



**Impact of Reconditioned Imported Cars on Local Automobile Industry of Pakistan
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Abstract:

Auto mobile sector is one of world's largest sector which generates revenue. Automobile sector includes all types of vehicles such as motor bikes, small cars, luxury cars, jeeps, commercial vehicles, trucks, vans and many others. In this study, we have deeply and critically analyzed the auto industry of Pakistan, it's major issues which are causing it a downfall, it's history, its impact on our GDP, we have studied thoroughly the insights of our auto industry, and for this, we have worked on two of our main local industries, which are Indus motors and Pak Suzuki motors. We have also suggested some recommendations to senior authorities that can improve the condition of our industry and can make it a fastest growing industry

KEYWORDS: Automobile Industry, Imported Cars, Quantitative Study, GDP Growth

Background of the Study:

As of the economic survey, the sub segment of cars of automobile industry, suffered growth of 23% in the year 2012 and 2013 in the segment suffered because second hand imported cars. This is not likely to ease out till the avidity of vehicles which is saturated. Paradoxically, the equality and equilibrium between import and export is a key to a balanced and proper economy. It has been observed that this balance and equality is fluctuating on many ways in Pakistan, and import of reused (reconditioned) cars is a major and one of them. In addition, there are rising numbers of imported cars surrounding on the streets of our country. So it came in our mind that why these reused cars are increasing by quantity in our roads day by day. What are their advantages and why people are willing to avail them, and how these cars are affecting our very own local industry and why our local industry is not providing any competition to them? So, researcher came up with the idea to analyze that why these reused cars are better option for consumers as compare to local cars. More specifically, this study is an attempt to measure the impact of imported (reconditioned) cars on local automobile industry and economic indicators of Pakistan. In this way, this study examines the insights of reconditioned cars, their increasing importance and value and their economic and strategic effect on our local automobile industry and our GDP. Changing conditions of our local automobile industry, will surely affect our GDP because it is contributing to it by 3% to 4%.

Automobile Industry in Pakistan:

Pakistan produced its first own vehicle in 1953 at the National Motors Ltd, which was made in Karachi, assembled to Bedford Truck, cars were also assembled in that plant. So far, Pakistan's automobile sector is one of the fastest growing sector currently in the



country, and it contributes to 3 to 4 % of GDP of the country. However, there are 3200 manufacturing plants having a heavy and huge investment of 92 billion. Our automotive industry annually produce approximately 0.2 million vehicles and approximately 1.8 million motor bikes. If we talk about employment, this sector provides a huge and significant employment to 2.4 million people, so we can say that this sector plays a crucial and growing role in the growth of our national income and GDP.

In South Asia, Pakistan's automobile market is considered among the smallest market but fastest growing automobile market. Over 180,000 cars were sold in the fiscal year 2014-2015, which raised to 206,777 units fiscal year of 2015-2016. If we talk about local automobile industry, the sub segment car industry has invested approximately over Rs20 billion in last 6-7 years in sub-segment of cars of local mobile industry, so that they can meet growing demand, the direct employment in sub segment of cars of local automobile industry lingers between 5 thousand 5 hundred to 6 thousand persons. Automobile sector is the second largest payer of indirect taxes after the petroleum sector. There are 10cars in 1 thousand persons, in Pakistan context which is one of the lowest emerging economies, which itself speaks of high potential growth in auto sector and more so in car production. But as per capita income is raising, it is giving a stimulus to expand the industry more and more. As mentioned in (Auto Mark magazine, 2010). However, local manufacturers of cars are increasing continuously the prices of the locally produced cars, and they are giving reason that it's going difficult for the common man to even buy a small car.

Contribution of Automobile Sector in Gross Domestic Product:

As automobile sector is one of the fastest growing sectors of Pakistan, it contributes towards the national economy in the form of Employment, Investment, Technology, Transfer and much more. Automobile sector contributed over rupees 50 billion to national exchequer in the year 2015, which is 3-4% of the GDP. It is producing annually 1.8 million motor cycles and 0.2 million. Its contribution to the government revenue is around 7.5 billion. Its investment is of about 92 billion. As the industry is growing, so are the automobile companies. Every manufacturer is in the process of increasing production capacity to meet customer demand. The major automobile companies in Pakistan have set up as joint venture with foreign multinational companies.

Table 1: Joint Ventures for Automotive Vehicles

Company	Joint venture	Product
Indus Motors Co.	Toyota, Japan and Daihatsu, Japan	Toyota and Daihatsu vehicles (cars)
Atlas Honda Limited.	Honda, Japan	Honda Cars, Honda Motorbikes
Pak Suzuki company	Suzuki, Japan	Suzuki vehicles (cars)



Suzuki Motorcycle Pakistan Limited.	Suzuki, Japan	Suzuki Motorbikes
Ghandara Nissan company.	Nissan, Japan	Cars and heavy vehicles (trucks)
Dewan Farooq Motors Limited.	Kia and Hyundai, Korea	Cars and Light commercial vehicles
Raja Motors Company.	Fiat, Italy	Car

However, according to vision of Automotive Development Policy (ADP) 2016-2021, the following goals reflect future demand by recognizing the need to restructure and modernize the auto industry to meet the increased demand in future. Automobile promotion should be increased by 2021 up to:

- Wagons / cars and jeeps up to 350,000
- Heavy goods vehicle up to 12,000
- Bikes up to 2.5 million
- Self-propelled vehicle up to 88,000
- Light commercial vehicles up to 79,000
- Coach or motor bus up to 22,000

Eventually, it would increase contribution to manufacturing and production from 23% to 31%. Thus, increase contribution to country's GDP and generate employment, whether direct or indirect up to 4 million.

Scope of the Study:

The scope of this study is to establish decline in local automobile industry of Pakistan because of the import of reconditioned cars. This study focuses on the sub segment of cars of automotive industry which emphasize on production, sales and market growth functions, and measure the impact of these functions on the industry and directly related economic indicators.

Objectives of the Study:

The objective of this study is manifold such as;

- To determine the impact of import of reconditioned cars production in local automobile industry.
- To examine and analyse the impact of these reconditioned cars on employment.
- To analyze their impact on local automobile industry's share.



Literature Review:

Factors affecting automobile industry in Pakistan

The automobile industry in Pakistan is facing difficult situation because local manufacturing has been delivered uneconomical due to some factors. These factors include increase in depreciation in allowances of used cars, increase in duties of auto parts and reduction in duties of imported cars by GDP (Dawn, 2004).

Local producers require launching new cost-cutting measure cars if they want to stay in competition: Why has local car sale been on a moribund trend? Is this because of a large and increasing quantity of imported reconditioned cars or there are any other reasons? Import facts suggests that used definitely spoiled sales of locally engendered conveyances, but the expeditious saturation of imported cars is partly availed by the local production itself by discontinue endangerment of some model, analysts express. A judgment of data of the last three months show that the number of imported used cars is identically equal to forty-nine percent of are engendered locally. From July to September, around fourteen thousand, five hundred cars have been imported while domestic endangerment in the same period stands at 29,669 units, in the forward fiscal year (2011-2012), average monthly engenderment of local cars was far more preponderant than the first months of the fiscal year (2012-2013) (Farhan Zaheer, 2012).

The suspension of production of Suzuki Alto 1000 cc car has also shifted interest of the buyers to imported cars: Sales of local cars drop thirty-two percent near thirty-nine thousand, nine hundred and thirty-eight units in the first four months of the present fiscal year two thousand, twelve-thirteen compare to fifty-eight thousand, eight hundred and one units in the same era year, as host of reason partial the market. (Farhan Zaheer, 2012)

Facts about auto industry: A total of 155,514 cars were sold in 2005-2006 as compared to 2004-2005 which were 127,309 units. It is result of demand triggered by the failure of local manufacturers to satisfy customers. The demand for imported cars remained very large during the last fiscal year (Saleem Mahmood, 2006).

Second hand cars dominate market slowdown in demand due to increased buyers' interest in used cars: An official in Indus Motors Company (IMC) told dawn to the company has been observe non-engenderment day in Toyota Corolla and Toyota Hilux during the current month (Shafat Khan, 2012).

Import of used cars damaging local auto industry: The Indus Motor Company Ltd. Chairman Ali S. Habib said about challenges faced by industry he said constant policy is vital fault of growth of industry. Many countries have stabilized their economies by strengthening their manufacturing an automobile on auto sector while taking measures including restriction on impact of used cars. No auto manufacturing country permits



liberal imports of reconditioned cars on Pakistan and here Government would to tighten this policy if the industry is to flourish (Ghulam Abbas, 2015).

Demerits of imported cars: The main demerit include undocumented sale activity, negative effect on auto sector investment, no manufacturing job creation, lack of spare parts availability, lack of after sales service, low resale value said by the former Pakistan Association of Automotive Parts and Accessories Manufacturers (PAAPAM) (Amir Shafaat Khan, 2017)

Table 2: Estimated Custom Duties on imported reconditioned Non-Hybrid Cars:

	2012	2013	2014	2015
660cc-800cc	392,272	444,805	517,456	519200
801cc-1000cc	476,557	553,826	631,116	643995
1001cc-1300cc	949,870	1,103,903	1,257,936	1283608
1301cc-1500cc	1,337,734	1,554,664	1,771,594	1807749
1501cc-1800cc	1,994,190	2317,572	2,640,954	2694851

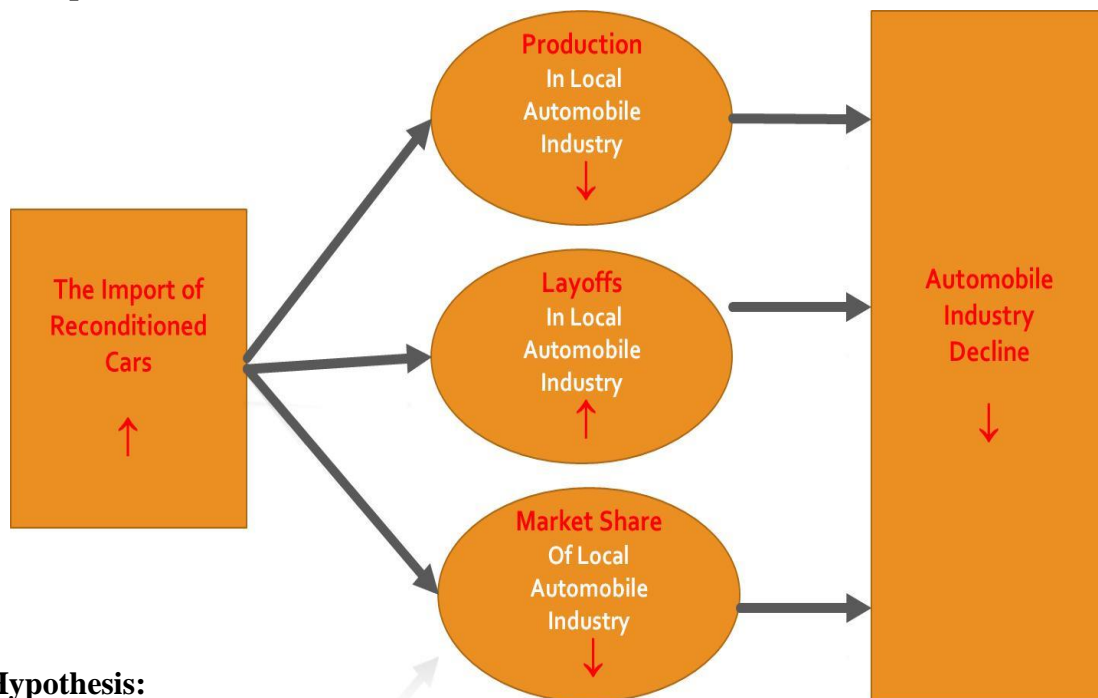
Table 3: Estimated Custom Duties on imported reconditioned Hybrid Cars

	2012	2013	2014
1001cc – 1300cc	474,935	551,952	641,804
1301cc – 1500cc	670,795	781,332	903,874
1501cc – 1800cc	1,012,897	168,786	1,347,745

Table 4: Jeeps / SUVs / commercial vehicles

	2010	2011	2012	2013	2014	2015
660cc – 800cc	263,600	324,100	392,739	444,804	506,870	517,215
801cc – 100cc	21,998	399,277	475,557	553,836	631,116	643,996
1001-1300 cc	641,804	795,837	948,870	1,103,903	1,257,936	1,283,608
1300cc -500cc	903,874	1,120,804	1,337,734	1,554,664	1,771,594	1,807,749

Conceptual Framework:



Hypothesis:

Based on preceding researches, studies and conceptual framework, following hypothesis were formed for testing the impact of reconditioned cars in local automobile industry decline.

- H1: reconditioned cars are causing a decline in the production of locally manufacturing cars.
- H2: these imported reconditioned cars are causing increase in the number of Layoffs (temporary or permanent unemployment), and are affecting employment.
- H3: these are causing decrease in market share of local auto manufactures.
- H4: are causing overall decline in our local automotive industry.

Research Methodology:

For this study, the methodology was used to analyze the production data of sub segment cars of local automobile industry and to analyze the impact of reconditioned cars on local automobile industry and GDP.

Research Design:

Data gathered through secondary sources as well as from primary surveys. The results concluded through the presentation of comparative analysis computed on year-wise secondary data of cars productions and sales. The primary data is taken from size of 100 participates own a 1000 to 1300 cc car or in cars business.



Research Instrument:

- For primary data collection, the research instrument was questionnaire.
- For secondary data collection, professional journal and magazines, articles, internet sources, books, reports provided by government on internet.

Data Analysis and Results:

The research was exploratory in nature to find out impact of import of reconditioned cars in decline of automobile industry. For this purpose, the data on two automobile companies is selected namely, Pak Suzuki Motor Co. Ltd and Indus Motors (Toyota Pakistan) Ltd. For the purpose of analysis in context of the sale of imported reconditioned vehicles.

Table 5: Descriptive Analysis

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
	5	4	3	2	1
Do you agree that reconditioned imported cars are giving healthy competition to local automobile industry?	30.0	16.0	0	20.0	34.0
Do you agree that imported reconditioned cars negatively affect growth of local automobile industry?	51.0	22.0	1.0	24.0	2.0
Do you agree that when people buy more reconditioned imported cars, production in local automobile industry will decline?	23.0	48.0	9.0	11.0	9.0
Do you agree that to compete with latest features of imported cars the capital investment for technology acquisition is inevitable?	66.0	20.0	4.0	4.0	6.0
Do you agree that these imported reused cars are good for employment?	10.0	9.0	9.0	48.0	24.0
Do you agree that decrease in the import of reconditioned cars will improve the employment conditions in automobile sector?	35.0	50.0	1.0	8.0	6.0
Do you agree that market share of local car industry is shrinking due to the import of reconditioned cars?	33.0	45.0	0	13.0	9.0



Do you agree that instead of import of reconditioned cars government should invest on technology for the automobile sector?	40.0	40.0	7.0	8.0	0
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As shown in Table 5, a total of ten participants participated in the research belongs to management of the respective industry, while ninety percent are users of local and imported cars. The above presented descriptive data is clearly showing the directional motivation and view of the participants on the matter which ascertains the following facts. The imports reconditioned cars is harmful for the productive growth and market share of the local mobile industry. These imported reconditioned cars are definitely causing layoffs in economy.

Table 6: Analysis of Imported Reconditioned Cars

2002-2003	60554
2003-2004	88130
2004-2004	66338
2005-2006	36563
2006-2007	202785
2007-2008	540025
2008-2009	425721
2009-2010	750888
2010-2011	675810
2011-2012	1079828
2012-2013	46156
2013-2014	32068
2014-2015	32100
2015-2016	53600

(Source: Economic survey of Pakistan / Federal Bureau of Statistics;
Custom Today)



Table 7: Analysis of other imported reconditioned vehicle

	Jeeps	Rickshaw	Station Wagon	Buses	Lorries/ Trucks	Vans	Motor Cycle
2002-03	6010	101	440	1230	14036	54	143952
2003-04	11435	3	154	2429	2883	95	127861
2004-04	5409	3	37	411	2616	1544	189721
2005-06	2108	15	284	2104	13463	551	167626
2006-07	1938	1727	2817	652	16610	573	164078
2007-08	210	1029	345	217	4331	875	209098
2008-09	14	125	28	232	2405	1203	200745
2009-10	27	10811	109	285	12819	5325	175577
2010-11	27	14746	29	861	24718	3371	215990
2011-12	28	45746	30	580	9238	627	351001
2012-13	-	-	-	2530	334	-	103
2013-14	-	-	-	506	420	-	83

Source: Economic survey of Pakistan / Federal Bureau of Statistics; Custom Today.

Analysis of Indus Motors (PAKISTAN) Ltd:

In 1993 Toyota motors Corporation established a joint venture, Indus motors Company Ltd, with Toyota Tsusho Corporation and Habib Group, with equity contribution of 40% by Habib Group, 12.5% by Toyota Motor, and 12.1% by Toyota Tsusho. Indus Motor also constructed a plant in Bin-Qasim and has commenced production of corolla mainly, as well as Hi-Lux and Daihatsu

Table 8: Indus Motors - Unit Produced

Years	Units Produced
2003	20486
2004	29222



2005	34928
2006	41552
2007	47821
2008	48222
2009	34298
2010	50557
2011	50759
2012	54917
2013	37405
2014	33012
2015	56,888

Source: Full year financial report 2015 Indus motors company Ltd.

Table 9: Production and import Analysis of Indus motors (Pakistan) Ltd

Years	Indus Motors cars	Imported cars
2006	42406	36563
2007	50557	202785
2008	50802	540025
2009	32276	425721
2010	52063	750888
2011	50943	675810
2012	55060	1079828
2013	38517	46156
2014	34470	32068
2015	57,387	32100

Source: (Economic survey of Pakistan/ State Bank of Pakistan; Full year financial report 2015 Indus motors company Ltd



Table 10: Profitability analysis of Indus motors (Pakistan) Ltd

Years	2007	2008	2009	2010	2011	2012	2013	2014	2015
Profit	2.7	2.3	1.3	3.4	2.7	4.3	3.4	3.9	9.1

Source: sbp.org.pk; Financial report 2015 Indus motors company Ltd

As the above table indicates the sharp fluctuations in profitability between years 2007 to 2015, which explain that Indus Motors competes in large engine size category (1300 cc to 1800 cc) and this segment is least affected by the imported cars.

Analysis of Pak Suzuki Motors:

In 1992, Suzuki acquired much of Pak Suzuki's shares. Then it extended a new assembly plant with integrated production lines. Beside this, eight factories of part manufactures are located in the surrounding area. Current State of Automobile Dealerships is 465 shops.

Table 11: Products Pak Suzuki Motors:

	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Daihatsu Cuore	4579	6339	8592	7883	13	12204	5852	5301
Suzuki Mehran	16582	27432	31165	35982	37	35526	13421	22513
Suzuki Bolan	4360	5228	7241	10451	6	17209	8664	11439
Total	25521	38999	46998	54316	65	64939	27937	39253
Suzuki Share	82%	84%	82%	85%	80%	81%	79%	86%

Source: JICA study team using toe data compiled by PAMA

Table 12: Number of cars sold in 1000 cc to 1300cc segment

	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Suzuki Cultus	7927	10795	15611	21390	29837	27563	9198	12658
Suzuki Alto	4701	7145	11431	16823	21988	19097	6550	10794
Hyundai Santro	3135	6922	7009	703	3470	2227	404	244
Total Sold	15763	24865	34051	45244	55295	48887	16152	23696
Suzuki Share	80%	72%	79%	84%	94%	95%	97%	99%

Source: JICA study team using toe data compiled by PAMA



The small cars segment represents the smallest class and consists of three models, which are Suzuki Mehran, Suzuki Bolan, and Daihatsu Cuore. They are produced by two companies, Suzuki and Indus Motors, but Suzuki virtually monopolizes the segment by maintaining more than eighty percent share. However, the medium-size car market in the country is relatively small and accounts for only 19% of the passenger's car market as a whole. Models under this category are Suzuki Cultus, Suzuki Alto, and Hyundai Santro was terminated in 2008-2009, Suzuki virtually monopolizes the market.

Table 13: Pak Suzuki Motor Car Production and Sales data

Years	Production	Sales	Profit/Loss
2006	114214	112173	3353851
2007	120899	124233	2774532
2008	90421	93123	624785
2009	51032	52011	255219
2010	78840	79138	211143
2011	92529	92705	794421
2012	96370	96100	2344871
2013	77142	77050	3242513
2014	80384	78005	4189699
2015	134,391	133,952	11,487,448
2016	111,979	110,000	7,348,577

Source: Suzuki Annual Report 2016

Table 14: Production and import analysis of Pak Suzuki Motors (Pakistan) Ltd:

Years	Suzuki Motors	Imported
2006	112173	36563
2007	124233	202785
2008	93123	540025
2009	52011	425721
2010	79138	750888
2011	92705	675810
2012	96100	1079828
2013	77050	46156
2014	78005	32068
2015	133,952	32100
2016	110,000	53600

Source: Economic survey of Pakistan/ State Bank of Pakistan; Suzuki Annual Report 2016



Table 15: Profitability Analysis of Pak Suzuki Motors (Pakistan) Ltd.

Years	2007	2008	2009	2010	2011	2012	2013	2014	2015
Profit	2775	626	254	212	794	978	1849	1921	5848

Source: sbp.org.pk; Suzuki annual report 2007-2015

As the above table clearly indicating the sharp drop in profitability between years 2008 – 2014, explains that Pak Suzuki Motor has more than 80% share in the category of 800 cc to 1000 cc engine cars these are the two categories in which most cars were imported, and that is the reason why Pak Suzuki's profits hurt most.

Impact of Reused Imported Cars on GDP:

The import of reused cars impacts negatively on local manufacturers and so on GDP of Pakistan, because the low and poor performance of local cars has shifted the preference of consumers from local cars to reused imported cars, which is causing the negative impact on local automobile industry. As we discussed, our automobile sector is contributing a lot to our GDP, so these imported reconditioned cars, as they are negatively affecting our local auto industry, will cause a negative effect on our GDP too. As we know, our local industry of automobile is not as forward in technology as are of imported car manufacturers, so consumers are willing to buy imported reused cars which are far better in quality, they are far better in technology, they have a better finishing done, they are made with fine material. If we compare all this to our local cars so we come to know that our local cars are far away from these cars, if it is quality, technology, material which is used in manufacturing or any other thing. Consumers are giving less or no value to local cars because of these huge differences in performance and quality between both cars. The extra-ordinary quality of materials used technology, labor, workman ship, final finish and world class fitting and fitness of each and every component are few of the things, in favor of reused imported cars. It means these cars eat the share of local automobile industry. So, to save our local automobile industry and to save jobs of thousands of workers. Government should take necessary action and lift the barriers to import to import used cars in Pakistan, prices of local cars should be set reasonably, advanced technology should be acquired by our car manufacturers to give tough time to imported cars, labors should be skilled and trained. By applying these techniques, we will favor our GDP because it will reduce temporary or permanent unemployment which is caused by imported reused cars, it will increase our investment and technologically advanced, hence favoring our economy as whole.

Major Issues of the Pakistani Automobile Industry:

Pakistan's automobile industry has one of the oldest histories in Asian countries. Pakistan has about 100 companies which assemble motor vehicles (includes cars, lorry, heavy vehicles (trucks), bikes, autos, and tractors). On other side, Pakistan have about 1700



automobile part manufacturers. Approximately seventy percent of passenger cars sold in Pakistan are medium-sized cars (one thousand cc or larger). Pakistan should increase its production capacity of car manufacturing because it is still lowest in growing economies.

Conclusion and Recommendations:

High duties should be imposed by Government to shift local people from imported reused cars to locally manufactured ones, and for this, subsidies should be given by Government to local car manufacturers so that they can improve their efficiency and can acquire advanced technology to give a tough competition to imported reused cars. In addition, training centre for technical studies should be made to facilitate labours to advance our automobile sector. Government should take necessary action and lift the barriers to import used cars in Pakistan, prices of local cars should be set reasonably, advanced technology should be acquired by our car manufacturers to give tough time to imported cars, labours should be skilled and trained.

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