

CUTLERY

KITCHENWARE CUTLERY



Small and Medium Enterprises Development Authority

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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 (MoI&P), 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. Introduction to Pakistan’s Cutlery Sector

3.1 Sector’s Overview

The cutlery sector is a key SME sector of Pakistan with significant linkages with other sectors of the economy. The sector is contributing towards the economy of Pakistan in multiple ways by providing pro-poor employment opportunities, generating national income, increasing foreign exchange, contributing to national trade and society development by creating cluster of cutlery industry.

The cutlery industry is mainly located in the traditional metal workmanship area of Wazirabad Punjab, where the major part of this industry is clustered. However, some of the cutlery units are located in Lahore, Karachi, Sialkot, and Dir (KPK). One of the important segment of shaving blades and disposable razors in cutlery industry is entirely located outside Wazirabad.

The history of metal work in Wazirabad and its surroundings is connected back to Alexander the Great when he invaded India. But the industry was highlighted as mastered in cutlery during the British era. The industry was used to produce arms, ammunition and accessories like bayonets, karpans, knives, daggers, etc. for British Indian Army and for allied forces during the World War II. After the partition of sub-continent most of the Hindu businessmen left for India and the industry dried up, therefore, it had to go through restructuring and product diversification. The industry emerged out again as started manufacturing different types of cutlery items like knives, scissors, shears, blades, daggers, kitchenware, swords and knives for decorative purposes.

The major raw materials used in cutlery industry are stainless steel, brass re-melted metals, compressed wood, camel bones, steel wire and plastic. All the raw materials, whether produced locally or imported, are easily available.

3.2 Contribution of Cutlery Sector to the Economy of Pakistan

Some major indicators of cutlery sector in Pakistan’s Economy are summarized below:

Contribution to GDP	0.11%
Direct Employment	10,000 – 15,000
To Indirect Employment	30,000 – 45,000
Share in Manufacturing Sector	0.20%
Contribution to Export	0.25%
YoY Growth in Exports	+1.73%
Production Quantity	4.2 million pcs
Total Production Value	> 6-7 billion Rupees
Estimated No. of SMEs	400+

Source: UNIDO Field Survey and Board of Investment, Pakistan Light Engineering Sector

According to Pakistan Cutlery & Stainless Utensils Manufacturers & Exporters Association, the cutlery sector of Pakistan offers direct employment to around 10 to 15 thousand people which is only 0.20% of the total employment in manufacturing industry, adding 30-45,000 indirect employment in manufacturing. However, the level of employment in the cutlery industry is far below then its potential as it is currently facing a tight competition from other cutlery exporting countries. Moreover, inconsistent government policies and energy crises have resulted in close down of 300+ units in the last few years.

According to an estimate, the cutlery industry is producing around 4.2 million pieces per year and worth over 6-7 billion rupees. The sector contributes 0.11% of GDP to the national economy. The figures are not significant; however, the industry complement to other related industries such as steel, wood, casings, leather, machine vendors, etc. and thus its contribution in economy is far greater than what is represented above.

The cutlery industry is mainly clustered around the skirts of Wazirabad with over 96% of the countries production. There are more than 400 SMEs involved in cutlery manufacturing. More than 150 cutlery manufacturers are members of “Pakistan Cutlery and Stainless-Steel Utensils Manufacturers Association”. Moreover, out of total production only 25% of the tableware cutlery is exported. Cutlery industry comes under the category of light engineering. Besides, small and medium units, there are also larger units in the industry with modern technology. Medium and large sized industrial units in the industry are exporting while the smaller units are exporting via commercial exporters or supplying to local wholesalers.

The key raw material in cutlery sector is ‘steel’. The industry is utilizing 80% of the steel manufactured locally while remaining 20% is imported from Germany and Japan. A recent breakthrough in the Cutlery Sector is the development of Damascus steel used in the making of hunting knives.

3.3 HS Codes Listing for Cutlery Sector

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

In general, Cutlery refers to all types of cutting instruments which may be used for domestic, commercial or industrial purposes. Mainly, cutlery products are classified into two different categories known as kitchenware and non-kitchenware. The detail of products included in each category is described below in Table 1.

H.S Codes	Description of Goods
Kitchenware Cutlery	
8215	Cutlery; spoons, forks, ladles, skimmers, cake-servers, fish-knives, butter knives, sugar tongs and similar kitchen or tableware
Non-Kitchenware Cutlery	
8208	Knives and cutting blades, for machines or for mechanical appliances.
8211	Knives; with cutting blades, serrated or not (including pruning knives), other than knives of heading no. 8208, and blades therefore
8212	Razors and razor blades; (including razor blade blanks in strips)
8213	Scissors; tailors' shears and similar shears, and blades therefore
8214	Cutlery; other articles, (e.g. hair clippers, butchers' or kitchen cleavers, choppers and mincing knives, paper knives), manicure or pedicure sets and instruments (including nail files)

Table 1: List of Cutlery HS-Codes

4. Pakistan's Trade in Cutlery Sector

4.1 Pakistan's Exports

The total US dollar value of Pakistan's exports in the cutlery sector from 2014 to 2018 in categories as defined in the previous section, is shown in the table below:

Pakistan Exports in Cutlery Sector					
Product Category	Exported value in 2014	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018
	Amount US \$ Thousands				
HS 8215	1,368	1,281	1,582	1,747	2,467
HS 8208	793	412	664	320	301
HS 8211	8,043	8,715	8,801	9,748	10,023
HS 8212	20,525	17,995	18,402	20,493	19,481
HS 8213	5,637	5,878	6,395	7,173	7,067
HS 8214	52,119	48,524	45,620	49,274	48,985
TOTAL	88,485	82,805	81,464	88,755	88,324

Table 2: Pakistan Exports in Cutlery Sector

Source: Trade Map [www.trademap.org]

The following illustration shows total value of Pakistan's cutlery sector exports (in US dollar thousand) as a five-year trend from 2014 to 2018. Also indicated is the percentage increase/decrease in sales value as compared to the previous year.

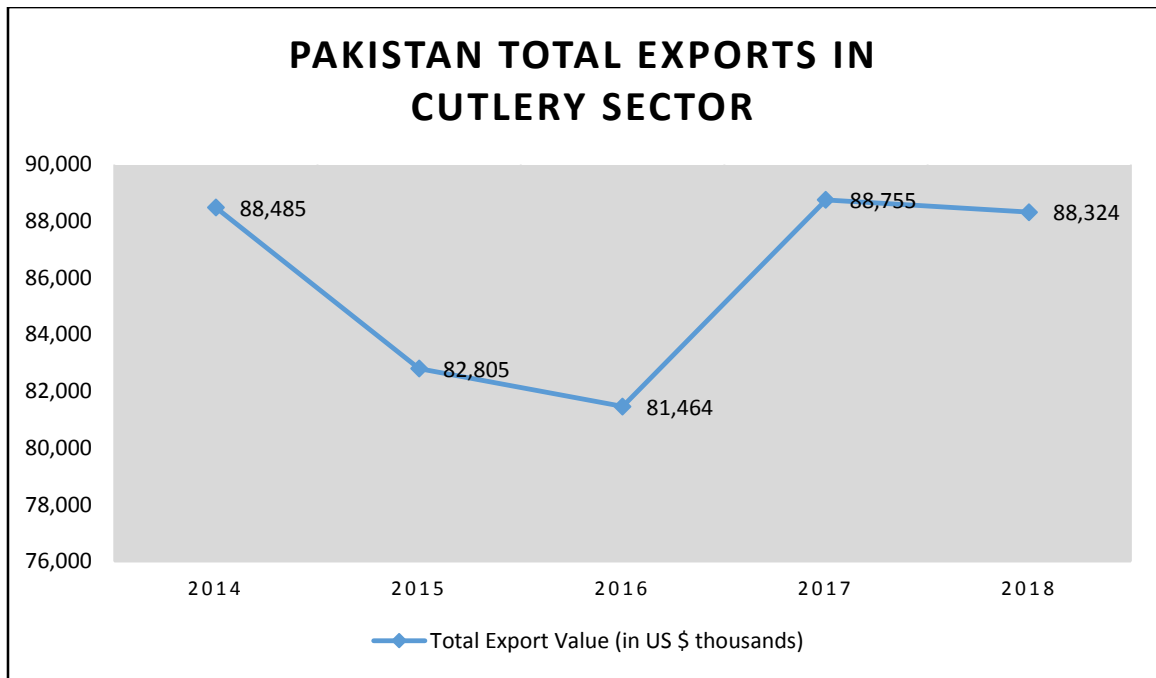


Figure 1: Pakistan Total Exports in Cutlery Sector

4.2 Pakistan’s Export Product Mix for Cutlery Sector

The following chart indicates Pakistan’s export product mix for cutlery sector, based on total value of products exported in the year 2018. It can be seen that the major value contributor in Pakistan’s cutlery sector exports is product category HS: 8214 which represents Cutlery Articles (e.g. hair clippers, butchers' or kitchen cleavers, choppers and mincing knives, paper knives), manicure or pedicure sets and instruments (including nail files). For HS codes reflecting 0% are rounded down and form a negligible portion of the Product Mix.

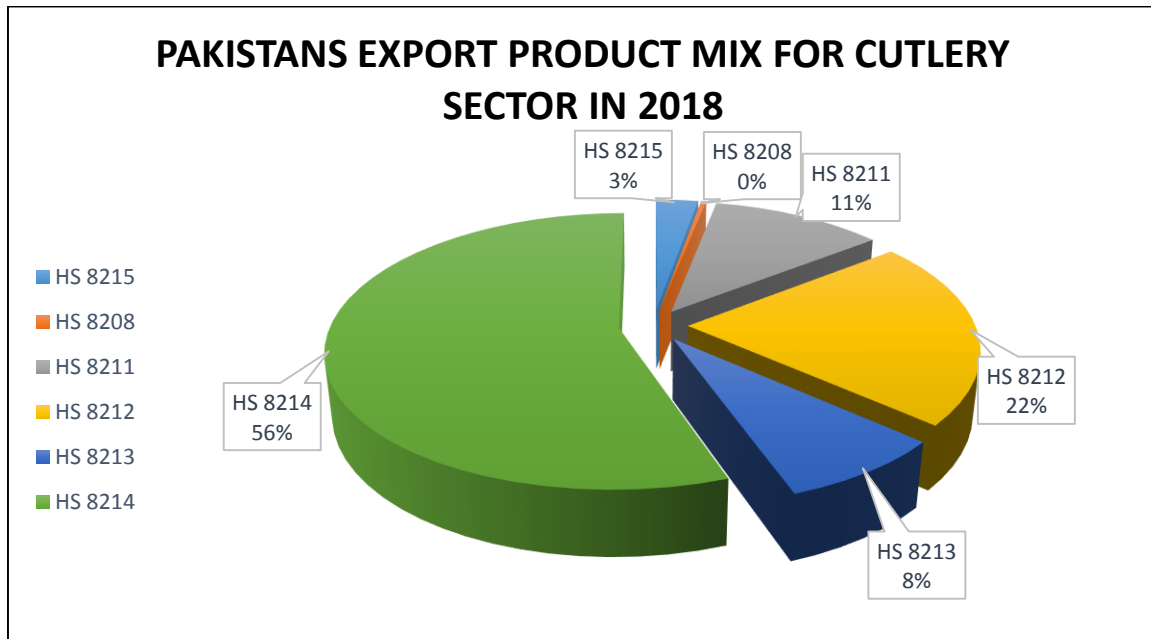


Figure 2: Pakistan Total Exports in Cutlery Sector

4.3 Pakistan's Imports

The total US dollar value of Pakistan's imports in the cutlery sector in various categories from 2014 to 2018 is shown in the table below:

Pakistan Imports in Cutlery Sector					
Product Category	Imported value in 2014	Imported value in 2015	Imported value in 2016	Imported value in 2017	Imported value in 2018
	Amount US \$ Million				
HS 8215	0.78	1.00	1.12	1.66	1.44
HS 8208	7.18	6.02	6.32	7.35	7.88
HS 8211	0.55	0.76	0.80	0.85	0.73
HS 8212	14.12	13.26	11.59	13.89	9.63
HS 8213	0.36	0.30	0.42	0.59	0.65
HS 8214	2.05	2.53	2.57	3.41	2.58
TOTAL	25.04	23.87	22.82	27.75	22.91

Table 3: Pakistan Imports in Cutlery Sector

Source: Trade Map [www.trademap.org]

5. Kitchenware Cutlery Products Global Perspective

In this section we will be looking at global trade of a subsector in the Cutlery sector, namely Kitchenware Cutlery Products, and how Pakistan plays into it. The HS product category 8215 covers trade in "Kitchenware Cutlery Products" includes spoons, forks, ladles, skimmers, cake-servers, fish-knives, butter knives, sugar tongs and similar kitchen or tableware etc.

5.1 World Exports in Kitchenware Cutlery

The total world exports in Kitchenware Cutlery stood at USD 2,833.4 million in the year 2018. There has been a downward trend in world exports from year 2014 to 2016 and upward trend from year 2017 to 2018 of these items as can be seen from the table below:

World Exports in Kitchenware Cutlery					
Product Category	2014	2015	2016	2017	2018
	Amount US \$ Million				
World Total	2,931.39	2,845.00	2,425.72	2,765.50	2,833.40
Growth %	2.42%	-2.95%	-14.74%	14.01%	2.46%

Table 4: World Exports in Kitchenware Cutlery

Source: Trade Map [www.trademap.org]

Based on the table above, the following illustration demonstrates the data on world exports:

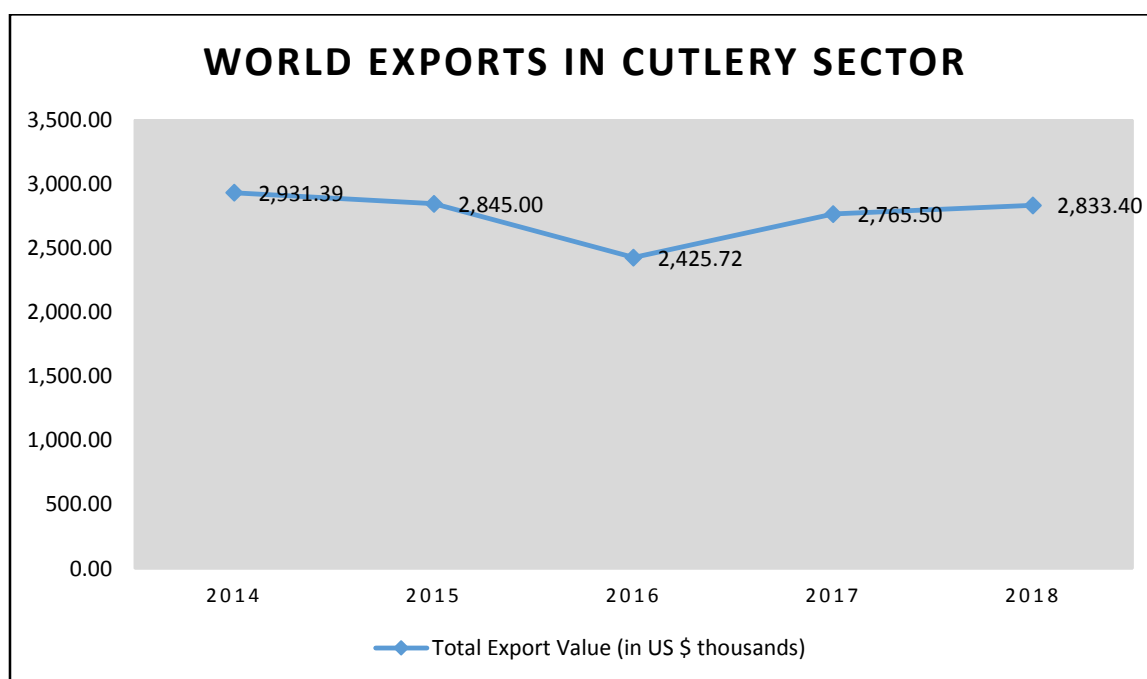


Figure 3: World Exports in Cutlery Sector

5.1.1 Top 5 Exporting Countries and Pakistan in Kitchenware Cutlery

The data of world exports of cutlery products under the HS Code 8215 is as follows:

HS CODE # 8215: Cutlery; Spoons, Forks, Ladles, Skimmers, Cake-Servers, Fish-Knives, Butter Knives, Sugar Tongs and Similar Kitchen or Tableware					
Exporting Countries	2014	2015	2016	2017	2018
	Amounts US \$ Million				
China	1,935.02	1,900.66	1,500.35	1,847.52	1,845.83
Viet Nam	139.84	169.97	155.74	149.89	184.59
Germany	133.97	122.85	129.10	124.22	122.79
Italy	73.92	70.61	74.58	77.11	78.48
Netherlands	67.40	51.27	45.08	40.40	56.96
Pakistan	1.37	1.28	1.58	1.75	2.47
World Total	2,931.39	2,845.00	2,425.72	2,765.50	2,833.40
Growth %	2.42%	-2.95%	-14.74%	14.01%	2.46%

Table 5: Exports of Cutlery Products HS-Code 8215

Source: Trade Map [www.trademap.org]

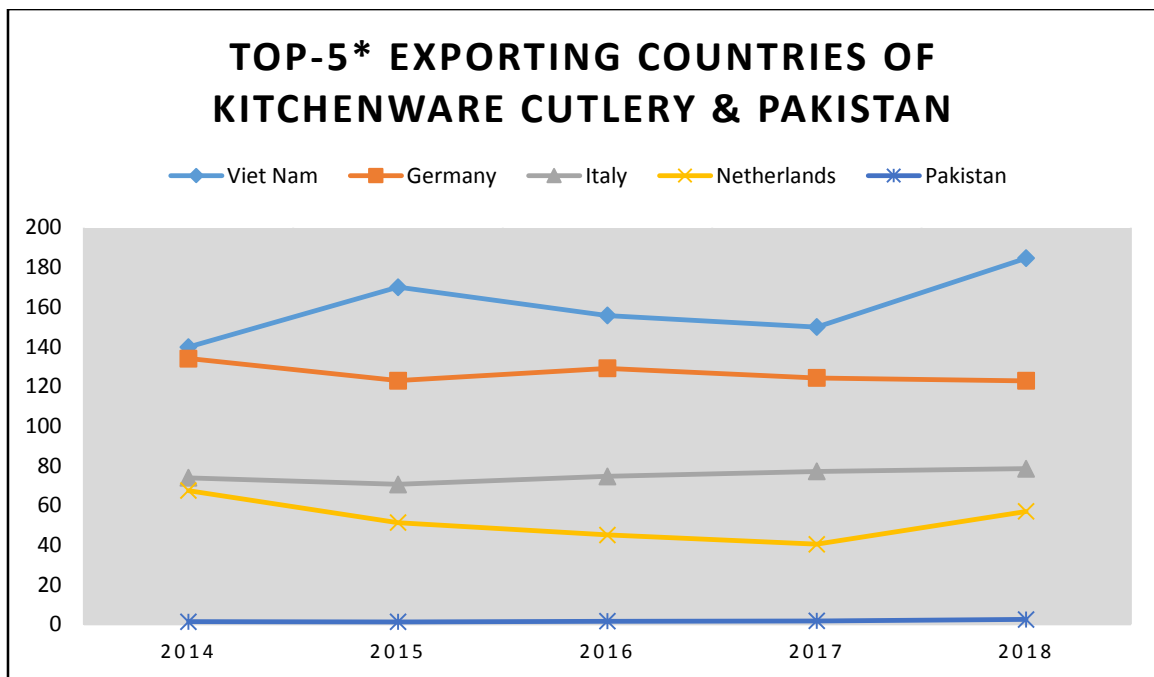


Figure 4: Exports of Cutlery Products HS-Code 8215

*China is not included in the above chart to avoid chart distortion.

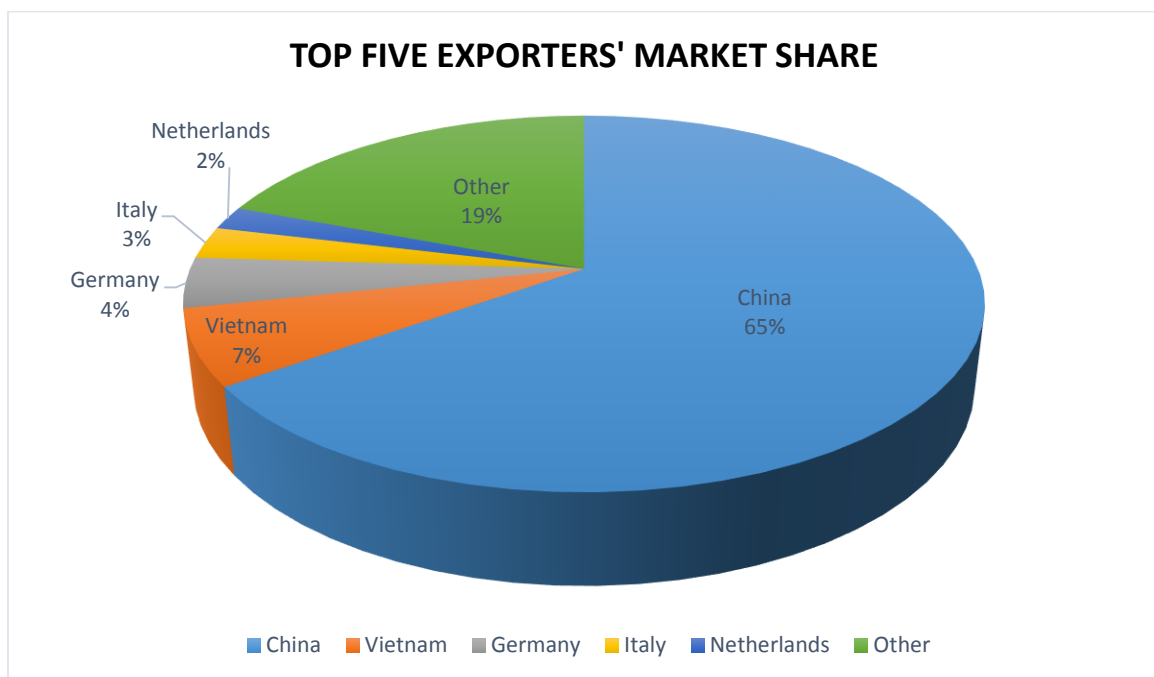


Figure 5: Top Five Exporter's Market Share in Cutlery

According to the above trade statistics of Kitchenware Cutlery products, China is found to be the top exporter of kitchenware cutlery in the world. China's exports for the year 2018 were 1845.83 million USD whereas Pakistan's exports for the same period were amount to only 2.47 million USD. China has 65% of the market share in the world of Kitchenware Cutlery.

5.2 World Imports in Kitchenware Cutlery

The total world imports in Kitchenware Cutlery stood at USD 2,214.6 million in the year 2018. There has been a downward trend in world exports from year 2014 to 2016 and upward trend from year 2017 to 2018 of these items as can be seen from the table below:

World Imports in Kitchenware Cutlery					
Product Category	2014	2015	2016	2017	2018
	Amount US \$ Million				
HS 8215	2,110.54	2,109.64	2,017.30	2,025.09	2,214.60
Growth %	1.72%	-0.04%	-4.38%	0.39%	9.36%

Table 6: World Imports in Kitchenware Cutlery

Source: Trade Map [www.tradmap.org]

5.2.1 Top 5 Importing Countries and Pakistan in Kitchenware Cutlery

The data of world imports of cutlery products under the HS Code 8215 is as follows:

HS CODE # 8215: Cutlery; Spoons, Forks, Ladles, Skimmers, Cake-Servers, Fish-Knives, Butter Knives, Sugar Tongs and Similar Kitchen or Tableware					
Importing Countries	2014	2015	2016	2017	2018
	Amounts US \$ Million				
USA	442.22	481.59	458.19	458.72	538.16
Germany	200.08	200.56	180.31	176.99	188.22
UK	126.54	133.64	117.06	114.00	114.21
France	92.06	98.07	94.63	89.87	92.55
Spain	54.17	52.36	53.06	55.75	60.04
Pakistan	0.78	1.00	1.12	1.66	1.44
World Total	2,110.54	2,109.64	2,017.30	2,025.09	2,214.60
Growth %	1.72%	-0.04%	-4.38%	0.39%	9.36%

Table 7: Imports of Cutlery Products HS Code 8215

Source: Trade Map [www.tradmap.org]

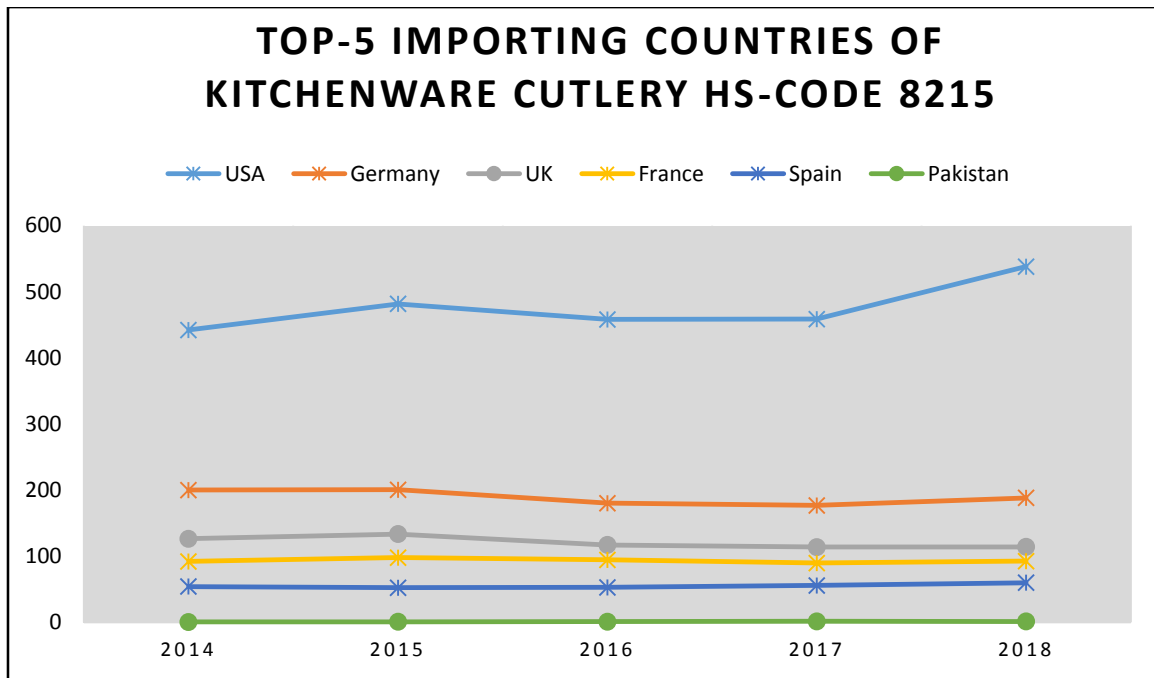


Figure 6: Imports of Cutlery Products HS Code 8215

The above table no. 8 shows data of world imports of kitchenware cutlery products of last five years. It shows that USA is the top importer of kitchenware cutlery and its imports for the year 2018 were amount to 538.16 million USD. Pakistan's imports for the year 2018 were amount to 1.44 million USD.

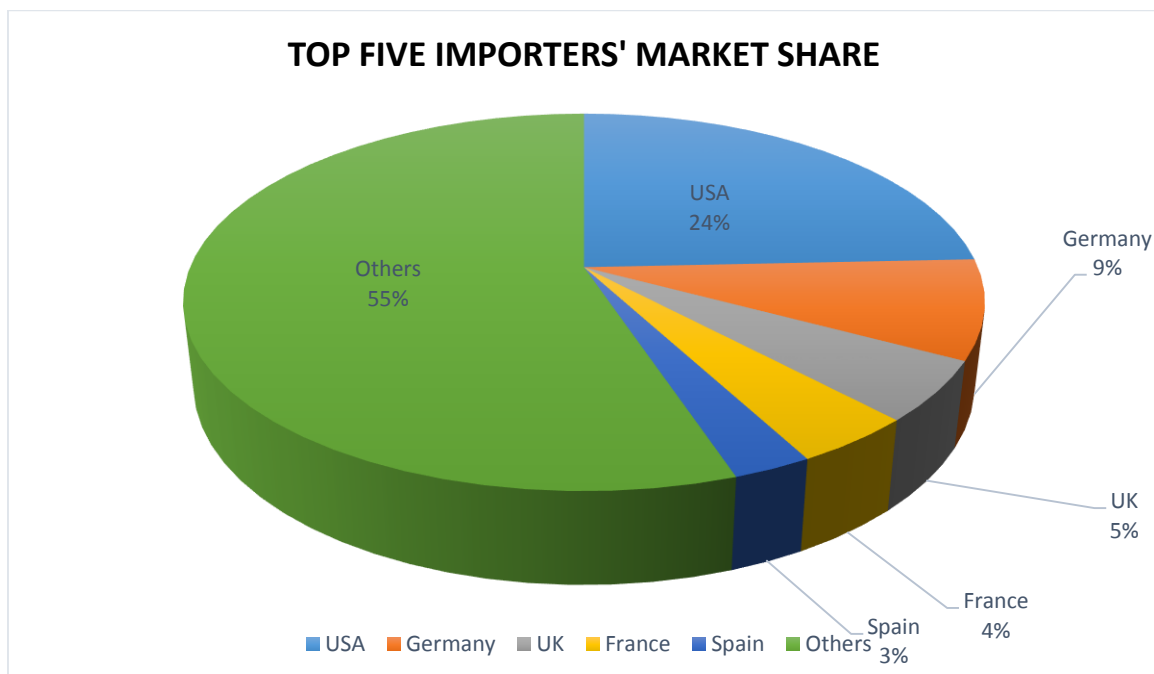


Figure 7: Top Five Importer's Market Share

6. Pakistan's Trade of Kitchenware Cutlery

6.1 Pakistan's Exports

The table below shows Pakistan's total exports for HS Code 8215 along with percentage growth from previous years.

Pakistan's Exports of Kitchenware Cutlery					
Product Category	2014	2015	2016	2017	2018
	Amount US \$ Thousand				
HS 8215	1368	1281	1582	1747	2467
Growth %	46.94%	-6.36%	23.50%	10.43%	41.21%

Table 8: Pakistan Exports of Kitchenware Cutlery

Source: Trade Map [www.tradmap.org]

6.1.1 Top Trading Partners for Pakistan

The data of Top 5 importing countries from Pakistan under the HS Code 8215 is as follows:

HS CODE # 8215: Cutlery; Spoons, Forks, Ladles, Skimmers, Cake-Servers, Fish-Knives, Butter Knives, Sugar Tongs and Similar Kitchen or Tableware					
Importing Countries	2014	2015	2016	2017	2018
	Amount US \$ Thousands				
Netherlands	599	437	1037	1191	1051
Afghanistan	0	0	0	0	769
Spain	214	107	63	192	191
Germany	9	147	197	149	130
South Africa	114	81	61	49	66

Table 9: Top 5 Importing Countries from Pakistan HS-Code 8215

Source: Trade Map [www.tradmap.org]

The table no. 10 below is showing Pakistan's export data for the year 2018 and its share in world exports of kitchenware cutlery items.

Category	HS Codes	Pakistan Exports 2018	World Exports 2018	Pakistan's Share in World Exports
		Amounts US \$ Million		%age
Kitchenware	8215	2.47	2,833.40	0.087%

Table 10: Pakistan's Share in World Exports of Kitchenware Cutlery

Source: Trade Map [www.tradmap.org]

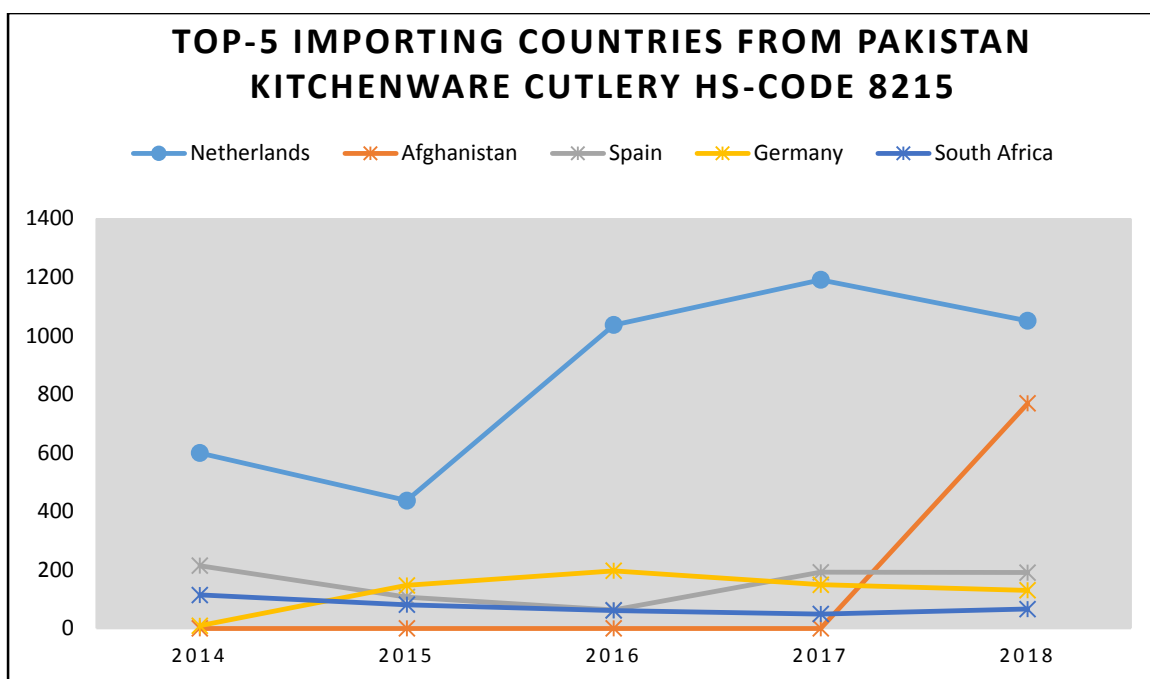


Figure 8: Top 5 Importing Countries from Pakistan HS-Code 8215

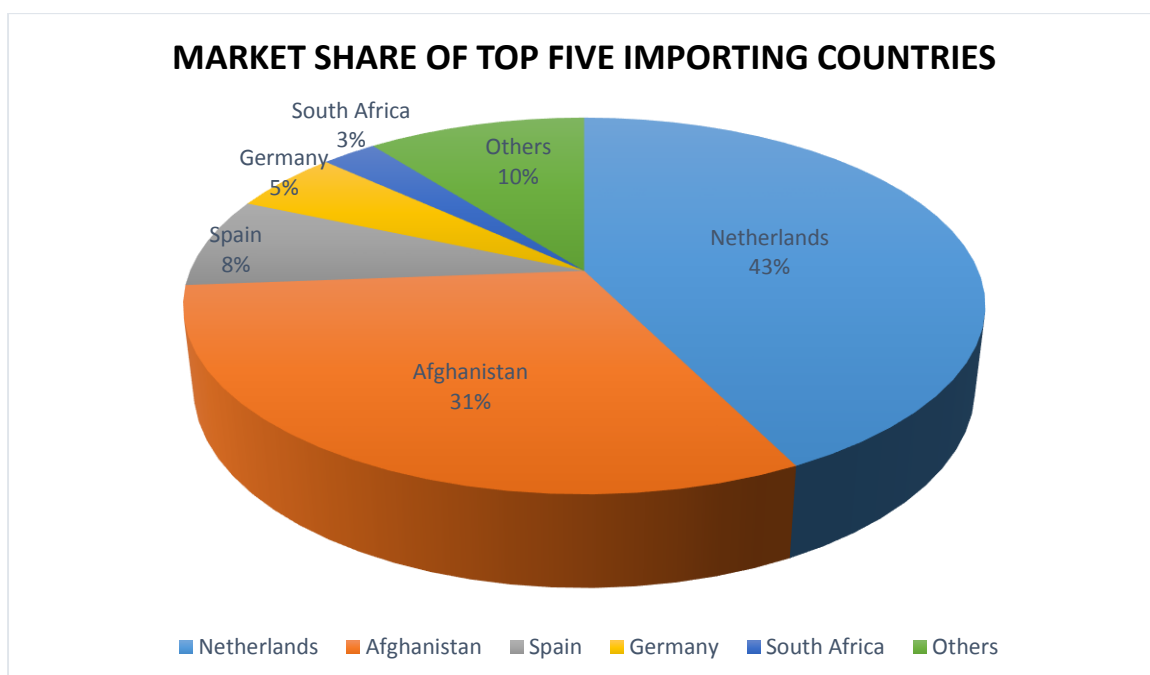


Figure 9: Share of Top 5 Importing Countries from Pakistan HS-Code 8215

The largest importer of Kitchenware Cutlery items HS-Code 8215 from Pakistan is Netherlands which has 43% of the market share of all imports from Pakistan in this category amounting to 1.05 million USD. The 2nd major importer of kitchenware cutlery items from Pakistan is Afghanistan which has 31% of the market share and having imports of 769 thousand USD. Overall, Pakistan exports of kitchenware cutlery items is very low as compared to the world total and constitute only 0.087%. The data shows, Pakistan's total export of kitchen ware cutlery items in 2018 is 2,467 thousand USD. However, exports under this category have

shown an increase since 2014 rising from 1,368 thousand USD to the current level of 2,467 thousand USD.

Top exporters to Pakistan of product code HS Code 8215 from 2014 to 2018 are shown below:

HS CODE # 8215: Cutlery; Spoons, Forks, Ladles, Skimmers, Cake-Servers, Fish-Knives, Butter Knives, Sugar Tongs and Similar Kitchen or Tableware					
Exporting Countries	2014	2015	2016	2017	2018
	Amount US \$ Thousands				
China	708	926	1,058	1,501	1,390
United Arab Emirates	1	4	2	8	20
Switzerland	3	11	12	12	14
United States of America	5	2	1	2	3
Indonesia	0	0	0	2	1

Table 11: Top 5 Exporting Countries to Pakistan HS-Code 8215

Source: Trade Map [www.trademap.org]

7. Pakistan's Untapped Export Potential for Kitchenware Cutlery

Category	HS Code	World Export 2018	Export Potential 2018	Actual Exports 2018	Untapped Export Potential
		Amounts US \$ Million			
Kitchenware Cutlery	8215	2,833.40	3.57	2.47	1.10

Table 12: Pakistan's Untapped Export Potential in Kitchenware Cutlery

Source: Export Potential Map [www.exportpotential.intracen.org]

NOTE: Potential export value (in dollars) of a product supplied by a country to the world is calculated based on demand and supply, market access and bilateral ease of trade. The export potential value is a projected value depends on the characteristics of the exporter, target market, and the strength of the relationship between them. The estimated value serves as a benchmark for comparison with actual export performance to identify untapped potential of a particular sector.

Pakistan's exports of kitchenware cutlery products HS Code: 8215 amount to over 2.47 million USD which makes up only a small fraction (0.087%) of world exports of over 2,833.40 million USD. According to the estimate of "Export Potential Map" the untapped export potential of the cutlery sector in the category mentioned in the Table 12 above is around 1.10 million USD. So, there is a gap for Pakistan's kitchenware cutlery sector to further increase its exports. Pakistan needs to consider various factors in order to improve its exports and increase its share in world, moreover, to face the competition in the international markets especially from China.

8. Major Cutlery Clusters in Pakistan

Cutlery sector is one of the fastest growing sectors and the increasing demand for its various products throughout the world makes it more lucrative. Although, most of the Pakistan Cutlery manufacturers are mainly of Micro, Small and Medium Enterprise category but it has high potential of meeting customer-specific demands in the market. But on the other hand, the SME sector of this industry still does not employ technically qualified personnel with a global perspective involved in production, designing, distribution, marketing or advertising of its products.

Cutlery Cluster of Wazirabad is recognized all over the world for its products. This is situated in the North of Lahore at the Triangle of cities of Gujranwala, Sialkot and Gujrat. There is high concentration of small-scale metal/light engineering industrial units. These are mainly concentrated at its suburb areas. There are approximately 400+ units present in this region - about half of them are registered Small and Medium Enterprises with Pakistan Cutlery & Stainless-Steel Utensils Manufacturers & Exporters Association (PCSSUMEA). 30 to 40 thousand people are associated directly or indirectly to this sector producing 5000 pieces per day manually. Cutlery Cluster of Wazirabad is recognized all over the world for its products. This is situated in the North of Lahore at the Triangle of cities of Gujranwala, Sialkot and Gujrat. There is high concentration of small-scale metal/light engineering industrial units. These are mainly concentrated at its suburb areas.

9. The Way Forward

Over the period of time, cutlery industry has matured and the basic skill set is available at low cost but unfortunately the skill set for higher value addition is not available. The industry has sufficient production capacity but has outdated basic technologies. The productive assets are also outdated. Moreover, the limited product mix and varieties in products is also hindering the growth of this industry. The manufacturers also lack the knowledge of potential new markets and their dynamics. Moreover, they have not yet been able to develop their brands and are dependent on third parties for marketing. The internal conflicts of the industry and the cut throat competition in prices are also adversely affecting the industry. Further, the industry also lacks the knowledge about quality standards and certifications and therefore quality management systems are almost nonexistent.

A thorough product wise examination of potential markets is needed in order to assist and prepare the exporters for reaching new markets. Knowledge sharing regarding latest manufacturing practices, new technologies, management practices and quality standards among the manufacturers is keenly required to enhance their competitiveness. Moreover, skill sets both at technical and managerial levels need to be improved. Although there are a few companies who are large enough and have adequate managerial, technical and financial strength, and sufficient export orientation and experience but majority fall in SME and lacks these skills.

Pakistan's exports make up only a small fraction of world trade in cutlery products (kitchenware cutlery HS Code: 8215 and non-kitchenware cutlery HS Code: 8208, 8211, 8212 and 8214) which amounts to over 88.33 million USD. This is one of the sectors where Pakistan has developed capabilities to penetrate high value / high income markets such as USA, Germany, France, Belgium etc. The average export price of goods made in Wazirabad is around 25-27 USD/Kg (Steel), which is much higher than what Chinese products fetch 3-5 USD (Composite material) *. However, the price is lower than some of the more sophisticated producers such as Germany and Switzerland.

**Source: UNIDO Report for TRTA II Program*

The cutlery sector, whereas, has reasonable export potential but has intense competition from China. The major weaknesses of the sector are low levels of productivity, inadequate technology upgrade and shortage of skilled labor. Moreover, most of the companies operate without any brands with only a few moving towards branding. Further, the industry in the years to come will face higher compliance requirements, especially the cutlery manufacturers, who would be required to meet standards on use of 'food grade materials'. Currently not much compliance or testing requirement exists and only a few companies adhere to ISO standards. As per the report of UNIDO benchmarking exercise, firms have indigenously developed products for the export markets and also the current export is much below potential due to lack of knowledge and understanding to export. The scale of operations is also a problem and firms find it harder to compete with competitors especially China.

10. Annexures

10.1 Annexure 1: Authorities, Trade Bodies and Associations

Ministry of Industry & Production – MoIP Address: 1st Floor, A Block Pak Secretariat, Islamabad Phone: (051) 9212164 Fax: (051) 9205334 Email: minister@moip.gov.pk Website: www.moip.gov.pk	Small and Medium Enterprise Development Authority – SMEDA Address: 4th Floor, 3rd Building Aiwan-e-Iqbal Complex Egerton Road, Lahore Tel: (042) 111-111-456 Fax: (042) 36304926-27 Email: helpdesk@smeda.org.pk Website: www.smeda.org.pk
Pakistan Cutlery and Stainless Utensils Manufacturers and Exporters Association - PCSUMEA Address 50/1, G.T Road, Opp. Government Degree College for Women, Wazirabad Tel: (055) 6602825 Fax: (055) 6600740 Email: pcsumea@gmail.com Website: www.pcsumea.org	The Punjab Small Industries Corporation - PSIC Address: Ground Floor, Alfalah Building, The Mall, Lahore Tel: (042) 99200439 Email: info@psic.gop.pk Website: www.psic.gop.pk
Trade Development Authority of Pakistan - TDAP Address: 62, Garden Block Garden Town, Lahore Tel: (042) 111 444 111 Email: tdap@tdap.gov.pk Website: www.tdap.gov.pk	Pakistan Institute of Trade and Development - PITAD Address: Pitras Bukhari Rd, H-8/4 H 8/4 H-8, Islamabad Tel: (051) 9269816 Website: www.pitad.org.pk
Trade Related Technical Assistance Pakistan - TRTA Address: 7th Floor, Serena Business Complex, Khayaban-e-Suharwardy, Sector G-5/1, Islamabad Tel: (051) 8354803 Fax: (051) 2600123 Website: www.trtapakistan.org	Cutlery & Small Tools Industries Service Centre – CSTISC Address: Opposite High-Class Bakery, GT Road, Wazirabad Tel: (055) 6602989 Mob: (0300) 6654283 Email: cstisc.grw@tevta.gop.pk Website: www.tevta.gop.pk

10.2 Annexure 2: Useful links

Government of Pakistan	http://www.pakistan.gov.pk/
Ministry of Industries and Production – MoIP	http://www.moip.gov.pk
Government of Punjab	www.punjab.gov.pk
Government of Sindh	www.sindh.gov.pk
Government of Khyber Pakhtunkhwa	www.khyberpakhtunkhwa.gov.pk
Government of Baluchistan	www.balochistan.gov.pk
Government of Azad Jammu Kashmir	www.ajk.gov.pk
Trade Development Authority of Pakistan – TDAP	www.tdap.gov.pk
Board of Investment – BOI	https://invest.gov.pk/
Security & Exchange Commission of Pakistan – SECP	www.secp.gov.pk
Federation of Pakistan Chambers of Commerce & Industry – FPCCI	www.fpcci.com.pk
State Bank of Pakistan – SBP	www.sbp.org.pk

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