

THE TWO-CITY TRAP:

Industrial Concentration, Spatial Inequality, and the Case for Geographic Diversification in Pakistan

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EXECUTIVE SUMMARY

Pakistan's manufacturing geography is defined by a structural paradox: two cities — Karachi and Lahore — collectively account for a disproportionate share of the country's entire large-scale manufacturing (LSM) output, while the remaining districts contribute the residual. According to primary PBS data, Karachi accounted for 29.23% of national LSM census value added in 2005–06 and Lahore contributed 9.04% in the same year — together representing well over a third of Pakistan's industrial base (PBS, 2013). Within Punjab alone, seven districts account for approximately 75% of the province's industry, with sector composition unchanged since the 1960s (Malik et al, 2019). Five distinct structural failures have converged to sustain and deepen the two-city trap: the absence of an enabling spatial policy framework; progressive infrastructure saturation in both primary hubs; a chronic data deficit that renders spatial industrial policy evidence-blind; industrial cluster lock-in with structural productivity stagnation; and a spatial mismatch between skills infrastructure and actual or potential industrial geography. The evidence points not toward resignation but toward a specific and sequenced reform agenda. Six interventions are both urgent and institutionally within reach: a national industrial spatial strategy; differentiated SEZ incentives for second-tier cities; targeted industrial corridor infrastructure; skills ecosystem anchoring; a district-level industrial statistics architecture; and a systematic repositioning of Punjab's underperforming industrial estate network.

Key Terms: Industrial concentration · Spatial policy · Agglomeration economies · Second-tier cities · Special economic zones · Industrial estates · Skills-industry mismatch · Geographic diversification

AT A GLANCE: INDUSTRIAL CONCENTRATION INDICATORS

Indicator	Value	Source
Punjab share of national LSM value added (adjusted)	48.33% (2015–16)	CMI 2015-16 (PBS, 2020)
Sindh share of national LSM value added (adjusted)	42.82% (2015–16)	CMI 2015-16 (PBS, 2020)
Karachi share of national LSM census value added	29.23% (2005–06)	CMI 2015-16 (PBS, 2020; p. 11)
Lahore share of national LSM census value added	9.04% (2005–06)	CMI 2015-16 (PBS, 2020: pp. 8 & 14)
Seven districts' share of Punjab's industry	~75% (2015–16)	(Malik et al, 2019; p. 16)
Industry in demarcated industrial estates (Punjab)	3.5% of firms; 6% of mfg. labour	(Malik et al, 2019; p. 17)
Manufacturing as % of national GDP	13.11% (2024)	World Bank (2024)

Note: Karachi and Lahore figures are from PBS CMI 2005–06 District-Wise Report — the only PBS publication providing district-level census value added. The 75% and 3.5% figures are sourced from PSS Technical Paper 1 (Malik et al, 2019), citing an unpublished CMI 2015-2016 - Punjab spatial dataset.

01 | THE PROBLEM: TWO CITIES, ONE INDUSTRIAL ECONOMY

Pakistan's large-scale manufacturing sector is not merely concentrated — it is captured by two cities. According to the PBS Census of Manufacturing Industries 2005–06 District-Wise Report — the only official publication providing district-level manufacturing value added — Karachi accounted for 29.23% of national LSM census value added in 2005–06, a dominance it has held since at least 1969 (PBS, 2013; Iqbal & Ullah, 2017). Lahore, the industrial heartland of Punjab, contributed 9.04% of national LSM census value added in the same year — a figure explicitly stated in the PBS district-wise report, which identifies Lahore as the single largest district by census value added within Punjab (PBS, 2013, p. 8). A subsequent academic study using national accounts decomposition methodology estimated Lahore's share had grown to approximately 9.7% by 2016–17 (Tahir, 2017), consistent with the upward trajectory observable in PBS data. Together, these two cities account for well over a third of the country's entire large-scale manufacturing output.

The degree of provincial concentration is equally striking. Punjab and Sindh together account for 91.15% of national LSM value added in 2015–16, with Punjab contributing 48.33% and Sindh 42.82% (PBS, 2020, Table 8.B). Within Punjab itself, the concentration is further compressed: the Punjab Spatial Strategy 2047 found that just seven districts — Faisalabad, Lahore, Gujranwala, Sialkot, Multan, Sheikhpura and Gujrat — account for approximately 75% of Punjab's industry, with industrial cluster preferences in these same locations traceable to the Mughal era (Malik et al, 2019). This is not merely a geographic asymmetry; it is a structural economic constraint that leaves provinces with abundant natural resources, agricultural potential, and labour supply industrially marginalised.

The global evidence is clear on what concentrated industrial geographies cost. Agglomeration economies — the productivity benefits that firms derive from co-locating with other firms — are real and powerful (World Bank, 2009). But their benefits plateau and eventually reverse when concentration pushes factor costs beyond competitive thresholds (Krugman, 1991). When a single city is simultaneously the country's port, financial capital, administrative hub, and industrial base — as Karachi is — the resulting congestion externalities and infrastructure competition begin to erode the productivity advantages that drew investment in the first place. PBS district-wise data shows Karachi's share of national LSM census value added at 29.23% in 2005–06 (PBS, 2013), down from 30.96% in 1990–91 (Iqbal & Ullah, 2017) — a trajectory reflecting not merely political instability, but deeper structural inefficiencies of hyper-concentration.

For Pakistan, manufacturing accounts for approximately 13% of GDP (World Bank, 2024), a share that has stagnated over decades and compares unfavourably to regional peers (State Bank of Pakistan, 2023). The failure to build a geographically diversified industrial base is not incidental to this stagnation — it is one of its primary drivers. Countries that have achieved sustained industrialisation — South Korea, Malaysia, Vietnam — did so through deliberate spatial industrial policies that channelled investment into multiple growth corridors simultaneously (OECD, 2020). Pakistan has yet to implement an equivalent framework. Until it does, the two-city trap will not merely persist — it will deepen.

02 | STRUCTURAL FAILURES: FIVE CONVERGING GAPS

Five distinct structural failures have converged to transform Pakistan's industrial geography into a systemic competitiveness vulnerability. Three operate at the national level; two are specific to Punjab's industrial architecture and together explain why even within the dominant province, productive capacity remains locked in a narrow cluster of districts.

Gap 1 — Spatial Policy Vacuum

Gap 1 — Spatial Policy Vacuum. Pakistan has never produced a national industrial spatial strategy — a policy framework that explicitly connects industrial investment decisions to geographic objectives. Industrial estates,

special economic zones, and investment incentives have been allocated through a combination of political calculation, historical inertia, and reactive administrative decisions, rather than evidence-based spatial planning (Urban Unit, 2021). The consequences are extensively documented in Punjab's own spatial planning evidence base: the Punjab Spatial Strategy 2047 found that only 3.5% of Punjab's manufacturing industries are located within demarcated industrial estates and SEZs, with these firms employing only 6% of the province's total manufacturing sector labour (Malik et al, 2019, p. 17). The government has established 9 large and 20 small-scale industrial estates across Punjab since the first Kot Lakhpat estate in Lahore in 1960 — yet the overwhelming majority have failed to attract meaningful private investment, with success confined almost exclusively to estates in Punjab's pre-existing industrial hubs (Malik et al, 2019). This is not a market failure: it is a planning failure.

Industrial estates were established without the spatial policy framework, infrastructure co-investment, or skills ecosystem that would make them viable alternatives to dominant clusters. Where a coherent spatial policy exists — as in Korea's Regional Industrial Development programme or Malaysia's corridor-based planning architecture — industrial activity is directed, not merely allowed. Pakistan's absence of this framework has left market forces to default to the path of least resistance: Karachi and Lahore.

Gap 2 — Infrastructure Saturation in Primary Hubs

Gap 2 — Infrastructure Saturation in Primary Hubs. Both Karachi and Lahore are exhibiting measurable symptoms of infrastructure saturation — the point at which the cost of industrial operation in a city begins to exceed the agglomeration premium that justifies locating there. Karachi's industrial zones — SITE, Korangi, Landhi, North Karachi — were designed for a manufacturing base a fraction of their current scale. Electricity, water, road logistics, and port handling capacity have failed to scale with industrial demand, producing chronic production disruptions and rising costs. Lahore presents a parallel constraint: industrial land within the city boundary is increasingly contested between manufacturing and real estate, logistics congestion has intensified, and energy costs remain among the highest in the region.

The urban land-use evidence from Punjab reinforces this diagnosis. Analysis of the fifty major cities of Punjab shows that only 4% of total urban land is designated for industry and 5% for commercial use, while residential land accounts for 62% of all urban area — compared to Singapore's 19% industrial land designation, which reflects a deliberate spatial commitment to maintaining a manufacturing land reserve (Malik et al, 2019, Figure 1.14). Only 41% of urban area in Punjab's top-fifty cities is planned; the rest is uncontrolled sprawl that consumes land that would otherwise be available for manufacturing. Punjab industries are locating outside demarcated zones precisely because land within estates is either unavailable, unaffordable, or suboptimally positioned (Urban Unit, 2021). When dominant industrial hubs become structurally expensive without offering a commensurate quality-of-infrastructure premium, the natural corrective would be spatial dispersal — but that dispersal requires a prepared receiving environment that currently does not exist.

Gap 3 — District-Level Industrial Data Deficit

Gap 3 — District-Level Industrial Data Deficit. Perhaps the most foundational obstacle to spatial industrial policy in Pakistan is the absence of regular, accessible district-level industrial statistics. The PBS CMI 2005–06 District-Wise Report — published in 2013, seven years after the reference year — remains the only official source providing district-level census value added data (PBS, 2013). The more recent CMI 2015–16 publishes only provincial-level aggregates in its publicly accessible summary tables (PBS, 2020). No annual district-level industrial indicator system exists that would allow policymakers, investors, or researchers to track the emergence, growth, or decline of industrial clusters in second-tier cities in real time. This data vacuum makes evidence-based spatial industrial policy structurally impossible: incentive design, infrastructure investment prioritisation, and SEZ location decisions all require sub-provincial granularity. India's Annual Survey of Industries publishes district-level industrial output annually; Pakistan has no equivalent mechanism.

Gap 4 — Industrial Cluster Lock-In and Structural Productivity Stagnation

Gap 4 — Industrial Cluster Lock-In and Structural Productivity Stagnation. A fourth structural failure — distinct from the spatial policy vacuum — is the persistent lock-in of Punjab's industrial structure into a narrow set of

districts and sectors, with limited evidence of dynamic upgrading over time. The Punjab Spatial Strategy 2047 found that seven districts account for approximately 75% of Punjab’s industrial output, with sector composition having changed only minimally since the 1960s and 1970s: textiles, wearing apparel, and food products remain the dominant industries — all predominantly agro-based, inward-focused, and operating below global productivity benchmarks (Malik et al, 2019, p. 16). The high-technology share of Punjab’s industrial base has declined over the past three decades.

The productivity consequences are severe. Value added per worker in Punjab’s industrial sector stands at approximately USD 4,350 — compared to USD 20,000 in China’s industrial sector (Malik et al, 2019, p. 16). Punjab’s industrial sector is thus not merely geographically concentrated — it is technologically stagnant. Pakistan’s industrial concentration is therefore not only a geographic problem; it is a productivity problem. Over the past three decades, growth of the industrial sector has been confined mainly to light and basic manufacturing sectors that are predominantly inward-focused and non-exporting, generating insufficient incentive for the technology integration, skills upgrading, and global value chain participation that would raise productivity across a broader industrial geography (Malik et al, 2019).

Gap 5 — Skills–Industry Spatial Mismatch

Gap 5 — Skills–Industry Spatial Mismatch. The fifth structural failure is the spatial mismatch between Pakistan’s skills infrastructure and its actual and potential industrial geography. Skills development institutions — NAVTTC-affiliated vocational training centres, polytechnics, and technical colleges — are overwhelmingly concentrated in the same cities as existing industry: Lahore, Faisalabad, Karachi. The Punjab Spatial Strategy 2047 documents that rising educational attainment across the province has not translated into a commensurate increase in workforce productivity, precisely because sector-specific, demand-driven skills training has not been systematically developed (Malik et al, 2019, p. 15). The Punjab Skills Mapping 2021 reinforces this diagnosis: skills supply across Punjab’s districts is neither matched to the industrial profile of those districts nor positioned to support the emergence of new industrial activities in lagging regions (Malik et al, 2021).

The implication for industrial dispersal is direct: even where infrastructure and incentive conditions could be improved in secondary cities, the absence of a proximate skills supply acts as an additional deterrent to industrial investment. Workers in industrially lagging districts remain absorbed in agriculture at rates far above the provincial average — DG Khan still has 66% of its labour in agriculture as of 2015, compared to 16% in Lahore (Malik et al, 2019, Figure 1.18) — not because of any intrinsic productivity differential, but because the enabling conditions for industrial employment have never been created there. By 2047, Punjab alone will require over 60 million new jobs to accommodate its expanding working-age population (Malik et al, 2019, p. 5); creating them outside the two dominant cities will be structurally impossible without a deliberate spatial skills strategy.

TABLE 1 — Structural Gap Analysis Matrix

Gap Type	Diagnosis	Economic Consequence	Priority
Spatial policy vacuum	No national industrial spatial framework; estates allocated by inertia; only 3.5% of Punjab’s industry in demarcated zones (Urban Unit, Malik et al, 2019)	Persistent concentration; enabling environment for dispersal absent	Critical — immediate
Infrastructure saturation	Input cost escalation in Karachi & Lahore; only 4% of Punjab urban land designated for industry (Malik et al, 2019, Fig. 1.14); industrial land contested by real estate	Declining agglomeration premium; active deterrence of new investment in primary hubs	High — near-term
District-level data deficit	No annual sub-provincial industrial statistics; CMI district data inaccessible outside decadal cycle;	Evidence-blind spatial policy; inability to identify or track emerging clusters	High — near-term

	PBS (2013) remains only primary district-level source		
Industrial cluster lock-in	Seven districts hold ~75% of Punjab's industry; sector mix unchanged since 1960s; value added/worker at ~USD 4,350 vs China's USD 20,000 (Malik et al, 2019)	Structural productivity stagnation; limited GVC integration; high-tech share declining	High — medium-term
Skills–industry spatial mismatch	Skills institutions concentrated in dominant hubs; lagging districts lack vocational capacity; Punjab needs 60 million new jobs by 2047 (Malik et al, 2019)	Industrial dispersal structurally impossible without proximate skills supply	Critical — immediate

03 | POLICY RECOMMENDATIONS: SIX ACTIONABLE REFORMS

The evidence points not toward fatalism but toward a specific and sequenced reform agenda. Six interventions are both urgent and institutionally within reach.

1 Formulate a National Industrial Spatial Strategy

The Ministry of Industries and Production, working jointly with the Board of Investment and provincial planning departments, should develop Pakistan's first National Industrial Spatial Strategy (NISS) — a framework that explicitly maps industrial investment decisions onto geographic objectives.

The NISS should designate a tiered hierarchy of industrial locations: primary hubs (Karachi and Lahore, to be sustained and upgraded), secondary clusters (Faisalabad, Hyderabad, Gujranwala, Quetta, Peshawar — to be actively developed), and emerging nodes for strategic seeding. The strategy must specify infrastructure, incentive, and governance conditions required at each tier, with inter-ministerial accountability mechanisms.

International Precedent: South Korea Regional Industrial Development Act — Korea Industrial Complex Corporation redirected investment into secondary clusters (OECD, 2020)

2 Restructure SEZ Incentives to Reward Geographic Dispersal

The Board of Investment should redesign Pakistan's SEZ incentive architecture to explicitly reward geographic dispersal. Currently, SEZ incentives are applied uniformly regardless of location — an approach that, in the presence of strong agglomeration pull, invariably results in SEZs clustering near primary hubs.

A differentiated framework would offer enhanced incentives — extended tax holidays, higher duty drawback rates, accelerated infrastructure provisioning — for SEZs established in designated second-tier industrial cities. Pakistan's CPEC-linked SEZs offer an immediate vehicle for this differentiation, but the incentive architecture requires fundamental redesign to make non-Karachi, non-Lahore locations genuinely competitive.

International Precedent: China's inland SEZ strategy in Chengdu and Xi'an — incentive differentials redirected investment from saturated coastal cities to inland corridors (World Bank, 2011)

3 Target Infrastructure Investment in Emerging Industrial Corridors

The Ministry of Planning, Development and Special Initiatives should identify and fund five to seven emerging industrial corridors where targeted infrastructure investment would unlock latent industrial potential. Investment should prioritise: reliable power supply through dedicated industrial feeders or off-grid solutions; trunk road connectivity to national logistics networks; and water and waste treatment capacity.

The critical principle is pre-competitive infrastructure provision — state investment that creates enabling conditions before private industrial capital is expected to commit. This is the inversion of Pakistan's historical pattern, in which infrastructure provision has lagged private investment and therefore never catalysed dispersal.

International Precedent: Malaysia's Northern Corridor Economic Region (NCER) and Eastern Corridor Economic Region (ECER) — pre-competitive corridor infrastructure successfully attracted private industrial investment at scale

Anchor a Skills Ecosystem in Designated Emerging Industrial Hubs

NAVTTTC, in coordination with provincial TEVTAs and emerging hub anchor investors, should design and implement sector-specific skills programmes anchored to the industrial profile of designated second-tier cities. The Punjab Skills Mapping 2021 provides the district-level skills demand and supply evidence base to identify priority locations and skill sets for this intervention (Malik et al, 2021).

4

The anchoring programme would designate 3–5 emerging industrial cities as skills development priority zones, establish vocational training capacity matched to the target industrial mix, and create incentive structures for anchor firms to contribute to skills infrastructure. Skills infrastructure must precede or co-arrive with industrial investment, not follow it: when investors face a skills desert at a potential location, they default to established centres regardless of other incentive advantages.

International Precedent: Taiwan's Hsinchu Science Park — skills ecosystem deliberately seeded ahead of industrial investment generated high-tech cluster formation that single-city concentration could not have achieved

Establish a District-Level Industrial Statistics Architecture

The Pakistan Bureau of Statistics, working with provincial Bureaux of Statistics, should design and implement an annual District-Level Industrial Monitoring System (DLIMS) — producing, on an annual basis, key industrial indicators at district level: number of establishments, employment, estimated output, and capital investment.

5

Pakistan's current decade-long census cycle renders industrial geography data obsolete before policy can respond: the most recent district-level value added data currently available dates to 2005–06 (PBS, 2013). A DLIMS need not be as comprehensive as the CMI — its value lies in frequency and geographic granularity. It would directly enable the evidence base required for all other recommendations (Duranton & Puga, 2004).

International Precedent: India's Annual Survey of Industries (Ministry of Statistics & Programme Implementation) — annual district-level industrial output data has been foundational to India's spatial industrial policy design

Audit and Reposition Punjab's Underperforming Industrial Estate Network

The Small Industries Corporation and Punjab Industrial Estates Development and Management Company (PIEDMC), in coordination with provincial planning authorities, should undertake a systematic audit and repositioning of Punjab's 29 industrial estates. Currently only 3.5% of Punjab's industry is located within these estates, employing only 6% of manufacturing sector labour — despite decades of public investment in their establishment (Malik et al, 2019).

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The audit should assess each estate against three criteria: infrastructure adequacy, locational strategic value relative to emerging industrial corridors, and proximity to skills supply. Estates failing on all three should be reclassified; those with locational potential but infrastructure deficits should receive targeted co-investment as part of the national spatial strategy. The existing network represents substantial sunk investment in industrial land across Punjab's secondary cities; realising that investment requires a fundamentally different

policy sequence — one in which infrastructure and skills provision precede, not follow, private sector engagement.

International Precedent: Malaysia’s MIDA industrial estate programme — systematic audit followed by targeted infrastructure co-investment and anchor-firm incentives for designated secondary corridor locations

TABLE 2 — Implementation Roadmap

Reform	Lead Institution	Int’l Precedent (APA)	Horizon
National Industrial Spatial Strategy	Ministry of Industries & Production + BOI	Korea Industrial Complex Corporation (OECD, 2020)	Near-term (0–12 months)
Differentiated SEZ incentives	Board of Investment + Provincial Govts	China inland SEZ — Chengdu, Xi’an (World Bank, 2011)	Near-term (0–12 months)
Industrial corridor infrastructure	Ministry of Planning, Development & SI	Malaysia NCER/ECER corridor model	Medium-term (1–3 years)
Skills ecosystem anchoring	NAVTTTC + Provincial TEVTAs + anchor firms	Taiwan Hsinchu Science Park skills model	Medium-term (1–3 years)
District-level industrial statistics	PBS + Provincial Bureaux of Statistics	India Annual Survey of Industries (MOSPI)	Near-term (0–12 months)
Industrial estate audit & repositioning	PIEDMC + SIC + Punjab P&D	Malaysia MIDA industrial estate programme	Near-term (0–12 months)

04 | CONCLUSION

Pakistan’s industrial geography is not the result of market efficiency — it is the residue of decades of policy neglect. The concentration of large-scale manufacturing in Karachi and Lahore reflects not these cities’ comparative advantage alone, but the systematic failure to create enabling conditions anywhere else. The two-city trap is not merely a geographic curiosity; it is a macroeconomic constraint that limits the breadth of Pakistan’s industrial base, concentrates vulnerability, and forecloses the employment creation potential of secondary cities and lagging regions.

The five structural failures identified in this brief — spatial policy vacuum, infrastructure saturation, the district-level data deficit, industrial cluster lock-in, and the skills–industry spatial mismatch — are not independent pathologies. They are mutually reinforcing. Without spatial policy, infrastructure investment defaults to established hubs. Without infrastructure in secondary locations, firms default to dominant centres. Without district-level data, neither the scale of the problem nor the effectiveness of interventions can be measured. Without productivity upgrading, concentration deepens regardless of incentives. Without skills infrastructure in lagging regions, dispersal remains structurally impossible. Breaking this cycle requires simultaneous action on all five fronts — and the six recommendations advanced here are designed to do exactly that.

The international evidence is unambiguous: no country has successfully developed a deep industrial base through exclusive reliance on one or two dominant cities. South Korea, Malaysia, Vietnam, and China all made deliberate policy choices to create multiple industrial corridors, support second-tier urban industrial development, and invest in the enabling conditions for geographic diversification (OECD, 2020; Malik et al, 2019). Pakistan has the human capital, the natural resource endowment, and — through CPEC and bilateral partnerships — the infrastructure financing to embark on an equivalent trajectory. Punjab’s own spatial strategy has already established the analytical foundation: what remains is the political will to act on it.

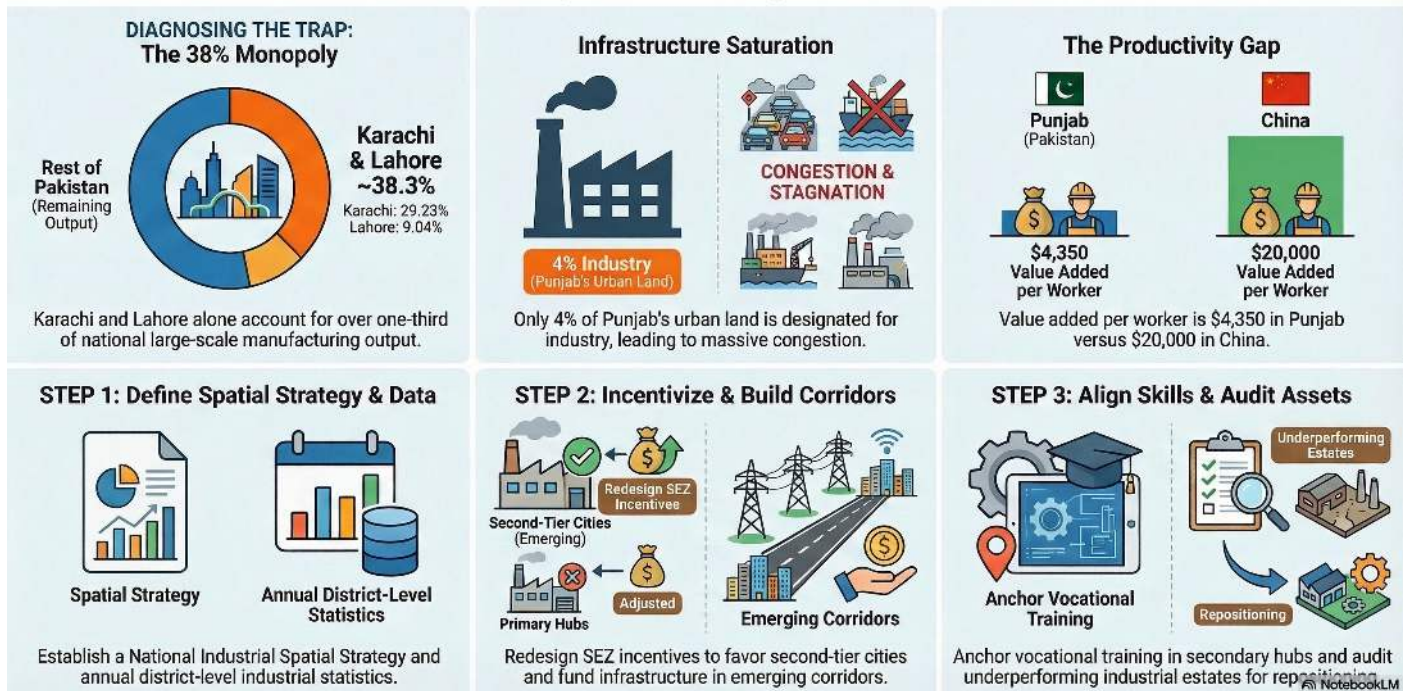
The two-city trap will not dissolve on its own. Every year that passes without a National Industrial Spatial Strategy, a skills mapping action plan, and a repositioned industrial estate network is a year in which the concentration

deepens, the secondary cities fall further behind, and Pakistan's industrial geography becomes harder and more costly to reform. The window for cost-effective course correction is not infinite — and it is closing.

GRAPHICAL ABSTRACT — Visual Summary

The Two-City Trap: A Roadmap for Pakistan's Industrial Diversification

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