

TRADE DEVELOPMENT AUTHORITY OF PAKISTAN (TDAP)

Pakistan's Exports Potential to USA

An analysis from duty-free tariff lines under MFN

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ABBREVIATIONS

CPFTA:	CHINA-PAKISTAN FREE TRADE AGREEMENT
HS:	HARMONIZED SYSTEM
US HTS:	UNITED STATES HARMONIZED TARIFF SCHEDULE
MFN:	MOST-FAVORED-NATION
PNTR:	PERMANENT NORMAL TRADE RELATIONS
USD/ US\$:	UNITED STATES DOLLAR
WITS:	WORLD INTEGRATED TRADE SYSTEM
WTO:	WORLD TRADE ORGANIZATION

1. INTRODUCTION TO MFN TRADE STATUS

Most-Favored-Nation (MFN) status is an economic position in which a country enjoys the best trade terms given by its trading partner. That means it receives the lowest tariffs, the fewest trade barriers, and the highest import quotas (or none at all). In other words, all MFN trade partners must be treated equally.

A most-favored-nation (MFN) clause requires a country to provide any concessions, privileges, or immunities granted to one nation in a trade agreement to all other World Trade Organization member countries. Although its name implies favoritism toward another nation, it denotes the equal treatment of all countries & applies to all World Trade Organization (WTO) members indiscriminately.

MFN status is critically important for smaller and developing countries for several reasons:

- It gives them access to the larger market.
- It reduces the cost of exports since trade barriers are lowered as much as possible.
- As a result, products from developing countries become more competitive and businesses have more opportunities for growth.

In the U.S., the term "Permanent Normal Trade Relations" is interchangeably used for MFN.

2. PERMANENT NORMAL TRADE RELATIONS (PNTR) IN US TRADE LAW

On 11th December 2001, China became WTO member. Many significant changes followed the Chinese economy. With the hope to open new doors of trade for American companies, USA granted permanent MFN status to China in 2001. In order to facilitate US Corporations, China centered MFN concessions were granted. If we examine the number of duty-free tariff lines, US MFN grants most of the concessions for products such as machinery & mechanical appliances (492 tariff lines), electrical equipment & machinery (336 tariff lines), Organic Chemicals (275 tariff lines), Iron & Steel (240 tariff lines), and Fish and crustaceans (227 tariff lines).

HS 2	Product Description	No. of Duty free Tariff lines
99	Commodities not elsewhere specified	1,413
84	Machinery, mechanical appliances, nuclear reactors, boilers; parts thereof	492
85	Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television ...	336
29	Organic chemicals	275
72	Iron and steel	240

03	Fish and crustaceans, molluscs and other aquatic invertebrates	227
48	Paper and paperboard; articles of paper pulp, of paper or of paperboard	225
90	Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical ...	218
73	Articles of iron or steel	192
44	Wood and articles of wood; wood charcoal	143

Table 1: No. of duty-free tariff lines under U.S. MFN

3. PAKISTAN'S EXPORTS TO USA UNDER MFN

In the year 2019, Pakistan's total exports valued around US\$ 4,042 bn. According to the statistics provided by United States Trade Representative and US. Census Bureau, Pakistan exported US\$ 344 million worth of goods under GSP scheme, US\$ 348 million worth of goods under duty-free tariff lines of MFN whereas around US\$ 3,298 million exports for the same period came from dutiable tariff lines. As per US Harmonized Tariff Schedule (USHTS), there are total 5,727 duty free tariff lines, of which trade took place only against 4,108 duty-free tariff lines. Pakistan managed to utilize just the 8.6% of the duty-free tariff lines under MFN.

Duty-free MFN Products	Dutiable MFN Tariff lines
4,108 (5,727) Tariff Lines (US\$ 348 million Pak Exports in 2019)	8,481 Tariff Lines (US\$ 3,298 million Pak Exports 2019)

Table 2: MFN tariff lines (8-digit)

4. TRADE ANALYSIS AT HS 2-DIGIT UNDER MFN

The sector-wise trade analysis of all the tariff lines under MFN at HS 2-digit shows that Pakistan has considerable exports to USA in the products from 7 sectors only – indicative of a very limited export basket. Pakistan has very negligible exports in 40 sectors whereas in the other 46 sectors, Pakistan has no exports to USA.

**Note: It is pertinent to mention here that due to certain limitations in the availability of data and asynchronization of HS codes at 8-digit level, trade analyses rest upon the trade statistics at HS 2-digit. However, the trade statistics at HTS 8-digit have been preferred for evaluating trade potential under MFN duty-free tariff lines.*

Total Free tariff line under MFN	HS 2 codes under MFN for which Pakistan has considerable exports	HS 2 Codes under MFN for which Pakistan has negligible exports	HS 2 Codes under MFN for which Pakistan has zero exports
5,727 (US\$ 348 mn)	(US\$ 3,577 Mn) 7 Chapters	(US\$ 363 Mn) 40 Chapters	(0.0) 46 Chapters

Table 3: Trade Analysis at HS 2-digit under MFN

4.1. List of duty-free MFN Tariff lines in which Pakistan has considerable exports

Pakistan's major export products to USA consist of Apparel, cotton, textile made-ups, medical & surgical equipments and plastics. The export volume of these products at HS 2-digits accumulates up to USD 3.66 billion which is 91% of the total exports of Pakistan to USA. Of these top exporting products, Pakistan enjoys duty-free concessions under MFN for just 319 tariff lines.

HS 2	Product Description	MFN tariff lines	Pak Export to USA 2019	USA Imports from World 2019	Pak Exports to World 2019
63	Other made-up textile articles; sets; worn clothing and worn textile articles; rags	14	1,397	16,871	4,071
61	Articles of apparel and clothing accessories, knitted or crocheted	12	1,122	48,241	3,029
62	Articles of apparel and clothing accessories, not knitted or crocheted	21	643	39,282	2,815
52	Cotton	15	157	863	3,252
42	Articles of leather; saddlery and harness; travel goods, handbags and similar containers; articles.	9	131	13,288	634
90	Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical ...	218	128	96,853	454
39	Plastics and articles thereof	30	81	60,584	358

Table 4: List of duty-free MFN Tariff lines in which Pakistan has considerable exports to US (Trade values in US\$ millions)

4.2. List of duty-free MFN Tariff lines in which Pakistan has negligible exports

The following table consists of products for which Pakistan at HS 2-digit has negligible exports to USA. Under MFN, there are 2,621 duty-free tariff lines but at the sectoral level, Pakistan is only exporting USD 363 million worth of products. Since Pakistan's world exports under these heads in 2019 stood around US\$ 6.92 billion, Pakistan with some capacity building, market awareness and quality controls can easily tap into these tariff lines in the short-run.

HS 2	Product Description	MFN tariff lines	Pak Export to USA 2019	USA Imports from World 2019	Pak Exports to World 2019
57	Carpets and other textile floor coverings	20	34	3,054	67
25	Salt; sulphur; earths and stone; plastering materials, lime and cement	72	32	4,478	434
17	Sugars and sugar confectionery	2	31	4,434	344
10	Cereals	6	30	2,477	2,376
82	Tools, implements, cutlery, spoons and forks, of base metal; parts thereof of base metal	39	29	10,716	114
95	Toys, games and sports requisites; parts and accessories thereof	42	29	34,117	225
94	Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; ...	56	27	67,173	95
84	Machinery, mechanical appliances, nuclear reactors, boilers; parts thereof	492	19	379,058	278
09	Coffee, tea, maté and spices	41	16	8,055	115

54	Man-made filaments; strip and the like of man-made textile materials	13	13	2,146	45
64	Footwear, gaiters and the like; parts of such articles	19	13	28,193	135
72	Iron and steel	240	10	24,617	63
20	Preparations of vegetables, fruit, nuts or other parts of plants	14	8	9,183	61
19	Preparations of cereals, flour, starch or milk; pastrycooks' products	10	6	8,809	62
13	Lac; gums, resins and other vegetable saps and extracts	8	6	1,572	40
96	Miscellaneous manufactured articles	26	5	6,788	16
08	Edible fruit and nuts; peel of citrus fruit or melons	28	5	19,547	399
68	Articles of stone, plaster, cement, asbestos, mica or similar materials	37	4	8,527	21
87	Vehicles other than railway or tramway rolling stock, and parts and accessories thereof	99	4	310,086	56
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	16	4	752	27
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal ...	33	4	2,151	85
41	Raw hides and skins (other than furskins) and leather	27	4	603	229
71	Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad ...	48	3	58,072	15
74	Copper and articles thereof	11	3	9,623	355
16	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	50	3	5,655	6
21	Miscellaneous edible preparations	8	2	8,571	37
85	Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television ...	336	2	352,315	55
73	Articles of iron or steel	192	2	41,132	67
11	Products of the milling industry; malt; starches; inulin; wheat gluten	5	2	2,032	151
40	Rubber and articles thereof	56	2	30,084	37
88	Aircraft, spacecraft, and parts thereof	16	2	34,950	64
03	Fish and crustaceans, molluscs and other aquatic invertebrates	227	1	18,501	475
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable ...	22	1	2,762	10
48	Paper and paperboard; articles of paper pulp, of paper or of paperboard	225	1	17,333	48
76	Aluminium and articles thereof	6	1	22,293	42
92	Musical instruments; parts and accessories of such articles	15	1	1,531	4
86	Railway or tramway locomotives, rolling stock and parts thereof; railway or tramway track fixtures ...	9	1	2,160	2
30	Pharmaceutical products	53	1	128,238	218
04	Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere ...	2	1	2,789	49

Table 5: List of duty-free MFN Tariff lines in which Pakistan has negligible exports to US (Trade values in US\$ millions)

4.3. List of duty-free MFN Tariff lines in which Pakistan has Zero exports

There are 46 chapters with over 1300 duty-free tariff lines in which Pakistan has zero exports to USA. In most of the sector listed in the following table, Pakistani industry is either in the early stages of production or is non-competitive or altogether lacks supply chain. However, few sectors such as Beverages, Glass & glassware, Ceramic products, and Organic & Inorganic Chemicals can be focused for product development & export promotion.

HS 2	Product Description	MFN tariff lines	Pak Export to USA 2019	USA Imports from World 2019	Pak Exports to World 2019
27	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral ...	41	-	210,112	373
22	Beverages, spirits and vinegar	34	0	27,555	323
02	Meat and edible meat offal	20	-	8,764	296
07	Edible vegetables and certain roots and tubers	19	0	11,488	250
26	Ores, slag and ash	38	-	3,268	94
89	Ships, boats and floating structures	16	0	2,379	93
23	Residues and waste from the food industries; prepared animal fodder	11	0	3,379	64
32	Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other colouring ...	20	0	4,400	50
15	Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal ...	17	0	6,459	44
05	Products of animal origin, not elsewhere specified or included	15	0	1,065	40
44	Wood and articles of wood; wood charcoal	143	0	19,305	38
34	Soap, organic surface-active agents, washing preparations, lubricating preparations, artificial ...	17	0	3,815	31
33	Essential oils and resinoids; perfumery, cosmetic or toilet preparations	26	0	14,584	25
24	Tobacco and manufactured tobacco substitutes	20	0	2,190	24
56	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	18	0	2,512	23
28	Inorganic chemicals; organic or inorganic compounds of precious metals, of rare-earth metals,	74	-	13,074	23
70	Glass and glassware	40	0	8,151	21
38	Miscellaneous chemical products	41	-	14,682	16
93	Arms and ammunition; parts and accessories thereof	18	0	2,852	14
35	Albuminoidal substances; modified starches; glues; enzymes	7	0	2,910	11
14	Vegetable plaiting materials; vegetable products not elsewhere specified or included	5	0	179	9
36	Explosives; pyrotechnic products; matches; pyrophoric alloys; certain combustible preparations	4	-	966	9
69	Ceramic products	22	0	7,008	7
01	Live animals	19	-	3,048	6
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn	23	0	229	5
29	Organic chemicals	275	0	54,503	4

83	Miscellaneous articles of base metal	15	0	13,217	4
78	Lead and articles thereof	2	-	1,081	4
79	Zinc and articles thereof	1	-	2,416	4
06	Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage	6	0	2,586	3
51	Wool, fine or coarse animal hair; horsehair yarn and woven fabric	29	0	273	3
65	Headgear and parts thereof	7	0	2,634	3
18	Cocoa and cocoa preparations	7	0	5,128	1
67	Prepared feathers and down and articles made of feathers or of down; artificial flowers; articles ...	6	-	2,674	1
46	Manufactures of straw, of esparto or of other plaiting materials; basketware and wickerwork	13	0	640	1
91	Clocks and watches and parts thereof	19	0	5,208	1
66	Umbrellas, sun umbrellas, walking sticks, seat-sticks, whips, riding-crops and parts thereof	3	0	683	0
50	Silk	8	0	72	0
47	Pulp of wood or of other fibrous cellulosic material; recovered (waste and scrap) paper or ...	21	-	3,591	0
37	Photographic or cinematographic goods	13	-	1,751	0
43	Furskins and artificial fur; manufactures thereof	6	0	210	0
81	Other base metals; cermets; articles thereof	21	0	3,054	0
75	Nickel and articles thereof	6	-	2,929	0
45	Cork and articles of cork	18	-	282	0
80	Tin and articles thereof	3	-	768	0

Table 6: List of duty-free MFN Tariff lines in which Pakistan has Zero exports to US (Trade values in US\$ millions)

5. POTENTIAL EXPORT ITEMS TO USA

Given below is an analysis of export commodities for which Pakistan can potentially increase its exports to United States of America. Alternatively, Pakistan can also divert its resources to USA if the competitive advantage is achieved at current rate of production.

In order to enhance our export base; a number of filters have been employed to identify potential exports of Pakistan to USA at HS – 6-digit level. Given the volume and trade of American market across the globe; a three-tier methodology is used.

- At first tier, top exports of Pakistan to USA under MFN duty-free tariff lines are selected which are in high demand in the American market and import value of USA for the same is greater than \$100 million.
- At second tier, top exports of Pakistan to USA are selected for which Pakistan's world export is greater than \$30 million.

- At third tier, after filtering products through first two tiers, top exports of Pakistan to USA which have successfully captured 15% market share in American market were excluded from potential list.

Some of the potential products identified for export promotion in the short-run are detailed as under:

HS 6	Product Description	No. of tariff lines	Pak Exports to USA 2019	US World Imports 2019	Pak Exports to World 2019
030617	Frozen shrimps and prawns, even smoked, whether in shell or not, incl. shrimps and prawns	1	0.00	4,814	72.78
130232	Mucilages and thickeners, derived from locust beans, locust bean seeds or guar seeds, whether	1	5.58	319	37.81
170490	Sugar confectionery not containing cocoa, incl. white chocolate (excluding chewing gum)	1	1.76	1,890	35.14
210690	Food preparations, n.e.s.	1	1.64	5,800	30.68
250100	Salts, incl. table salt and denatured salt, and pure sodium chloride, whether or not in aqueous ...	1	11.97	753	49.64
300490	Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purpose	2	0.13	61,253	82.41
410712	Grain splits leather "incl. parchment-dressed leather", of the whole hides and skins of bovine	1	0.73	107	68.76
420321	Specially designed gloves for use in sport, of leather or composition leather	2	26.91	236	84.39
611610	Gloves, mittens and mitts, impregnated, coated or covered with plastics or rubber, knitted ...	1	42.02	697	144.75
620342	Men's or boys' trousers, bib and brace overalls, breeches and shorts, of cotton (excluding ...	2	63.75	5,316	400.50
620462	Women's or girls' trousers, bib and brace overalls, breeches and shorts of cotton...	2	13.84	4,644	98.55
630790	Made-up articles of textile materials, incl. dress patterns, n.e.s.	4	14.89	4,668	47.78
640399	Footwear with outer soles of rubber, plastics or composition leather, with uppers of leather ...	1	9.97	5,456	87.77
821420	Manicure or pedicure sets and instruments, incl. nail files, of base metal (excluding ordinary ...	1	12.87	114	51.04
721049	Flat-rolled products of iron or non-alloy steel, of a width of ≥ 600 mm, hot-rolled or cold-rolled.	1	7.58	1,359	30.33
840710	Spark-ignition reciprocating or rotary internal combustion piston engine, for aircraft	1	0.34	182	30.51
841199	Parts of gas turbines, n.e.s.	1	12.61	2,455	56.86
880390	Parts of aircraft and spacecraft, n.e.s.	2	1.35	257	42.13
901890	Instruments and appliances used in medical, surgical or veterinary sciences, n.e.s.	10	124.16	13,187	405.51
950662	Inflatable balls	1	19.10	223	170.88
950699	Articles and equipment for sport and outdoor games n.e.s.; swimming and paddling pools	7	6.34	1,939	30.32

Table 7: List of Indicative Potential exports to USA (Trade values in USD millions)

6. DUTY-FREE MFN POTENTIAL ANALYSES

According to the sectoral trade statistics of World Integrated Trade System (WITS) for the year 2018, Pakistan's exports under duty-free MFN remained highest for the mineral sector (US\$ 49 million) followed by textile (US\$ 37 million), metals (US\$ 22 million), Agro-food (US\$ 17 million), machinery & electrical appliances (US\$ 5 million), and stones & glass (US\$ 4 million). In order to examine the trade potential of duty-free tariff lines under MFN, an extensive analysis of products at HS 8-digit has been conducted. Since tariff lines (at HS 8-digit) vary from country to country, a careful synchronization of data from four different sources (i.e. Trade Map, Pakistan Customs data, WITS, and US Customs trade data) has been ensured. In this regard, products for which Pakistan has world export over US\$ 2 million and US world import for the same remained over US\$ 10 million have been identified as potential tariff lines under US MFN.

Product Group	Pak Export to USA 2018	Export Share (%)	MFN Specific Duty ¹ Exports 2018	MFN Dutiable ² Exports 2018	MFN Duty Free Exports 2018
All Products	3,896	100%	19	3,494	260
Miscellaneous	279	7.16%	0	117	111
Minerals	51	1.31%	-	0	49
Textiles and Clothing	3,049	78.26%	10	3,013	37
Metals	53	1.36%	6	31	22
Vegetable	78	2.00%	0	61	17
Animal	6	0.15%	-	0	5
Food Products	59	1.50%	3	51	5
Machinery and Elect.	8	0.20%	-	3	5
Stone and Glass	57	1.47%	-	55	4
Chemicals	3	0.08%	-	1	2
Footwear	10	0.27%	0	9	1
Wood	4	0.09%	-	1	1
Hides and Skins	132	3.39%	-	132	0
Plastic or Rubber	102	2.63%	-	17	0

Table 8: Sector-wise exports under MFN (Trade values in US\$ million)

¹ A specific rate duty is a tariff levied on imports, defined in terms of a specific amount per unit, such as cents per kilogram.

² Dutiable exports are charged an ad valorem duty which is applied in terms of a fixed percentage of value.

6.1. Textile Group

Given the export basket and production capacity of Pakistan, detailed analysis of duty-free MFN tariff lines related to textile & textile made-ups (Chapter 50 to Chapter 63) have been preferred. World import of USA against the tariff lines related to textile in the year 2019 stood around US\$ 120 billion. Of the total exports of Pak to USA in textile (US\$ 3.4 billion), textile exports under MFN duty-free tariff lines could merely surpass US\$ 40 million. The following table details the breakup of textile sector exports profile and available duty-free lines under MFN.

HS	Product Description	No. of Tariff lines	Pak Exports to USA 2019	US World Import 2019	Pak World Exports 2019
63	Other made-up textile articles; sets; worn clothing and worn textile articles; rags	14	1,397	16,871	4,071
61	Articles of apparel and clothing accessories, knitted or crocheted	12	1,122	48,241	3,029
62	Articles of apparel and clothing accessories, not knitted or crocheted	21	643	39,282	2,815
55	Man-made staple fibres	9	14	1,741	312
57	Carpets and other textile floor coverings	20	34	3,054	67
54	Man-made filaments; strip and the like of man-made textile materials	13	13	2,146	45
52	Cotton	15	157	863	3,252
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	16	4	752	27
60	Knitted or crocheted fabrics	1	2	966	37
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable ...	22	1.32	2,762	10
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn	23	0.23	229	5
51	Wool, fine or coarse animal hair; horsehair yarn and woven fabric	29	0.09	273	3
56	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	18	0.05	2,512	23
50	Silk	8	0.01	72	0.40
Total		221	3,387	119,764	13,696

Table 9: Duty-free tariff lines in Textile Group under MFN (Trade values in US\$ million)

- Under HS code 63, Pakistan's world export for made-up textiles articles was recorded at US\$ 4 billion in 2019. United States of America (with 34% share) remained the largest destination for the said product followed by United Kingdom (13%), Germany (8%) and Netherlands (7%). With around US\$ 1.4 exports at HS-63 going to USA, Pakistan became the 3rd largest supplier in the US market whereas China ranked top with around US\$ 9.5 billion exports followed India (US\$ 2.7

billion). Pakistan's competitors; China and India collectively provide for 72% of the total world import of USA for HS 63. If we examine the top exports of Pakistan to USA for the said product at HS 6-digit, the average tariff faced by the Pakistani exports was around 7% whereas none of the top exported products fall under MFN duty-free tariff lines. There are in total 14 duty-free MFN tariff lines but Pakistan utilized just the 2 duty-free tariff lines whereas the only product "Worn clothing and other worn articles at HTS 8-digit classification 6309.0000 showed significant export performance of US\$ 3.2 million. Pakistan can enhance exports to USA for the highlighted products in Table 10 under HS-6 Codes 630510, 630790 and 630900 (5 tariff lines available). For all the remaining duty-free tariff lines under MFN, **Pakistan has no export base.**

HS 6	Product Description	No. of tariff lines	Pak Exports to USA 2019	US World Imports 2019	Pak World Exports 2019
630510	Sacks and bags, for the packing of goods, of jute or other textile bast fibres of heading 5303	1	0	11	10
630790	Made-up articles of textile materials, incl. dress patterns, n.e.s.	4	15	4,668	48
630900	Worn clothing and clothing accessories, blankets and travelling rugs, household linen and articles ..	1	1	10	33

Table 10: Potential products for exports under duty-free MFN (HS63) – Trade values in US\$ million

- The next top products with considerable exports in the textile sector are articles of apparel and clothing accessories, both knitted or crocheted and not knitted or crocheted at HS code 61 and HS code 62. Pakistan's world export for articles of apparel and clothing accessories was recorded at US\$ 5.8 billion in 2019. World import of USA for these chapters was reported around US\$ 87 billion in the year 2019. Under these chapters, there are 33 duty-free tariff lines in the MFN list Pakistan has zero world exports against all the tariff lines. The duty-free tariff lines under MFN comprise of products (such as suits knitted or crocheted made of artificial fibres, overcoats, capes, cloaks, car-coats, men's & women's anoraks, babies' garments, ice hockey & field hockey gloves coated with plastic or rubber, and gloves, mittens & mitts of textile materials containing 70% weight of silk etc.) for which **Pakistan has no export base at all.** The production of these products either requires imported raw material or advanced industrial machinery which Pakistan lacks.

- For all the remaining sectors in textile, there are 174 duty-free tariff lines but Pakistan has world export against 23 tariff lines only. Amongst these 23 tariff lines, Pakistan has world export greater than US\$ 2 million for just four (4) products whereas for two products, US market has no world import. Resultantly, there remain only two products at HTS 8-digit that can be considered for export potential under duty-free MFN to USA.

“There are around 221 duty-free tariff lines under MFN in the textile group but against all duty-free MFN tariff lines; Pakistan is only exporting against the 27 tariff lines to the world.”

HTS-8	Product Description	Pak Exports to USA 2019	US World Imports 2019	Pak Exports to World 2019
60069090	Other knitted or crocheted fabrics nesoi, other than of wool, cotton or manmade fibers & containing < 85% by wt of silk/ silk waste	0.462	5	9
53101000	Unbleached woven fabrics of jute or of other textile bast fibers of heading 5303	0	19	4

Table 11: Potential products for exports under duty-free MFN (Textiles) – Trade values in US\$ million

6.2. Minerals Group

The minerals group (Chapter 25 – Chapter 27) has been the top performing export sector under duty-free MFN trade for Pakistan. As per World Integrated Trade Statistics, Pakistan's duty-free exports to USA under MFN tariff lines were US\$ 49 million in 2018. Under MFN, there are 151 tariff lines whereas Pakistan has world exports against 57 tariff lines. According to Pakistan Customs data statistics 2019, Pakistan has utilized just the two tariff lines under MFN. However, in Mineral Group, Pakistan has an export potential for the following products at HTS 8-digit which have considerable demand in US market and are also exported by Pakistan.

HTS-8	Product Description	Pak Exports to USA 2019	US World Imports 2019	Pak Exports to World 2019
25232900	Portland cement (other than white cement), whether or not colored	-	1,007	172.91
25231000	Clinkers of portland, aluminous, slag, super sulfate and similar hydraulic cements	-	123	83.96
25262000	Steatite, natural; talc; the foregoing crushed or powdered	19	85	56.68
25101000	Natural calcium phosphates, natural aluminum calcium phosphates and phosphatic chalk, unground	-	157	1.50
25174100	Granules, chippings and powder of marble, whether or not heat-treated	0	15	1.93

25174900	Granules, chippings and powder, of travertine/calcareous monument. or build.stone (except marble)/granite/porphyry/basalt/sandstone etc.	-	19	1.35
25191000	Natural magnesium carbonate (magnesite)	-	32	1.97
25232100	Portland cement (white cement), whether or not artificially colored	-	191	1.15
25239000	Slag cement, supersulfate cement and other hydraulic cements, nesoi, whether or not colored	-	66	1.91
25292100	Fluorspar, containing by weight 97 percent or less of calcium fluoride	-	16	9.75
26100000	Chromium ores and concentrates	-	37	71
26011100	Iron ores and concentrates (other than roasted iron pyrites), not agglomerated	-	382	11
26011200	Iron ores and concentrates (other than roasted iron pyrites), agglomerated	-	437	7.7

Table 12: Potential products for exports under duty-free MFN (Minerals) – Trade values in US\$ million

6.3. Metals Group

Pakistan's exports of metals group (Chapter 72 – Chapter 83) to United States of America in 2018 were US\$ 53 million. Of which US\$ 22 million came from duty-free exports. There are around 573 duty-free tariff lines under MFN whereas Pakistan has world exports against 67 tariff lines. Amongst these 67 tariff lines, Pakistan's exports over US\$ 1 million were recorded against 12 tariff lines and based on the US world imports, 3 tariff lines have further been excluded for lacking considerable demand.

HTS-8	Product Description	Pak Exports to USA 2019	US World Imports 2019	Pak Exports to World 2019
72042100	Stainless steel waste and scrap	0	187	13.0
82122000	Base metal safety razor blades (including razor blade blanks)	0.021	123	10.0
82121000	Base metal razors	0.181	433	9.2
73102900	Iron/steel, cans for any material (o/compressed/liq. gas), n/closed by soldering or crimping, w/cap. less..	0.001	324	6.8
79020000	Zinc, waste and scrap	0	18	2.3
83111000	Coated base metal electrodes for electric arc-welding	0	43	1.2
73023000	Iron or steel, switch blades, crossing frogs, point rods and other crossing pieces, for jointing or fixing rails	0	44	1.1
73181520	Iron or steel, bolts and bolts & their nuts or washers, imported in the same shipment	0.562	321	1
73084000	Iron or steel, props and similar equipment for scaffolding, shuttering or pit-propping	0	417	1

Table 13: Potential products for exports under duty-free MFN (Metals) – Trade values in US\$ million

6.4. Agro-Food Group

In Agro-Food Group (Chapter 01 to Chapter 24), there are 607 duty-free tariff lines listed under US MFN whereas Pakistan is exporting against 63 tariff lines to the world. Amongst these 63 products, Pakistan has world exports greater than US\$ 2 million for just 15 tariff lines whereby all these products are sufficiently demanded by the US. The following table provides the list of potential duty-free tariff lines for exports to USA under MFN.

HTS-8	Product Description	Pak Exports to USA 2019	US World Imports 2019	Pak Exports to World 2019
03061700	Other shrimps and prawns, cooked in shell or uncooked, dried, salted or in brine, frozen	0.001	2,712	72
12074000	Sesame seeds, whether or not broken	4	81	40
08039000	Bananas, fresh or dried	0	2,204	33
19053100	Sweet biscuits	0.935	1,247	21
05040000	Guts, bladders and stomachs of animals (other than fish), whole and pieces thereof	0.066	65	19
02062900	Edible offal of bovine animals, except tongues or livers, frozen	0	209	14
02045000	Meat of goats, fresh, chilled or frozen	0	139	8
09023000	Black tea (fermented) and partly fermented tea, in immediate packings of a content not exceeding 3 kg	3	74	6
23023000	Bran, sharps (middlings) and other residues, derived from the sifting, milling or other working of wheat	0.03	12	6
19021920	Uncooked pasta, not stuffed or otherwise prepared, not containing eggs, exclusively pasta	0.347	280	5
23011000	Flours, meals, and pellets, of meat or meat offal unfit for human consumption; greaves (cracklings)	0	138	4
09096100	Seeds of anise, badian, caraway or fennel; juniper berries; neither crushed nor ground	0	19	2
03038900	Smelts, cusk, pollock, shad, sturgeon, atkafish, fresh-water fish, etc. frozen, excluding fillets, other meat portions, livers and roes	0	169	2
02061000	Edible offal of bovine animals, fresh or chilled	0	103	2
09093200	Seeds of cumin, crushed or ground	0.015	15	2

Table 14: Potential products for exports under duty-free MFN (Agro-Food Group) – Trade values in US\$ million

6.5. Medicaments & Chemicals

Medicaments at HS -30 have around 50 duty-free tariff lines und MFN whereas USA's world import against these tariff lines in 2019 stood at US\$ 85 billion but unfortunately, Pakistan is only exporting against one (1) tariff line to the US. Similarly, organic & inorganic chemicals at HS 28 & HS 29 have 349 duty-free tariff lines but Pakistan has no exports to USA against any of the duty-free tariff lines. Pakistan's pharmaceuticals industry is taking its roots and offers reliable quality products but lacks in certifications and new product research. There is a huge potential for

pharmaceuticals in the American market and with targeted approach new tariff lines can be utilized.

HTS-8	Product Description	Pak Exports to USA 2019	US World Imports 2019	Pak Exports to World 2019
30043900	Medicaments, containing products of heading 2937 nesoi, in dosage form or packed for retail	-	8,828.9	76.7
30042000	Medicaments containing antibiotics, nesoi, in dosage form or packed for retail	-	2,730.1	16.6
28272000	Calcium chloride	-	78.8	4.5
30049010	Medicaments containing antigens or hyaluronic acid or its sodium salt, nesoi, in dosage form or packed for retail	0.04	333.8	3.1
28061000	Hydrogen chloride (Hydrochloric acid)	-	40.9	2.4
28151100	Sodium hydroxide (Caustic soda), solid	-	26.8	2.3
28170000	Zinc oxide; zinc peroxide	-	272.1	2.0

Table 15: Potential products for exports under duty-free MFN (Medicaments & Chemicals) – Trade values in US\$ million

6.6. Machinery & Equipments

Under US MFN, there are 77 duty-free tariff lines consisting of primary goods, scrapes, and spare parts. Of which, Pakistan is merely utilizing six tariff lines. According to the trade statistics compiled by WITS, Pakistan's exports to USA for machinery & equipments under MFN stood at US\$ 5 million whilst world import of USA for the same remained around US\$ 27.6 billion. Based on the export capacity of Pakistan to the world, following tariff lines have been identified for export potential to USA.

HTS-8	Product Description	Pak Exports to USA 2019	US World Imports 2019	Pak Exports to World 2019
84071000	Spark-ignition reciprocating or rotary internal combustion piston engines for use in aircraft	0	136	32
84149090	Parts of air or vacuum pumps and ventilating or recycling hoods	0	256	2
84264900	Derricks, cranes and other lifting machinery nesoi, self-propelled, not on tires	-	346	2
84294000	Self-propelled tamping machines and road rollers	-	390	3
84389010	Parts of machinery for sugar manufacture, nesoi	1	46	6
84718090	Other units of automatic data processing machines, not entered with the rest of a system, nesoi	-	667	3
85177000	Parts of products in heading 8517	0	4,753	2
87059000	Mtr. vehicles (o/than for transport of persons or of goods), special purpose motor vehicles nesoi	-	404	2

Table 16: Potential products for exports under duty-free MFN (Medicaments & Chemicals) – Trade values in US\$ million

6.7. Miscellaneous Products

Some of the miscellaneous products under US duty-free MFN for which Pakistan either has nominal or negligible exports, cumulates to 3,129 tariff lines. Pakistan has world export against 229 tariff lines whereas in the year 2019, only 60 tariff lines were utilized under US duty-free MFN by Pakistan. The export value for these 60 products rounds up to US\$ 4 million. The potential products identified include odoriferous substances used in food, petroleum jelly, soaps, pneumatic tires for motorcycles and bicycles, cartons & boxes, and Football, soccer & polo articles and equipment etc.

HTS-8	Product Description	Pak Exports to USA 2019	US World Imports 2019	Pak Exports to World 2019
33021090	Mixtures of or with a basis of odoriferous substances, used in the food or drink industries, over 20 percent of alcohol by weight, nesoi	0.00	160	9
33049910	Petroleum jelly put up for retail sale	0.02	21	6
34012000	Soap, not in the form of bars, cakes, molded pieces or shapes	0.01	100	4
39159000	Waste, parings and scrap, of plastics, nesoi	0.00	103	3
40114000	New pneumatic tires, of rubber, of a kind used on motorcycles	-	127	5
40115000	New pneumatic tires, of rubber, of a kind used on bicycles	-	65	2
48191000	Cartons, boxes and cases of corrugated paper or paperboard	0.13	476	2
48192000	Folding cartons, boxes and cases of noncorrugated paper or paperboard	1	650	3
95069920	Football, soccer and polo articles and equipment (o/than balls), and parts & accessories thereof	0.04	96	2

Table 17: Potential products for exports under duty-free MFN (Miscellaneous Products) – Trade values in US\$ million

7. CONCLUSION

United States of America is the top export destination for Pakistan. In the year 2019, Pakistan's exports to USA stood at US\$ 4,042 million. US\$ 348 million was contributed through the exports under MFN duty-free tariff lines, US\$ 354 million export earnings came from GSP duty-free tariff lines whereas rest of the 83% exports faced applied effective tariff³. The detailed analyses of MFN duty-free tariff lines have shed some light on the nature and export potential of MFN. There are 5,727 duty-free tariff lines in US MFN but world trade takes place against 4,108 tariff lines. USA had granted its MFN status to China upon permanent normalization of trade relations in 2001 which is why the concessions granted therein also favour either the Chinese export base or the American corporations. Therefore, the nature of products provided concessions under MFN are either primary goods or require higher level of technological advancement.

- The analyses of duty-free tariff lines have revealed that the textile sector has a very limited potential since the concessions are on primary goods whereas Pakistan already has an existing supply chain for further value addition.
- In the minerals and metals group, Pakistan has a considerable export potential since the world exports of Pakistan against MFN duty-free tariff lines mainly are primary, unprocessed and raw goods. Therefore, these products may be exported to US under MFN duty-free tariff lines. In the minerals group, Potential products for exports are: steatite phosphatic chalk, granules, chipping and powder of marbles & of travertine, natural magnesium carbonate, chromium ores, and iron ores etc. In the metals group, Pakistan has potential exports in products such as stainless-steel waste, base metal safety razors, zinc waste and scrap, iron or steel props and equipments etc.
- In the Agro-Food group, the potential products identified include shrimps & prawns, sesame seeds, seeds of anise, seeds of cumin, sweet biscuits, edible offal of bovine, and meat of goats (fresh or frozen) etc. Although animal products such as shrimps and prawns, guts, bladders and stomachs of animal, edible offal of bovine animals, meats of goats (fresh, chilled or frozen), and smelts, cusk, and pollock etc. have identified potential in US market but these products are equally demanded in China too. It is recommended that Pakistan may preferably exploit the concessions granted under China-Pakistan Free Trade

³ Applied effective tariff is defined as the lowest available/ applicable tariff for a product.

Agreement (CPFTA) rather than exporting these products to USA. However, sesame seeds, seeds of cumin, seeds of anise, sweets biscuits, black tea (fermented), uncooked pasta, and bran, sharps, and other residue may be promoted for exports to USA.

- United States of America is the biggest importer of medicaments in the world with imports of around US\$ 128 billion in 2019 (US\$ 85 billion imports under MFN duty-free tariff lines). Yet Pakistan is exporting against one (1) duty-free tariff line under MFN. The reasons for such a dismal performance are lack of research & product development, weak patent protection laws, poor quality controls and non-existent marketing & branding.
- Although duty-free tariff lines under MFN related to mechanical & electrical machinery are the only products that enjoy concessions at all levels of production; be it primary, intermediate or value-added/ finished (consumer/ capital) products. MFN facilitates around 830 duty-free tariff lines from the mechanical & electrical machinery group and interestingly Pakistan has world exports against 200 of these tariff lines (under Chapter 84 and Chapter 85) but the products, being of primary nature hardly add value to the exchequer. Nonetheless, Pakistan has some of the emerging industries that can exploit concessions under MFN in the near future. Some of the emerging products include derricks, tower cranes, self-propelled bulldozers and angledozers, optical fiber cables, dielectric fixed capacitors of paper or plastics, electronic integrated circuits, parts of air or vacuum pumps, pumps for liquids, parts of furnace burners, parts of engines (spark-ignition engines for aircrafts and internal combustion aircraft engines), ventilating or recycling hoods incorporating a fan, and medical, surgical or laboratory sterilizers etc.

In the year 2019, Pakistan's exports to USA under MFN accounted for 8.6% of Pakistan's total exports to US (US\$ 4,042 million) whereas in terms of duty-free tariff line utilization, Pakistan could only exploit concessions against 154 duty-free tariff lines (of the total 4,108 duty-free TLs). So, Pakistan managed to utilize only 3.75% of the available tariff lines – surely a gloomy scenario. Irrespective of the fact that USA is the largest export destination for Pakistan but under MFN concessions, the duty-free tariff lines in relation to the export base & production capacity of Pakistan offer a very limited scope for product complementarity. In a nutshell, the top exports of Pakistan fall under dutiable tariff lines thereby charged with an average tariff of 6 to 11%. At the same time, the concessions under MFN are either for raw materials or high-tech mechanical & electrical machinery or medical & surgical equipment or medicaments (vaccines, catheters, human

blood & other immunological products etc.) for which Pakistan has a very limited or no supply chain at all. The duty-free MFN tariff lines in the Mineral (Chapter 25 – Chapter 27) & Metals Group (Chapter 72 to Chapter 83) seemingly have a significant export potential but exporting them would deprive the local manufacturers/ producer off the raw material required for value-addition. Furthermore, exporting raw material to the United States of America across 4 continents would also strip off the competitiveness from the products so exported. Henceforth, it is highly recommended that Pakistan must focus on the duty-free MFN tariff lines against some of the emerging value-added supply chains (under Chapter 19, Chapter 30, Chapter 40, Chapter 84, Chapter 85, Chapter 90, Chapter 94, and Chapter 95) rather than exporting products in the primary stages of production or in the raw form. Promotion of a culture of proper marketing & branding, Research & Development, and registration of patents (Intellectual Property rights protection) can also help yield more revenue from sales.

ANNEX – I (MFN DUTY-FREE TARIFF LINES UTILIZATION)

HS 2	Product Description	Tariff lines	Pak Exports to World (TL)	Pak Exports to USA (TL)	MFN Utilization Rate
01	Live animals	19	4	0	0.00%
02	Meat and edible meat offal	20	5	0	0.00%
03	Fish and crustaceans, molluscs and other aquatic invertebrates	227	32	4	1.76%
04	Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere ...	2	0	0	0.00%
05	Products of animal origin, not elsewhere specified or included	15	4	2	13.33%
06	Live trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage	6	2	1	16.67%
07	Edible vegetables and certain roots and tubers	19	0	0	0.00%
08	Edible fruit and nuts; peel of citrus fruit or melons	28	7	1	3.57%
09	Coffee, tea, maté and spices	41	22	12	29.27%
10	Cereals	6	3	1	16.67%
11	Products of the milling industry; malt; starches; inulin; wheat gluten	5	1	0	0.00%
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal ...	33	10	2	6.06%
13	Lac; gums, resins and other vegetable saps and extracts	8	2	0	0.00%
14	Vegetable plaiting materials; vegetable products not elsewhere specified or included	5	4	1	20.00%
15	Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal ...	17	4	1	5.88%
16	Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates	50	1	0	0.00%
17	Sugars and sugar confectionery	2	0	0	0.00%
18	Cocoa and cocoa preparations	7	2	0	0.00%
19	Preparations of cereals, flour, starch or milk; pastrycooks' products	10	4	3	30.00%
20	Preparations of vegetables, fruit, nuts or other parts of plants	14	1	1	7.14%
21	Miscellaneous edible preparations	8	1	1	12.50%
22	Beverages, spirits and vinegar	34	1	1	2.94%
23	Residues and waste from the food industries; prepared animal fodder	11	5	0	0.00%
24	Tobacco and manufactured tobacco substitutes	20	0	0	0.00%
25	Salt; sulphur; earths and stone; plastering materials, lime and cement	72	36	3	4.17%
26	Ores, slag and ash	38	13	0	0.00%
27	Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral ...	41	8	0	0.00%
28	Inorganic chemicals; organic or inorganic compounds of precious metals, of rare-earth metals, ...	74	19	0	0.00%
29	Organic chemicals	275	7	0	0.00%
30	Pharmaceutical products	53	11	1	1.89%
31	Fertilizers	24	1	0	0.00%
32	Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other colouring ...	20	3	0	0.00%

33	Essential oils and resinoids; perfumery, cosmetic or toilet preparations	26	13	10	38.46%
34	Soap, organic surface-active agents, washing preparations, lubricating preparations, artificial ...	17	7	1	5.88%
35	Albuminoidal substances; modified starches; glues; enzymes	7	1	0	0.00%
36	Explosives; pyrotechnic products; matches; pyrophoric alloys; certain combustible preparations	4	2	0	0.00%
37	Photographic or cinematographic goods	13	0	0	0.00%
38	Miscellaneous chemical products	41	5	0	0.00%
39	Plastics and articles thereof	30	4	2	6.67%
40	Rubber and articles thereof	56	15	3	5.36%
41	Raw hides and skins (other than furskins) and leather	27	4	1	3.70%
42	Articles of leather; saddlery and harness; travel goods, handbags and similar containers; articles ...	9	0	0	0.00%
43	Furskins and artificial fur; manufactures thereof	6	1	0	0.00%
44	Wood and articles of wood; wood charcoal	143	6	2	1.40%
45	Cork and articles of cork	18	1	0	0.00%
46	Manufactures of straw, of esparto or of other plaiting materials; basketware and wickerwork	13	0	0	0.00%
47	Pulp of wood or of other fibrous cellulosic material; recovered (waste and scrap) paper or ...	21	1	0	0.00%
48	Paper and paperboard; articles of paper pulp, of paper or of paperboard	225	43	18	8.00%
49	Printed books, newspapers, pictures and other products of the printing industry; manuscripts, ...	29	10	3	10.34%
50	Silk	8	2	1	12.50%
51	Wool, fine or coarse animal hair; horsehair yarn and woven fabric	29	1	0	0.00%
52	Cotton	15	4	3	20.00%
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn	23	6	1	4.35%
54	Man-made filaments; strip and the like of man-made textile materials	13	2	0	0.00%
55	Man-made staple fibres	9	2	1	11.11%
56	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	18	3	0	0.00%
57	Carpets and other textile floor coverings	20	1	1	5.00%
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	16	0	0	0.00%
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable ...	22	1	0	0.00%
60	Knitted or crocheted fabrics	1	1	1	100.00%
61	Articles of apparel and clothing accessories, knitted or crocheted	12	0	0	0.00%
62	Articles of apparel and clothing accessories, not knitted or crocheted	21	0	0	0.00%
63	Other made-up textile articles; sets; worn clothing and worn textile articles; rags	14	4	2	14.29%
64	Footwear, gaiters and the like; parts of such articles	19	2	2	10.53%
65	Headgear and parts thereof	7	2	2	28.57%
66	Umbrellas, sun umbrellas, walking sticks, seat-sticks, whips, riding-crops and parts thereof	3	0	0	0.00%

67	Prepared feathers and down and articles made of feathers or of down; artificial flowers; articles ...	6	1	0	0.00%
68	Articles of stone, plaster, cement, asbestos, mica or similar materials	37	10	2	5.41%
69	Ceramic products	22	6	0	0.00%
70	Glass and glassware	40	0	0	0.00%
71	Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad ...	48	7	1	2.08%
72	Iron and steel	240	21	2	0.83%
73	Articles of iron or steel	192	28	7	3.65%
74	Copper and articles thereof	11	2	0	0.00%
75	Nickel and articles thereof	6	1	0	0.00%
76	Aluminium and articles thereof	6	1	0	0.00%
78	Lead and articles thereof	2	0	0	0.00%
79	Zinc and articles thereof	1	1	0	0.00%
80	Tin and articles thereof	3	0	0	0.00%
81	Other base metals; cermets; articles thereof	21	1	1	4.76%
82	Tools, implements, cutlery, spoons and forks, of base metal; parts thereof of base metal	39	12	7	17.95%
83	Miscellaneous articles of base metal	15	6	1	6.67%
84	Machinery, mechanical appliances, nuclear reactors, boilers; parts thereof	492	152	20	4.07%
85	Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television ...	336	34	2	0.60%
86	Railway or tramway locomotives, rolling stock and parts thereof; railway or tramway track fixtures ...	9	0	0	0.00%
87	Vehicles other than railway or tramway rolling stock, and parts and accessories thereof	99	10	2	2.02%
88	Aircraft, spacecraft, and parts thereof	16	2	1	6.25%
89	Ships, boats and floating structures	16	3	0	0.00%
90	Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical ...	218	24	5	2.29%
91	Clocks and watches and parts thereof	19	0	0	0.00%
92	Musical instruments; parts and accessories of such articles	15	1	1	6.67%
93	Arms and ammunition; parts and accessories thereof	18	1	0	0.00%
94	Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; ...	56	9	6	10.71%
95	Toys, games and sports requisites; parts and accessories thereof	42	11	6	14.29%
96	Miscellaneous manufactured articles	26	5	1	3.85%
97	Works of art, collectors' pieces and antiques	7	1	0	0.00%
98	#N/A	117	0	0	0.00%
99	Commodities not elsewhere specified	1,413	0	0	0.00%
TOTAL		5,727	707	154	2.69%