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TRANSPORT & LOGISTICS

SECTOR PROFILE

Pakistan | Comprehensive Edition | July 2026

An investor-grade profile of Pakistan's transport and logistics sector - roads and trucking, rail, ports and shipping, aviation, warehousing and cold chain - at the crossroads of CPEC, incorporating the Pakistan Economic Survey 2025-26, verified national transport statistics, and the Finance Act 2026.

PREPARED FOR	PRIMARY SOURCES	EDITION
Investors, Businesses & Academia	**PES 2025-26 · NHA · M/o Railways · Ports · CAA · World Bank**	**Comprehensive · Print Edition**

About This Profile

This profile provides a comprehensive, evidence-based assessment of Pakistan's transport and logistics sector for national and international audiences - investors evaluating infrastructure, terminals, warehousing and services opportunities, businesses assessing supply-chain partners, policymakers, and academic researchers. It is written to be read as an analyst report, with charts and tables used selectively to complement the narrative.

Scope & Methodology

The profile covers the modal structure of freight and passenger transport, road, rail, ports and maritime, aviation and express segments, warehousing and cold chain, the policy and fiscal framework including the Finance Act 2026, investment opportunities, risk factors, and regional benchmarking. Analysis is anchored in primary official sources - the Pakistan Economic Survey 2025-26 (Chapter 13: Transport & Communications), NHA, Ministry of Railways, port authorities, and CAA data as reported therein, and Federal Board of Revenue instruments - supplemented by World Bank and ADB data for international comparison. All references appear in Section 12.

Quality Assurance

Every quantitative claim in this edition has been cross-validated against the source documents cited, and a structured self-audit covering data accuracy, source attribution, and analytical consistency was conducted in July 2026. Figures that are estimates rather than official statistics - including modal-share ratios and post-harvest loss rates - are identified as such and attributed to their originating institutions with dates.

Data Currency

Data are current as at 5 July 2026 unless otherwise stated. Fiscal-year references follow Pakistan's July-June fiscal year. Figures for July-March FY2026 are nine-month provisional data as reported in the Pakistan Economic Survey 2025-26. Fiscal parameters reflect the Finance Act 2026 as effective 1 July 2026.

Disclaimer

This document is for information purposes only and does not constitute investment, legal, or tax advice. Tariffs, levies, and programme parameters change through annual Finance Acts and statutory regulatory orders; readers should verify current parameters with the Federal Board of Revenue and implementing agencies before transacting. While every effort has been made to ensure accuracy, no liability is accepted for decisions made in reliance on this document.

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Acronyms & Abbreviations

3PL	Third-Party Logistics	**NHA**	National Highway Authority
ADB	Asian Development Bank	**NLC**	National Logistics Corporation
CAA	Civil Aviation Authority	**NGIA**	New Gwadar International Airport
CAREC	Central Asia Regional Economic Cooperation	**NTP**	National Transport Policy
CPEC	China-Pakistan Economic Corridor	**PES**	Pakistan Economic Survey
EEZ	Exclusive Economic Zone	**PIA**	Pakistan International Airlines
FBR	Federal Board of Revenue	**PNSC**	Pakistan National Shipping Corporation
FCL/LCL	Full / Less-than Container Load	**PQA**	Port Qasim Authority
HCV	Heavy Commercial Vehicle	**PSDP**	Public Sector Development Programme
KPT	Karachi Port Trust	**PSW**	Pakistan Single Window
LPI	Logistics Performance Index (World Bank)	**SIFC**	Special Investment Facilitation Council
ML-1	Main Line 1 (Karachi-Peshawar railway)	**TEU**	Twenty-foot Equivalent Unit
NFLP	National Freight & Logistics Policy	**TIR**	Transports Internationaux Routiers
NEV	New Energy Vehicle	**tkm**	Tonne-kilometre

THE SECTOR AT A GLANCE · FY2025-26

Eight numbers that frame the opportunity

TRANSPORT PSDP FY26 **Rs 333B** federal allocation (PES 2025-26)	**NHA NETWORK** **14,480 km** 48 highways & motorways; 71 PSDP projects	**PORT CARGO** **78.45 MT** Karachi, Qasim & Gwadar, Jul-Mar FY26 (PES)	**TRUCK PRODUCTION** **+87.8%** Jul-Mar FY26 - the freight bellwether (PES)
RAIL FREIGHT **4,839M tkm** 24.16M passengers, Jul-Mar FY26 (PES)	**ROAD FREIGHT SHARE** **~90%+** of freight tonne-km moves by road (ADB/NTP)	**PIA REVENUE CY2025** **Rs 212B** 3.9M passengers; operational turnaround (PES)	**COASTLINE & EEZ** **1,046 km** EEZ ~240,000 sq km on the Arabian Sea

Sources - Pakistan Economic Survey 2025-26, Ch. 13; NHA; Ministry of Railways; port authorities; ADB; National Transport Policy 2019.

1. Executive Summary

Pakistan's transport and logistics sector sits on one of the more consequential pieces of economic geography in Asia: a 1,046 km Arabian Sea coastline at the mouth of the Gulf, land borders with China, India, Iran and Afghanistan, and the shortest overland route between western China and open ocean. Domestically, the sector is the circulatory system of a 252.09million-person economy; regionally, it is the physical substance of CPEC. The federal government allocated Rs 333 billion to transport in the FY2026 PSDP, with the National Highway Authority alone carrying 71 projects worth Rs 226.98 billion (PES 2025-26).

The sector's structure is defined by one imbalance: roads carry the overwhelming majority of freight - long estimated at over 90% of tonne-kilometres (ADB; National Transport Policy 2019) - while rail's share has withered. The July-March FY2026 numbers make the point: Pakistan Railways moved 4,839 million tonne-kilometres of freight, while truck production, the sector's demand bellwether, surged 87.8% as fleet replacement began against an HCV industry still operating at roughly 80% idle capacity (PES 2025-26). Ports handled 78.45 million tonnes of cargo in the period, concentrated at Karachi and Port Qasim, with Gwadar's commercial ramp still ahead of it.

The reform agenda is trade facilitation. The Pakistan Single Window has digitised import-export processing, the Finance Act 2026 cut customs duties across vehicle and industrial categories in a deliberate liberalisation, and the National Freight & Logistics Policy provides the sector's first dedicated policy framework. The honest caveat is measurement: Pakistan ranked 122nd on the World Bank's Logistics Performance Index in 2018 and was not included in the 2023 edition for want of adequate survey data - itself a signal of the documentation gap investors should expect (World Bank LPI).

For investors, the opportunity set spans asset classes: modern warehousing and cold chain (where post-harvest losses for perishables are estimated by industry sources at up to 40-50%), container terminals and port concessions with proven international-operator precedents, rail freight under a long-delayed but structurally inevitable modernisation, and digital logistics riding e-commerce growth on 161 million broadband connections. Each pairs large structural demand with thin formal supply - the recurring pattern of this profile.

FIVE INVESTOR ENTRY POINTS

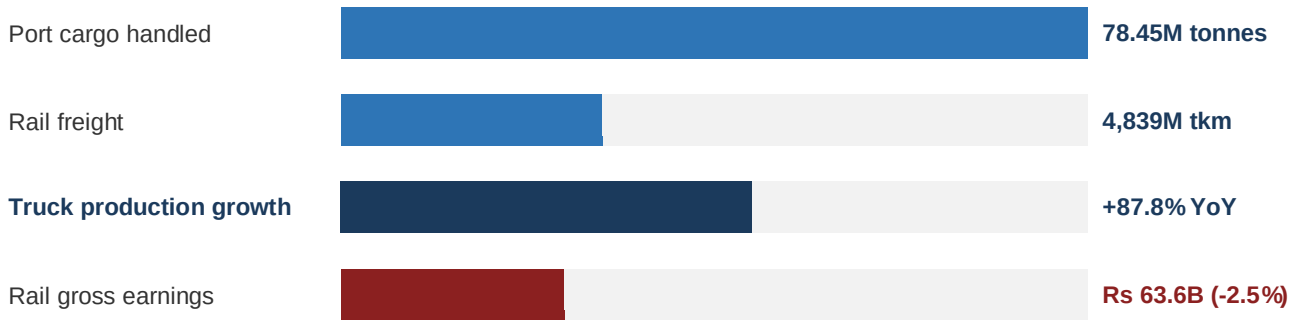
01 · WAREHOUSING & 3PL	02 · COLD CHAIN	03 · PORTS & TERMINALS	04 · RAIL & DRY PORTS	05 · DIGITAL LOGISTICS
Grade-A warehousing scarce; 3PL outsourcing rising; e-commerce fulfilment demand.	Up to 40-50% perishable losses (industry est.); reefer fleet & cold-store gap nationwide.	78.45 MT handled Jul-Mar FY26; international operators established; Gwadar optionality.	Rail freight structurally underused; ML-1 modernisation pending; dry-port network.	Freight marketplaces, fleet telematics, express parcel riding e-commerce growth.

2. Market Structure & the Modal Mix

2.1 Road Dominance & the Freight Bellwether

Pakistan moves by road. The last comprehensive modal studies put road transport at roughly 92% of passenger-kilometres and up to 96% of freight tonne-kilometres (PIDE,2025), and nothing in the current data suggests the balance has shifted: rail freight of 4,839 million tonne-kilometres in July-March FY2026 is a small fraction of national freight demand, and the road network carries the rest. This dominance is simultaneously the sector's biggest inefficiency - road freight is more expensive, more energy-intensive, and slower at scale than rail for long-haul bulk - and its biggest investment signal, because every percentage point of freight that policy shifts to rail or coastal shipping represents a large addressable market.

Freight transport indicators, Jul-Mar FY2026



Source - PES 2025-26, Ch. 13 & Table 3.9. Bars indicative of relative momentum, not a common unit. Truck output growth signals fleet replacement beginning against ~80% HCV idle capacity.

2.2 Industry Segments

The service industry around this infrastructure divides into five segments. Freight forwarding is the most internationalised, with global forwarders and established domestic firms serving textile, rice, surgical goods and other export trades. Third-party logistics (3PL) is emerging as corporates outsource warehousing-plus-transport bundles. Warehouse operators run general cargo, bonded, and a small but growing base of modern racked facilities. Specialised transporters handle heavy, out-of-gauge, and project cargo. And trucking itself - the largest segment by volume - remains overwhelmingly informal: owner-operators and small fleets dominate, with implications for service reliability, insurance, and documentation that formal-sector entrants convert into a competitive advantage (BOI; industry assessments).

3. Road Transport & Highways

The National Highway Authority manages the apex tier of the road system: 48 national highways, motorways and strategic roads spanning 14,480 km, within a national network exceeding 264,000 km across federal, provincial and district tiers. The NHA's FY2026 development portfolio of 71 PSDP projects worth Rs 226.98 billion - 67 ongoing schemes worth Rs 224.83 billion and four new starts - prioritises completion of existing corridors (PES 2025-26). Beyond CPEC's north-south spine, the survey highlights corridor investment serving the Reko Diq mining economy, including upgrading of the route from Nokundi toward Gwadar, and improved connectivity linking the New Gwadar International Airport with Gwadar Port.

NHA PSDP PROJECTS	MOTORWAY-CLASS NETWORK	TRANSPORT ALLOCATION
71	**14,480 km**	**Rs 333B**
Rs 226.98B; 67 ongoing + 4 new (PES 2025-26)	48 national highways & motorways	federal PSDP FY2026

The trucking fleet that runs on this network is old, fragmented, and financed informally - which is precisely why the +87.8% surge in truck production in July-March FY2026 matters: it marks the start of a replacement cycle, supported by bank fleet financing and CPEC-related demand, in an HCV industry that PES notes still operates at about 80% idle capacity. Fleet modernisation is a direct play for vehicle financiers, telematics providers, and formal fleet operators.

4. Rail Transport

Pakistan Railways operates 7,791 route-km with 444 locomotives, and in July-March FY2026 carried 24.16 million passengers and 4,839 million tonne-kilometres of freight, generating gross earnings of Rs 63.6 billion, slightly below the Rs 65.2 billion of the same period last year (PES 2025-26). The network's freight share is far below both its history and its potential: rail is the natural mode for long-haul bulk - wheat, cement, coal, containers - on the Karachi-Lahore-Peshawar axis, and every serious diagnostic of Pakistani logistics identifies rail underutilisation as the sector's largest structural inefficiency.

The transformation project is ML-1, the modernisation of Pakistan's Karachi-Peshawar main line, historically cited at 1,872 km, though government statements in July 2026 describe a revised 1,680 km scope. Long structured as CPEC's flagship rail project, ML-1 was formally separated from the CPEC framework in early July 2026, after financing negotiations with China failed to materialise; the government is now pursuing ADB-led multilateral financing, with the Asian Infrastructure Investment Bank and Islamic Development Bank also under discussion, at a revised estimated cost of $7.5-7.7 billion. The ADB has committed approximately $2 billion to Phase 1 (the Karachi-Rohri/Hyderabad section), and technical work, consultant contracts, survey and design reports, was formally underway as of late July 2026. Nearer-term entry points exist regardless of the full line's timeline: private freight-train operations, terminal and dry-port management, and rolling-stock leasing are all models used in comparable railways, and roughly 200 railway freight stations and the dry-port network provide physical anchors (Pakistan Railways; BOI)5. Ports, Shipping & Maritime

Pakistan's three commercial seaports - Karachi Port, Port Qasim, and Gwadar - handled 78.45 million tonnes of cargo in July-March FY2026 (PES 2025-26). Karachi and Qasim carry effectively all commercial volume today, with a dry-port network extending customs clearance inland. The national carrier PNSC remains profitable, with after-tax profit of Rs 7.5 billion in the period, and Pakistan's Exclusive Economic Zone covers roughly 240,000 sq km of the Arabian Sea.

Gwadar remains the strategic long game: a deep-water port 2,500-3,200 km from western China (Kashgar/Xinjiang) via the planned CPEC land corridor, against 5,000+ km to China's eastern seaboard via the traditional Malacca Strait sea route, positioned as CPEC's maritime terminus. The New Gwadar International Airport is now linked into the port's connectivity plan, and mining-corridor development toward Reko Diq gives the port a potential bulk-export anchor cargo for the 2030s. The commercial caveats are the

same as in our companion profiles: utilities, security assessments, and timeline discipline. Gwadar is optionality with a strategic floor, not near-term cash flow.

5.1 Success Stories

Three cases demonstrate that international-standard logistics operations work in Pakistan.

GLOBAL TERMINAL OPERATORS	NLC TIR CORRIDORS	PIA TURNAROUND
Two decades of precedent	**Overland to Central Asia**	**2025 operational reset**
The world's leading container-terminal groups operate Pakistan's box trade: DP World at Qasim International Container Terminal and Hutchison Ports at the deep-water South Asia Pakistan Terminal in Karachi - long-running proof that international port concessions function commercially in Pakistan.	Under the TIR convention, Pakistani carriers led by the National Logistics Corporation have opened scheduled road-freight corridors to Uzbekistan, Kazakhstan and beyond - converting Pakistan's geography into working transit trade with Central Asia for the first time at commercial scale.	PIA broke a 21-year losing streak with its first net profit in FY2024, and built on that momentum in 2025: total revenue of Rs 212 billion, a record operating profit of Rs 16 billion, resumed international operations, and improved financial performance (PES 2025-26) - restoring a functioning flag-carrier platform ahead of its December 2025 privatisation, in which a 75% stake was sold to an Arif Habib-led consortium for Rs 135 billion (~$480 million).

6. Aviation & Express Logistics

Pakistan's civil aviation network is anchored by three major international gateways - Karachi, Lahore, and Islamabad - with the New Gwadar International Airport recently added, alongside a wider network of domestic and regional airports across the country. The year's aviation story is PIA's operational reset: revenue of Rs 212 billion in CY2025, international operations, and improved financial performance (PES 2025-26). a genuine turnaround ahead of its December 2025 privatisation, in which a 75% stake was sold to an Arif Habib-led consortium for Rs 135 billion (~$480 million).Private carriers serve domestic and Gulf routes, and the Gulf workforce corridor underpins structural passenger demand.

On the cargo side, express and parcel logistics is the fastest-evolving segment, pulled by e-commerce on Pakistan's 161 million broadband connections. Domestic courier networks have scaled into structured parcel operations with cash-on-delivery infrastructure, and international integrators operate alongside them. Air freight remains thin relative to potential - high-value exports such as surgical instruments, textiles samples, and IT hardware move by air, and dedicated cargo capacity is limited - an addressable gap as export composition shifts toward higher value density.

7. Policy & Institutional Framework

Transport policy is spread across federal and provincial actors: the Ministry of Communications (NHA), Ministry of Railways, Ministry of Maritime Affairs (ports), and the aviation division, with the Planning Commission setting PSDP allocations and the SIFC fast-tracking strategic investments. The National Transport Policy 2019 set the framework objectives; the National Freight & Logistics Policy carried them into the freight domain with corridor, modal-shift, and formalisation goals; and CAREC membership ties Pakistan into regional corridor standards (Ministry of Planning; CAREC).

Transport investment is explicitly nested in URAAN Pakistan, the National Economic Transformation Plan 2024-29: the Economic Survey describes the Rs 333 billion FY2026 transport allocation as made under the framework of URAAN Pakistan alongside CPEC, and the plan's Energy & Infrastructure pillar targets a 10% renewable energy share in the energy mix and doubling railway freight transport to 25%,, with CPEC Phase III priorities including export industry, Gwadar and the blue economy, and regional connectivity with third-party participation (Ministry of Planning, Development & Special Initiatives, 2024; Planning Commission press briefing)..

THE POLICY ARC · 2019-2026

2019 **National Transport Policy** First integrated federal transport policy framework.	**2021-22** **PSW & Freight Policy** Pakistan Single Window digitises trade; National Freight & Logistics Policy adopted.	**2022-24** **TIR Corridors & SIFC** Central Asia road corridors scale; SIFC fast-tracks logistics investment.
2025 **NEV Policy 2025-30** Electrification framework extends to trucks and buses; fleet-renewal incentives.	**FY2026** **Corridor Investment** Rs 333B transport PSDP; Reko Diq-Gwadar corridor; NGIA-port linkage.	**JUL 2026** **Finance Act 2026** Broad tariff liberalisation cuts vehicle & input duties; trade-volume tailwind.

8. Fiscal & Trade Facilitation: The Finance Act 2026

The Finance Act 2026, effective 1 July 2026, matters to logistics through the trade channel more than through any sector-specific levy. Customs duties were cut across vehicle categories - including reductions on trucks' imported inputs, a 10% cut in auto-parts duties, and additional customs duty flattened to 4% - within a broader tariff-rationalisation programme that also reduced ACD and regulatory duties across industrial inputs, at an estimated revenue cost exceeding Rs 112 billion (Finance Act 2026; FBR). Lower tariffs mean higher trade volumes, and trade volumes are the sector's demand curve.

> **What the Finance Act 2026 Means for Logistics Investors**
>
> Fleet economics improve directly: duty reductions on commercial-vehicle inputs and parts lower replacement-cycle costs just as truck production accelerates (+87.8% Jul-Mar FY26).
>
> The liberalisation direction - lower tariffs, PSW digitisation, documentation incentives across the economy - compounds into higher containerised volumes through ports, dry ports, and bonded logistics.
>
> The NEV Policy 2025-30's extension to commercial vehicles, with the NEV levy on ICE vehicles funding adoption subsidies, begins tilting long-run fleet composition; early movers in electric urban delivery gain the policy tailwind.

9. Investment Opportunities

9.1 Warehousing & Cold Chain

Modern warehousing is the sector's clearest supply gap: the historical stock is low-grade godown space, while e-commerce, organised retail, and 3PL outsourcing demand racked, insured, compliant Grade-A facilities near urban consumption. Cold chain is the acute case - industry estimates put post-harvest losses for perishables as high as 40-50% for want of refrigerated storage and transport (BOI; Global Cold Chain assessments), in the world's fourth-largest milk-producing country with major horticulture exports. Rental yields on modern logistics real estate benefit from scarcity, and anchor tenancy from e-commerce and FMCG players de-risks development.

9.2 Ports, Terminals & Transshipment

The DP World and Hutchison concessions prove the model; the next opportunities are bulk and specialised terminals (LNG, grain, minerals - with Reko Diq's export logistics a defined future requirement), landside container infrastructure, and eventually Gwadar transshipment if utilities and shipping-line economics converge. Port-adjacent logistics zones under PQA and the maritime affairs agenda offer land plays with concession-like characteristics.

9.3 Rail Freight & Dry Ports

Rail's freight share has one direction to go. Private train operations, terminal management at the ~200 freight stations and dry ports, and rolling-stock leasing are entry models that do not depend on ML-1's financing timetable - though ML-1, when it proceeds, would transform trunk capacity. Cargo classes with natural rail economics - cement, coal, wheat, containers on the port-Punjab axis - already exist at scale.

9.4 Digital & Express Logistics

Freight marketplaces matching shippers with the fragmented trucking base, fleet telematics and financing for formalising operators, and express parcel networks for e-commerce are the sector's venture-scale plays. The enabling stack - 161 million broadband connections, digital payments growth, PSW rails - is already deployed.

Opportunity	Key Enablers	Risk Factors
Warehousing & cold chain	Supply scarcity; e-commerce & FMCG anchors; loss reduction value	Land title; power costs; tenant credit
Ports & terminals	Operator precedents; volume growth; Reko Diq bulk future	Concession policy continuity; dredging & access
Rail freight & dry ports	Underused capacity; natural bulk economics	PR institutional reform; ML-1 uncertainty
Digital & express	Broadband base; fragmented incumbents; payment rails	Unit economics; informal price competition

Sources - PES 2025-26; BOI; industry assessments. See Section 10 for risk detail.

10. Challenges & Risk Factors

Risk ratings are the authors' qualitative assessment of relevance to international investors.

Modal Imbalance & Logistics Cost

HIGH RISK

Over-reliance on road freight raises national logistics costs well above efficient benchmarks and exposes supply chains to fuel-price and corridor disruptions. Rail reform has been promised for decades; investors should price continued road dominance for the medium term.

Informality & Documentation

MEDIUM RISK

Trucking is dominated by informal owner-operators; contracts, insurance and service standards are thin. Pakistan's absence from the 2023 World Bank LPI for lack of adequate survey data (after ranking 122nd in 2018) illustrates the measurement gap. Formal entrants gain an edge but transact against informal price points.

Energy & Fuel Cost Exposure

MEDIUM RISK

Diesel dominates freight economics and imported-fuel prices transmit directly to rates; grid reliability raises warehousing operating costs. Fuel-price shocks - as in April 2026's oil-driven rate response - move the whole sector's cost base.

Corridor Security & Geography

MEDIUM RISK

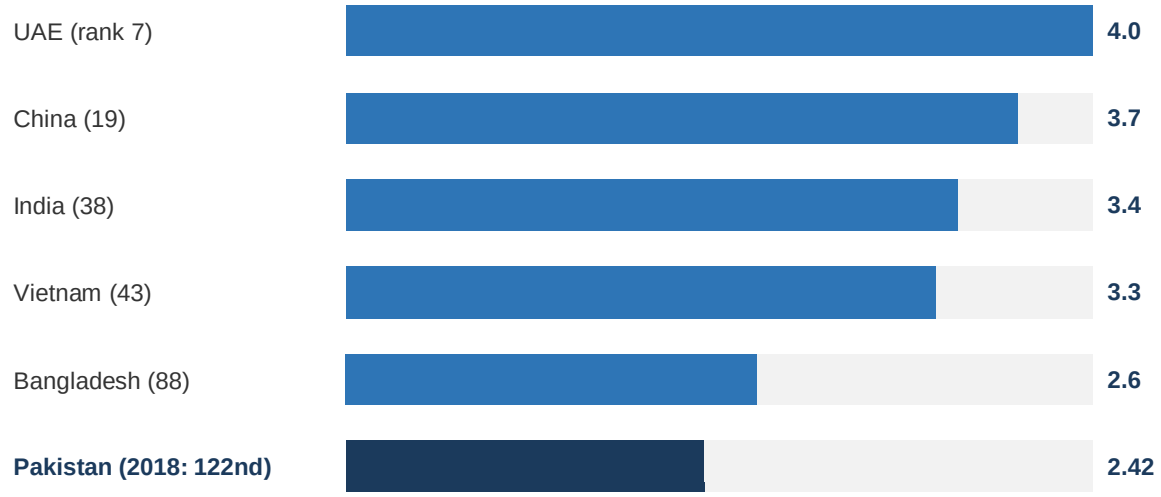
Western-corridor and Balochistan operations require current security assessment; Afghan transit trade is volatile; border-crossing closures episodically disrupt TIR and transit flows. Route diversification and insurance structuring are standard mitigations.

11. Regional Benchmarking

The World Bank's Logistics Performance Index is the sector's standard scorecard, and Pakistan's reading is sobering on both level and trend: a 2.42 score and 122nd place in 2018, and exclusion from the 2023 edition for inadequate survey data. The gap to regional peers is a measure of the opportunity: every reform that moves Pakistan toward Indian or Vietnamese logistics performance releases trade competitiveness

across all its export sectors, and the investments that close the gap - terminals, warehousing, digitisation, modal shift - are precisely this profile's opportunity set.

World Bank LPI 2023 overall score (1-5); Pakistan shown at last available score



Source - World Bank Logistics Performance Index 2023; Pakistan's score/rank from LPI 2018 (excluded from the 2023 edition for insufficient survey data).

The Upside Case

Pakistan's logistics inefficiency is, arithmetically, its investment case: estimates place national logistics costs well above the levels of efficient economies as a share of GDP, and each point of improvement flows to the competitiveness of every export sector simultaneously.

The geography is not replicable: the shortest route from western China to the sea, the land bridge between Central Asia and warm water, and a 241 million-person domestic market along the corridor.

The precedents already exist inside the country - international terminal operators, TIR corridors, single-window digitisation. Scaling what demonstrably works, rather than proving new models, is the nature of the opportunity.

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All data and analysis are sourced from primary and authoritative secondary sources, presented in APA 7th Edition format.

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Transport & Logistics Sector Profile - Pakistan - Comprehensive Edition July 2026 - End of Report

TRANSPORT & LOGISTICS SECTOR PROFILE

Pakistan - Comprehensive Edition - July 2026

Part of the Pakistan Sector Profile Series

Housing & Construction - Automotive - Information Technology - Transport & Logistics - further sectors in preparation

Compiled from official and primary sources: Pakistan Economic Survey 2025-26 - NHA - Ministry of Railways - Port Authorities - CAA - World Bank

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