

# CUTLERY

## NON-KITCHENWARE CUTLERY



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## Table of Contents

<b>1. Disclaimer</b>	<b>3</b>
<b>2. Introduction to SMEDA</b>	<b>3</b>
<b>3. Introduction to Pakistan’s Cutlery Sector</b>	<b>4</b>
3.1 Sector’s Overview	4
3.2 Contribution of Cutlery Sector to the Economy of Pakistan	4
3.3 HS Codes Listing for Cutlery Sector	5
<b>4. Pakistan’s Trade in Cutlery Sector</b>	<b>6</b>
4.1 Pakistan’s Exports	6
4.2 Pakistan’s Export Product Mix for Cutlery Sector	7
4.3 Pakistan’s Imports	8
<b>5. Non-Kitchenware Cutlery Products Global Perspective</b>	<b>8</b>
5.1 World Exports in Non-Kitchenware Cutlery	9
5.1.1 Product Subcategory-wise Exports	10
5.1.2 Top 5 Exporting Countries and Pakistan in Non-Kitchenware Cutlery	10
5.2 World Imports of Non-Kitchenware Cutlery	15
5.2.1 Product Sub-Category Wise Imports	15
5.2.2 Top 5 Importing Countries and Pakistan in Non-Kitchenware Cutlery	16
<b>6. Pakistan’s Trade of Non-Kitchenware Cutlery</b>	<b>21</b>
6.1 Pakistan’s Exports	21
6.1.1 Pakistan’s Subcategory-wise Exports	22
6.1.2 Top Trading Partners for Pakistan	22
6.2 Pakistan Share in World Exports	27
<b>7. Pakistan’s Untapped Export Potential for Non-Kitchenware Cutlery</b>	<b>28</b>
<b>8. Major Cutlery Clusters in Pakistan</b>	<b>29</b>
<b>9. The Way Forward</b>	<b>29</b>
<b>10. Annexures</b>	<b>31</b>
10.1 Annexure 1: Authorities, Trade Bodies and Associations	31
10.2 Annexure 2: Useful links	32
<b>11. References</b>	<b>32</b>

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## **1. Disclaimer**

This information memorandum is to introduce the subject matter and provide a general idea and information on the said matter. Although, the material included in this document is based on data/information gathered from various reliable sources; however, it is based upon certain assumptions, which may differ from case to case. The information has been provided on as is where is basis without any warranties or assertions as to the correctness or soundness thereof. Although, due care and diligence has been taken to compile this document, the contained information may vary due to any change in any of the concerned factors, and the actual results may differ substantially from the presented information. SMEDA, its employees or agents do not assume any liability for any financial or other loss resulting from this memorandum in consequence of undertaking this activity. The contained information does not preclude any further professional advice. The prospective user of this memorandum is encouraged to carry out additional diligence and gather any information which is necessary for making an informed decision, including taking professional advice from a qualified consultant/technical expert before taking any decision to act upon the information.

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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.

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### 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	10000 – 15000
To Indirect Employment	30000 – 45000
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

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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](http://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
<b>Kitchenware Cutlery</b>	
<b>8215</b>	Cutlery; spoons, forks, ladles, skimmers, cake-servers, fish-knives, butter knives, sugar tongs and similar kitchen or tableware
<b>Non-Kitchenware Cutlery</b>	
<b>8208</b>	Knives and cutting blades, for machines or for mechanical appliances.
<b>8211</b>	Knives; with cutting blades, serrated or not (including pruning knives), other than knives of heading no. 8208, and blades therefore
<b>8212</b>	Razors and razor blades; (including razor blade blanks in strips)
<b>8213</b>	Scissors; tailors' shears and similar shears, and blades therefore
<b>8214</b>	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

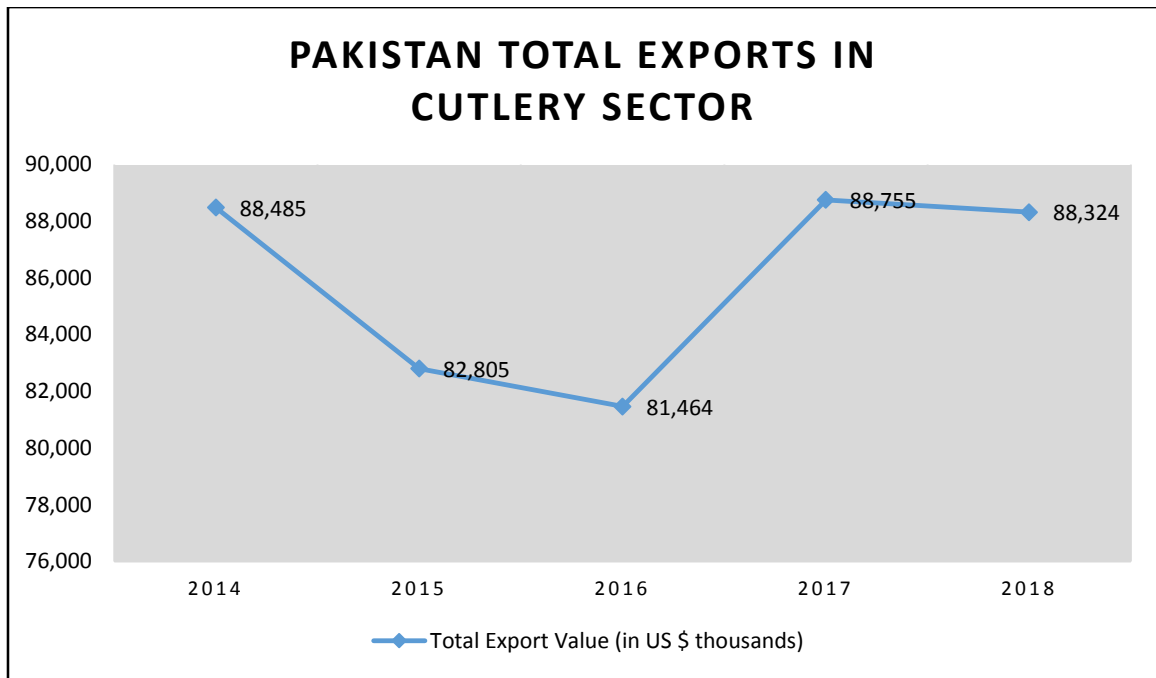
The total US dollar value of Pakistan's exports in the cutlery sector in various categories from 2014 to 2018 is shown in the table below:

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

**Table 2:** Pakistan Exports in Cutlery Sector

*Source: Trade Map [www.trademap.org]*

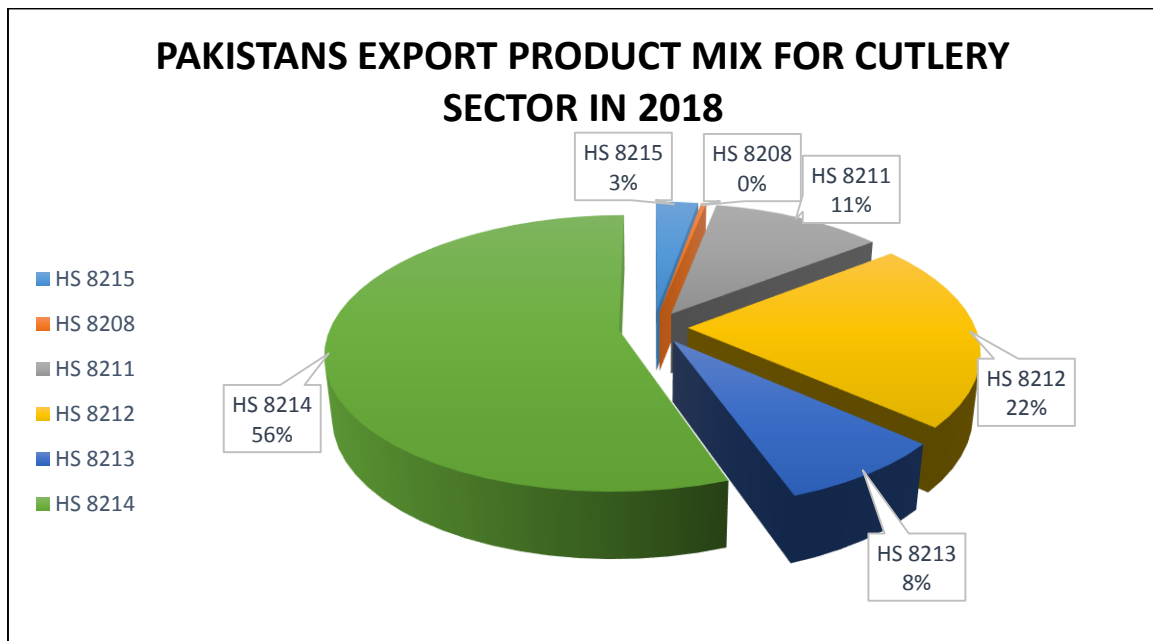
The following illustration shows total value of Pakistan's cutlery sector exports (in US dollar thousand) as a five-year trend from 2014 to 2018. Also indicated is the percentage increase/decrease in sales value as compared to the previous year.



**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
<b>TOTAL</b>	<b>25.04</b>	<b>23.87</b>	<b>22.82</b>	<b>27.75</b>	<b>22.91</b>

**Table 3:** Pakistan Imports in Cutlery Sector

Source: Trade Map [[www.trademap.org](http://www.trademap.org)]

## 5. Non-Kitchenware Cutlery Products Global Perspective

In this section we will be looking at global trade of subsectors in the Cutlery sector, namely Non-Kitchenware Cutlery Products, and how Pakistan plays into it. This category is further sub divided into five categories as described below:

H.S Codes	Description of Goods
	Non-Kitchenware Cutlery
8208	Knives and cutting blades, of base metal, for machines or for mechanical appliances.
8211	Knives with cutting blades, serrated or not, incl. pruning knives, and blades therefor, of base metal (excluding straw knives, machetes, knives and cutting blades for machines or mechanical appliances, fish knives, butter knives, razors and razor blades and knives of heading 8214)
8212	Non-electric razors and razor blades of base metal, incl. razor blade blanks in strips
8213	Scissors, tailors' shears and similar shears, and blades therefor, of base metal (excluding hedge shears, two-handed pruning shears and similar two-handed shears, secateurs and similar one-handed pruners and shears and hoof nippers for farriers)



8214

Articles of cutlery, n.e.s., e.g. hair clippers, butchers' or kitchen cleavers, choppers and mincing knives and paperknives of base metal; manicure or pedicure sets and instruments, incl. nail files, of base metal

**Table 4:** Non-Kitchenware Cutlery Products Category

### 5.1 World Exports in Non-Kitchenware Cutlery

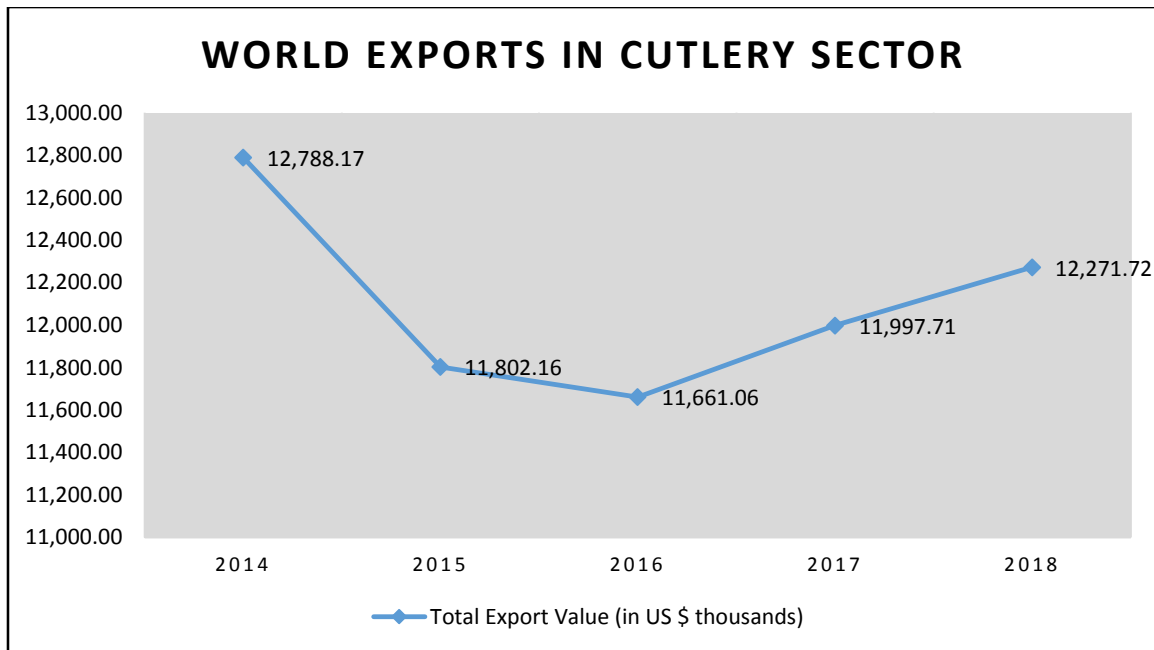
The total world exports for Non-Kitchenware Cutlery Sector stood at USD 12,271.72 million in the year 2018. There has been a downward trend in world exports from year 2014 to 2016 and upward trend from year 2017 to 2018 of these items as can be seen from the table below:

World Exports in Cutlery Sector					
Product Category	2014	2015	2016	2017	2018
	Amount US \$ Million				
<b>World Total</b>	12,788.17	11,802.16	11,661.06	11,997.71	12,271.72
<b>Growth %</b>	5.99%	-7.72%	-1.03%	3.22%	2.48%

**Table 5:** World Exports in Non-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 Product Subcategory-wise Exports

World exports for each of the subcategories of non-kitchenware products between 2014 and 2018 are shown below. A general downwards trend in the value of exports can also be observed in the various sub-categories

World Exports in Non-Kitchenware Cutlery Sector					
Product Category	2014	2015	2016	2017	2018
	Amount US \$ Million				
HS 8208	2,810.46	2,515.01	2,527.30	2,759.66	3,027.70
HS 8211	2554.09	2411.19	2342.98	2586.88	2723.92
HS 8212	5340.07	4930.11	5032.83	4760.40	4640.53
HS 8213	876.88	777.94	712.02	803.75	826.13
HS 8214	1206.67	1167.91	1045.93	1087.02	1053.44
<b>World Total</b>	<b>12,788.17</b>	<b>11,802.16</b>	<b>11,661.06</b>	<b>11,997.71</b>	<b>12,271.72</b>

**Table 6:** Category Wise World Exports in Non-Kitchenware Cutlery

*Source: Trade Map [www.tradmap.org]*

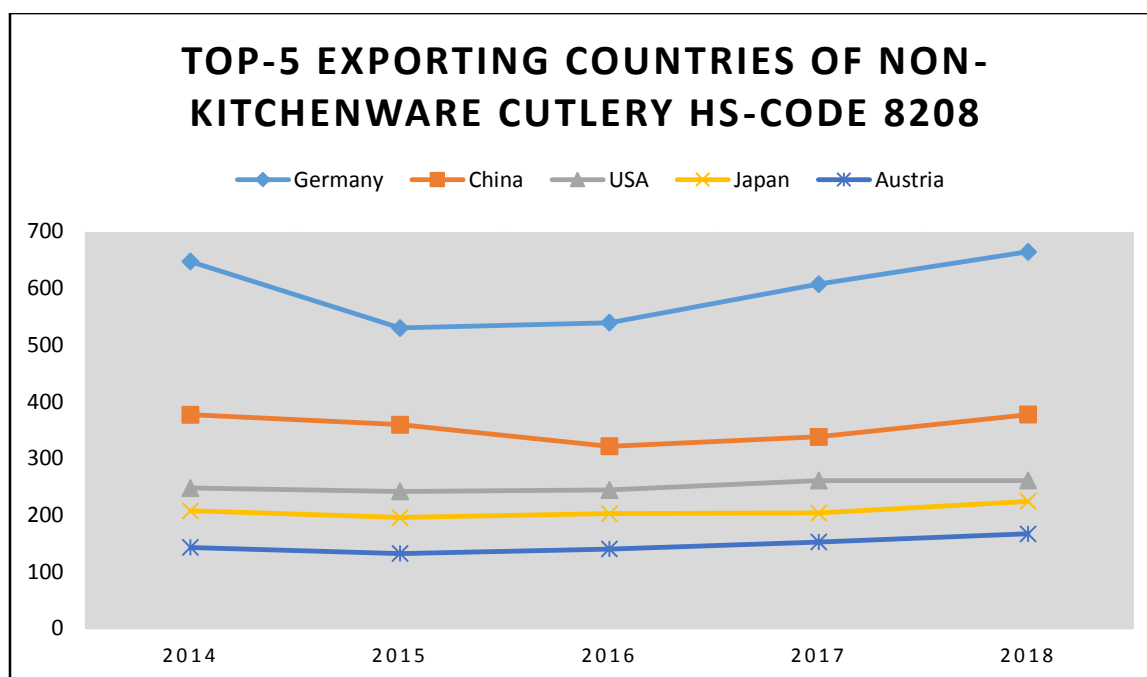
### 5.1.2 Top 5 Exporting Countries and Pakistan in Non-Kitchenware Cutlery

The date of world exports of cutlery products under the HS Code 8208 is as follows:

HS CODE # 8208: Knives and Cutting Blades, of Base Metal, for Machines or for Mechanical Appliances					
Exporting Countries	2014	2015	2016	2017	2018
	Amounts US \$ Million				
Germany	647.30	530.03	539.44	607.32	664.37
China	377.01	359.45	321.22	338.07	377.32
USA	247.64	241.59	244.34	261.01	260.95
Japan	207.59	195.62	202.45	203.52	224.23
Austria	142.71	132.09	140.03	152.32	166.83
Pakistan	0.79	0.41	0.66	0.32	0.30
<b>World Total</b>	<b>2,810.46</b>	<b>2,515.01</b>	<b>2,527.30</b>	<b>2,759.66</b>	<b>3,027.70</b>
<b>Growth %</b>	<b>6.88%</b>	<b>-10.51%</b>	<b>0.49%</b>	<b>9.19%</b>	<b>9.71%</b>

**Table 7:** Exports of Cutlery Products HS Code 8208

*Source: Trade Map [www.tradmap.org]*



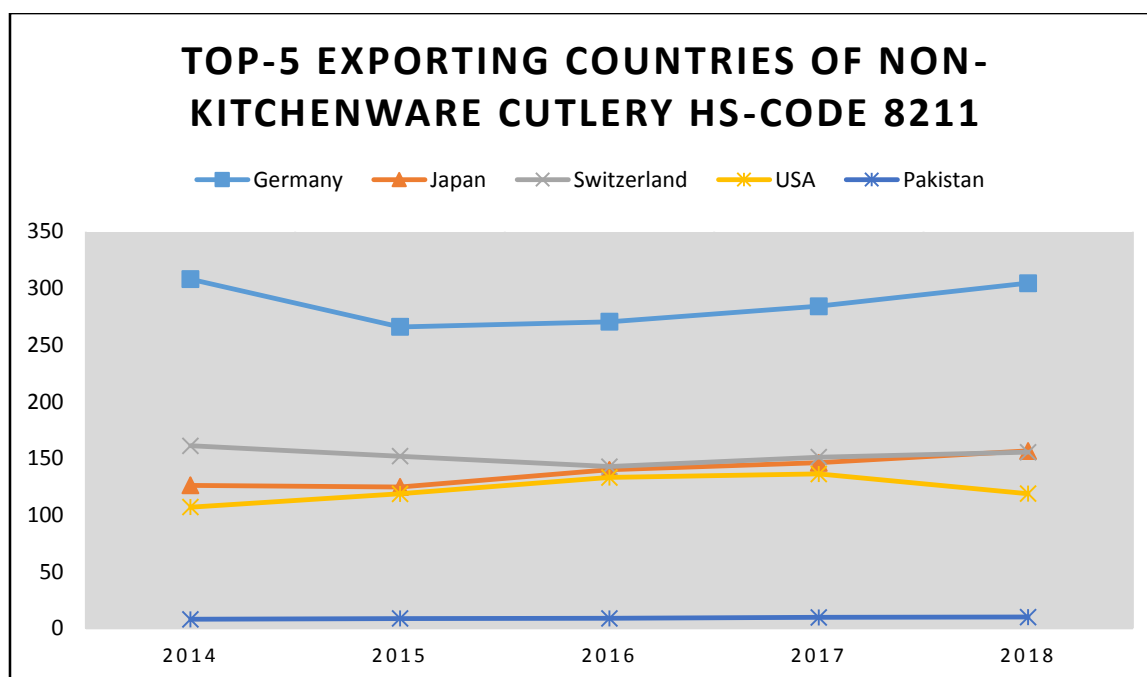
**Figure 4:** Exports of Cutlery Products HS Code 8208

The data of world exports of cutlery products under the HS Code 8211 is as follows:

HS CODE # 8211: Knives; with Cutting Blades, Serrated or Not (Including Pruning Knives), and Blades					
Exporting Countries	2014	2015	2016	2017	2018
Amounts US \$ Million					
China	1081.42	1120.26	1006.43	1168.62	1235.96
Germany	308.13	265.96	270.52	284.17	304.55
Japan	126.22	124.83	139.94	146.17	156.60
Switzerland	161.15	151.86	142.70	151.05	155.43
USA	106.96	118.66	133.17	136.17	118.90
Pakistan	8.04	8.72	8.80	9.75	10.02
<b>World Total</b>	<b>2554.09</b>	<b>2411.19</b>	<b>2342.98</b>	<b>2586.88</b>	<b>2723.92</b>
<b>Growth %</b>	<b>8.66%</b>	<b>-5.93%</b>	<b>-2.91%</b>	<b>9.43%</b>	<b>5.03%</b>

**Table 8:** Exports of Cutlery Products HS Code 8211

Source: Trade Map [www.trademap.org]



**Figure 5:** Exports of Cutlery Products HS Code 8211

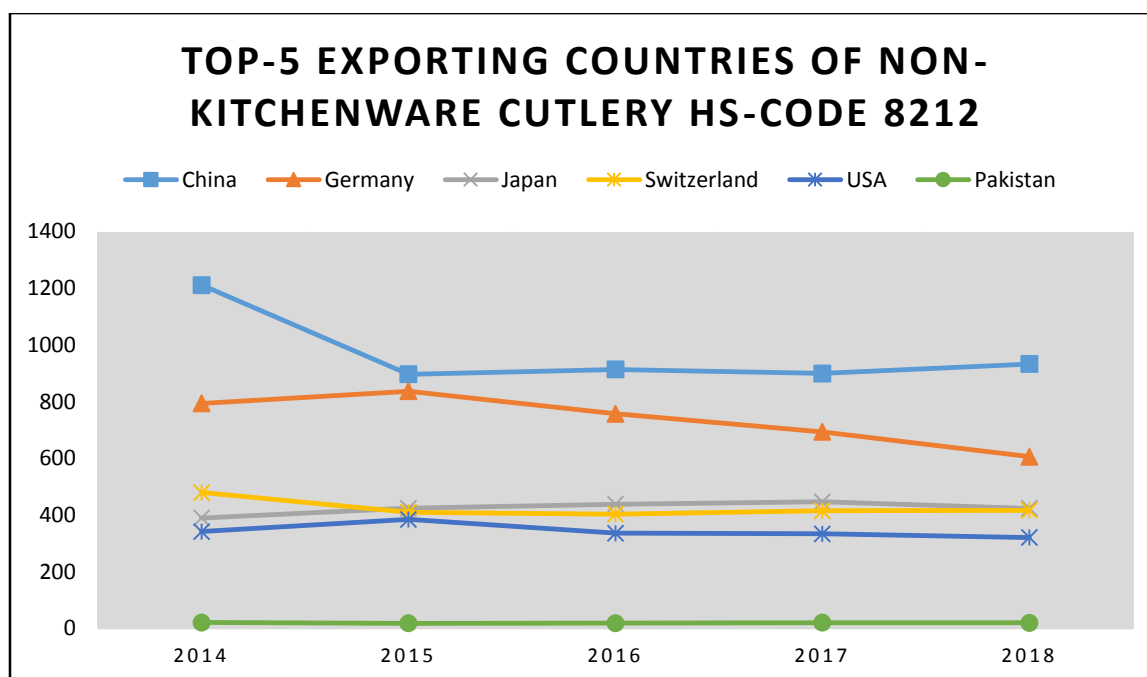
\*China is not included in the above chart to avoid chart distortion.

The data of world exports of cutlery products under the HS Code 8212 is as follows:

HS CODE # 8212: Razors and razor blades; (including razor blade blanks in strips)					
Exporting Countries	2014	2015	2016	2017	2018
	Amounts US \$ Million				
<b>China</b>	1211.23	896.64	913.82	899.37	933.11
<b>Germany</b>	793.84	836.75	757.06	693.32	605.89
<b>Japan</b>	389.50	424.03	438.39	446.88	423.40
<b>Switzerland</b>	479.14	409.95	402.89	415.18	416.51
<b>USA</b>	341.50	384.45	335.85	333.57	320.92
<b>Pakistan</b>	20.53	18.00	18.40	20.49	19.48
<b>World Total</b>	5340.07	4930.11	5032.83	4760.40	4640.53
<b>Growth %</b>	1.52%	-7.68%	2.08%	-5.41%	-2.52%

**Table 9:** Exports of Cutlery Products HS Code 8212

Source: Trade Map [[www.trademap.org](http://www.trademap.org)]



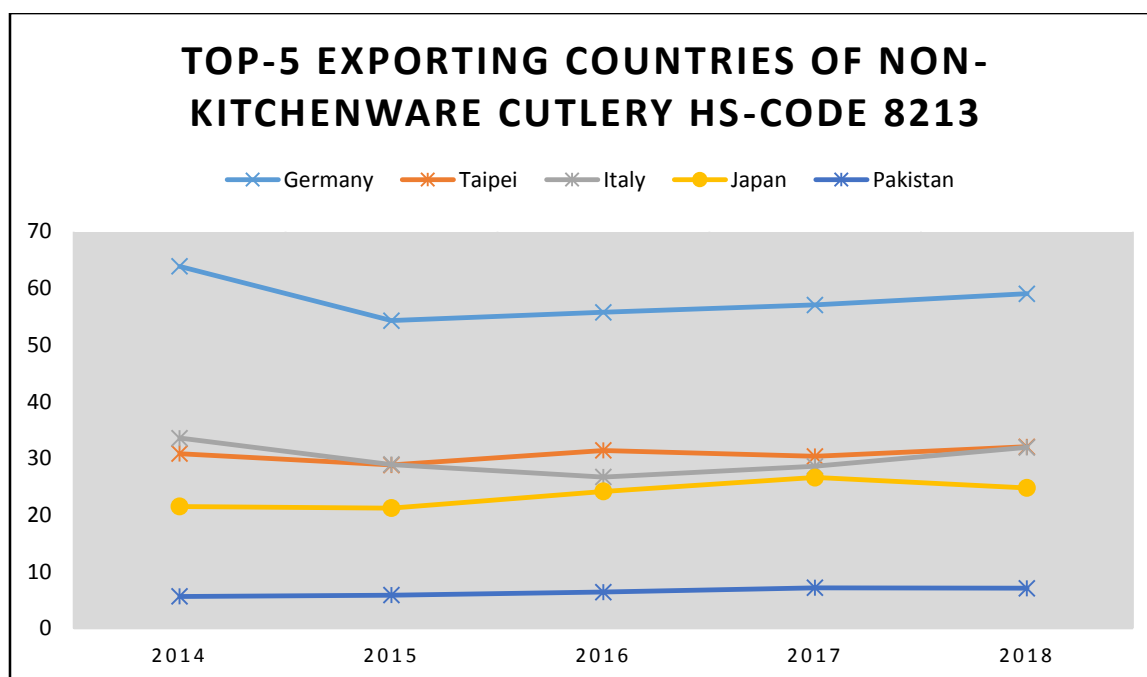
**Figure 6:** Exports of Cutlery Products HS Code 8212

The data of world exports of cutlery products under the HS Code 8213 is as follows:

HS CODE # 8213: Scissors; tailors' shears and similar shears, and blades					
Exporting Countries	2014	2015	2016	2017	2018
	Amounts US \$ Million				
<b>China</b>	590.31	518.21	440.20	516.30	534.33
<b>Germany</b>	63.87	54.29	55.77	57.08	59.04
<b>Taipei</b>	30.84	28.83	31.39	30.35	32.04
<b>Italy</b>	33.57	28.92	26.72	28.60	31.94
<b>Japan</b>	21.50	21.24	24.16	26.63	24.80
<b>Pakistan</b>	5.64	5.88	6.40	7.17	7.07
<b>World Total</b>	876.88	777.94	712.02	803.75	826.13
<b>Growth %</b>	17.02%	-11.28%	-8.47%	12.88%	2.78%

**Table 10:** Exports of Cutlery Products HS Code 8213

**Source:** Trade Map [[www.trademap.org](http://www.trademap.org)]



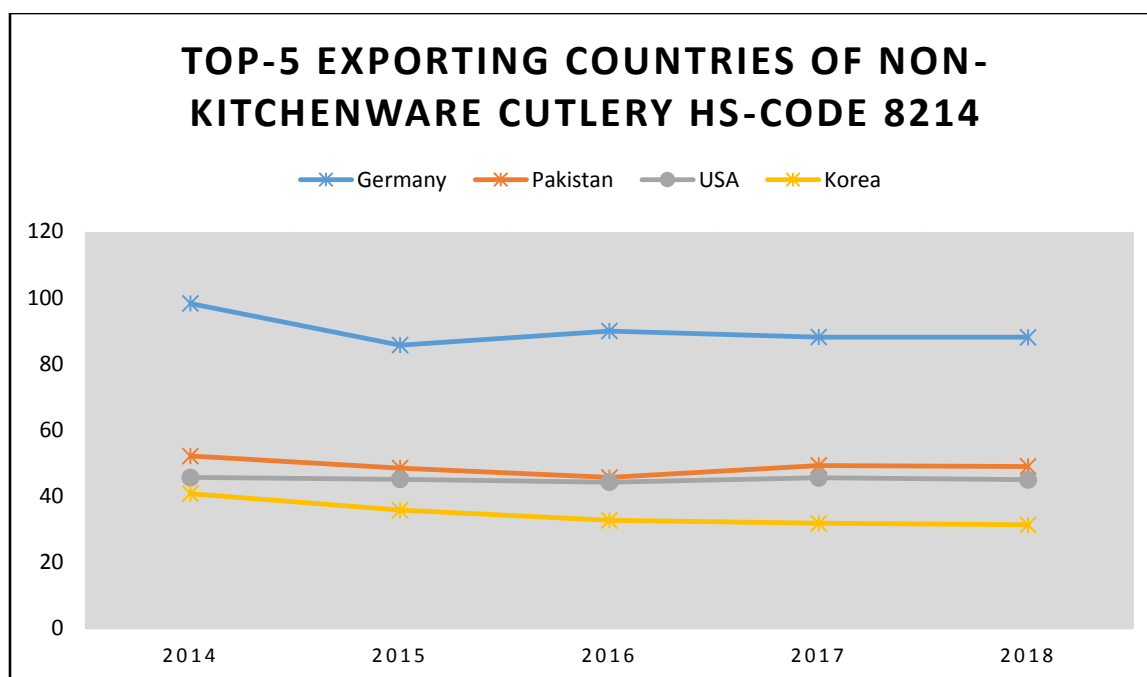
**Figure 7:** Exports of Cutlery Products HS Code 8213

The data of world exports of cutlery products under the HS Code 8214 is as follows:

HS CODE # 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)					
Exporting Countries	2014	2015	2016	2017	2018
	Amounts US \$ Million				
<b>China</b>	710.95	704.84	581.91	612.73	586.09
<b>Germany</b>	98.25	85.69	89.95	88.11	88.06
<b>Pakistan</b>	52.12	48.52	45.62	49.27	48.99
<b>USA</b>	45.64	45.12	44.22	45.54	44.96
<b>Korea</b>	40.74	35.76	32.69	31.81	31.33
<b>World Total</b>	1206.67	1167.91	1045.93	1087.02	1053.44
<b>Growth %</b>	9.98%	-3.21%	-10.44%	3.93%	-3.09%

**Table 11:** Exports of Cutlery Products HS Code 8214

Source: Trade Map [[www.trademap.org](http://www.trademap.org)]



**Figure 8:** Exports of Cutlery Products HS Code 8214

The above data shows that China is the top exporter of the non-kitchenware cutlery items HS-Codes 8211, 8212, 8213 and 8214 as well except for 8208 in which Germany is on top.

## 5.2 World Imports of Non-Kitchenware Cutlery

The total world imports for non-kitchenware cutlery products which fall under HS CODES 8208, 8211, 8212, 8213 and 8214 respectively stood at USD 13,478.43 million in the year 2018. The downward trend observed in world imports of products as shown below:

World Imports in Non-Kitchenware Cutlery					
Product Category	2014	2015	2016	2017	2018
	Amount US \$ Million				
<b>World Total</b>	13,200.15	12,604.84	12,730.52	12,994.1	13,478.43
<b>Growth %</b>	3.39%	-4.49%	1.03%	2.42%	3.95%

**Table 12:** World Imports in Non-Kitchenware Cutlery

**Source:** Trade Map [[www.trademap.org](http://www.trademap.org)]

### 5.2.1 Product Sub-Category Wise Imports

World Imports for each of the subcategories of non-kitchenware cutlery product between 2014 and 2018 are shown in the following table. A general downwards trend in the value of Imports can be observed in the various sub-categories from year 2014 to 2015 and upward trend from 2016 to 2018.

World Imports in Non-Kitchenware Cutlery					
Product Category	2014	2015	2016	2017	2018
	Amount US \$ Million				
HS 8208	3,663.05	3,515.25	3,537.01	3,877.95	4,232.97
HS 8211	2,613.59	2,437.46	2,453.78	2,572.45	2,733.50
HS 8212	5,398.45	5,165.33	5,287.28	5,055.12	4,950.56
HS 8213	632.81	602.82	613.12	649.56	678.65
HS 8214	892.25	883.98	839.33	839.02	882.75
<b>TOTAL</b>	<b>13,200.15</b>	<b>12,604.84</b>	<b>12,730.52</b>	<b>12,994.1</b>	<b>13,478.43</b>

**Table 13:** Category Wise World Imports in Non-Kitchenware Cutlery

Source: Trade Map [www.tradmap.org]

## 5.2.2 Top 5 Importing Countries and Pakistan in Non-Kitchenware Cutlery

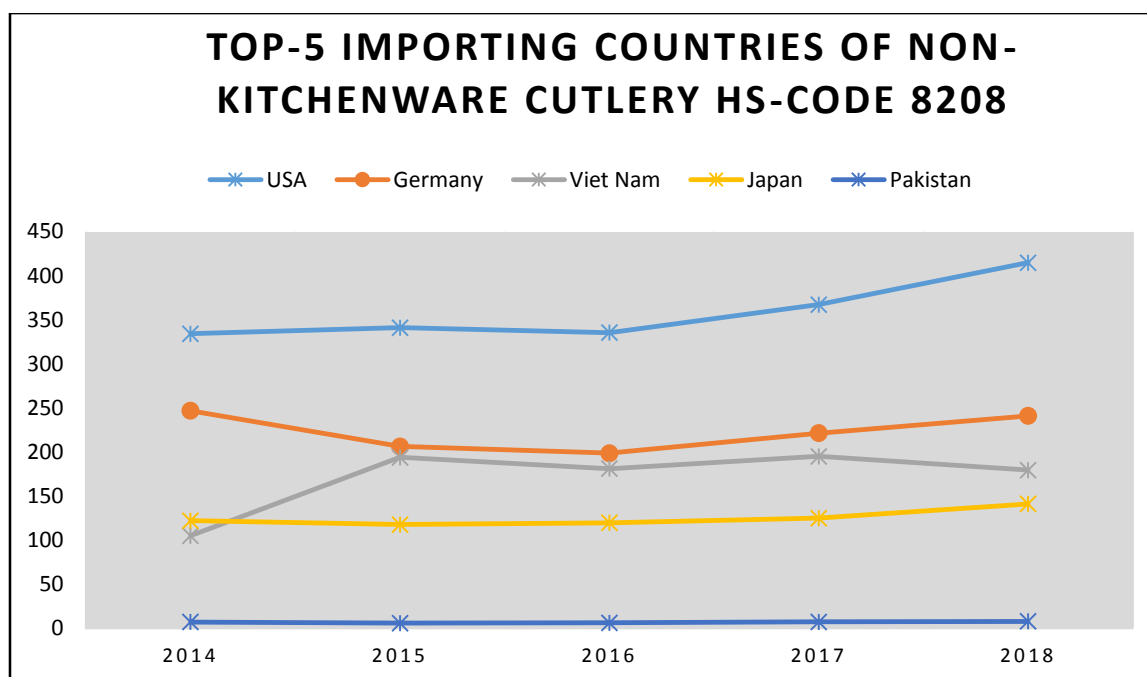
The data of world imports of cutlery products under the HS Code 8208 is as follows:

HS CODE # 8208: Knives and Cutting Blades, of Base Metal, for Machines or for Mechanical Appliances					
Importing Countries	2014	2015	2016	2017	2018
	Amount US \$ Million				
China	877.38	792.78	838.99	942.05	1,018.31
USA	334.27	341.01	335.49	367.21	414.72
Germany	246.95	206.47	198.77	221.46	240.98
Viet Nam	105.03	193.97	181.13	195.05	179.54
Japan	122.17	117.72	119.79	125.11	141.14
Pakistan	7.18	6.02	6.32	7.35	7.88
<b>World Total</b>	3,663.05	3,515.25	3,537.01	3,877.95	4,232.97
<b>Growth %</b>	6.53%	-4.03%	0.62%	9.64%	9.15%

**Table 14:** Imports of Cutlery Products HS Code 8208

Source: Trade Map [www.tradmap.org]





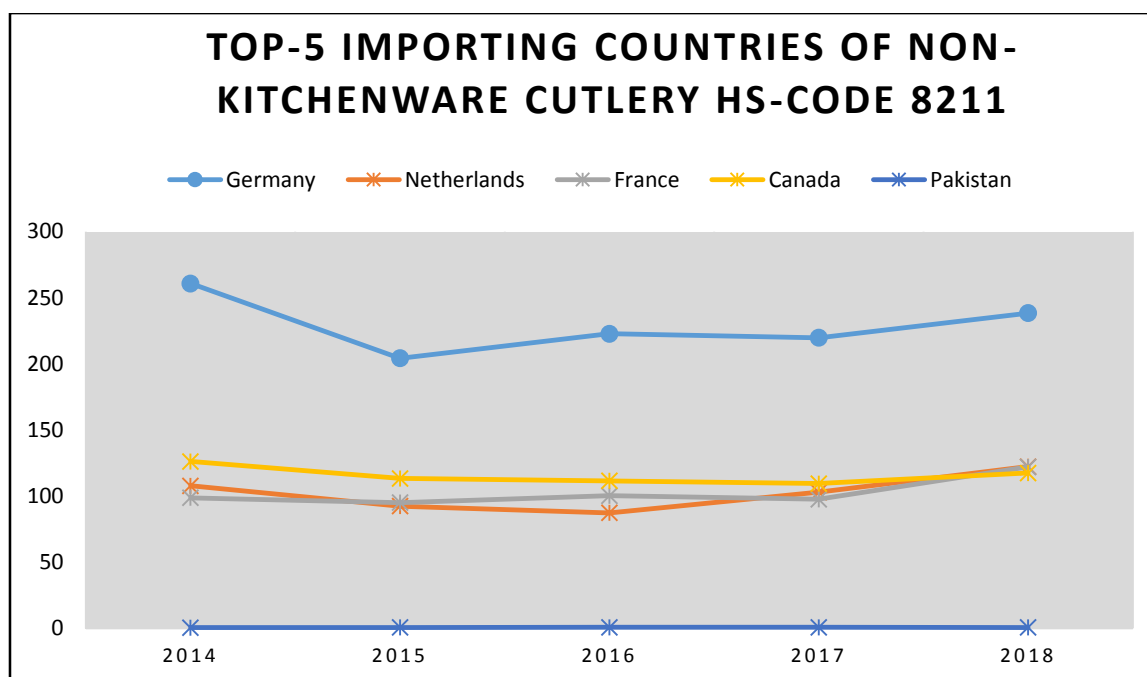
**Figure 9:** Imports of Cutlery Products HS Code 8208

The data of world imports of cutlery products under the HS Code 8211 is as follows:

HS CODE # 8211: Knives; with Cutting Blades, Serrated or Not (Including Pruning Knives), and Blades					
Importing Countries	2014	2015	2016	2017	2018
	Amount US \$ Million				
<b>USA</b>	715.19	767.21	751.06	764.99	804.42
<b>Germany</b>	260.78	204.31	222.74	219.73	238.37
<b>Netherlands</b>	107.78	92.46	87.34	102.95	122.30
<b>France</b>	98.79	95.05	100.37	97.68	122.12
<b>Canada</b>	126.27	113.33	111.61	109.50	117.44
<b>Pakistan</b>	0.55	0.76	0.80	0.85	0.73
<b>World Total</b>	2,613.59	2,437.46	2,453.78	2,572.45	2,733.50
<b>Growth %</b>	7.99%	-6.74%	0.67%	4.84%	6.26%

**Table 15:** Imports of Cutlery Products HS Code 8211

**Source:** Trade Map [[www.trademap.org](http://www.trademap.org)]



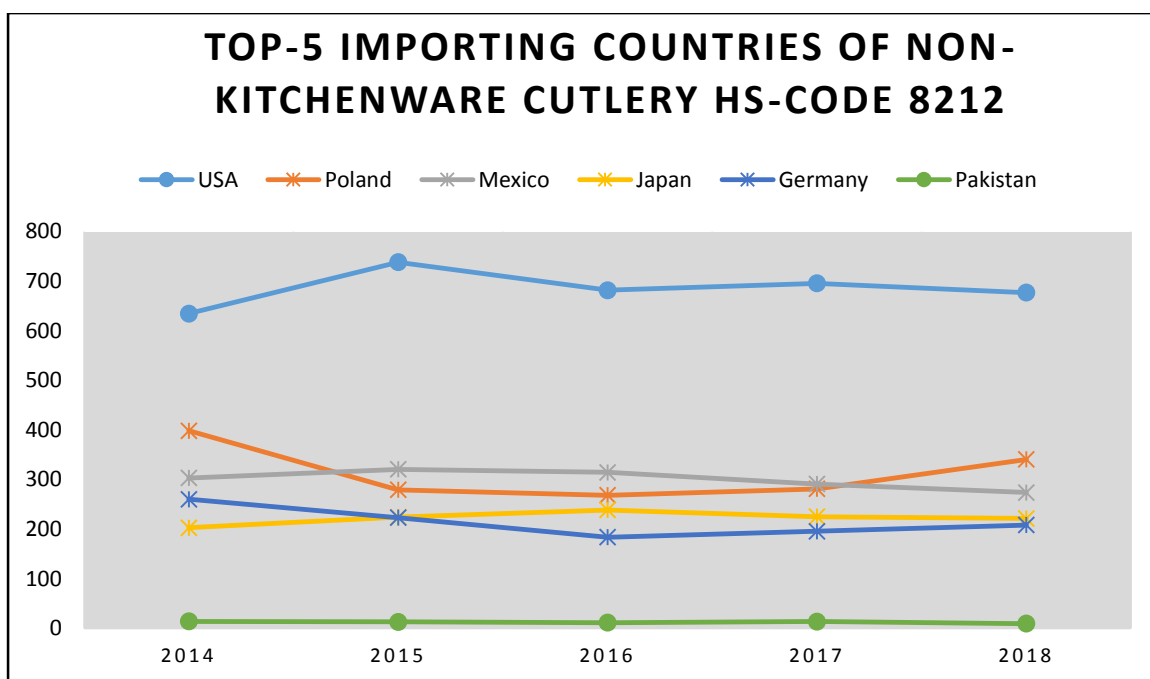
**Figure 10:** Imports of Cutlery Products HS Code 8211

The data of world imports of cutlery products under the HS Code 8212 is as follows:

HS CODE # 8212: Razors and razor blades; (including razor blade blanks in strips)					
Importing Countries	2014	2015	2016	2017	2018
	Amount US \$ Million				
<b>USA</b>	634.69	738.40	681.86	695.87	677.10
<b>Poland</b>	398.41	279.46	268.57	281.31	340.69
<b>Mexico</b>	303.41	320.70	314.54	291.15	273.99
<b>Japan</b>	202.92	224.10	238.69	225.16	221.53
<b>Germany</b>	260.30	223.29	183.80	195.70	208.31
<b>Pakistan</b>	14.12	13.26	11.59	13.89	9.63
<b>World Total</b>	5,398.45	5,165.33	5,287.28	5,055.12	4,950.56
<b>Growth %</b>	-2.31%	-4.32%	2.36%	-4.39%	-2.07%

**Table 16:** Imports of Cutlery Products HS Code 8212

Source: Trade Map [www.trademap.org]



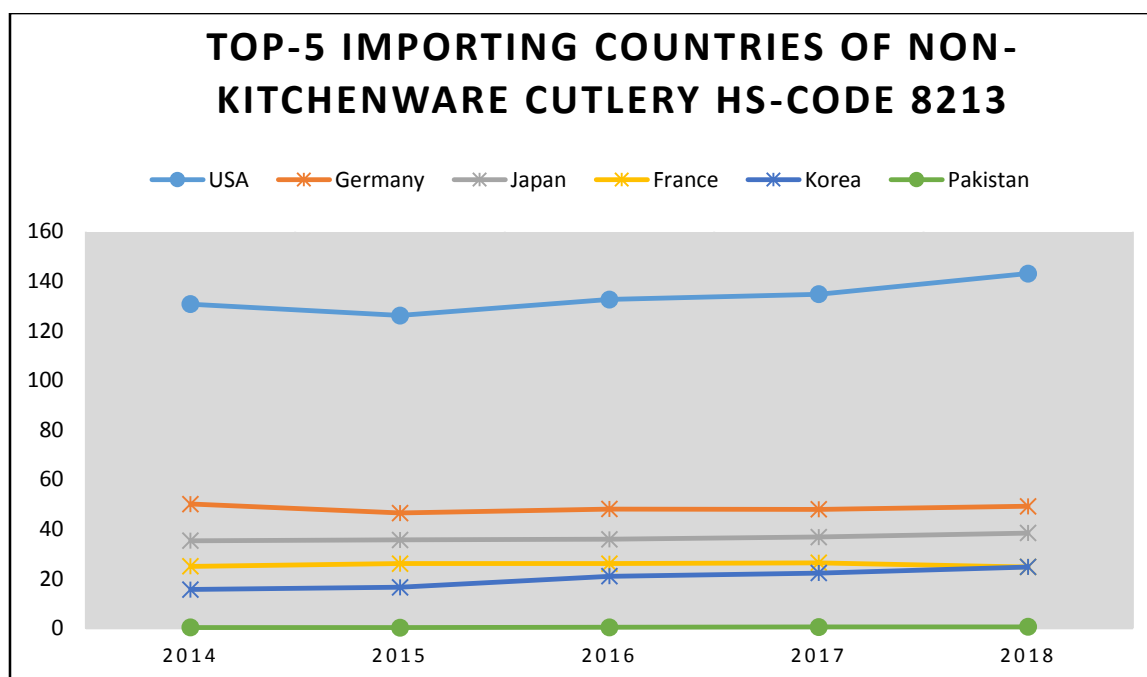
**Figure 11:** Imports of Cutlery Products HS Code 8212

The data of world imports of cutlery products under the HS Code 8213 is as follows:

HS CODE # 8213: Scissors; Tailors' Shears and Similar Shears, and Blades					
Importing Countries	2014	2015	2016	2017	2018
	Amount US \$ Million				
<b>USA</b>	130.78	126.20	132.62	134.79	143.08
<b>Germany</b>	50.17	46.51	48.11	48.03	49.21
<b>Japan</b>	35.33	35.69	35.94	36.87	38.47
<b>France</b>	25.06	26.12	26.11	26.48	24.77
<b>Korea</b>	15.70	16.59	21.00	22.30	24.76
<b>Pakistan</b>	0.36	0.30	0.42	0.59	0.65
<b>World Total</b>	632.81	602.82	613.12	649.56	678.65
<b>Growth %</b>	3.34%	-4.74%	1.71%	5.94%	4.48%

**Table 17:** Imports of Cutlery Products HS Code 8213

Source: Trade Map [[www.trademap.org](http://www.trademap.org)]



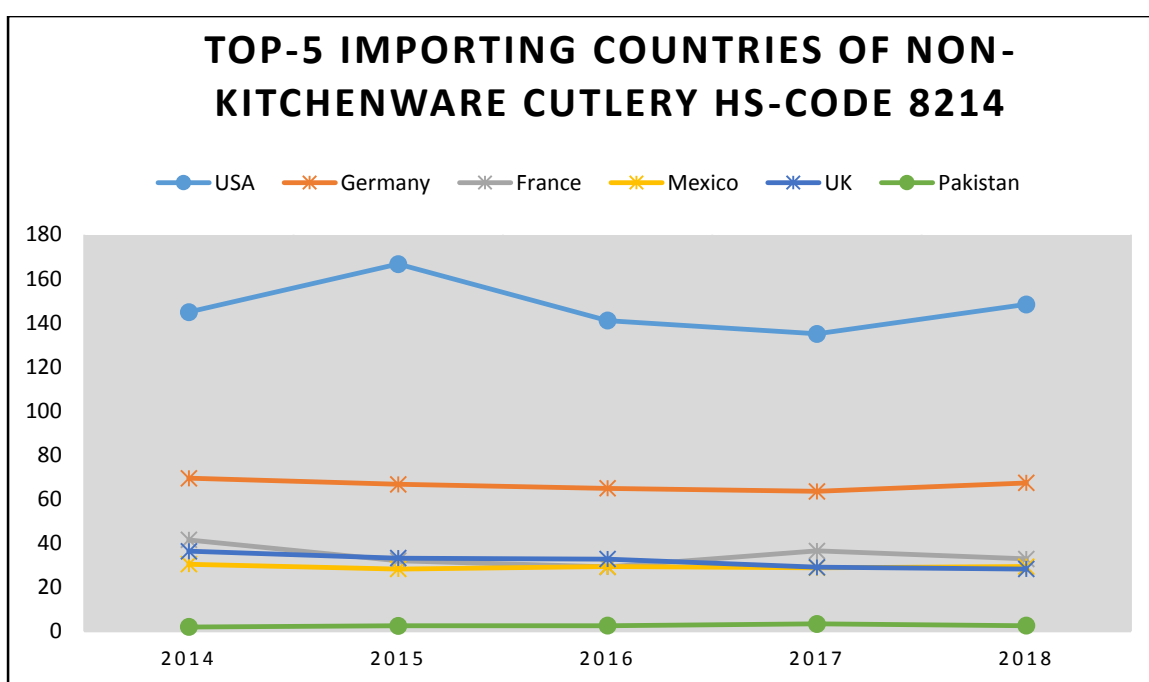
**Figure 12:** Imports of Cutlery Products HS Code 8213

The data of world imports of cutlery products under the HS Code 8214 is as follows:

HS CODE # 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)					
Importing Countries	2014	2015	2016	2017	2018
	Amount US \$ Million				
<b>USA</b>	144.88	166.61	141.04	134.97	148.33
<b>Germany</b>	69.47	66.69	64.93	63.54	67.40
<b>France</b>	41.54	32.06	29.23	36.53	32.90
<b>Mexico</b>	30.51	28.28	29.40	28.90	29.40
<b>UK</b>	36.37	33.23	32.80	29.13	28.28
<b>Pakistan</b>	2.05	2.53	2.57	3.41	2.58
<b>World Total</b>	892.25	883.98	839.33	839.02	882.75
<b>Growth %</b>	11.49%	-0.93%	-5.05%	-0.04%	5.21%

**Table 18:** Imports of Cutlery Products HS Code 8214

*Source: Trade Map [www.trademap.org]*



**Figure 13:** Imports of Cutlery Products HS Code 8214

## 6. Pakistan's Trade of Non-Kitchenware Cutlery

### 6.1 Pakistan's Exports

The table below shows Pakistan's total exports for HS Code 8208, 8211, 8212, 8213 and 8214 of Non-Kitchenware Cutlery along with percentage growth from previous years.

Pakistan's Exports of Non-Kitchenware Cutlery					
Non-Kitchenware Cutlery	2014	2015	2016	2017	2018
	Amount US \$ Thousand				
<b>World Total</b>	<b>87,117</b>	<b>81,524</b>	<b>79,882</b>	<b>87,008</b>	<b>85,857</b>
<b>Growth %</b>	6.20%	-5.87%	-1.57%	9.23%	-1.27%

**Table 19:** Pakistan Imports of Non-Kitchenware Cutlery

**Source:** Trade Map [[www.trademap.org](http://www.trademap.org)]

### 6.1.1 Pakistan's Subcategory-wise Exports

Pakistan's Exports of Non-Kitchenware Cutlery					
Product Category	2014	2015	2016	2017	2018
	Amount US \$ Thousand				
HS 8208	793	412	664	320	301
HS 8211	8043	8715	8801	9748	10023
HS 8212	20,525	17,995	18,402	20,493	19,481
HS 8213	5637	5878	6395	7173	7067
HS 8214	52,119	48,524	45,620	49,274	48,985
<b>World Total</b>	<b>87,117</b>	<b>81,524</b>	<b>79,882</b>	<b>87,008</b>	<b>85,857</b>

**Table 20:** Category-wise Pakistan Imports of Non-Kitchenware Cutlery

Source: Trade Map [www.trademap.org]

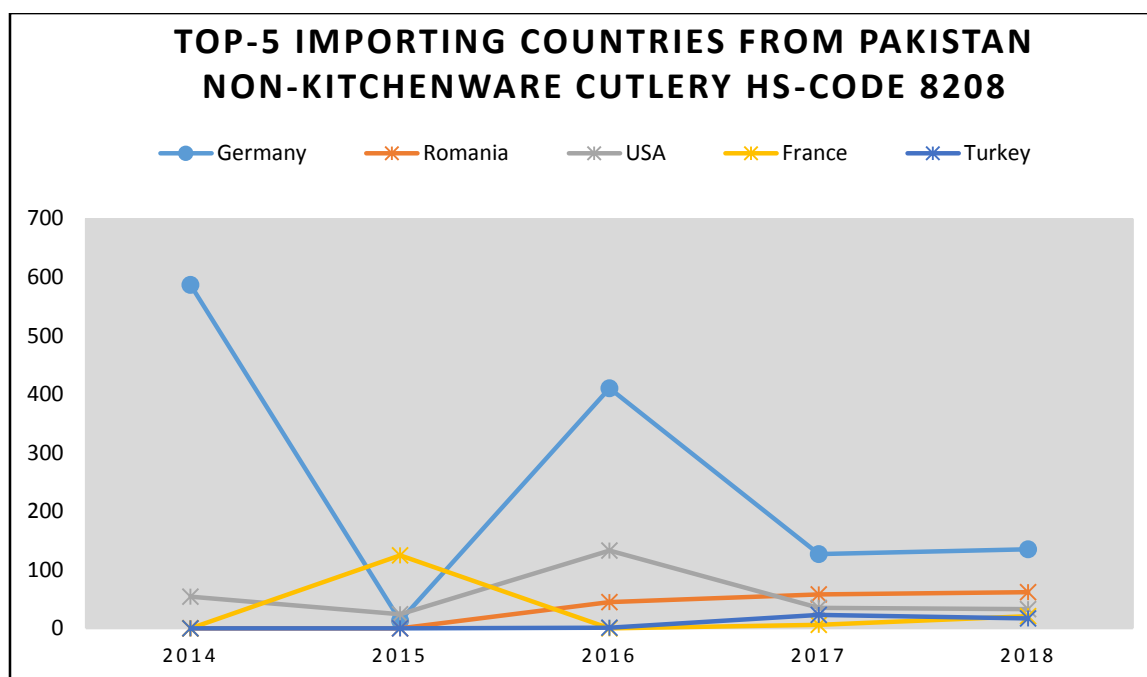
### 6.1.2 Top Trading Partners for Pakistan

The data of Top 5 importing countries from Pakistan under the HS Code 8208 is as follows:

HS CODE # 8208: Knives and Cutting Blades, of Base Metal, for Machines or for Mechanical Appliances					
Importing Countries	2014	2015	2016	2017	2018
	Amount US \$ Thousands				
Germany	587	13	410	127	135
Romania	0	0	45	58	62
USA	54	24	133	35	33
France	0	125	0	6	21
Turkey	0	0	1	23	17
<b>World Total</b>	<b>793</b>	<b>412</b>	<b>664</b>	<b>320</b>	<b>301</b>
<b>Growth %</b>	<b>-24.04%</b>	<b>-48.05%</b>	<b>61.17%</b>	<b>-51.81%</b>	<b>-5.94%</b>

**Table 21:** Top 5 Importing Countries from Pakistan HS-Code 8208

Source: Trade Map [www.trademap.org]



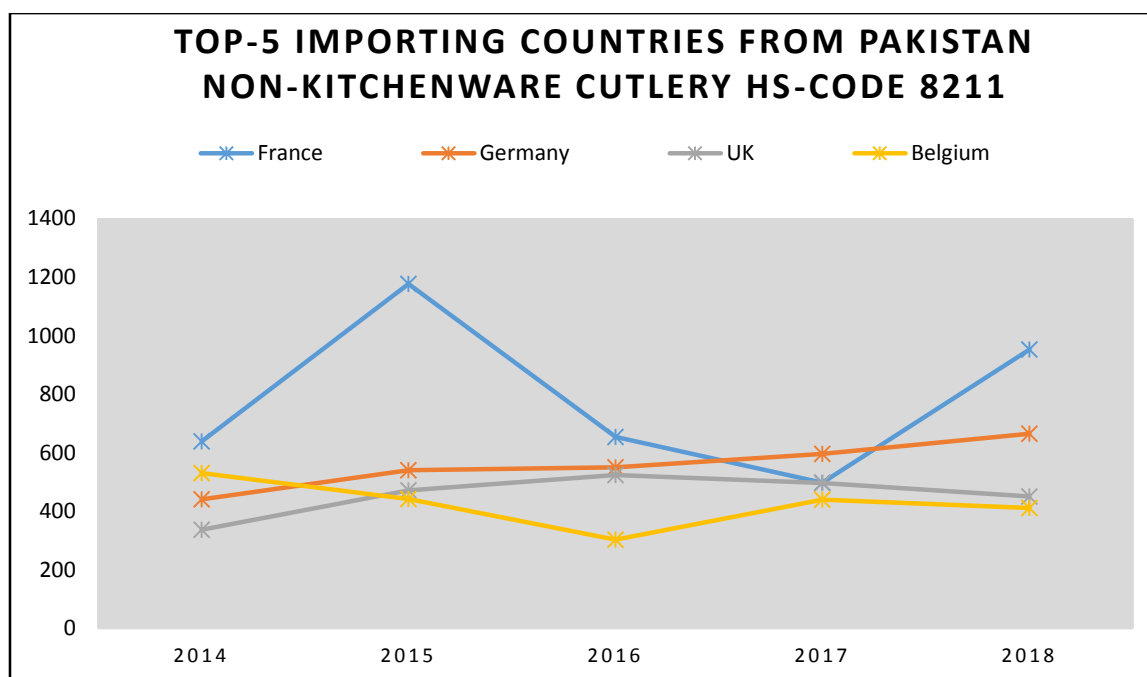
**Figure 14:** Top 5 Importing Countries from Pakistan HS-Code 8208

The data of Top 5 importing countries from Pakistan under the HS Code 8211 is as follows:

HS CODE # 8211: Knives; with Cutting Blades, Serrated or Not (Including Pruning Knives), and Blades					
Importing Countries	2014	2015	2016	2017	2018
	Amount US \$ Thousands				
<b>USA</b>	4573	5180	5714	6839	6468
<b>France</b>	639	1177	654	498	953
<b>Germany</b>	441	541	550	596	665
<b>UK</b>	337	472	524	497	451
<b>Belgium</b>	531	442	303	440	411
<b>World Total</b>	8043	8715	8801	9748	10023
<b>Growth %</b>	3.18%	8.36%	0.99%	10.76%	2.82%

**Table 22:** Top 5 Importing Countries from Pakistan HS-Code 8211

*Source: Trade Map [www.trademap.org]*



**Figure 15:** Top 5 Importing Countries from Pakistan HS-Code 8211

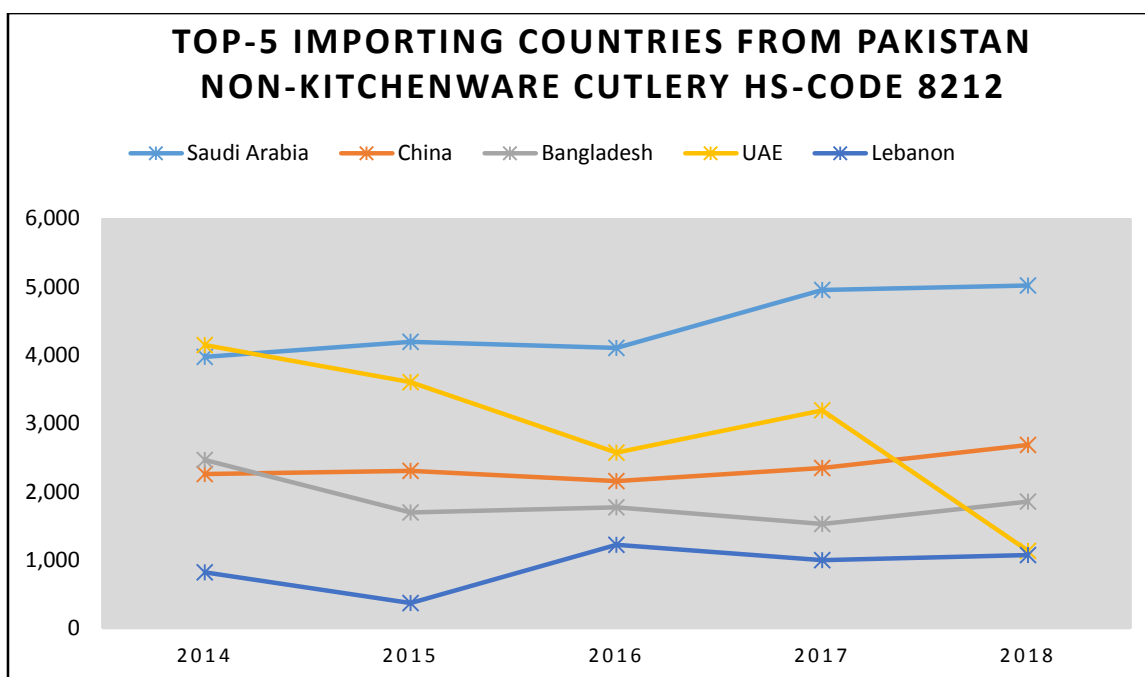
The data of Top 5 importing countries from Pakistan under the HS Code 8212 is as follows:

HS CODE # 8212: Razors and razor blades; (including razor blade blanks in strips)					
Importing Countries	2014	2015	2016	2017	2018
	Amount US \$ Thousands				
Saudi Arabia	3,977	4,194	4,105	4,954	5,019
China	2,262	2,307	2,156	2,348	2,688
Bangladesh	2,466	1,698	1,771	1,528	1,858
UAE	4,149	3,605	2,575	3,192	1,136
Lebanon	821	372	1,226	997	1,074
<b>World Total</b>	<b>20,525</b>	<b>17,995</b>	<b>18,402</b>	<b>20,493</b>	<b>19,481</b>
<b>Growth %</b>	<b>17.78%</b>	<b>-12.33%</b>	<b>2.26%</b>	<b>11.36%</b>	<b>-4.94%</b>

**Table 23:** Top 5 Importing Countries from Pakistan HS-Code 8212

**Source:** Trade Map [[www.trademap.org](http://www.trademap.org)]





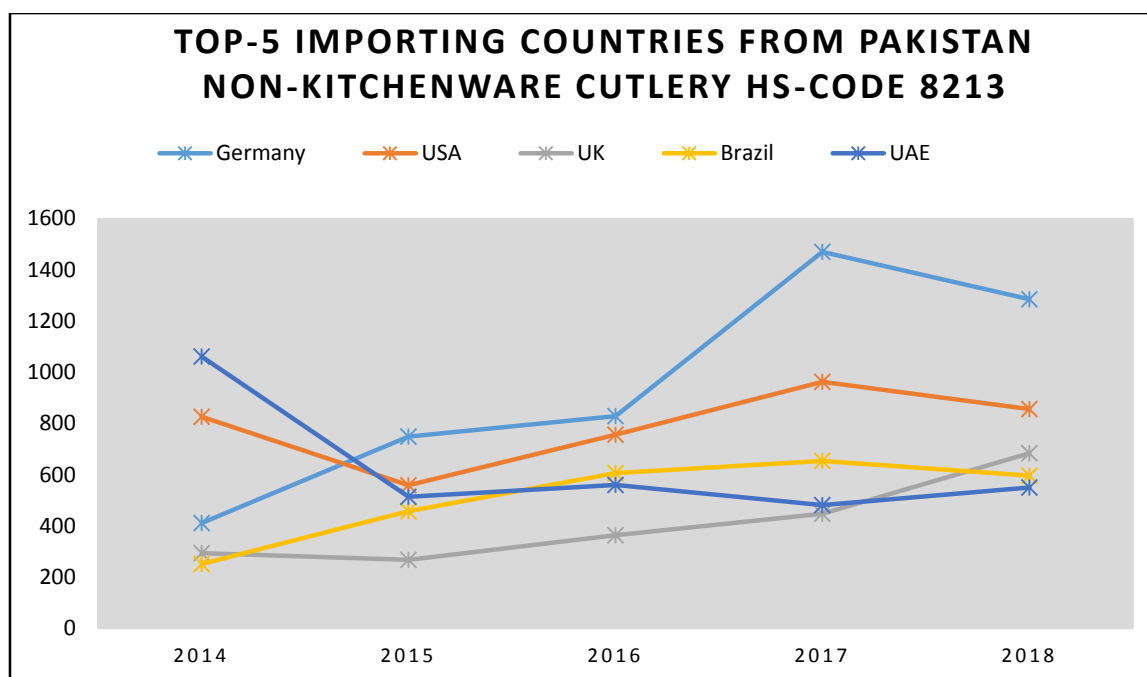
**Figure 16:** Top 5 Importing Countries from Pakistan HS-Code 8212

The data of Top 5 importing countries from Pakistan under the HS Code 8213 is as follows:

HS CODE # 8213: Scissors; Tailors' Shears and Similar Shears, and Blades					
Importing Countries	2014	2015	2016	2017	2018
	Amount US \$ Thousands				
Germany	412	749	829	1470	1285
USA	826	559	757	963	856
UK	294	268	364	448	684
Brazil	252	458	607	654	597
UAE	1062	514	560	482	550
<b>World Total</b>	<b>5637</b>	<b>5878</b>	<b>6395</b>	<b>7173</b>	<b>7067</b>
<b>Growth %</b>	<b>-6.53%</b>	<b>4.28%</b>	<b>8.80%</b>	<b>12.17%</b>	<b>-1.48%</b>

**Table 24:** Top 5 Importing Countries from Pakistan HS-Code 8213

Source: Trade Map [www.trademap.org]



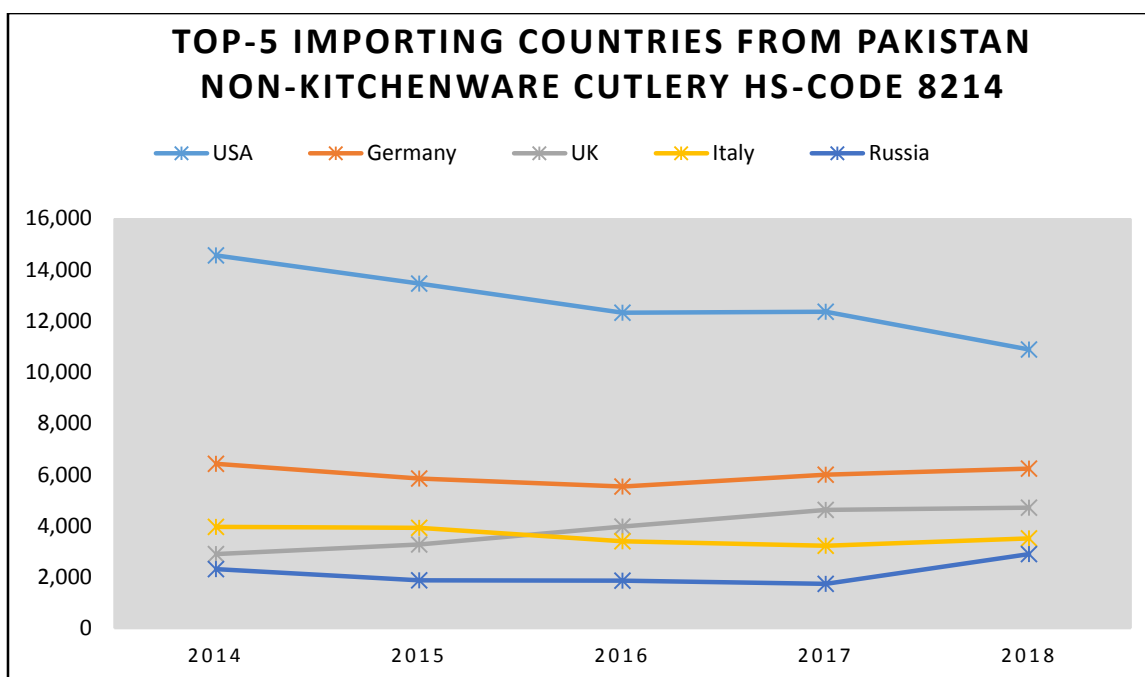
**Figure 17:** Top 5 Importing Countries from Pakistan HS-Code 8213

The data of Top 5 importing countries from Pakistan under the HS Code 8214 is as follows:

<b>HS CODE # 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)</b>					
<b>Importing Countries</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
	<b>Amount US \$ Thousands</b>				
<b>USA</b>	14,570	13,463	12,332	12,362	10,890
<b>Germany</b>	6,433	5,854	5,543	5,996	6,235
<b>UK</b>	2,901	3,282	3,972	4,623	4,715
<b>Italy</b>	3,970	3,929	3,400	3,233	3,515
<b>Russia</b>	2,314	1,872	1,863	1,734	2,899
<b>World Total</b>	52,119	48,524	45,620	49,274	48,985
<b>Growth %</b>	3.94%	-6.90%	-5.98%	8.01%	-0.59%

**Table 25:** Top 5 Importing Countries from Pakistan HS-Code 8214

**Source:** Trade Map [[www.trademap.org](http://www.trademap.org)]



**Figure 18:** Top 5 Importing Countries from Pakistan HS-Code 8214

## 6.2 Pakistan Share in World Exports

The table no. 21 below is showing Pakistan's export data for the year 2018 and its share in world exports of kitchenware and non-kitchenware cutlery items respectively.

Category	HS Codes	Pakistan Exports 2018	World Exports 2018	Pakistan's Share in World Exports
		Amounts US \$ Million		%age
Non-Kitchenware	8208	0.3	3,027.7	0.010%
	8211	10.02	2,723.92	0.368%
	8212	19.48	4,640.53	0.420%
	8213	7.07	826.13	0.856%
	8214	48.99	1,053.44	4.650%
<b>Total</b>		<b>85.86</b>	<b>12,271.72</b>	<b>0.700%</b>

**Table 26:** Pakistan's Share in World Exports of Non-Kitchenware Cutlery

**Source:** Trade Map [www.trademap.org]

The data shows, Pakistan's total export of cutlery items in 2018 is 85.86 million USD. A majority of Pakistan's exports are concentrated in the HS 8214 whose exports were 48.99 million USD. However, exports under this category have shown a decrease since 2014 declining from 52.12 million USD to the current level of 48.99 million USD. The decline was the result of Pakistan's economic conditions and substantial increase in China's exports to all the world's major markets.

Pakistan's major export partners in the category HS 8214 are USA accounting for 22.23%, Germany 12.73%, UK 9.63%, Italy 7.18% and Russia 5.92%. The largest exporter of HS 8214 in the world is China with a 55.6% share of the world market and exports of 586.09 million USD. The second largest exporter is Germany with a share of 8.4% of the world market. Pakistan is the third largest exporter with a share of 4.7%.

The other main export product for Pakistan is HS 8212 with exports of 19.48 million USD. The world market for the Kitchenware and Non-Kitchenware Cutlery products mentioned in the Table No. 21 is 12.3 billion USD with the largest exporter being China with a share of 24.27% of the world exports and export value of 3.667 billion USD, whereas, Pakistan has a share of only 0.7% of the world market and export value of 85.86 million USD.

## 7. Pakistan's Untapped Export Potential for Non-Kitchenware Cutlery

Category	HS Codes	World Exports 2018	Exports Potential 2018	World Exports 2018	Untapped Export Potential
		Amounts US \$ Million			
Non-Kitchenware	8208	3027.7	0.46	0.3	0.16
	8211	2723.92	16.43	10.02	6.41
	8212	4640.53	36.78	19.48	17.30
	8213	826.13	13.47	7.07	6.40
	8214	1053.44	66.03	48.99	17.04
<b>Total</b>		<b>12271.72</b>	<b>133.17</b>	<b>85.86</b>	<b>47.31</b>

**Table 27:** Pakistan's Export Potential in Cutlery Sector

Source: *Export Potential Map* [[www.exportpotential.intracen.org](http://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 non-kitchenware cutlery products HS Code: 8208, 8211, 8212 and 8214 amounts to over 85.86 million USD which makes up only a small fraction (0.7%) of world exports of over 12,271.72 million USD. According to the estimate of "Export Potential Map" the export potential of the cutlery sector in the categories mentioned in the Table 27 above is around 133.17 million USD. So, there is a gap for Pakistan's 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.

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## **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.

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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

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

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## 10.2 Annexure 2: Useful links

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

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