

2024

## Trade Analysis

# Paints, Dyes & Coatings Sector of Pakistan



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## 1. Disclaimer

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## 2. Introduction to SMEDA

Small and Medium Enterprises Development Authority (SMEDA) is an apex SME development agency working under the Ministry of Industries and Production (MoIP), Government of Pakistan. In pursuit of its mission, SMEDA has adopted an integrated strategy that comprises SME sectors & clusters development, business development services (BDS), and policy advocacy to protect and promote SME interests.

SMEDA offers a broad spectrum of business development services to SMEs which include prefeasibility studies, identification of experts and consultants, delivery of need-based capacity building programs in addition to business guidance through help desk services.

## 3. Paints and Coatings Sector in Pakistan

The objective of this write-up is to provide the reader with an overview of the sector. The information covers global trade of Paints and Coatings Sector specifically the product categories falling under HS:32, and status of Pakistan's trade in the same. Trade information for global comparisons has been obtained from [www.trademap.org](http://www.trademap.org), International Trade Centre's Database.

The sector can be divided into two segments<sup>1</sup>,

### i) Organized Segment

Our main focus will be on the organized segment in this sector study. The organized segment accounts for ~40% of total market share. This segment comprises around 20 players including both multinational brands, such as AkzoNobel, Jotun, Berger, Nippon and Kansai, and local players like Master, Brighto, Happilac, Nelson and Diamond Paints. The organized segment suffers not only due to loss of market share but also faces cost pressures as the unorganized segment avoids taxation and other costs associated with the organized sector.

### ii) Unorganized Segment

The unorganized segment accounts for ~60% of the production and has over 100 players. It caters to construction industry with focus on vast markets of semi-urban and rural area. The segment is highly price sensitive.

According to the Pakistan Coating Association (PCA), the size of the local paints and coatings sector is relatively small compared to other regional markets. A recent PCA study indicates that the size of local paints and coating products sector is approximately 0.25 million tons, a per capita average of only 1.2 kg.

### 3.1. Sub Sectors/ Segmentation

Pakistan's paints and coating sector is segmented into three major components:

1. **Resins** (Acrylic, Alkyd, Polyurethane, Epoxy, Polyester, and other Resin Types)
2. **Technology** (Water-Borne and Solvent-Borne)
3. **End-user Industry** (Architectural, Automotive, Wood, Industrial Coatings, Transportation, and Packaging)

<sup>1</sup> Brief on Paint Sector - Trade Development Authority of Pakistan (<https://tdap.gov.pk/wp-content/uploads/2022/04/Paint-report-converted.pdf>)

### 3.2. Investment Potential

The Paints and coatings sector in Pakistan holds significant potential for international investment in both downstream and upstream sub-sectors. With the market size estimated at \$400 million, this sector is expected to grow 4 percent per annum over the next 4-5 years. Despite the 2020-21 global pandemic, the sector remained relatively unaffected, benefitting from overall positive consumer demand. The sector experienced sizable growth across all segments, benefitting in large part from the government's pandemic-related stimulus package and additional special incentives/amnesty schemes offered to a few key sectors, i.e. construction, as well as a successive reduction in import duties from the past 2-3 years.<sup>2</sup>

Presently, U.S. companies have a sizeable presence in this market, followed by Japan and China. Both Federal and Provincial Governments' initiatives and projects provide significant opportunities for this sector. These include medium-to-large-scale infrastructure projects (dams, road networks, and government-funded housing schemes). Pakistan is an emerging economy where the cities are growing rapidly and rural areas are transforming into semi-urban areas.

### 3.3. HS: Code Listing and Product Description

The Harmonized System (HS) is an international nomenclature for the classification of products published by the World Customs Organization ([www.wcoomd.org](http://www.wcoomd.org)). It allows countries to classify traded goods on a common basis for customs purposes

With reference to paints and coatings sector of Pakistan, for the purpose of this analysis we will be looking at the HS product category **32** which covers trade in Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other coloring matter; paints and varnishes; putty and other mastics; inks

This category is further sub divided into fifteen sub categories as described below;

Harmonized System Code (HS Code)	Description of Goods
<b>3201</b>	Tanning extracts of vegetable origin; tannins and their salts, ethers, esters and other derivatives
<b>3202</b>	Synthetic organic tanning substances; inorganic tanning substances; tanning preparations, whether or not containing natural tanning substances; enzymatic preparations for pre-tanning
<b>3203</b>	Colouring matter of vegetable or animal origin, incl. dye extracts (excluding animal black), whether or not chemically defined; preparations based on colouring matter of vegetable or animal origin of a kind used to dye fabrics or produce colorant preparations (excluding preparations of heading 3207, 3208, 3209, 3210, 3213 and 3215)

<sup>2</sup> International Trade Administration (<https://www.trade.gov/country-commercial-guides/pakistan-paints-and-coatings-sector>)

<b>3204</b>	Synthetic organic colouring matter, whether or not chemically defined; preparations based on synthetic organic colouring matter of a kind used to dye fabrics or produce colorant preparations; synthetic organic products of a kind used as fluorescent brightening agents or as luminophores, whether or not chemically defined (excl. preparations of heading 3207, 3208, 3209, 3210, 3213 and 3215)
<b>3205</b>	Colour lakes (other than Chinese or Japanese lacquer and paints); preparations based on colour lakes of a kind used to dye fabrics or produce colorant preparations (excluding preparations of heading 3207, 3208, 3209, 3210, 3213 and 3215)
<b>3206</b>	Inorganic or mineral colouring matter, n.e.s.; preparations based on inorganic or mineral colouring matter of a kind used for colouring any material or produce colorant preparations (excl. preparations of heading 3207, 3208, 3209, 3210, 3213 and 3215); inorganic products of a kind used as luminophores, whether or not chemically defined
<b>3207</b>	Prepared pigments, prepared opacifiers and prepared colours, vitrifiable enamels and glazes, engobes, liquid lustres and similar preparations of a kind used in the ceramic, enamelling or glass industry; glass frit and other glass in the form of powder, granules or flakes
<b>3208</b>	Paints and varnishes, incl. enamels and lacquers, based on synthetic polymers or chemically modified natural polymers, dispersed or dissolved in a non-aqueous medium; solutions of products of headings 3901 to 3913 in volatile organic solvents, containing > 50% solvent by weight (excl. solutions of collodion)
<b>3209</b>	Paints and varnishes, incl. enamels and lacquers, based on synthetic polymers or chemically modified natural polymers, dispersed or dissolved in an aqueous medium
<b>3210</b>	Paints and varnishes, incl. enamels, lacquers and distempers (excluding those based on synthetic polymers or chemically modified natural polymers); prepared water pigments of a kind used for finishing leather
<b>3211</b>	Prepared driers
<b>3212</b>	Pigments, incl. metallic powders and flakes, dispersed in non-aqueous media, in liquid or paste form, of a kind used in the manufacture of paints; stamping foils of a kind used in the printing of book bindings or hatband leather; colorants and other colouring matter, n.e.s. put up for retail sale
<b>3213</b>	Artist's, student's or signboard painter's colours, modifying tints, amusement colours and the like, in tablets, tubes, jars, bottles, pans or similar packages
<b>3214</b>	Glaziers' putty, grafting putty, resin cements, caulking compounds and other mastics; painters' fillings; non-refractory surfacing preparations for façades, indoor walls, floors, ceilings or the like
<b>3215</b>	Printing ink, writing or drawing ink and other inks, whether or not concentrated or solid

## 4. Global Perspective on Items Trading Under HS: 32

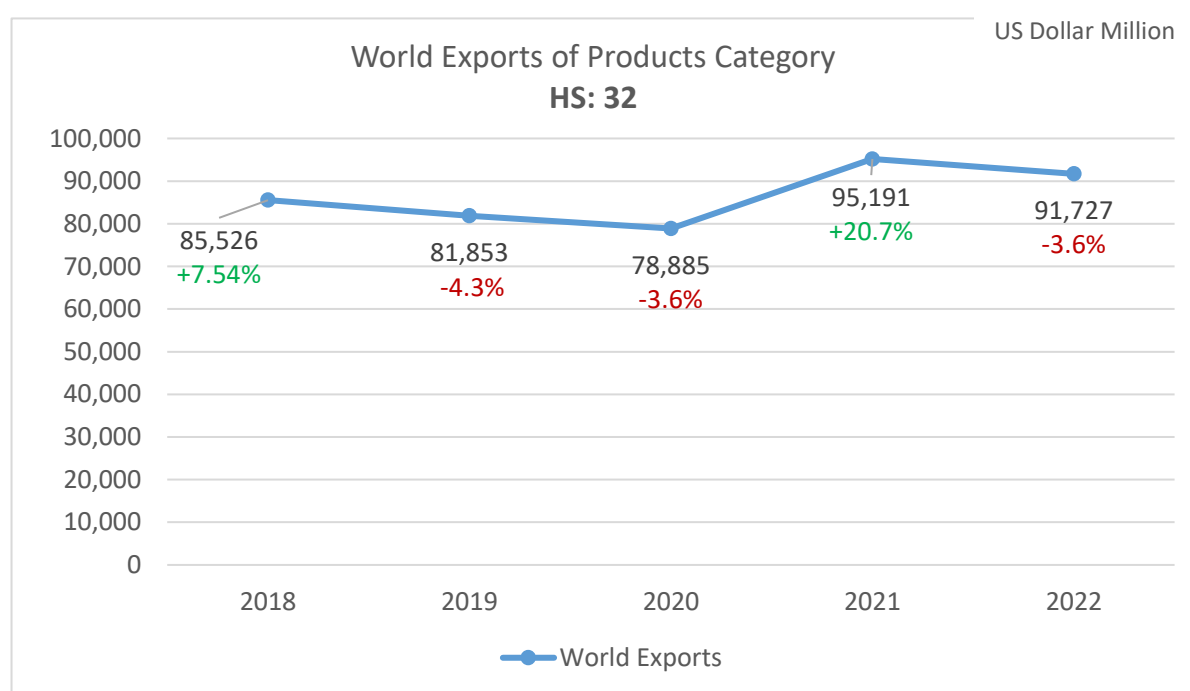
Global trade of the HS product category **32** covers trade Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other coloring matter; paints and varnishes; putty and other mastics; inks and how Pakistan plays into it.

### 4.1. World Exports

The total world exports for products falling under HS:32 (Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other coloring matter; paints and varnishes; putty and other mastics; inks) stood at USD 91,727 Million (USD 91.73 Billion) in the year 2022. The table below shows a five-year trend of world exports in HS: 32 from year 2018 to 2022, along with percentage growth from previous years;

HS: 32 World Exports		US Dollar million			
	Year 2018	Year 2019	Year 2020	Year 2021	Year 2022
<b>World Exports</b>	85,526	81,853	78,885	95,191	91,727
<b>Growth % (from previous year)</b>	7.5%	- 4.3%	- 3.6%	20.7%	- 3.6%

Based on data from the table above, the following illustration demonstrates the data on world exports under HS: 32, along with percentage increase from previous years;



#### 4.1.1. Product Subcategory Wise World Exports

World exports for each subcategory of products traded under HS: 32 between 2018 and 2022 are shown, along with percentage growth between 2021 and 2022 in the following table;



Product Code HS: 32		Sub-Category Wise World Exports			US Dollar Million	
Sub-category HS Codes	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022	% Growth between 2021-22
3208	15,265	14,982	14,391	16,849	16,991	0.8%
3206	14,947	13,484	13,177	17,316	16,848	-2.7%
3204	13,648	13,778	12,237	15,137	13,924	-8.0%
3215	12,250	11,450	11,059	12,120	11,213	-7.5%
3214	9,030	8,808	8,506	10,301	10,574	2.7%
3209	6,771	6,621	6,562	7,702	7,466	-3.1%
3207	4,715	4,281	4,796	6,215	5,403	-13.1%
3212	2,412	2,337	2,048	2,464	2,324	-5.7%
3203	1,320	1,258	1,459	1,578	1,641	4.0 %
3213	794	838	999	1,227	962	-21.6%
3210	893	725	662	797	811	1.7%
3202	705	629	496	587	625	6.3%
3205	270	253	224	257	304	18.5%
3201	288	255	235	332	275	-17.1%
3211	243	225	205	249	238	-4.3%

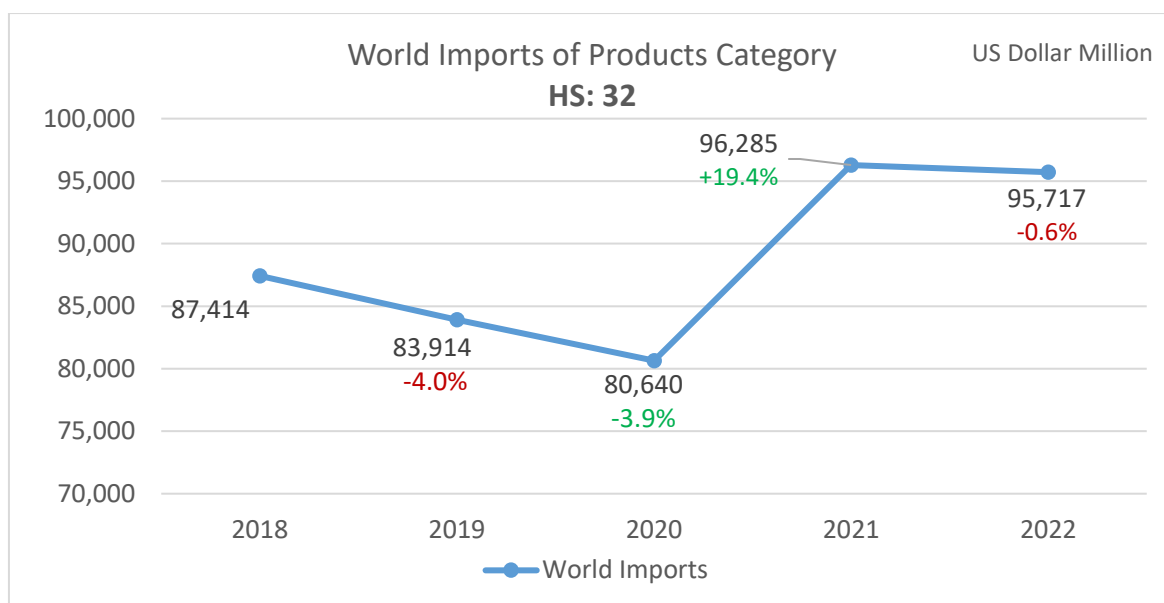
#### 4.2. World Imports

World imports for products which fall under product category HS: 32 stood at USD 95,716,946 thousand (USD 95,716 million) in the year 2022. The following table shows total world imports in HS: 32 from 2018 to 2022, also indicating percentage increase/decrease from previous years;

HS: 32 World Imports		US Dollar millions			
	Year 2018	Year 2019	Year 2020	Year 2021	Year 2022
World Imports	87,414	83,914	80,640	96,285	95,717
Growth % (from previous year)	8.3%	- 4.0%	- 3.9%	19.4%	-0.6%

Based on data from the preceding table, the following illustration demonstrates the data on world Imports under HS: 32 between 2018-2022





#### 4.2.1. Product Sub-Category Wise World Imports

World Imports for products traded under HS: 32, between 2018 and 2022 are shown in the following table. Also shown is the percentage growth in trade between 2021 to 2022.

Product Code HS: 32					US Dollar Million	
Sub-Category HS Codes	Imported value in 2018	Imported value in 2019	Imported value in 2020	Imported value in 2021	Imported value in 2022	Percentage Growth 2021-22
3206	16,036	14,618	14,190	17,900	18,216	1.8%
3208	14,491	14,338	13,730	16,165	16,245	0.5%
3204	14,958	14,928	13,045	15,945	16,000	0.3%
3215	14,130	13,294	13,828	14,874	13,568	-8.8%
3214	9,175	8,966	8,573	10,327	10,874	5.3%
3209	6,608	6,468	6,402	7,512	7,391	-1.6%
3207	3,997	3,638	3,648	4,688	4,709	0.4%
3212	2,529	2,434	2,168	2,623	2,512	-4.3%
3203	1,659	1,592	1,734	1,848	1,903	3.0%
3210	888	823	789	948	933	-1.6%
3213	680	690	769	978	868	-11.2%
3202	777	691	579	703	683	-2.9%
3201	390	359	299	386	397	2.9%
3205	283	262	243	267	296	10.8%
3211	251	236	218	263	236	-10.3%

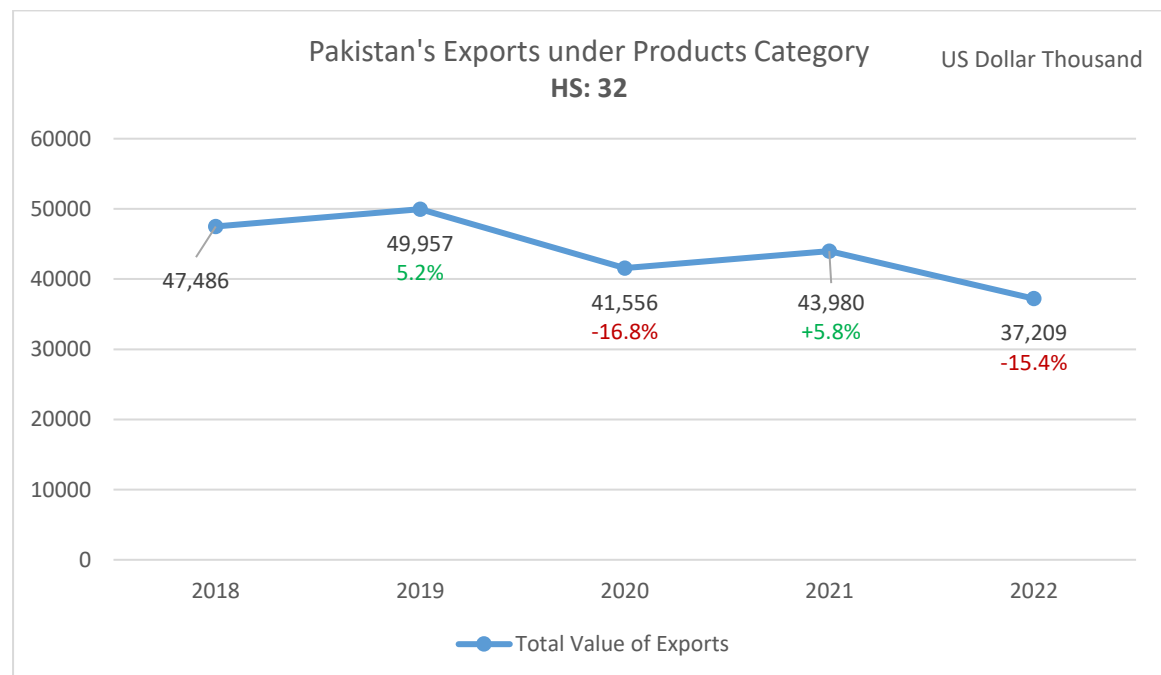
## 5. Pakistan's Trade in Products Listed Under HS: 32

### 5.1. Pakistan's Exports

The table below shows Pakistan's total exports for HS: 32 (in US dollar thousands) along with percentage growth from previous years.

Pakistan's Exports of Product code HS: 32					US Dollar Thousand
Year	2018	2019	2020	2021	2022
Export Value (in \$ thousand)	47,486	49,957	41,556	43,980	37,209
% Growth (from previous year)		26%	5.2%	-16.8%	5.8%

Data from the table above is graphically represented below;



It can be observed that despite a relatively mature paints and coatings industry most of the products produced under this category are generally consumed within the country with very little exported.

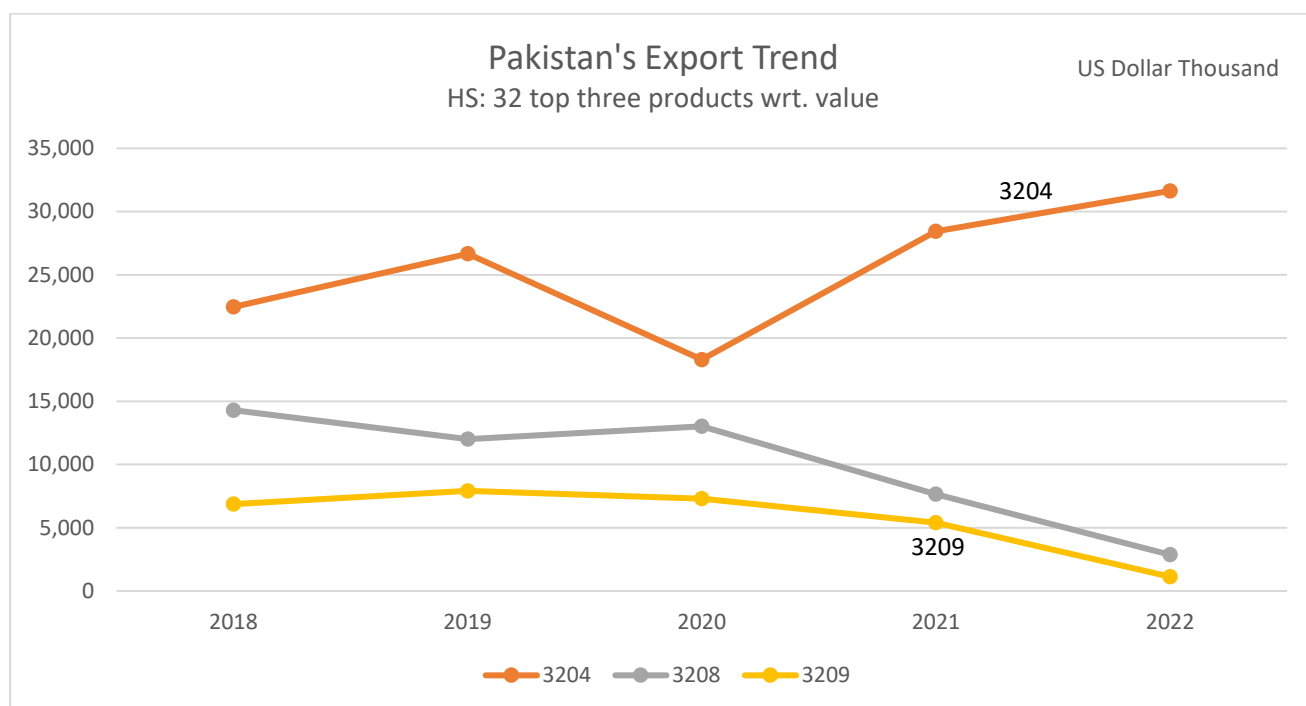
#### 5.1.1. Pakistan's Subcategory Wise Exports

Pakistan's exports for product code HS: 32 in significant subcategories (exceeding USD 1 million in value between 2018 to 2022) are shown below. Also indicated is the percentage growth in trade value between from 2021 to 2022.

Pakistan's Exports of HS: 32						US Dollar thousand
Sub-category HS Codes	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022	% Growth 2021-22
3204	22,468	26,671	18,296	28,425	31,637	11.3%
3208	14,294	12,011	13,011	7,653	2,863	-62.6%

<b>3209</b>	6,866	7,916	7,307	5,389	1,127	<b>-79.1%</b>
<b>3214</b>	806	874	1,355	1,052	790	<b>-24.9%</b>
<b>3206</b>	242	631	1,038	844	324	<b>-61.6%</b>
<b>3215</b>	2,309	1,517	290	305	198	<b>-35.1%</b>

The illustration below shows Pakistan's export trend from 2018 to 2022 for the top three sub-categories (values wise) under HS: 32.



#### 5.1.2. Top Importing Partners for Pakistan

Following table shows data about major HS: 32 products importing countries from Pakistan between 2018 and 2022.

<b>HS: 32</b>	<b>Top Importers from Pakistan</b>					US Dollar thousand
<b>Country</b>	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022	
Turkey	881	4,312	4,724	8,872	11,596	
Bangladesh	3,123	5,165	3,894	7,992	8,794	
Vietnam	1,433	6,091	3,339	5,525	4,766	
Afghanistan	21,388	20,785	21,316	13,563	3,699	
Thailand	1,420	1,750	1,476	1,938	2,333	

## 5.2. Price Comparison of Items Exported under HS 3204

It can be seen from Pakistan's export data regarding products falling under parent category HS:32 that the major sub product category (value wise) in this segment is HS: 3204 namely "Synthetic organic colouring matter, whether or not chemically defined".

The table below compares per ton value of products exported under HS: 3204 by Pakistan with the top five global exporters of this product sub category in the year 2022. Average distance of the respective importing countries is also mentioned for additional context.

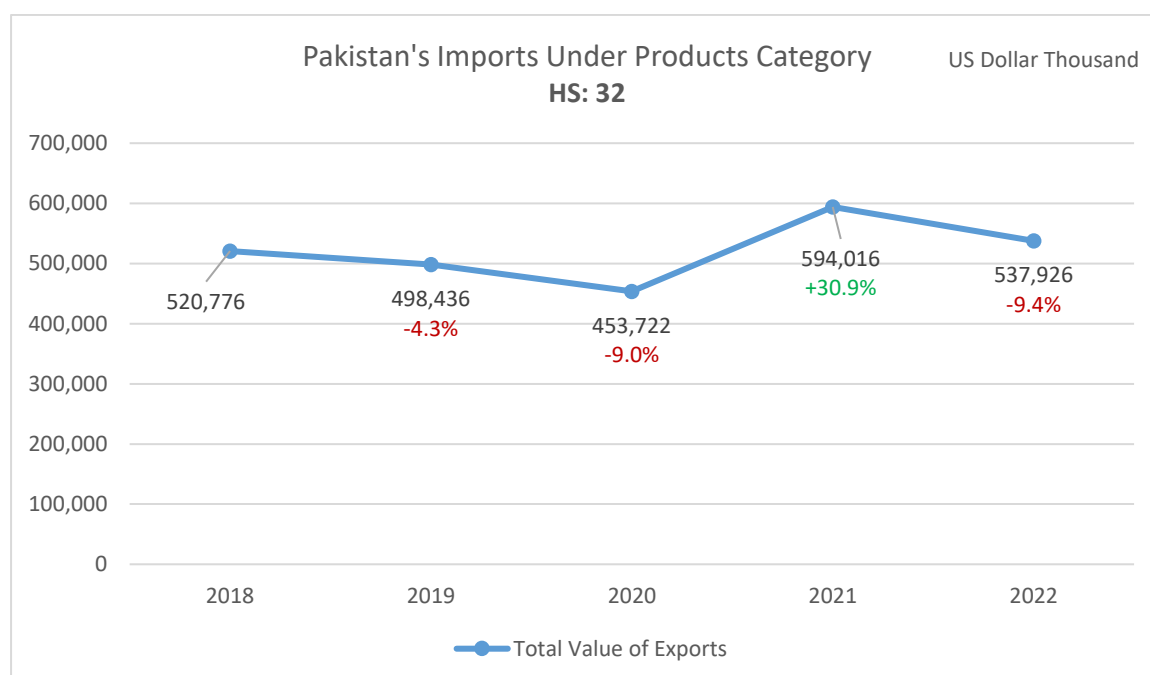
HS: 3204 Pakistan's Price Comparison with top 5 Exporters (year 2022)			
Country	Unit value per Ton (US \$ 000)	Share in World Exports	Avg. Distance of Importing Countries
China	6,871	20.4%	6,306
India	5,925	19.4%	6,907
Germany	12,859	9.7%	3,834
USA	15,096	6.9%	7,294
Korea, Republic of	11,552	5.2%	4,318
Pakistan	10,315	0.2%	3,376

## 5.3. Pakistan's Imports

The table below shows Pakistan's total imports for HS: 32 in (US Dollar thousands) along with percentage growth from previous years.

Pakistan's Imports of Product under HS: 32					
Year	2018	2019	2020	2021	2022
Import Value (in USD thousand)	520,776	498,436	453,722	594,016	537,926
% Growth (from previous year)	6.5%	- 4.3%	- 9.0%	30.9%	- 9.4%

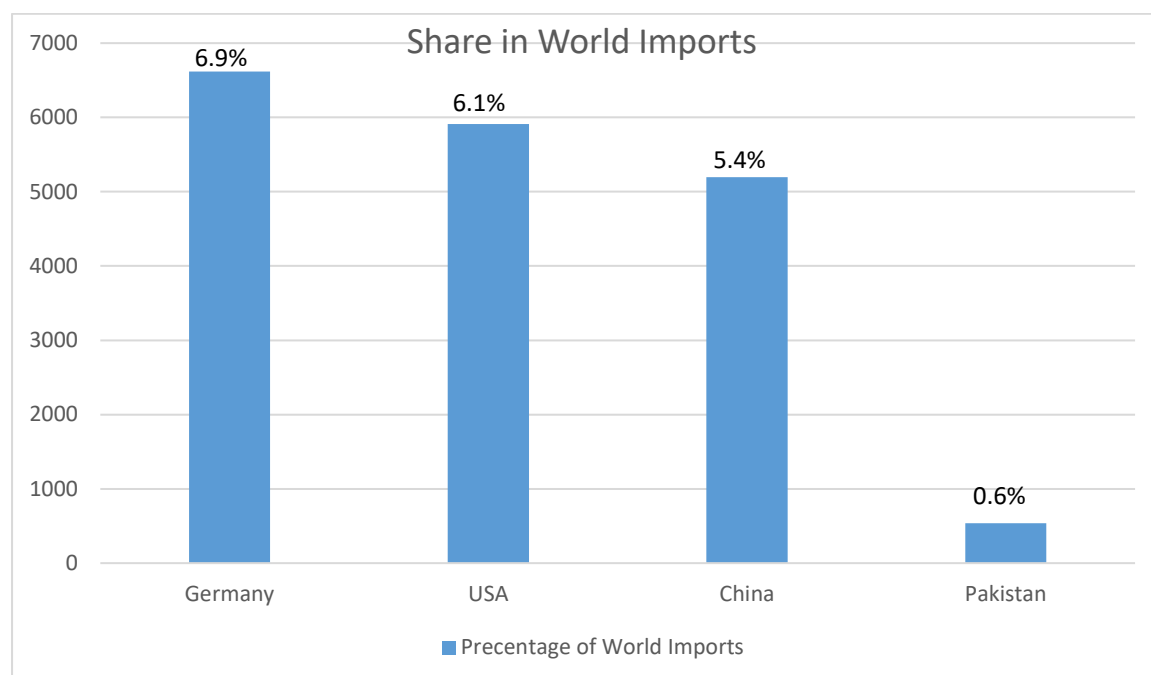
Data from the table above is graphically represented below;



It is evident that Pakistan's Imports under this product category are significantly higher than the imports (USD 37 Million Exports vs USD 538 Million Imports). This is likely due to lack of quality input materials available in the local market. Perhaps if state of the art machinery and processes can be incorporated into the local industry the dependence on imports can be reduced.

### 5.3.1. Pakistan's Comparative Share in World Imports

Pakistan share in global imports of products under HS:32 in the year 2022 was 0.6%. Whereas the top three importers in this category namely Germany, USA and China have 6.9%, 6.1% and 5.4% of the global share in imports of these products.



### 5.3.2. Pakistan's Subcategory Wise Imports

Most of the imports into Pakistan are for premium paints. The total US dollar value of Pakistan's imports of products falling under HS:32 in various categories from 2018 to 2022 are shown in the following table. Also indicated is the percentage increase/decrease in value of imports between 2021-2022.

Pakistan's Imports of HS: 32					In US Dollar thousand	
Sub-category HS Codes	Imported value in 2018	Imported value in 2019	Imported value in 2020	Imported value in 2021	Imported value in 2022	% Growth 2021-22
<b>3204</b>	254,386	253,552	228,072	292,722	250,622	-14.4%
<b>3206</b>	97,695	85,228	78,234	112,071	108,170	-3.5%
<b>3215</b>	48,157	52,998	44,871	46,645	40,878	-12.4%
<b>3207</b>	21,937	22,921	23,239	42,121	37,545	-10.9%
<b>3208</b>	26,807	23,078	26,193	32,316	31,540	-2.4%

<b>3202</b>	29,798	23,543	18,220	25,346	27,826	9.8%
<b>3214</b>	11,476	8,809	7,980	11,882	12,551	5.6%
<b>3201</b>	7,953	7,552	7,371	8,907	7,609	-14.6%
<b>3205</b>	3,038	3,014	3,868	4,043	5,682	40.5%
<b>3212</b>	6,339	6,350	5,573	6,838	5,593	-18.2%
<b>3209</b>	6,934	6,102	5,295	4,504	4,178	-7.2%
<b>3210</b>	2,126	1,752	1,534	2,585	2,323	-10.1%
<b>3211</b>	2,328	1,878	1,702	1,991	1,364	-31.5%
<b>3203</b>	1,098	800	610	926	1,058	14.3%
<b>3213</b>	705	857	961	1,119	986	-11.9%

### 5.3.3. Top Exporting Partners to Pakistan

Data on top exporters of products falling under HS: 32 to Pakistan from 2018 to 2022 is shown below;

HS: 32 Top Exporters to Pakistan US Dollar thousand					
Country	Imported value in 2018	Imported value in 2019	Imported value in 2020	Imported value in 2021	Imported value in 2022
China	172,245	204,838	221,943	301,034	285,729
Republic of Korea	27,955	35,584	46,620	57,103	40,811
Germany	39,215	29,879	25,654	28,906	27,703
Switzerland	26,883	27,216	23,750	26,405	19,722
Spain	18,478	13,548	16,235	19,444	17,919

### 5.4. Custom Tariffs & Duties Applicable

It is important to get educated about applicable customs duties & tariffs before choosing a product or service to import or export and calculating economic feasibility of any trade. Knowing applicable custom duty is also essential if you wish to any claim refunds or rebates. The whole circle of imports and exports hangs upon knowing and using the custom tariffs/duties or exemptions. Customs Act, 1969 & Customs Rules 2001 are the relevant laws and “Pakistan Customs” which is a subsidiary of FBR is the final authority dealing with custom tariffs and rules in Pakistan. The Government often changes the duty structure and rules therefore businesses/traders need to regularly check for any changes to remain updated. The following is the link can be used to check current applicable customs tariffs/duties in Pakistan

<https://www.fbr.gov.pk/categ/customs-tariff/51149/70853/131188>

## 6. Pakistan's Untapped Export Potential for Products Under HS: 32

In this section we will explore Pakistan's export potential of products falling under HS:32 along with subcategories based on the ITC's "Export Potential Map" tool.

The following table subcategories/products falling under parent category HS: 32 have untapped export potential, as shown in table below;

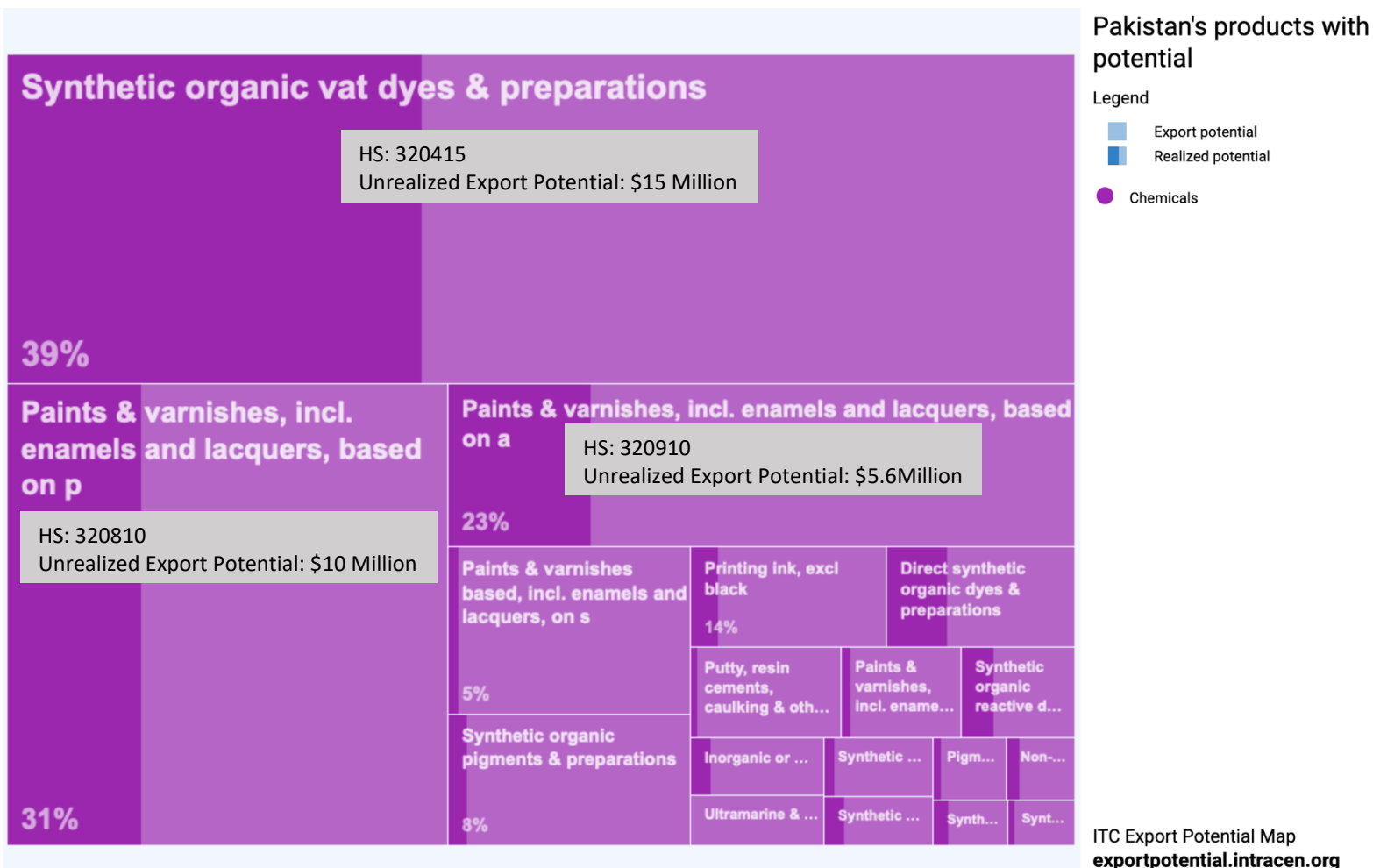
Pakistan's Untapped Export Potential for Products Category HS: 32		
Product HS Code	Unrealized Export Potential	Top 3 Potential Markets for Export
320415	\$15 mn	China, Germany, Brazil
320417	\$2.1 mn	China, Germany, USA
320414	\$914 k	China, Italy, Netherlands
320416	\$522 k	Turkiye, China, Indonesia
320420	\$412 k	USA, China, Netherlands
320490	\$ 307 k	China, Republic of Korea, Germany
320419	\$ 193 k	China, USA, Germany
320412	\$ 191 k	China, Italy, Germany
<b>HS: 3204 (total)</b>	<b>\$19.6 mn</b>	
320810	\$10 mn	China, Thailand, Russian Federation
320890	\$2.8 mn	China, USA, Thailand
<b>HS: 3208 (total)</b>	<b>\$12.8 mn</b>	
320910	\$5.6 mn	UAE, China, USA
320990	\$716 k	China, USA, Vietnam
<b>HS: 3209 (total)</b>	<b>\$6.3 mn</b>	
321410	\$936 k	China, USA, Saudi Arabia
321490	\$243 k	China, Malaysia, Thailand
<b>HS: 3214 (total)</b>	<b>\$1.2 mn</b>	
<b>HS: 3215</b>	<b>\$1.2 mn</b>	China, USA, Vietnam
320641	\$484 k	China, USA, Spain
320649	\$464 k	China, USA, Germany
<b>HS: 3206 (total)</b>	<b>\$948 k</b>	
<b>HS: 3212</b>	<b>\$288 k</b>	China, USA, Germany

It may be noted that data in ITC's Export Potential Map is quite different from data in the "Trade Maps" tool from which the rest of the figures in this document have been obtained. Therefore, the above figures should be looked at independently from the Import/export data provided before.

It can be observed that the categories with the most export potential such as. 3204, are also the same where Pakistan is most dependent on imports for these same or very similar products. This implies that in case quality production of these items is achieved in bulk, we stand to benefit not only from potential increase in exports but also through import substitution.



The above data is graphically represented in the following figure



For further information on the above illustration please visit the following link:  
<https://exportpotential.intracen.org/en/products/tree-map?fromMarker=i&exporter=586&toMarker=w&market=w&whatMarker=k>

Based on the information available at ITC's Export Potential Map tool regarding Pakistan's export potential for products traded under HS: 32 it can be seen that there is untapped export potential for exporting to China for almost all the products that Pakistan produces under this category. Similarly, there is also encouraging potential for exporting these products to Germany and the USA as well.

## 7. Prominent Regional Trade Fairs

Name of Trade Show	Location	Frequency	Web links
Coating & Paint Asia	Karachi Expo Centre	Annual	<a href="https://www.ecgateway.net/">https://www.ecgateway.net/</a>
ICADEX Pakistan (International Exhibition and Conference on Chemical, Dyes & Pigments Industry of Pakistan)	Lahore Expo Centre	Annual	<a href="https://icadexpakistan.com/">https://icadexpakistan.com/</a>
Pakistan's Dyestuff & Chemical Exhibition	Lahore Expo Centre	Every 2 Years	<a href="https://www.textileasia.com.pk/">https://www.textileasia.com.pk/</a>
Pakistan Paint & Construction Chemicals Expo	Lahore Expo Centre	Annual	<a href="https://pakcoat.org/pakistan-paint-construction-chemicals-expo-2023/">https://pakcoat.org/pakistan-paint-construction-chemicals-expo-2023/</a>
CHINACOAT (China International Exhibition for Coatings, Printing Inks and Adhesives)	Shanghai China	Annual	<a href="https://www.chinacoat.net/">https://www.chinacoat.net/</a>
Chongqing International Coatings and Painting Exhibition	Guangzhou, China Import and Export Fair Complex Area B	Every 2 years	<a href="https://www.cantonfair.org.cn/en-US">https://www.cantonfair.org.cn/en-US</a>
IPCC (Paint, Resin, Coatings, Composite & Plating Industries Fair)	Tehran (Iran), Permanent Fairground	Annual	<a href="http://en.iranfair.com/">http://en.iranfair.com/</a>
PAINTINDIA	Nodia (India), India Expo Centre & Mart	Annual	<a href="https://www.paintindia.in/">https://www.paintindia.in/</a>
Asia Pacific Coatings Show	Jakarta (Indonesia)	Annual	<a href="https://www.coatings-group.com/">https://www.coatings-group.com/</a>
INACOATING (Indonesia International Coating, Paintinf, Resins and Composite Exhibition)	Jakarta International Expo (JIExpo)	Annual	<a href="https://www.inacoating-exhibition.net/">https://www.inacoating-exhibition.net/</a>

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