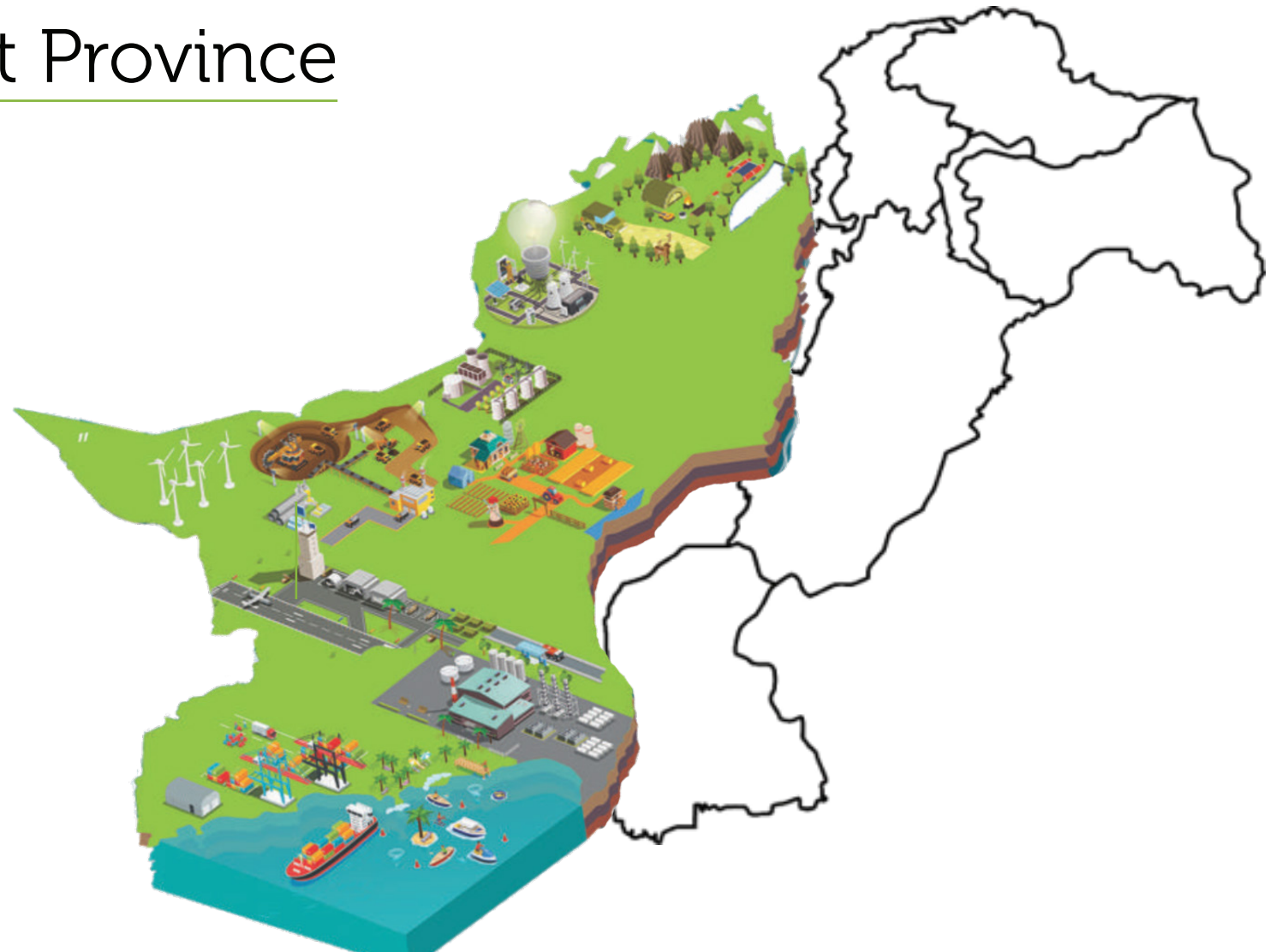


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Geo Strategic Location,
Minerals Rich,
Agriculture & Balochistan,
Attractive investment
package



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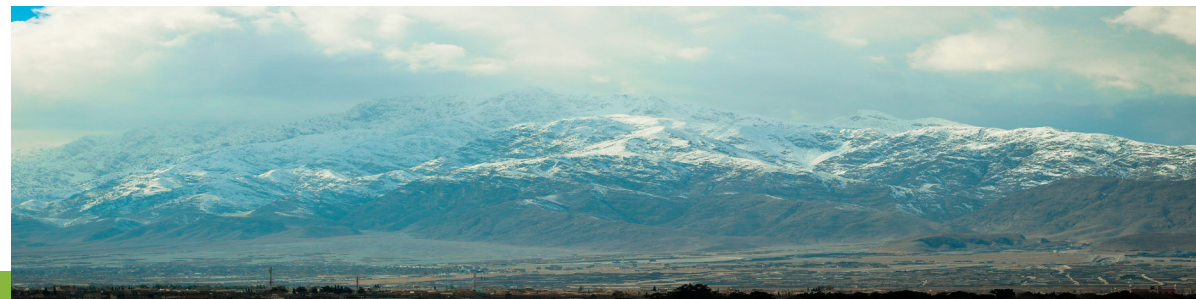
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BALOCHISTAN FACILITA-
TION CENTER (BFC) ONE
STOP SUPPORT

Message from Chief Minister

Mr Sarfaraz Bugti

Balochistan is truly a land of immense potential — its vast natural landscapes, mineral riches, and geo-strategic location make it one of the most promising regions for investment in Pakistan. As the largest province by area, Balochistan is blessed with an abundance of untapped resources and offers diverse opportunities across key sectors such as mining and minerals, renewable energy, coastal development, fisheries, livestock, agriculture, food processing, and tourism. Each of these sectors presents a unique opportunity for investors to contribute to sustainable development while securing long-term economic returns.

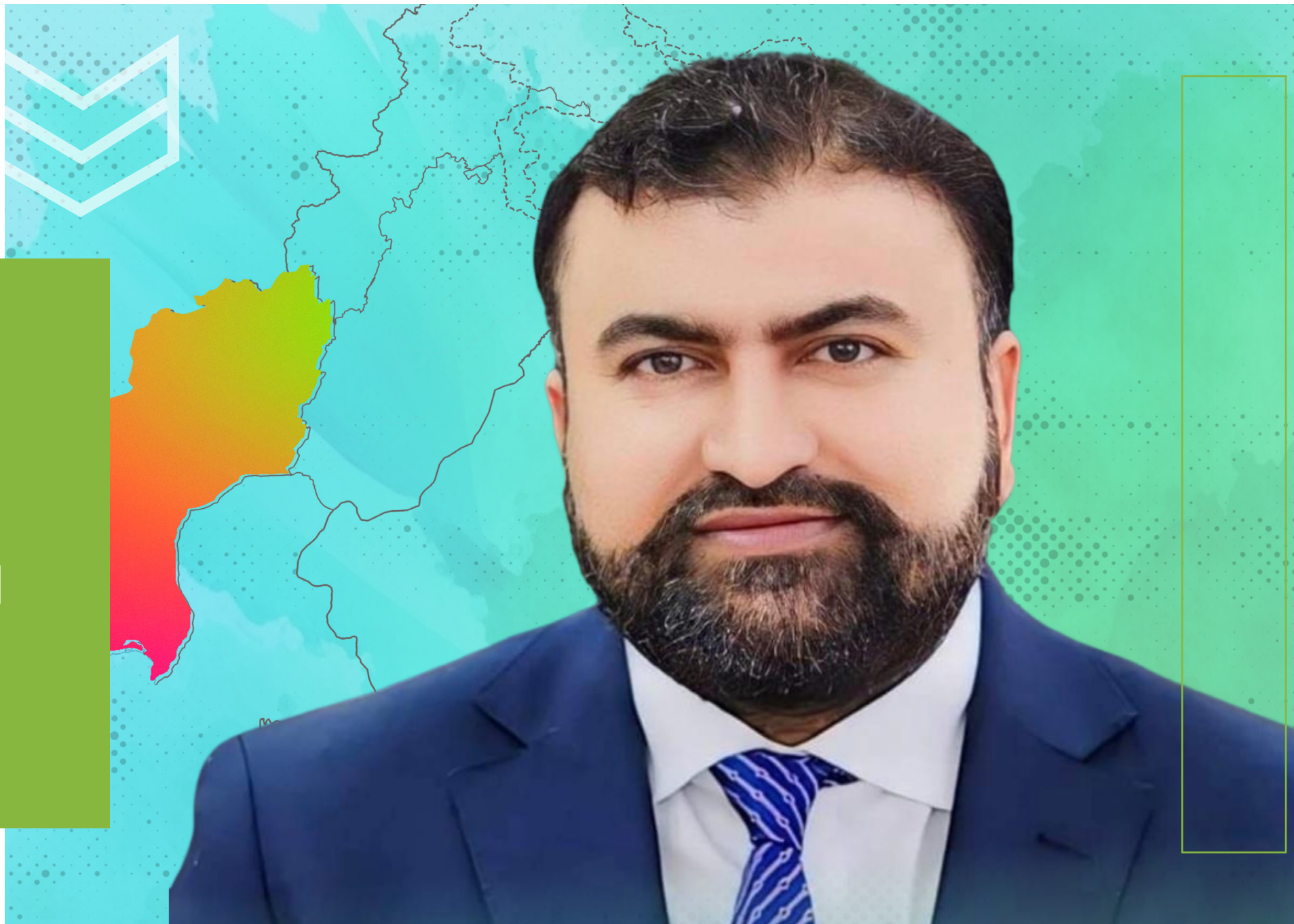
Strategically located at the crossroads of South, Central, and West Asia, Balochistan shares borders with Iran and Afghanistan, and hosts Gwadar—Pakistan's flagship deep-sea port and a cornerstone of the China-Pakistan Economic Corridor (CPEC). Gwadar connects Pakistan to global trade networks through the Belt and Road Initiative and serves as a gateway to the energy-rich and landlocked Central Asian markets. With its extensive coastline and natural transit corridors, Balochistan holds immense promise for becoming a logistics and trade hub of regional significance.

The Government of Balochistan is fully committed to transforming the province into a dynamic and competitive investment destination. We are introducing investor-friendly policies, improving infrastructure, and streamlining regulatory processes to ensure that businesses can thrive. We warmly invite all local and foreign investors to explore the wealth of opportunities this region offers and to join us in shaping a new era of inclusive growth and economic transformation.

“

**Together, we can
unlock Balochistan's
immense promise and
build a future of shared
prosperity and regional
connectivity.**

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Messages

Board of Investment & Trade



Balochistan stands as one of the last great frontiers for investment - a province endowed with abundant natural resources, strategic geographic positioning, and a diverse portfolio of high-potential sectors. Acknowledging this immense potential, the Government of Balochistan has introduced a comprehensive and forward-looking investment framework that offers a wide range of fiscal and regulatory incentives to encourage both domestic and international investment. These include long-term tax exemptions, customs duty relief, and the provision for 100% foreign ownership—particularly in Gwadar, Pakistan's premier Free Trade Zone, as well as in designated Industrial Zones and Special Economic Zones (SEZs) across the province.

However, beyond fiscal benefits, our commitment extends to systemic reforms aimed at improving the ease of doing business. Institutional mechanisms such as the Ease of Doing Business Cell have been established to integrate and coordinate all relevant government departments, ensuring seamless investor facilitation, prompt resolution of grievances, and the continuous implementation of regulatory reforms. These efforts reflect our broader vision of aligning Balochistan's investment environment with global standards of transparency, efficiency, and predictability.

Our objective is clear: to position Balochistan as a globally competitive and investor-friendly province, capable of driving inclusive economic growth and regional connectivity. We are confident that Balochistan's future holds transformative opportunities—not just for the province, but for all investors who recognize its untapped promise.

We extend a sincere invitation to you to partner with us in this journey of progress and prosperity.



Balochistan is on the brink of transformative economic change. With its strategic coastal access, vast mineral wealth, and proximity to regional markets, the province is uniquely positioned to become a major investment destination.

Our dedicated team works to improve the investment climate by simplifying procedures, aligning stakeholders, and providing hands-on facilitation from project initiation to execution. Whether you're exploring opportunities in mining, renewable energy, logistics, fisheries, or industrial development, BBOIT offers tailored support to help investors navigate the regulatory landscape and unlock local advantages.

We are also digitizing and automating investment procedures to ensure transparency, predictability, and speed in service delivery. With policy advocacy, risk mitigation support, and a proactive investor outreach program, we aim to build a credible platform that fosters investor trust.

Through this pitch book, we extend an open invitation to all visionary investors to be part of Balochistan's growth story. Let's build a legacy of prosperity together.

Messages

Board of Investment & Trade



Bilal Khan Kakar
Vice Chairman, BBOIT

Balochistan's sustainable economic development requires transformative investments that create jobs, reduce poverty, and uplift communities. In this vision, the Balochistan Board of Investment & Trade (BBolT) plays a vital role by identifying, promoting, and facilitating high-potential investment opportunities.

The Government of Balochistan is committed to fostering a business-friendly environment. Comprehensive policies have been introduced that provide fiscal incentives, ensure regulatory transparency, and promote public-private partnerships. We encourage investment in value-added and export-oriented ventures, particularly those that bring innovation, generate employment, and leverage the province's unique geo-economic position.

As Vice Chairman of BBolT, I assure prospective investors of our full support. Our institution serves as a one-window facilitator—bridging gaps, building confidence, and ensuring a smooth journey for every investor in Balochistan. Let us collaborate to shape a future of shared growth and opportunity.

“

**Together, we can unlock Balochistan's
immense promise and build a future of
shared prosperity and regional connectivity**

EDITORIAL NOTE

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On behalf of the Balochistan Board of Investment and Trade

I welcome you all to the readership of BBoIT's second edition of Investment Guide, taking this opportunity to thank my team and everyone who contributed to our Guide's publication. The aim is to recognize our vision and mission and the cognizance regarding the potentials for investing in Balochistan.

This Investment Guide is a blend of contemporary writing style aimed to craft for the projection of prosperity in Balochistan, its potential, Investment opportunities, culture, heritage, and the on-going developments in different sectors. Being a leading agency, BBoIT ensures investors' combined efforts with the most extraordinary team under the CEO's leadership and invites the readers to explore Balochistan and its potentials.

If you have any suggestions, feedback, or concerns, please address them to marketing@bboit.gob.pk.

Thank You!

ABOUT BBoIT

Balochistan Board of Investment & Trade is the leading focal agency of the Government of Balochistan for investment and trade advancement and investors and trader's facilitation. BBoIT is dedicated to enhancing the prevailing competitiveness and Ease of Doing Business in Balochistan.

Hence, empowering a friendly and conducive domain for investment and businesses equally. Encourage businesses and entrepreneurs at every step by harmonizing with relevant agencies and providing information on the investment opportunities. The major public/ private projects, persisting sectoral policy framework, existing incentive regime, financing options, trade statistics, and supporting discovery the investment and trade partners with combined efforts by the most extraordinary team. BBoIT proudly stands grounds with various operational and administrative departments.

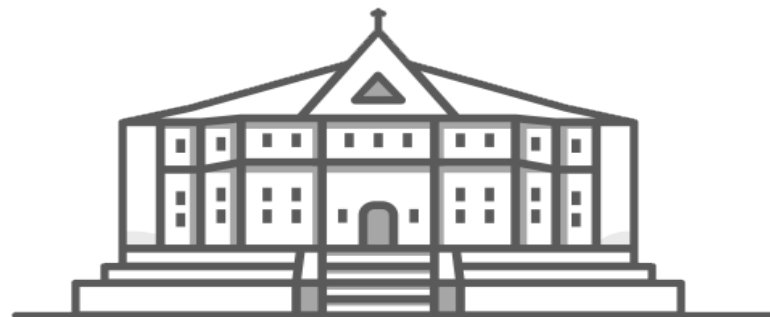


VISION

To leverage upon its geo-strategic position and enormous untapped potential resources, making Balochistan as one of the most favorite destinations for investors, successfully integrating it into global value chains, achieving socio-economic prosperity, eliminating poverty, and improving overall infrastructure development of the Province

MISSION

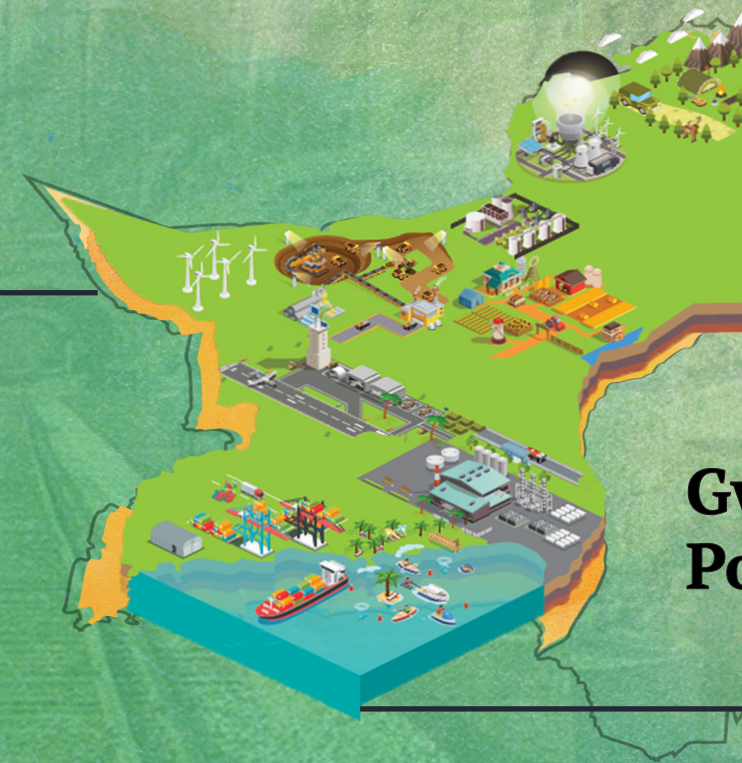
To promote investment in Balochistan by providing investors with maximum facilitation, and acting as a bridge between investors and all related Provincial and Federal Departments.



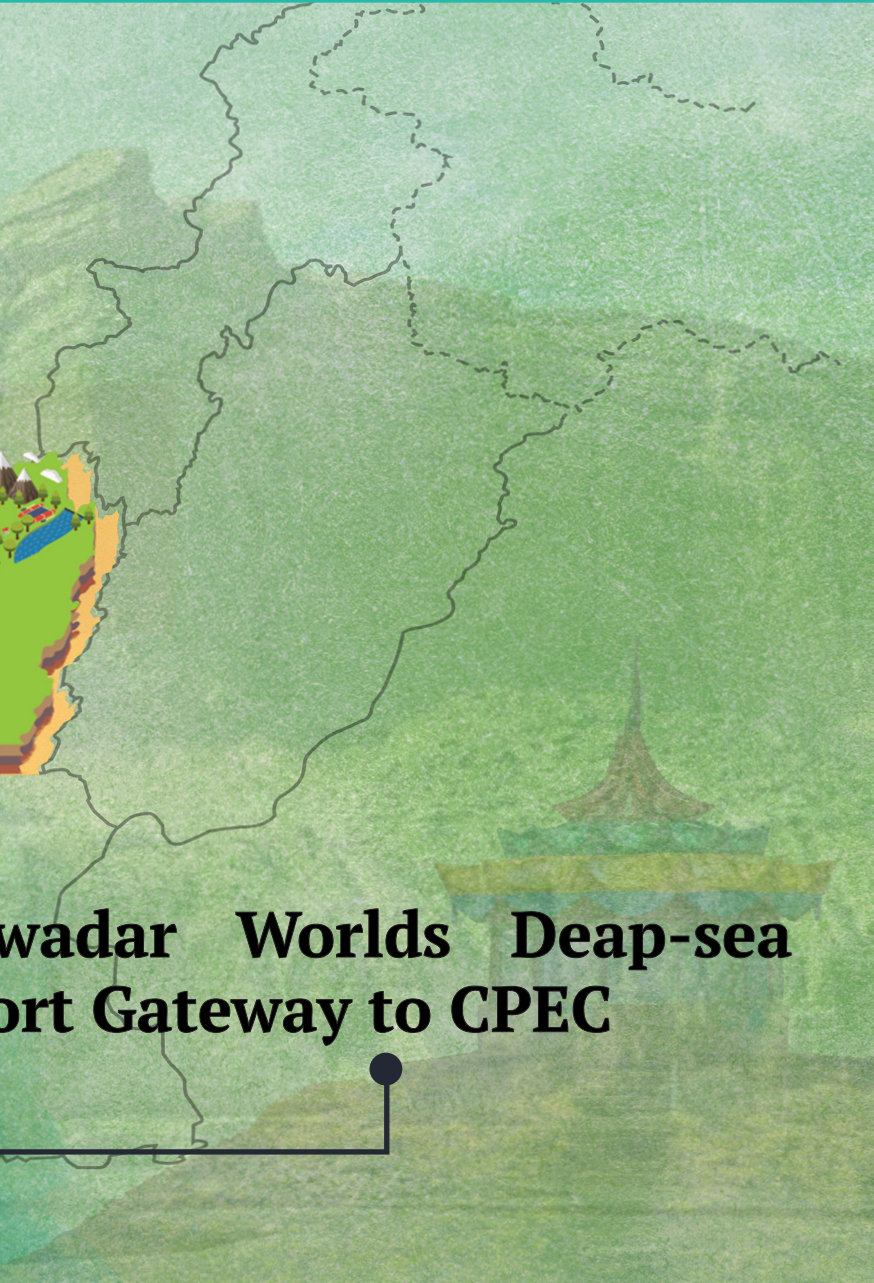
Balochistan have Coastline 770 Km,
73% of country's total Coastline

ABOUT BALOCHISTAN

Balochistan is home to only 6% of the country's population, however, area-wise it is the largest province of Pakistan, covering 44% of the national landmass. Balochistan is a land of diversity, mountains rich in minerals, coastal land, uplands, plains, and deserts, having a diverse flora & fauna and land of great difference and contrast. Its strength lies in its strategic location, the wealth of natural resources, the vast rangeland, the coastal belt with 770 km of coastline, and rich mineral and hydrocarbon deposits.



**Largest Province of Pakistan,
Covering 44%**



Gwadar World's Deep-sea
Port Gateway to CPEC

THE PROVINCE OF BALOCHISTAN IS STRATEGICALLY LOCATED IN THE

southwest of the country while sharing its borders with all other three provinces of Pakistan (Sindh, Punjab, and KPK) and

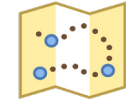
two international borders with Iran and Afghanistan. Balochistan shares a 1468 km border with Afghanistan in its north-west that links the province with Central Asian countries through Gaznali Border Noshki, "Babe Dosti" Chaman Border, and Badini Border Killa Saifullah. Moreover, the province has a 959 km border with Iran in its south-west that connects the province with South East Asian countries and European countries.

As the road from Quetta to Taftan (Pak-Iran) Border is also known as London

road which connects Quetta with London through Taftan (Pak-Iran Border), Iran, Turkey, and Europe of about 5878 km.

THE PROVINCE IS ALSO BLESSED WITH A 770 KM COASTLINE ON THE ARABIAN SEA

in its south which is a gateway to the strategically important 'Strait Of Hurmoz' in the Indian Ocean. Nevertheless, Balochistan having borders with Sindh in its South-East, with Punjab in North-East and with Khyber-Pakhtunkhwa in the North which gives access to China, India, and Pakistan's highest populated areas.



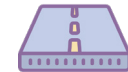
BALOCHISTAN SHARES 2427 KM INTERNATIONAL BORDER (AFG 1468 AND IRAN 959KM) WHICH PROVIDE ACCESS TO CENTRAL ASIA AND EUROPE.



BALOCHISTAN ALSO SHARE BORDERS WITH REST OF THREE PROVINCES: PUNJAB, KPK AND SINDH



THERE ARE THREE MAJOR INTERNATIONAL AIRPORTS OPERATIONAL



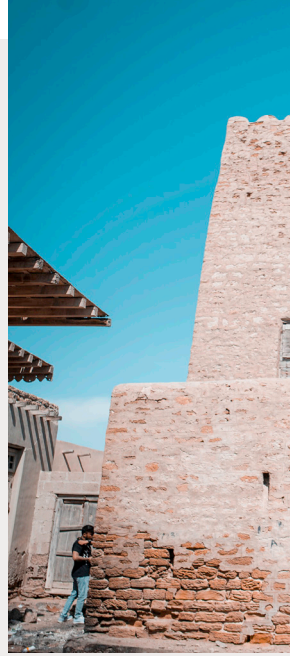
5000 KM HIGHWAYS NETWORK



1000 KM RAILWAY NETWORK



THERE ARE 6 TYPES OF LANDSCAPES IN BALOCHISTAN



SIGNIFICANCE OF BALUCHISTAN



1. Geo-Strategic Location



44%
of the total national
landmass



The Border with Afghanistan connects Balochistan with central Asian states of Uzbekistan, Turkmenistan, Tajikistan and Kirghizstan through Afghanistan



Pak-Iran border (Taftan) provides access to South East Asian countries and European countries; which connects Quetta with London through Iran, Turkey and Europe – 5878 km

2. Minerals Rich – Availability of raw material

ABOUT 50 MINERALS ARE DISCOVERED IN BALOCHISTAN, 22 OF WHICH ARE COMMERCIAL MINERAL UNDER SOME 1610 LICENSES



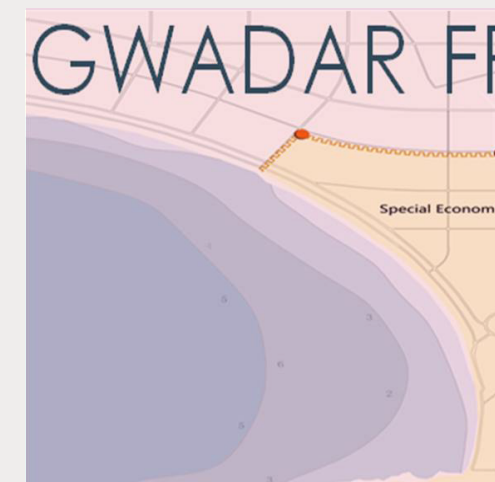


BALUCHISTAN HOLDS BOTH METALLIC AND NON-METALLIC MINERALS INCLUDING THE WORLD'S FIFTH-LARGEST DEPOSIT GOLD AT REKO DIQ

SOME OF THE MINERALS FOUND IN THE PROVINCE ARE: GOLD, COPPER, IRON, MOLYBDENUM, LEAD, ZINC, CHROMITE, MICA, COAL, GYPSUM, ONYX, MARBLE, LIMESTONE, RHYOLITE, GRANITE, ETC



MOST OF THE MINERALS FOUND IN BALUCHISTAN ARE USED AS RAW MATERIAL IN VARIOUS INDUSTRIES SUCH AS; CEMENT PRODUCTION, STEEL MANUFACTURING, CERAMIC & MARBLE TILES PRODUCTION, ETC



3. Balochistan Industrial Zones

A total of 486 enterprises are currently operating in the industrial zones of Balochistan, showcasing the region's growing industrial potential.

The government offers a range of incentives to investors in Special Economic Zones (SEZs), Export Processing Zones (EPZs), and the Gwadar Free Trade Zone to promote industrial growth and economic development.

2 Special Economic Zones (Bostan and Hub)

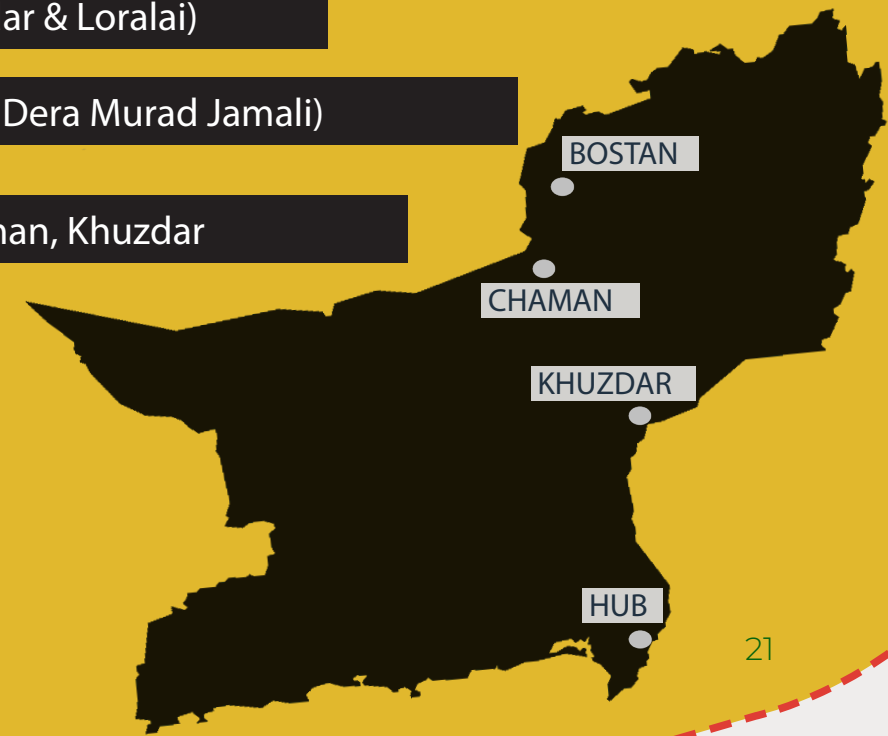
2 Export processing zones (Saindak and Dudar)

3 Marble Cities (Hub, Khuzdar & Loralai)

4 Industrial Estates (LIEDA, GIEDA, Quetta & Dera Murad Jamali)

5 Mini Industrial Estates (Muslimbagh, Zhob, Chaman, Khuzdar

Gwadar Free Trade Zone



4. Agriculture and Balochistan



B

alochistan is known as the Fruit Basket of Pakistan (2.3 million-ton annual production) Balochistan produces 1.7 million-ton of vegetables

L

ivestock Contributes 20% to the national livestock production, Balochistan is home 40 million livestock animals

B

alochistan Produces 137 kilo tons of fish. in which 86% is exported to other countries

B

alochistan holds 73% of Pakistan's total coastline

A

bout 3.97 million hectares of fertile land area available for cultivation

A

griculture in total contributes 26% to the GPP of Balochistan



93% of the province is classified as rangelands that produce livestock for organic meat and dairy products



Exclusive Government Incentives in SEZs, EPZs, and Gwadar Free Trade Zone

The government offers a range of incentives to investors in Special Economic Zones (SEZs), Export Processing Zones (EPZs), and the Gwadar Free Trade Zone to promote industrial growth and economic development. Below is a summary of these incentives

GWADAR FREE TRADE ZONE	SPECIAL ECONOMIC ZONES	EXPORT PROCESSING ZONES
100% exemption on customs duties for construction and operation	One-time exemption from customs duties and taxes on capital goods. (Zone Developers /Co-Developers), (Zone Enterprises)	Duty-free import of machinery, equipment, and materials
Tax holiday for 23 years for businesses in Gwadar Free Trade Zone	Income tax exemption for 10 years. (Zone Developers/Co-Developers), (Zone Enterprises)	Duty-free vehicles allowed under certain conditions
Exemptions of sales tax on certain goods for Zone/Port businesses		Reduced rate of Income Tax @ 1%
100% ownership for foreign investors in specific sectors		Freedom from national import regulations
Availability of land/plots with a lease period of 99 years		Exchange control regulations not applicable
Exemptions of sales tax on certain goods for Zone/Port businesses		Domestic market access up to 20% or higher
		Sale of obsolete/old machines in the domestic market
		EPZ units allowed to supply to custom manufacturing bonds
		Sale of 'B' grade goods/used materials in the domestic market
		Developed land on competitive rates for 30 years
		Duty-free import of machinery, equipment, and materials



07

POTENTIAL INVESTMENT SECTORS OF BALOCHISTAN

Considering the true economic values and the potential for the investment, the opportunities in Balochistan can be separated into the following sectors

01 Mines & Minerals Sector

02 Livestock Sector

03 Agricultural Sector

04 Energy Sector

05 Fisheries Sector

06 Industries & Urban/ Infrastructure Development

07 Tourism sector



MINERAL SECTOR

One of the main attractions of the province is its unexplored geological potential and its geological belt with known world-class mineral deposits.

Balochistan, covering 55% of Pakistan's outcrop area (335,360 square km) is the nation's most mineral-rich province

Balochistan is rich in both metallic and non-metallic minerals. The province is known to hold more than 50 different types of minerals, 22 of which are actively mined and exported both domestically and internationally. Some of the key minerals include:

Metallic Minerals: Copper, Gold, Iron Ore, Manganese, Chromite, Sulphur, Magnesite

Non-Metallic Minerals: Mica, Calcite, Serpentine, Travertine, Basalt, Onyx Marble, Granite, Pumice, Barite, Coal, Shale, Limestone, Marble, Gypsum Anhydrite, Lead and Zinc, Fluorite.



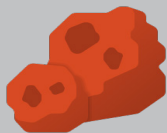
Reko Diq and Saindak are copper and gold mines in Chagai district of Balochistan province with a value up to \$500bn. It holds more than 7 billion tonnes of ore containing gold of 42 million oz, making it the world's fifth largest deposit of gold and copper.

Balochistan also have iron ore reserves of 273 million tonnes, the largest reserve in Dilband/Kalat of 200 million tonnes.

Baluchistan has proven coal reserves of 217 million tons, the province tops coal production of two million tons - 58% share in country coal production.

Minerals in Balochistan

Metallic Minerals



COPPER

7B TONS



IRON ORE

273M TONS



LEAD & ZINC

50M TONS



GOLD

50M OUNCE

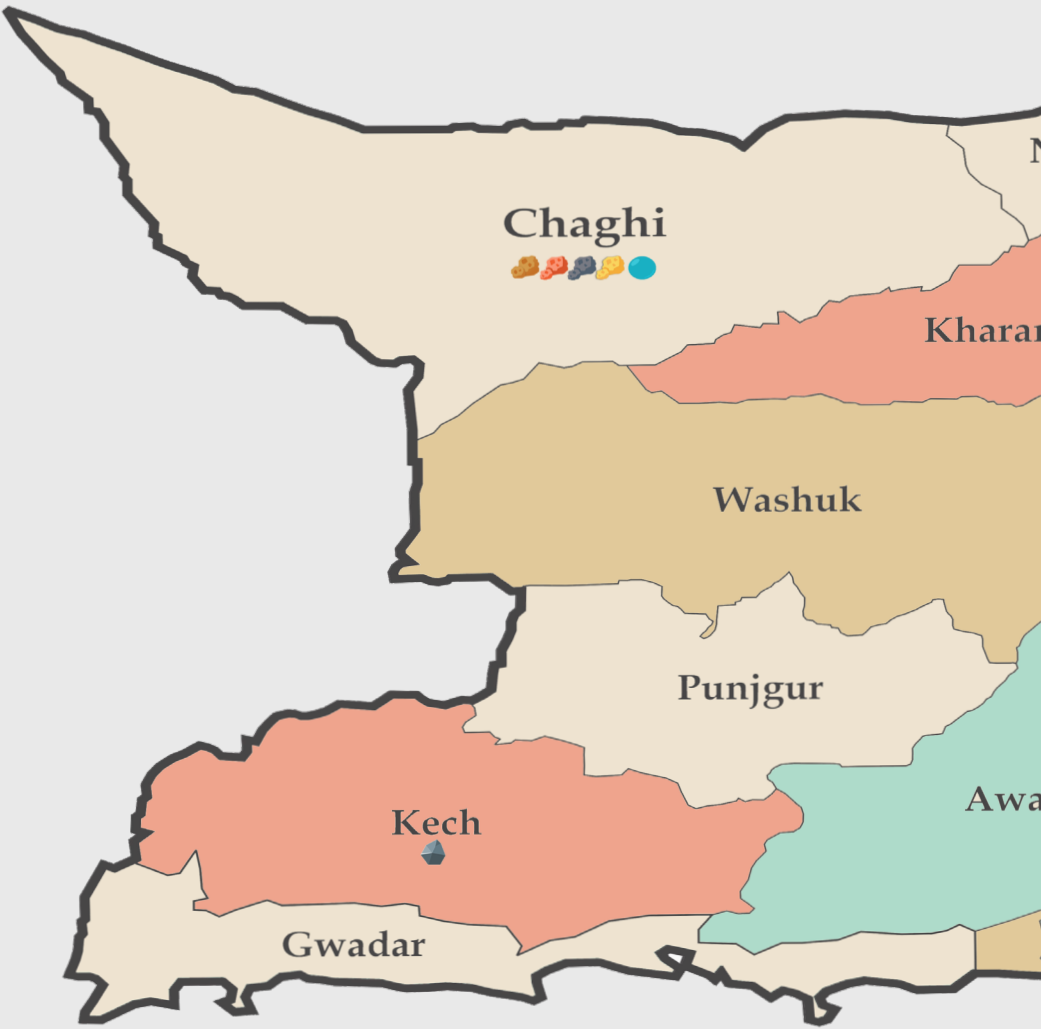


CHROMITE ORE

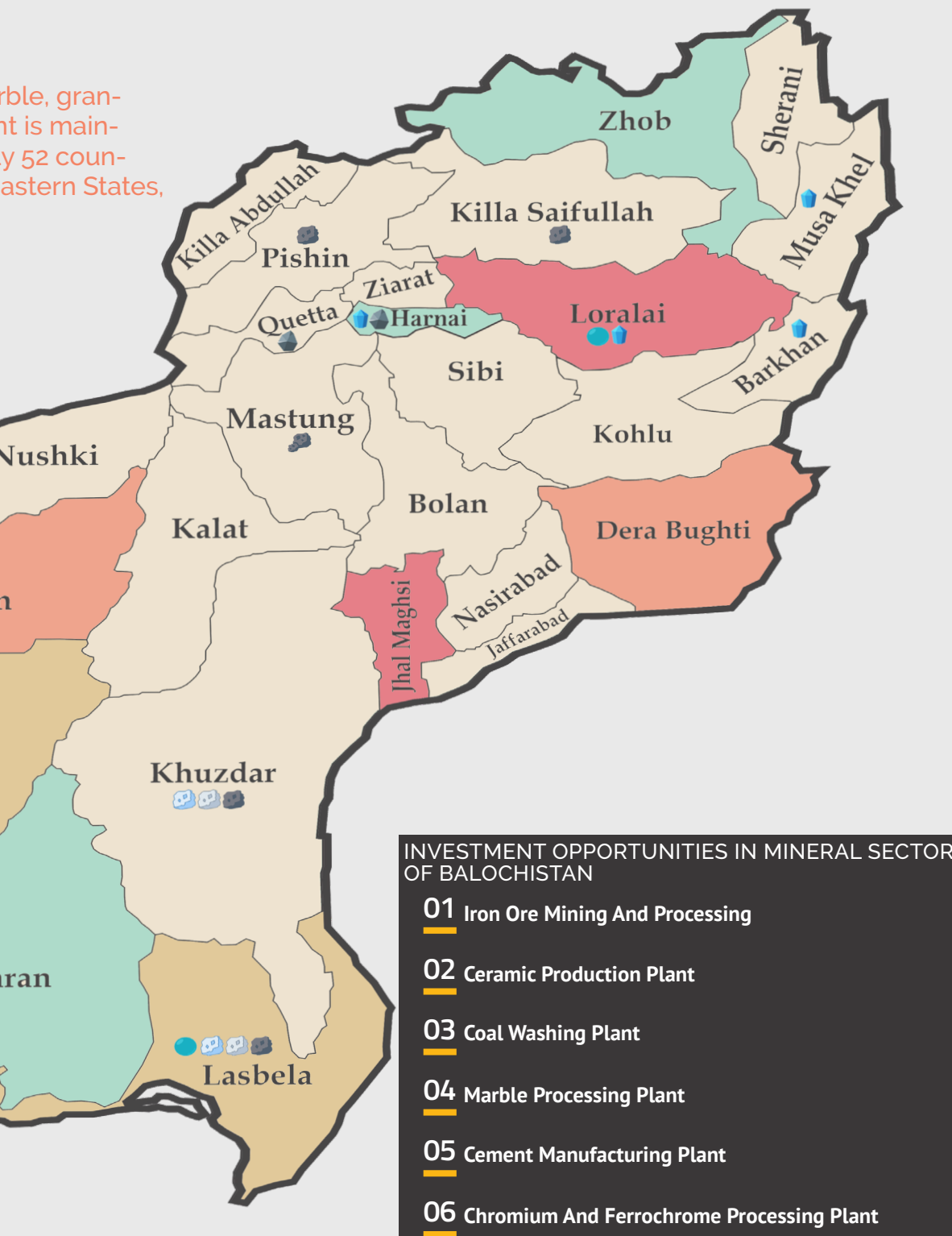
500M TONS



Balochistan has 100 billion tons of marble, and onyx deposits, up to 90 percent of which are being shipped from Karachi to nearly 100 countries worldwide. Gulf and the Middle East.



Marble, granite
is mainly
found in 52 coun-
ties in eastern States,



NON-Metallic Minerals & DIMENSION STONES



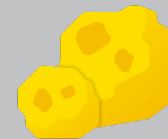
ONYX, MARBLE &
GRANITE

100B TONS



COAL

217M TONS



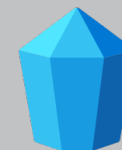
SULPHUR

50M TONS



BARITE

30M TONS



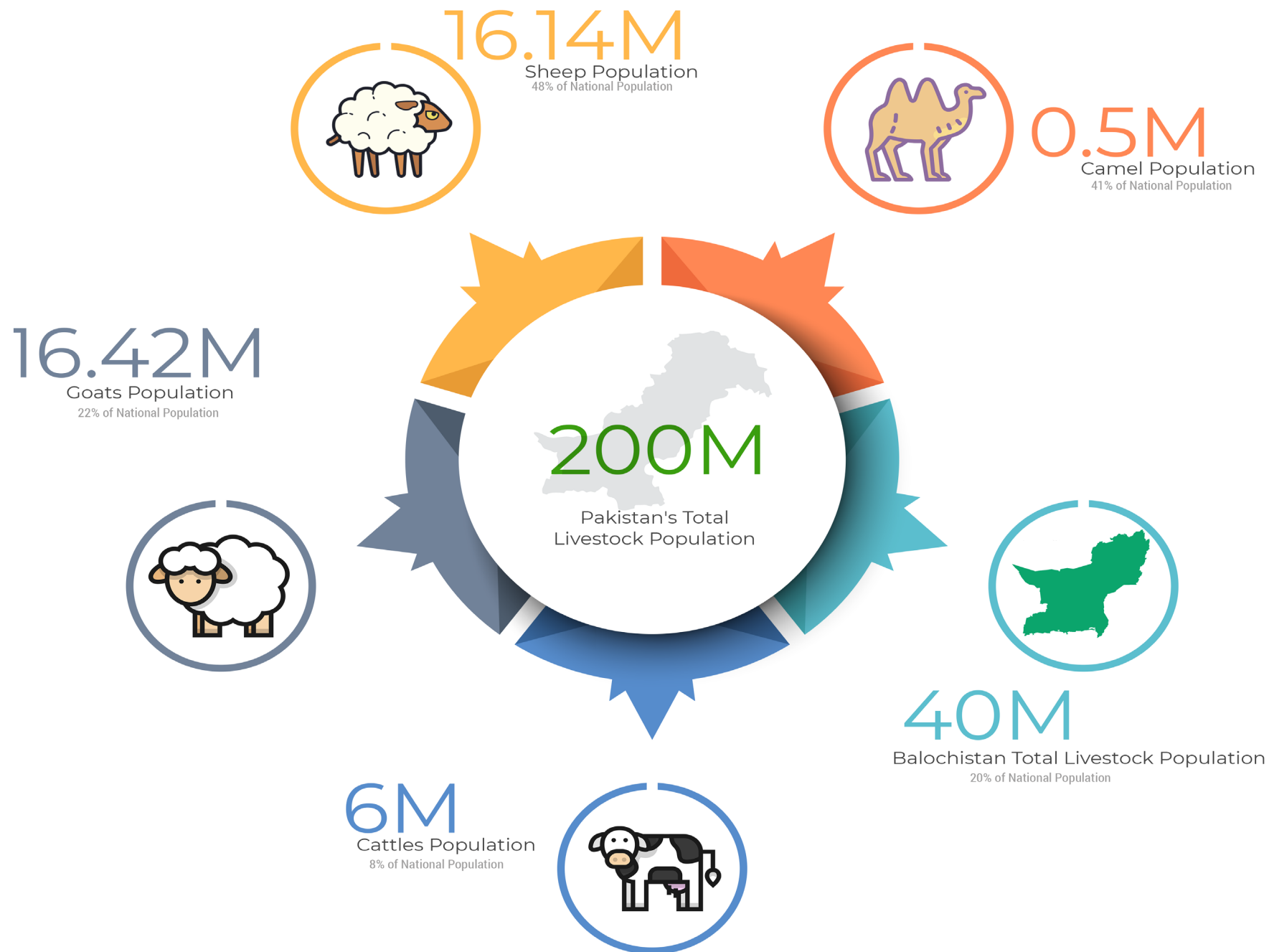
GYPSUM &
ANHYDRITE

14.5B TONS



Balochistan, in terms of land area, is the largest province of Pakistan, where Balochistan Livestock sector contributes around 20% to Pakistans livestock sector Balochistan livestock is mostly organic and of native breeds, primarily because of large natural grazing fields. Livestock is an important and integral sub-sector of agriculture sector and the national reliance on livestock is evident from its contribution to both the macro and micro economies.

Over 90% of the total area in the province (34.72 million hectares) is covered by rangelands and of the 21 million hectares is considered medium to good grazing land. These various rangelands found in the province are capable of supporting a large number of livestock, creating the potential for an international market for wool and a thriving local market for dairy and meat.



Investment Opportunities in Livestock Sector of Balochistan

Sausages Industry



Milk Processing – Milk Pasteurization & Dairy by products



Commercial Broiler Production Poultry Processing



Hides & Skin Processing

Wool & carpet industry

Organic Meat Processing for export to Middle East and Gulf Countries



LIVESTOCK MAP OF BALOCHISTAN

- LIVESTOCK**
- CATTLE
 - BUFFALOS
 - SHEEP
 - GOATS
 - CAMELS
 - POULTRY





Divisions	Cattles	Buffalos	Sheep	Goats	Camels	Total
Quetta	476,700	134,476	1,795,862	1,145,283	3,196	3,555,517
Rakhshan	65,575	687	1,180,439	1,446,640	120,574	2,813,915
Zhob	758,920	28,244	3,035,543	2,567,406	29,318	6,419,431
Loralai	1,365,983	41,225	2,947,682	1,471,933	28,703	5,855,526
Sibi	1,149,508	71,682	2,889,826	2,994,334	123,334	7,228,684
Naseerabad	2,033,371	1,239,646	779,813	2,416,515	62,368	6,531,713
Kalat	806,193	73,906	4,475,713	5,131,778	101,250	10,588,840
Mekran	239,547	2,021	235,766	1,057,582	20,050	1,554,966
Grand Total	6,895,797	1,591,887	17,340,644	18,231,571	488,841	44,548,740



AGRICULTURE

Balochistan, Pakistan's largest province by area, holds immense untapped potential in agriculture, thanks to its diverse climate, fertile lands, and rich natural resources.

Currently, over 3 million hectares of land are under cultivation in Balochistan, Agriculture accounts for 12% of the provincial GDP, playing a crucial role in the economy.

In 2023-24, Balochistan significantly contributed to the nation's agriculture by producing 2.32 million tonnes of fruits and 1.7 million tonnes of vegetables, highlighting its vital role in meeting the country's agricultural needs.

The climate diversity in Balochistan's support the **cultivation of a board spectrum of crops and fruits**, including dates, pomegranates, apples, grapes, apricots, and various vegetables.

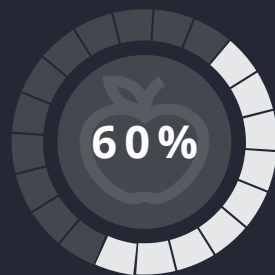
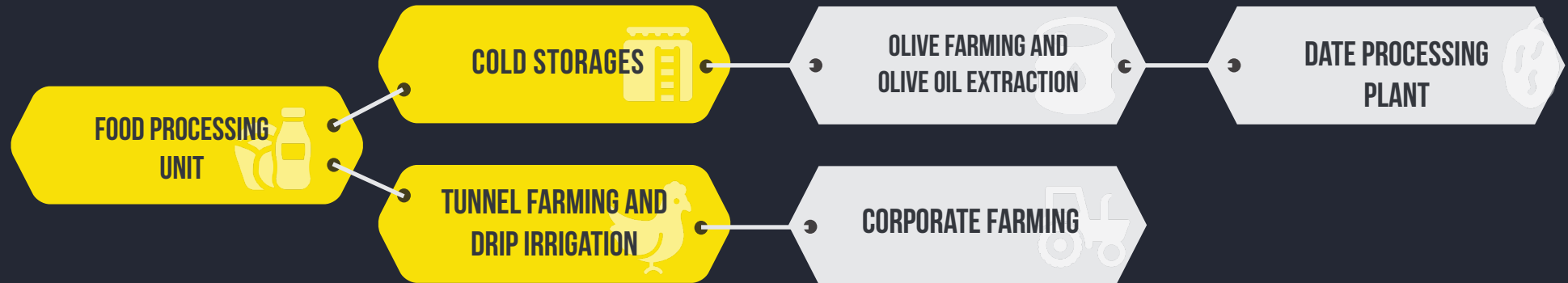
34 The region's climatic variation provides **multiple growing seasons**, enabling both annual and perennial crop production.



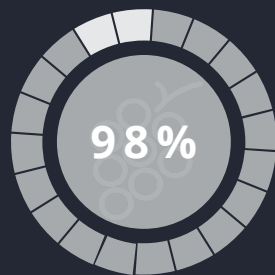
Major crops produced are wheat, rice, cotton, sugarcane, maize, edible seeds, pulses, and gram. Vegetables produced in Balochistan include onion, potato, tomato, cabbage, carrot, cucumber, cauliflower, peas, turnip, pumpkin, and brinjal. Major fruits produced are apple, dates, cherry, pomegranate, peach, citrus, mango, grapes, and apricot.

Traditionally, five distinct agro-ecological zones have been categorized since long in the Province ranging from sea coast to 1600 meters and above. The main criterion of the classification was mostly difference in altitude and temperature.

Investment Opportunities in Agriculture Sector of Balochistan



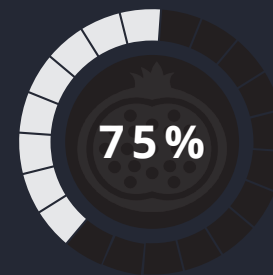
APPLE PRODUCTION



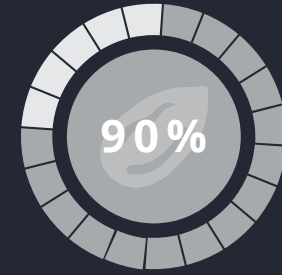
GRAPES PRODUCTION



CHERRY PRODUCTION



POMEGRANATE PRODUCTION



ALMOND PRODUCTION



MAJOR CROPS PRODUCTION IN BALOCHISTAN 2023-24

Crops	Area in hectares	Production in Tons
Total Fruits Production in Balochistan 2,322,764		
Apple	68066	798.143
Dates	53937	660.443
Grapes	15831	193.176
Melons	10247	187.900
Apricot	12474	175.130
Peach	4994	74.919

Crops	Area in hectares	Production in Tons
Total Vegetable Production in Balochistan: 1,734,300		
Onion	45411	852.400
Tomato	23872	373.475
Other Vegetables	30049	471.407
Potato	2397	37.033

SOURCE: DIRECTORATE OF CROP REPORTING SERVICES AGRICULTURE DEPARTMENT

Crops	Area in hectares	Production in Tons
Total Field crop production in Balochistan: 4,086,867		
Wheat	529400	1,486,100
Fodders	47100	1,636,400
Rice	162500	526,600
Cotton	117700	160,600
other Field Crops	270313	277,167

WATER POTENTIAL IN BALOCHSITAN (MAF) (SOURCE: DEPT. OF IRRIGATION)

A	INDUS		Total	Used	Remaining
		Perennial water	3.87	3.05	0.82
		Flood	4.62	0.00	4.62
		Total	8.49	3.05	5.44
B	NON-INDUS	Flood Runoff	10.79	2.28	8.51
		Ground water	2.21	2.66	-0.45
		Total	13.00	4.94	8.06
Grand Total (A + B)			21.49	7.99	13.50



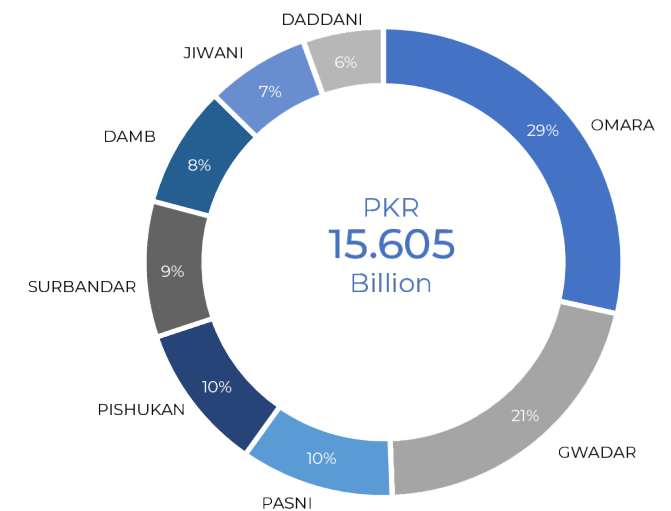
About **90%** of total fish catch from **Balochistan** is transported to Karachi for processing before it is exported to Middle East, South Asia and other **International Destinations**

Fisheries Sector

Fishing is one of the most important economic activities along the coastal areas of Pakistan. Along the coast of Balochistan there are five major towns and more than 38 fishing villages spreading along more than 770 km long coastline. More than three dozen species of fish and shellfish including shrimp and lobsters, Sea-cat, fish, Hair-tail fish, Indian Mackerel, Sardines, Small Croaker and Tuna are netted, on regular basis from eight landing sites, along the coastal areas including those of Gwadar and Pasni.

Marin fish capture in Balochistan of 153,155 metric tons on an annual basis is 34% of Pakistan's total fisheries production. About 80% of the total fish catch from Balochistan coast is exported to Middle East, South Aisa, Central Asia and many other international destinations.

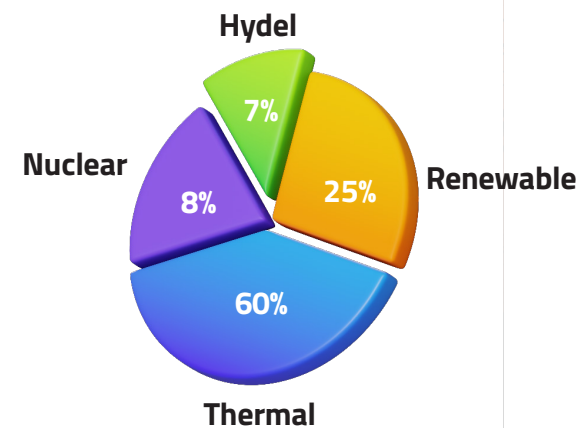
Landing Sites	Registered Fishing Vessels	Fishermen Population
PASNI	2145	14492
GWADAR	2105	24488
SURBANDER	935	6742
PISHUKAN	865	6948
JIWANI	1696	8600
ORAMARA	1751	10583
GADDANI	390	5451
DAMB	1095	5239
TOTAL	10982	82543



ENERGY SECTOR

Balochistan's, the largest province of Pakistan, future economic and industrial development is linked with adequate and uninterrupted power supply to the industrial and commercial consumers.

Balochistan provincial government has devised the Baluchistan Power Generation Policy promoting project development using renewable resources. The province of Balochistan is rich in renewable energy (RE) resources, which must be explored for the sustainable development of the province.



RENEWABLE ENERGY RESOURCES

According to the World Bank report, Balochistan has a total solar power generation potential of approximately **1.2 million MW** and a wind power generation potential of **20,000 MW**.

Solar Power: Balochistan receives one of the highest solar irradiances in the world, averaging 6-8 kWh/m²/day. This makes it an ideal location for solar power projects

Wind Energy: The Nokkundi & Chagai area, along with Coastal areas like Gwadar & Pasni have strong wind corridors, with wind speeds consistently ranging between 6-7.5 m/s, suitable for wind energy generation.



RENEWABLE ENERGY RESOURCES



MINERAL
RESOURCE
FOR ENERGY PRODUCTION

Coal Reserves: Balochistan's coal reserves are estimated at over 217 million tons, distributed across key districts such as Duki, Chama-lang, and Harnai.

Oil and Gas Exploration: Balochistan's substantial untapped oil and gas reserves present lucrative investment opportunities for energy companies seeking to expand exploration and production activities.

LARGE-SCALE SOLAR & WIND PROJECTS

Solar Energy: Balochistan's high solar irradiance (2,000-2,500 kWh/m²) makes it ideal for solar power, with PV systems achieving up to 35% grid utilization.

Wind Energy: Coastal & Nokkundi (Chagai) regions have strong, consistent winds, offering excellent potential for wind farm development.



RENEWABLE ENERGY OFF-GRID POWER PLANTS

With only 36% of Balochistan currently electrified, decentralized microgrids paired with solar generation offer a promising solution to enhance reliable electricity access for rural communities. This approach is particularly beneficial for remote villages, mining regions, and industrial estates, providing sustainable and cost-effective energy solutions.

LPG TERMINALS AT GWADAR & TAFTAN

Gwadar and Taftan are strategically positioned for establishing LPG terminals. Gwadar's deep-sea port supports regional trade and energy distribution, enabling efficient LPG imports. Taftan, near the Iran border, offers a key location for cross-border energy trade, enhancing supply reliability and regional energy security.

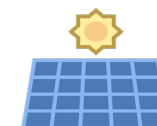


LPG DISTRIBUTION CENTERS IN REGIONS WITHOUT GAS PIPELINES

In areas of Balochistan where gas pipeline infrastructure is absent, establishing Liquefied Natural Gas (LNG) distribution centers can address energy needs effectively. These centers can supply LNG to remote communities, mining operations, and industrial estates, ensuring a consistent and cleaner energy source compared to traditional fuels.



INVESTMENT OPPORTUNITIES IN ENERGY SECTOR



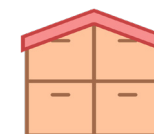
SOLAR POWER PLANT



WIND POWER PLANT



COAL POWER PLANT



LPG TERMINAL

SOLAR RESOURCE MAP

PHOTOVOLTALIC
POWER
POTENTIAL
PAKISTAN



DESCRIPTION

This solar resource map provides a summary of estimated solar photovoltaic (PV) power generation potential. It represents the average daily/yearly sum of electricity production from a 1 kW-peak grid-connected solar PV power plant, calculated for a period of 10 recent years (1999-2016). The PV system configuration consists of ground-based, free-standing structures with crystalline-silicon PV modules mounted at a fixed position, with optimum tilt to maximize yearly energy yield. The optimum tilt ranges from 20° to 35° towards the equator. Use of high efficiency inverters is assumed. The solar electricity calculation is based on high-resolution solar resource data and PV modeling software provided by Solargis. The calculation takes into account solar radiation, air temperature, and terrain, to simulate the energy conversion and losses in the PV modules and other components of a PV power plant. The cumulative effect of losses due to dirt, snow and ice on the PV modules, and the losses from cables, inverters and transformers, is 9%. The power plant availability is considered to be 100%.

The underlying solar resource database is calculated from atmospheric and satellite data with a 30-minute time step, and a spatial resolution of 250 m. The uncertainty of the solar resource data has been reduced by regional model adaptation based on ground measurements collected at nine solar meteorological stations in Pakistan commissioned by The World Bank over the years 2014 to 2017.

ABOUT

The World Bank and the International Finance Corporation (IFC), collectively the World Bank Group, have published this solar resource map alongside a **Global Solar Atlas** consisting of global, regional and country maps, to support the scale-up of solar power in our client countries. This work is funded by the Energy Sector Management Assistance Program (ESMAP), a multi-donor trust fund administered by The World Bank and supported by 13 official bilateral donors. It is part of a global ESMAP initiative on Renewable Energy Resource Mapping that covers biomass, small hydro, solar and wind. The World Bank Group has selected Solargis as its global provider of solar resource data and related services, and this map has been prepared by Solargis, under contract to The World Bank, based on a solar resource database that they own and maintain.

To obtain additional maps and information, please visit:
<http://globalsolaratlas.info>

TERMS

This map is published by the World Bank Group, funded by ESMAP, and prepared by Solargis.

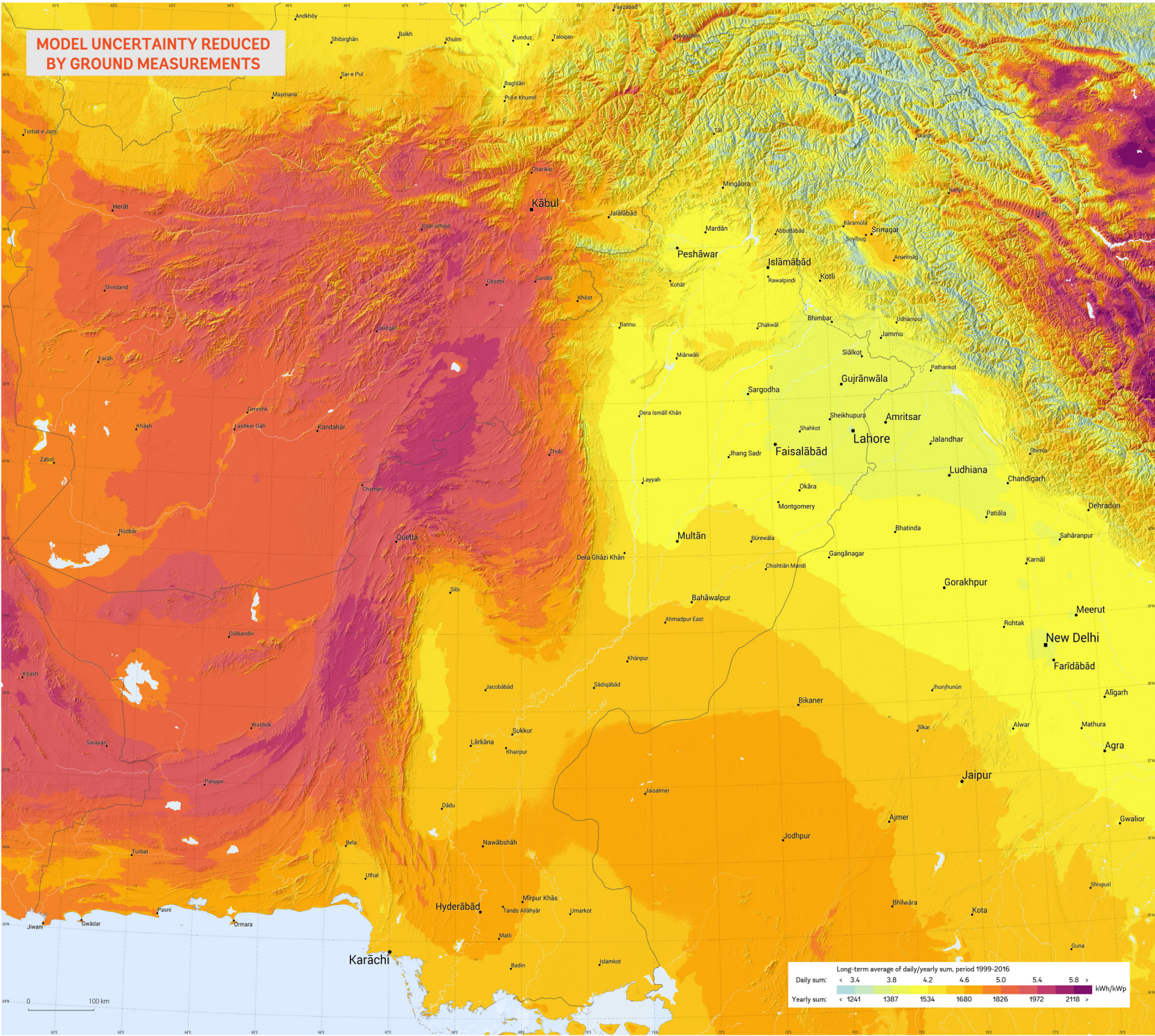
Data Sources: Solar PV power potential © 2017 Solargis - Administrative boundaries © 2016 Cartography Unit, GSDFM, World Bank Group - Map data © 2016 OpenStreetMap contributors - GeoNames.org - Data and Maps for ArcGIS © 2014 ESRI - Shuttle Radar Topography Mission, version 2 © 2000-2006 SRTM Mission Team - Cartography © 2017 Solargis

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Considering the nature of climate fluctuations, inter-annual and long-term changes, as well as the uncertainty of measurements and applied methods, The World Bank, International Finance Corporation, and Solargis do not take any responsibility whatsoever, and do not give any warranty, on the accuracy of the data that were used to produce the map. Solargis has done its utmost to make an assessment of solar climate conditions and the performance of solar power systems based on the best available data, software, and knowledge. It is recommended that this map be used as a guide of solar PV power potential rather than an instrument to plan or develop solar power installations. The boundaries, colors, denominations and any other information shown on this map do not imply, on the part of the World Bank, any judgment on the legal status of any territory, or any endorsement or acceptance of such boundaries.

Solargis database version: 2.1 - Map issue date: 2017-03-01



INDUSTRIES & URBAN / INFRASTRUCTURE DEVELOPMENT



INDUSTRIAL DEVELOPMENT

Balochistan is rapidly emerging as a strategic hub for industrial development, underpinned by a growing network of specialized economic zones and infrastructure projects. The province hosts two Special Economic Zones (SEZs)—Bostan and Hub—designed to attract both domestic and foreign investors by offering incentives such as tax holidays, custom duty exemptions, and streamlined regulatory processes.



INVESTMENT OPPORTUNITIES

Complementing these are two Export Processing Zones (EPZs) located in Saindak and Duddar, which focus on mineral processing and value addition, particularly in the rich mining sectors of copper, gold, and other metallic ores. These zones provide a conducive environment for export-oriented industries, capitalizing on Balochistan's natural resource endowment and proximity to key regional markets..



• **PACKAGES MANUFACTURING PLANT**



• **WOOL AND CARPET INDUSTRY**



• **OLIVE OIL EXTRACTION AND REFINERY UNIT**



• **QUETTA SOLID WASTE TO ENERGY**



• **QUETTA STATE OF THE ART MEDICAL UNIVERSITY HOSPITAL**

To further diversify industrial activity, Balochistan is developing three dedicated Marble Cities in Hub, Khuzdar, and Loralai, aiming to harness the province's world-class marble and granite reserves. These cities offer facilities for cutting, polishing, and exporting stone products. Additionally, the province is home to four Industrial Estates in LIEDA (Lasbela), GIEDA (Gaddani), Quetta, and Dera Murad Jamali, each tailored to support SMEs and large-scale industries across various sectors. Expanding outreach to more remote areas, five Mini Industrial Estates have been established in Muslim Bagh, Zhob, Chaman, Khuzdar, and Turbat, promoting localized manufacturing and employment. Collectively, these infrastructure initiatives reflect Balochistan's commitment to industrialization and economic diversification, making it a prime destination for long-term investment.





Infrastructure Development

Rapid Urbanization and Population growth has significant backlog of housing units estimated at 9 million units and announcement of various plans by the government to address this shortfall. Large-scale infrastructure projects i.e. Thermal (Coal) powered projects, dams, highways are part of the CPEC project, including Quetta mass transit and 2000 km dual highways.

BALUCHISTAN's Raw Material Potential



2.3

million tons
Fruits Production (2023-24)



3

million tons
Vegetable Production (2023-24)



137,950

tons
Fisheries Production (2023)



44.5

million tons
Livestock Production (2023)

Key Minerals Production 2023



2.56

million tons
Coal



205,812

million tons
Iron Ore



1.5

million tons
Marble (Onyx/ORD)



113,402

million tons
Chromite



4.3

million tons
Limestone

1. Value Addition & Processing Industry

1 LIVESTOCK PROCESSING INDUSTRY

Opportunity to establish Halal meat, dairy, wool, and leather processing units for high-value exports.

2 CROPS PROCESSING UNITS

Fruit and vegetable processing units can add significant value to Balochistan's premium agricultural produce.

3 MINERALS VALUE ADDED INDUSTRY

Rich in minerals, Balochistan can support industries producing refined metals, chemicals, and polished stones.

4 FISH PROCESSING PLANT

Marine processing offers export-focused value addition in seafood, with 86% of catch already exported in 2023.

2. Pharmaceutical Industry

1 MINERAL & BIOLOGICAL RESOURCE UTILIZATION

Abundant minerals, livestock, and marine resources can support pharmaceuticals, supplements, and herbal medicine.

2 HIGH-VALUE PRODUCT MANUFACTURING

Potential for producing innovative bioactive compounds, Omega-3, and marine-based drugs for global markets.

3 EXPORT MARKET OPPORTUNITY

Global demand, led by the USA, Germany, and Switzerland, offers strong export potential for pharmaceutical products.



3. Cement Industry

1 RAW MATERIAL AVAILABILITY

Limestone, gypsum, and other minerals provide a strong foundation for a competitive cement industry.

3 GLOBAL MARKET GROWTH

With the global cement market growing steadily, Balochistan offers a timely investment opportunity.

2 LOCAL & EXPORT MARKET POTENTIAL

Strategic location enables Balochistan to meet national needs and tap international cement markets.



4. Manufacturing Industry

1 STRATEGIC LOCATION ADVANTAGE

Access to shipping routes positions Balochistan for industrial growth in food, light, and heavy manufacturing

3 GLOBAL MARKET CONNECTIVITY

The province enables efficient import of raw materials and export of finished goods to high-demand markets

2 RESOURCE-DRIVEN PRODUCTION

Local minerals and agriculture support diverse sectors including steel, textiles, and automotive components.

TOURISM SECTOR

Land of Balochistan has been naturally gifted by the blend of different breath-taking sceneries, like it has the world's 2nd largest Juniper Forest at Ziarat Valley. Archaeological sites of Balochistan like Mehargarh is from 7000BCE i.e. 3500 years older than even Indus Civilization, and the



Coastal region of Balochistan with 770 Km, in particular, has a number of sand beaches with "shifting sand dunes" such as Kund Malir, Mrmara, Pasni, Gwadar and Jiwani. Biological diversity, adds to the beauty and importance of the coastal belt, where migratory birds can be seen at Pasni, Jiwani, and Miani Hor. Astola Island, the country's first Marine Protected Area (MPA), is a known nesting ground for endangered green turtles which can perhaps be developed into a sustainable tourist attraction

The coastal region of Balochistan has a number of sand beaches such as Kund Malir, Mrmara, Pasni, Gwadar and Jiwani. Biological diversity and importance of the coastal belt, where migratory birds can be seen at Pasni, Jiwani, and Miani Hor. Astola Island, the country's first Marine Protected Area (MPA), is a known nesting ground for endangered green turtles which can perhaps be developed into a sustainable tourist attraction

Another, site of attraction for car racers, audience and tourists are the various roads of Gwadar, Rally of Jhal Magi and Bolan Car Rally and Sibi Mela



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with “shifting sand dunes” such as Kund Malir,
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(), is a known nesting ground for endangered green
perhaps be developed into a sustainable tourist attrac-



BBolt investment guide not only highlights the tourist destinations but also the investment opportunities for the investor in this growing sector of Balochistan like:

INVESTMENT OPPORTUNITIES IN TOURISM SECTOR OF BALOCHISTAN

- LUXURIOUS BEACH RESORTS AT GADDANI, GWADAR, JIWANI, ORMARA, KUND MALIR, SONMIANI
- ENTERTAINMENT AND RECREATIONAL PARK AT QUETTA
- TOURIST RECREATIONAL, CHAIR LIFT AND HILL RESORTS AT ZIARAT
- TOURIST RECREATION, WATER SPORTS FACILITIES AND THEME PARK AT GWADAR
- 3 STARS HOTELS AND MOTELS AT VARIOUS TOURIST SPOTS

CPEC & BALOC

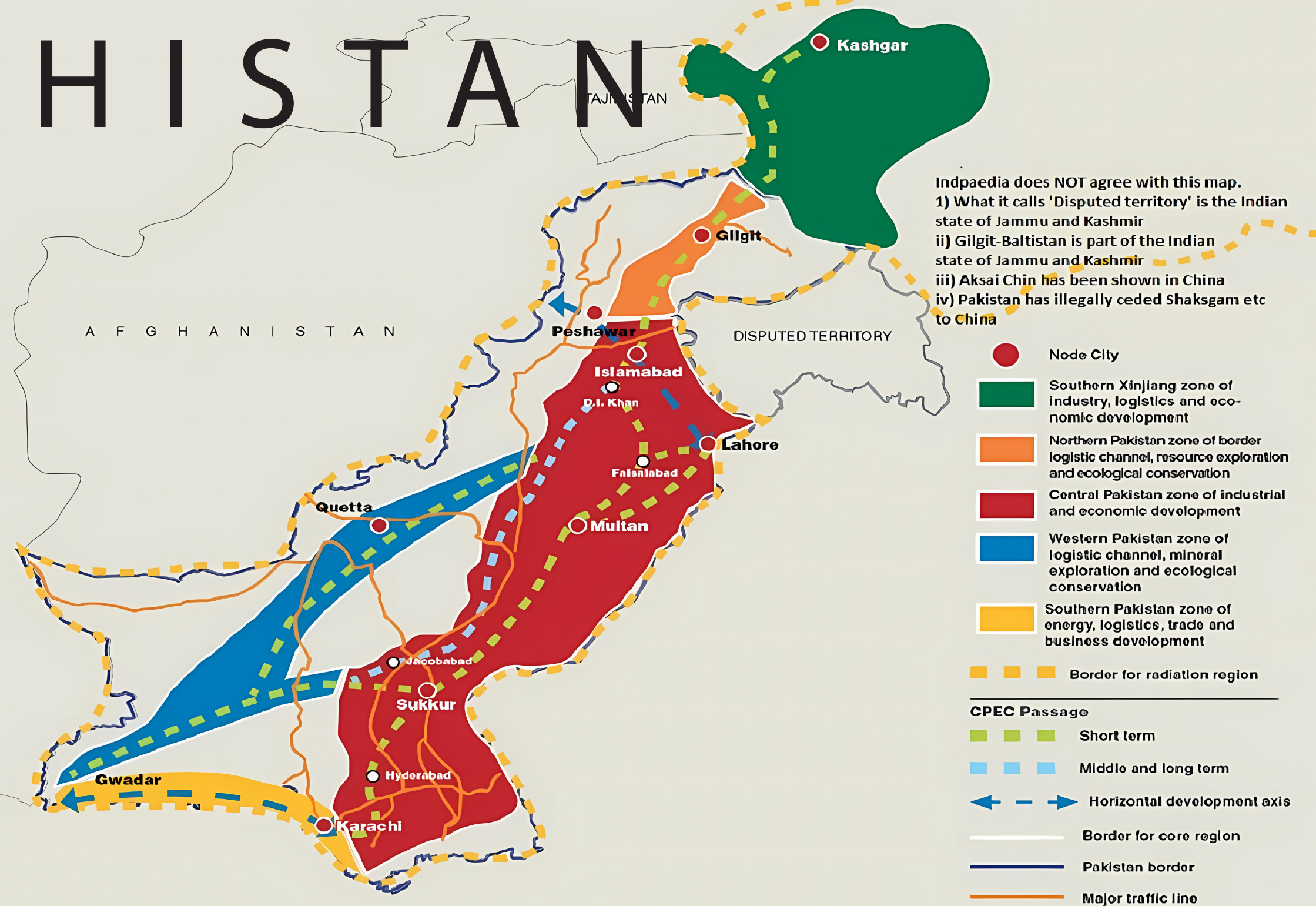
China Pakistan Economic Corridor (CPEC) is a mega project between Pakistan and China, however, Gwader (Balochistan) is the backbone of it. CPEC with an initial \$46 billion agreement equivalent to 20% of Pakistan's GDP with approximately \$28 billion worth of fast-tracked "Early Harvest" projects. Later on, the overall CPEC portfolio extended to \$60 billion with \$35 billion foreign direct investment (FDI) in the Energy sector by Chinese investment companies and the remaining \$25 billion public investments financed either through commercial or government-to-government loans from Chinese entities for infrastructure projects or grants for social sector projects.

CPEC has brought multiple opportunities for economic growth and social development by enhancing regional connectivity and improvement in infrastructure, the establishment of SEZs, and linking fast-growing regions to relatively poorer regions, which will create demand for the development of urban infrastructure. Increased connectivity with the CPEC roads network will boost economic growth and bring prosperity to Balochistan as the corridor will pass through some of the poorest districts of the province, which, in turn, will spur the process of integration of Balochistan's economy with surrounding regions of other provinces. CPEC can

be a catalyst in bringing in investment in urban development to create growth poles, which can serve as centers from which growth spreads and stimulates the surrounding economy of the largely scattered population of Balochistan.

The increased connectivity with the CPEC roads network will increase access to local and international markets through reduced transportation costs. With the construction of the western route of CPEC, property value has skyrocketed in these areas. Cities close to this route like Kalat, Quetta, and Zhob have become more vibrant by an increase in various development projects and other economic activities.

H I S T A N



WESTERN AND CENTRAL ROUTES OF CPEC

Western route is the original and shortest route of China-Pak Economic Corridor (CPEC). This route starts from Gwadar and passes through Turbat, Panjgur, Khuzdar, Kalat, Quetta, Zhob in Balochistan.

THE MAIN PROJECTS UNDER CPEC'S WESTERN ROUTE ARE: ZHOB QUETTA (N-50):

The dualization of 298 kilometres long Kuchlak-Zhob Highway will connect far-flung areas of Balochistan with other parts of the country, this is a part of the western route and will help set up new industrial zones and boost the process of development in the province.

KHUZDAR-QUETTA— CHAMAN SECTION (N-25):

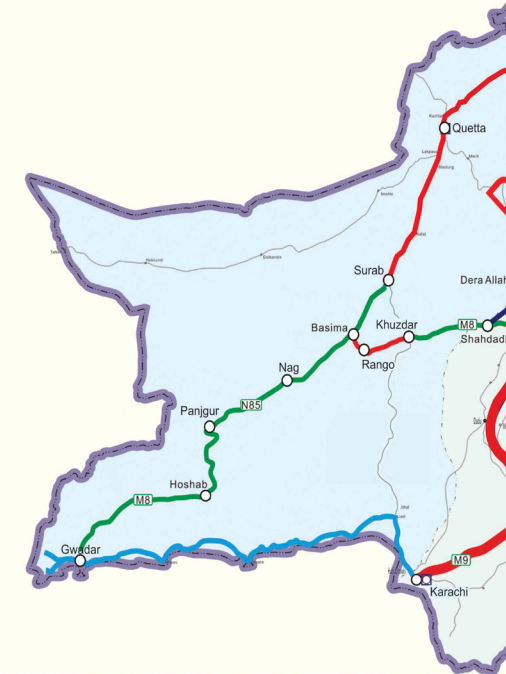
It is 813 km long, passing through Bela, Khuzdar, Kalat, Quetta and Chaman and continuing into Afghanistan, It then joins N-40 (National Highway 40 Quetta-Taftan International Border Circuit) which leads it via Naukundi to Road 84 in Iran and through various Iranian Highways to Turkey and onwards Europe. The highway has a connection to Gwadar and passes through many towns in Balochistan.

SURAB-HOSHAB (N-85):

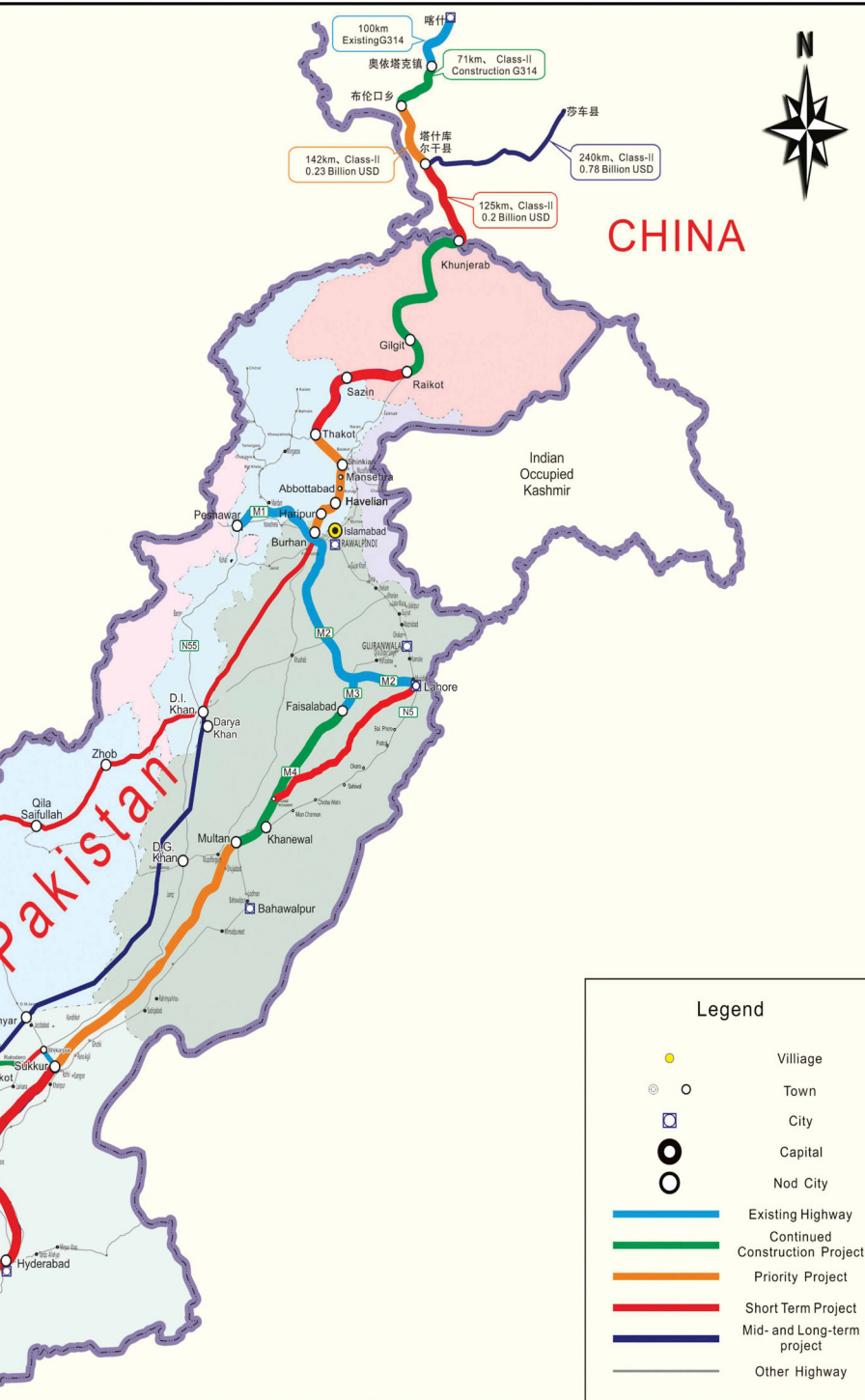
It is the major road for accessing southern parts of Baluchistan province. The Project has been completed and is functional.

The N-85 Highway is also known as the Gwadar-Quetta link. It starts from Hoshab and moves northwards towards Quetta passing through Panjgur-Basima and Sorab from where it merges with the Karachi-Quetta Highway (N-25) at Kalat.

Highways Net



Work of CPEC



Three Arteries of CPEC:

Central Route

Length = 1633 km

Starting Point is
Burhan (Hakla)



The 650 km high-way passes through the remote towns of interior Balochistan and provides a direct and shorter link between Gwadar and Quetta. The highway is regarded as a catalyst for the progress and development of Balochistan. Due to this route Gwadar would be connected not only to Quetta

GWADAR – TURBAT – HOSHAB (M-8):

This route is a 193 kilometer stretch between Gwadar and Hoshab. The project costed around Rs. 13 Billion. It has been completed and is functioning.

CENTRAL ROUTE:

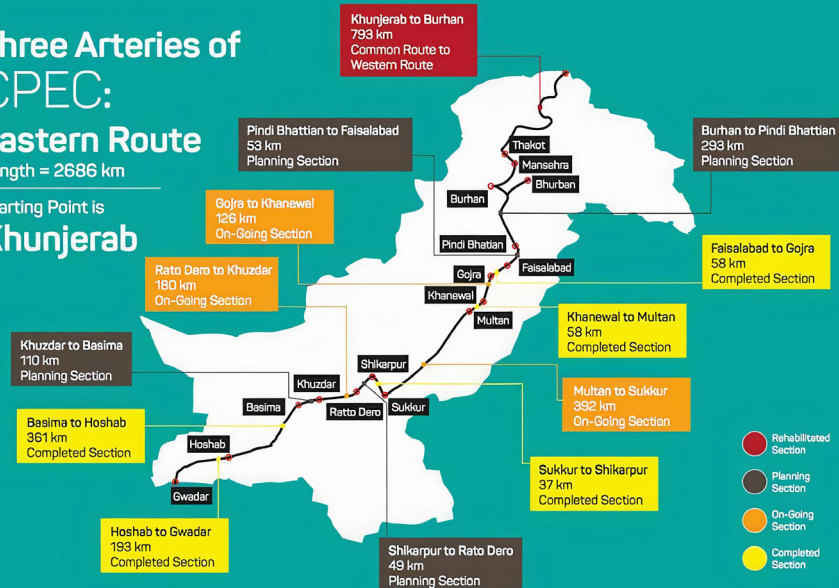
The Central route of CPEC, once constructed it will pass through these areas of Balochistan; Gwadar – Turbat – Panjgur – Khuzdar and onwards connecting other areas of Pakistan.

Three Arteries of CPEC:

Eastern Route

Length = 2686 km

Starting Point is
Khunjerab





The progress on Gwadar Port has been the most significant development task in recent years. Once developed, the port would be a game-changer for the province, the China-Pakistan Economic Corridor will open up new avenues of opportunities for the people of Balochistan. It is envisioned that Gwadar would be transformed into an Economic hub and will subsequently contribute towards the development of the whole province, which will result in addressing the various economic and social problems of Balochistan.

The China-Pakistan Economic Corridor is not only expected to change the fate of the two countries, but also the whole region, for it will open a gateway to the Indian Ocean. The landlocked Central Asian states are likely to derive maximum benefit from CPEC. For Central Asian countries, marine trade with South Asia, Middle East and Africa through the warm waters of Gwadar port would be feasible. Gwadar is the shortest route to sea that provides a strategic opportunity for CARs to transport their goods more easily and gain competitiveness in regional and global markets.

GWADAR

P O

GWADAR FREE TRADE ZONE

The development and operation of the Gwadar Free Trade Zone has been handed over to the COPHC under an agreement between China Overseas Ports Holding Company (COPHC), Gwadar Port Authority (GPA), and Singapore Port Authority in 2013. COPHC has invested 250 million USD in the port renovation so far. Five new quay cranes, a 100,000 M2 storage yard, a seawater desalination plant with a capacity of 220,000-gallons of pure water/day, 2 sets of sewage disposal systems, and cargo handling equipment have been installed and 80,000 M2 green space has been added to the port area. 400,000 tons of cargoes have been handled by Gwadar

Port in 2017.

The Gwadar Free Trade Zone is located in the northern part of Gwadar, about 7km away from the port. The planned development period is from 2015 to 2030 and is divided into four phases. The 923-hectare Free Zone includes an initial area (25 hectares) and the northern area (898 hectares). The initial area is located in the west of the existing port. Its main purpose is to play a pilot role in setting up industries and to increase cargo capacity for the port. The construction of the initial area includes a few projects: infrastructure, business center, trade exhibition hall, cold storages, and ware house. By January of 2018, all these

constructions have been completed. The Gwadar Free Trade Zone was inaugurated and the first International Expo was held in January 2018.

Around 30 companies have invested in the Free Trade Zone with a direct investment of about \$474 million. With the construction of the free trade zone, the city of Gwadar will become a commercial hub of the region in the near future. At present, the following areas have been allocated as free zones and export processing zones in the industrial locations of Gwadar. The land has already been earmarked/acquired for these purposes.

DEEP-SEA

R T

PORT PROCESSING ZONE: 1,000 ACRES



Gwadar Free Zone
New Business Opportunities Opening

SPECIAL ECONOMIC ZONES

Balochistan faced a number of problems that have restricted industrial development because of the lack of substantial investment, weak institutions, unskilled human resources as a result of limited vocational education, lack of modern technology, and high business cost. CPEC provides a fast-tracked industrial development opportunity through the development of Special Economic Zones (SEZs). SEZ is a strategic policy instrument for rapid industrialization and economic development. SEZ is defined as a separate zone, subject to its own tax system, which differs from the country's existing tax system. SEZ is administered by a competent authority and supported by high-quality infrastructure, regional connectivity, and uninterrupted energy supply.

Special Economic Zones Incentive Package

Developers:

- One Time Custom Duty exemption on import of capital goods.
- Income Tax exemption for 10 years from the date of signing of development agreement.

Zone Enterprises:

- One Time Custom duty and taxes exemption on import of capital goods.
- Income Tax exemption for 10 years from commencement of commercial operation.

General Incentives for Special Economic Zones:

- Gas, Electricity, and other utilities will be provided at the zero-point of the Zones
- Captive power generation is permissible to Developers of the Zones
- Incentives granted cannot be withdrawn midway
- Incentives cannot be modified to the disadvantage of an enterprise
- SEZ Act encourages transparent procedures for the establishment of SEZs
- Best practices for building codes, environment protection, and workforce
- Security arrangements by the respective provincial government
- For dispute resolution, administrative and alternate dispute resolution mechanism

BOSTAN SPECIAL ECONOMIC ZONE:

The Bostan Special Economic Zone is one of the SEZs located in Balochistan over the area of 1000 acres. It is situated at district Pishin bordered with Quetta (provided with enough skilled labor), Qila Saifullah (famous livestock, fruits and vegetables), Ziarat (famous for dry fruits, apple and grapes) and Qila Abdullah (climate suitable for fruits and vegetables). The availability of different means of connectivity (Airport, seaport, dry port, railways and roads) make this zone feasible for business activities and ensure the mobility of labor force to start operations.

The zone is situated at a distance of:

- 23 KM from Airport (Quetta)
- 713 KM from seaport (Karachi)
- 976 KM Gwadar
- 32 KM from dry port (Quetta).
- 124 KM from Chaman (Pak-Afghan border)
- 650 KM from Taftan (Pak-Iran border)
- located near national highway N-50 which will connect the zone to other regions of Pakistan.

Following clusters/sectors are proposed to be established at Bostan Industrial Zone:

- Fruit Processing
- Agriculture machinery
- Pharmaceutical
- Motor Bikes Assembly
- Chromite
- Cooking Oil
- Ceramic industries
- Ice and Cold storage
- Electric Appliance

NOT LIMITED TO THE ABOVE-MENTIONED ONES

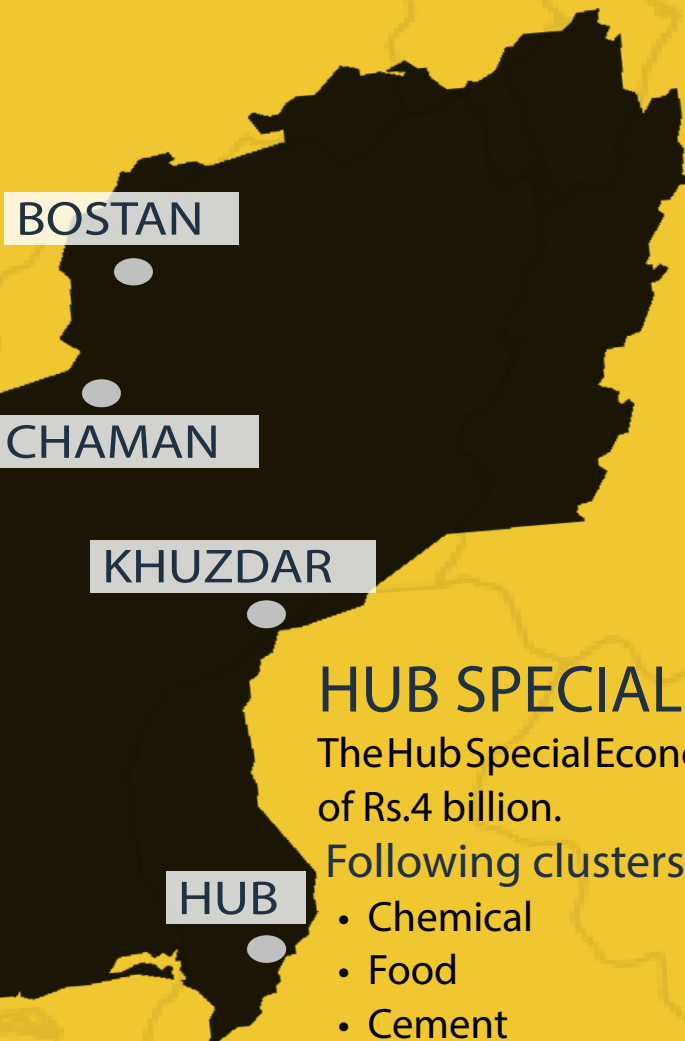
HUB SPECIAL ECONOMIC ZONE:

The Hub Special Economic Zone is one of the SEZs located in Balochistan over the area of 406 acres, with a total cost of Rs.4 billion.

Following clusters/sectors are proposed to be established at Hub Industrial Zone:

- Chemical
- Food
- Cement
- Manufacturing
- Pharmaceuticals
- Power generation
- Oil lubricants
- Blending
- Marble
- Metal processing
- Mineral grinding
- Steel grinding industries
- Engineering and other industries will be established as

NOT LIMITED TO THE ABOVE-MENTIONED ONES



INDUSTRIAL ESTATES IN BALOCHISTAN

Balochistan provides highly developed industrial estate facilities in the province. These estates cater to all types of industry needs and are well supplied with a wide range of infrastructure and related services which include Four Industrial Estates in LIEDA (Lasbela), GIEDA (Gaddani), Quetta, and Dera Murad Jamali, each tailored to support SMEs and large-scale industries across various sectors. Expanding outreach to more remote areas, five Mini Industrial Estates have been established in Muslim Bagh, Zhob, Chaman, Khuzdar, and Turbat, promoting localized manufacturing and employment.

INVESTMENT REGIME AND INCENTIVES

- Numerous sectors are open for foreign investment
- Up to 100% foreign ownership allowed
- No restrictions on foreign real estate developers
- No minimum requirement for the amount for foreign equity investment
- Entitlement to sell shares, transfer ownership, and de-register
- Option to repatriate profits, dividends, or any other funds in foreign investor's currency of origin
- Online registration procedure for foreign companies
- Opening of branch offices is allowed and facilitated
- Legal system provides recognition and enforcement of foreign arbitration awards
- Guarantees against nationalization and expropriation
- Well-established regime for managerial personnel
- Bilateral Investment Treaties with 47 countries and agreements on Avoidance of Double Taxation with 52 countries.
- Full membership of International Standards Organization
- Access to domestic borrowing
- Online Payment of Taxes Integrated Border Customs Clearing System.



The background is a solid yellow color. On the left side, there is a white, cloud-like shape. Two arrows originate from the right side of this cloud shape and point upwards and to the right. The top arrow is white, and the bottom arrow is a darker yellow. Both arrows have a trail of small white dots behind them. The text 'EASE OF DOING BUSINESS' is written in a bold, dark blue, sans-serif font, positioned to the left of the arrows.

EASE OF DOING BUSINESS

The Ease of Doing Business Project is developed by the World Bank through a set of objective indicators that focus on the impacts of laws, regulations, and their enforcement across the economies. In this regard, Balochistan is consistently making efforts to improve the business environment in the province.



REGULATORY MAPPING AND MODERNIZATION



The Ease of Doing Business Cell under BBoIT took the initiative to consolidate and create a database of all business regulations applicable in the province. Regulatory Modernization Initiative consolidate and create a database of all business registrations, licenses, NOC's, certificate to simplify the regulations and processes by introducing the Balochistan Smart Business Regulations Act in order to achieve Ease of Doing Business in the province.

Balochistan Smart **Business Regulations.**

01

One Law to Fully Modernize Business Regulations across Departments

02

Will Abolish all Redundant and Duplicate Laws

03

Will modernize all Existing Laws relating to Businesses

04

Will be based on International Best Practices on Ease of Doing Business

05

One Law for all Regulatory Guillotine and Regulatory Modernization

Balochistan Facilitation Center **(BFC)** One Stop Support

The Balochistan Board of Investment & Trade (BBotT) is establishing a state-of-the-art Business Facilitation Center (BFC) to serve as a single-window platform for investors, entrepreneurs, and business stakeholders.

KEY OBJECTIVES



Provide seamless access to government approvals, permits, licenses, and NOCs



Act as a central interface between businesses and relevant government departments

CORE SERVICES OFFERED

- Business registration and licensing assistance
- Investor onboarding and project facilitation
- Regulatory compliance guidance
- Access to federal and provincial incentives (e.g., SEZ, tax benefits)
- Coordination with relevant departments and regulatory bodies

”

The BFC **streamline the business lifecycle** from entry to operation, reduce turnaround times, enhance transparency, and establish **Balochistan as an investor-friendly destination**

03



Enable end-to-end digital service delivery through integration with the Pakistan Regulatory Modernization Initiative (PRMI)

04



Offer investment advisory, aftercare, and dispute resolution support under one roof

The Knowledge Hub Functions

- Empower investors with credible, timely, and actionable insights
- Inform public policy and reform design with evidence-based research
- Promote knowledge sharing across government, industry, and academia



BBOT Investment Knowledge HUB

To complement its facilitation services, BBoIT is also launching a Knowledge Hub to serve as a central repository of investment intelligence, market data,



1

Trade & Investment

Real-time dashboards and sectoral data on



2

Research & Feasibility

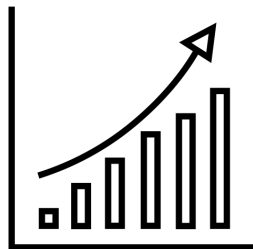
Research papers, feasibility studies, and



3

Regulations & Investment

Regulatory and legal frameworks, investment



4

Economic Trends

Repository of economic trends, success stories,



5

Academia & Industry

Support for academia, think tanks, and private



6

Data-Driven Investment

This can cover actionable insights drawn from sectoral trends, economic indicators,

WE WELCOME ALL INVESTORS TO CONNECT, AND GROW WITH BALCO



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