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Report Highlights:

Pakistan ranks as the 25th largest export market for U.S. food and agricultural related products, with U.S. exports surpassing \$1.25 billion in 2019. The top U.S. exports to Pakistan were soybeans, cotton, tree nuts, dairy products, pulses, planting seeds, live animals, and wood products. Pakistan is a growing consumer market due to its rapid urbanization and a young population which is shifting traditional consumption patterns away from the purchasing of bulk and raw foods towards that of packaged and processed foods, including ready-to-eat meals, and frozen foods. Despite COVID-19 disruptions to trade flows, U.S. agricultural exports to Pakistan grew 11 percent through October 2020. However, as in most other countries, the global pandemic is expected to reverse the trend of economic growth in Pakistan and to have a severe impact on the food service industry. This Exporter Guide provides an overview of the market, trends, and recommendations to U.S. exporters on how to conduct business in Pakistan.

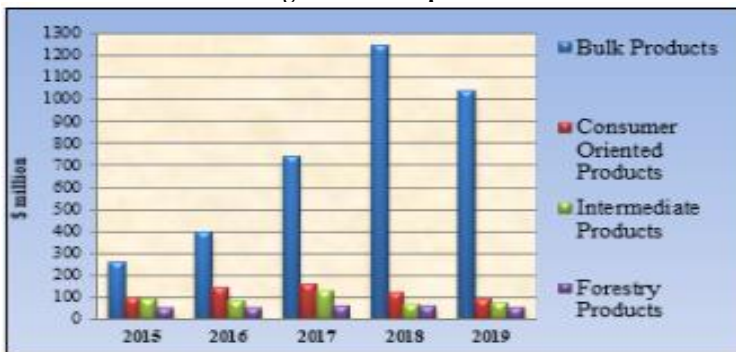
MARKET FACT SHEET: PAKISTAN

Executive Summary:

Pakistan is the fifth most populous nation in the world with a population of 217 million. Pakistan’s economy began a remarkable turnaround as the new fiscal year (FY) (July 2019-June 2020) 2020 began. According to the U.S. Census Bureau, Pakistan’s overall trade with the United States rose to \$5.31 billion through the first ten months of 2020.

Pakistan Agricultural Trade with the United States: Pakistan is ranked as the 25th largest export market for U.S. food and agricultural products in 2019. The value of agricultural trade between the United States and Pakistan during CY2019 totaled \$1.38 billion. U.S. agricultural exports to Pakistan reached \$1.25 billion, led by cotton (\$628 million), soybeans (\$384 million), consumer oriented products (\$90 million), wood products (\$55 million), pulses (\$29 million), planting seeds (\$30 million), and live animals (\$13 million). U.S. agricultural imports from Pakistan reached \$129 million, led by rice (\$38 million), sugar/sweeteners (\$29 million), spices (\$18 million), snack foods (\$8 million), processed fruit and vegetables (\$7 million), tea (\$4 million), seafood products (\$4 million), and feeds and fodders (\$2 million).

U.S. Agricultural Exports to Pakistan



Food Processing Industry: The food and beverage processing industry is the second-largest industry in Pakistan after textiles, accounting for 27 percent of the value-added production and 16 percent of employment in the manufacturing sector. The food processing sector is comprised of the processing of fruits, vegetables, flour, sugar, pulses, grains, frozen and packaged food, edible oil, and dairy products.

Food Retail Industry: The modern food retail industry in Pakistan grew substantially in the past ten years and reached over \$2 billion in 2019. The well-known European supermarkets, Metro, Carrefour, and Tesco, in collaboration with Pakistani groups, opened several self-service outlets in Karachi, Lahore, Faisalabad, and Islamabad.

Food Service Industry: The food service industry in Pakistan is capitalizing on changing lifestyles, a growing, young population, expansion of urban malls, modern retailing, and an increase in the number of working women. U.S. companies dominate the franchise market in Pakistan but sales are expected to drop significantly in FY 2021 (July 2020-June 2021), due to a pandemic-related drop in demand. Restaurants had to temporarily close their doors and could only offer take away and delivery services. Food service outlets were reopened in August, but only under strict conditions, such as dining outside.

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Quick Facts FY2019

Top U.S. Agricultural Exports to Pakistan

Cotton, Soybeans, Pulses, Forestry products, Planting seeds, Live animals, Tree nuts, Dairy products, Soybean oil

Top Food Retailers in Pakistan

Intiaz Supermarket, Metro Cash & Carry, Carrefour Hypermarket, Al-Fatah, Naheed Supermarket, Agha’s Supermarket, Greenvalley Premium Hypermarket

Population/GDP

Population: 217 million (FY19)
 GDP: \$279 billion (FY19)
 GDP Per Capita: \$1,284 (FY20)
 Economic Growth Rate estimate: -0.4% (FY20)

Source: State Bank of Pakistan & PBS

SWOT Analysis

Strengths	Weaknesses
<p><i>Good reputation of U.S. products perceived as high quality and safe.</i></p>	<p><i>Unwillingness of U.S. suppliers to meet Pakistani importers requirements. Pakistan retailers rarely import U.S. products directly.</i></p>
Opportunities	Threats
<p><i>Growing potential for imported commodities like soybeans and wood products as they are not available domestically.</i></p>	<p><i>Non-tariff barriers such as Halal certification and Urdu labeling requirements. The fluctuating value of Pakistani Rupee against the US Dollar. Pandemic-related decreases in demand.</i></p>

SECTION 1: MARKET OVERVIEW

Economic Overview: Pakistan is the fifth most populous nation in the world with a population of 217 million. Pakistan's economy registered positive growth as FY 2020 began. For the first time in many years, from July 2019-April 2020, the current account recorded a surplus, reducing the trade deficit to \$3.3 billion (1.5 percent of GDP); this compares to an \$11.4 billion trade deficit (4.8 percent of GDP) in the corresponding period last year.¹ The current account surplus was mainly due to a 5.5 percent growth in overseas worker remittances. Successful government policies have resulted in a stable exchange rate, healthy growth in foreign direct investment (FDI), improvements in the ease of doing business², and a stable credit outlook. These government policies are stabilizing the economy and laying a foundation for future growth. This has helped in attracting FDI, which, during July 2019-March 2020, increased 127 percent from FY 18/19 to \$2.1 billion. The government plans to improve the policy environment further to attract more potential FDI. However, as in most other countries, the COVID-19 pandemic is expected to reverse the trend of economic growth in Pakistan in FY 2021 and to have a severe impact on the food service industry.

So far, the global pandemic has not adversely impacted Pakistan's production agriculture in a significant way. Overall, for most of FY 19/20 (July-March), the agriculture sector grew by 2.67 percent, due to production increases for wheat (2.45 percent), rice (2.89), corn (6.01), livestock (2.58), forestry (2.29), and fishery (0.60). However, cotton and sugarcane production recorded negative growth of 6.92 percent and 0.44 percent, respectively. Cotton ginning also declined by 4.61 percent, due to a decrease in local cotton production. However, Pakistan's largest manufacturing industry, the textile sector, which is heavily dependent on imports of long staple cotton from the United States, grew 4.2 percent.

According to U.S. Census Bureau, Pakistan's overall trade with the United States rose to \$5.31 billion through the first ten months of 2020. There are at least 30 U.S. firms in Pakistan's food and agriculture sector primarily in the form of investments, franchising or distributorships. The major U.S. seed and chemical companies are CORTEVA and Food Machinery Corporation (FMC). The Massey Ferguson Company assembles tractors and sells small-scale farm equipment. U.S.-based companies PepsiCo, Coca-Cola, and Kraft have all invested in food processing. Valmont sells irrigation equipment, while dairy genetics companies are tapping into the growing demand for bovine semen. The recent shipments of U.S. dairy cattle are expected to increase domestic dairy production in Pakistan. Cargill and the U.S. arm of Louis Dreyfus maintain commodity-trading operations in the country. There are about 15 U.S. restaurant franchises operating in Pakistan, helping to provide the impetus for the development of safe and modern food supply chains. Furthermore, Pakistan is now the leading importer of U.S. wood products in the region because of a residential construction boom. U.S. companies already have an advantage as U.S. products are considered premium products due to their high quality.

Food Purchasing Behavior: A small number of international and domestic grocery retail outlets are starting to change the food retail sector in urban cities, but Pakistanis still buy much of their food in traditional shops and markets. In major cities, middle and high-income consumers are slowly diversifying their purchases away from bulk and raw foods towards packaged and processed foods, including ready-to-eat meals and frozen foods. Supporting this trend is an increase in women working full-time and higher levels of disposable income, particularly in urban areas. Food consumption patterns have not changed in the rural areas and are based on wheat and grain products and a variety of meat products.

A typical Pakistani household makes regular purchases of staple foods (e.g., wheat flour, pulses, edible oils, fruits, vegetables, milk, and meat) from neighborhood stores due to convenience, perceived freshness, and limited storage space at home. Young Pakistani professionals purchase food from modern retail stores due to the greater variety of products, and access to co-located stores, restaurants, and prepared foods. For urban dwellers with sufficient incomes, one-stop grocery shopping is catching-on as a family outing. Affluent Pakistani families are attracted to modern retail stores due to affordability, strategic locations, variety, and access to imported processed foods. The demand for specialty and high-value foods such as dates, cereals, beverages, chocolates, almonds, cakes, fruits and fruit juices soars during the Islamic festive season, especially at Eid and Ramadan.

Consumer Demographics Trends and Labor Force: Pakistan is the fifth most populous nation in the world with a population of 217 million in 2019. Pakistan has the ninth largest labor force in the world with a population growth rate of 1.94 percent. Over 55 percent of Pakistan’s population is under the age of 25, a fact that has not gone unrecognized by the government, which is making sincere efforts to provide them opportunities. The population falling in the age group of 65 years and over is 4.4 percent; 55-64 years is 5.5 percent; 25-54 years is 34.7 percent; 15-24 years is 19.3 percent; and 0-14 years is 36 percent. Pakistan’s middle class is estimated at over 60 million, but incomes deemed middle class are significantly lower than in the United States. Consumers from the Pakistani middle class broadly support both domestically produced and imported goods, including imported foods. The upper middle-income class is estimated at 17 million, with relatively high per capita income that favors consumer spending.

Advantages and Challenges for U.S. Suppliers

Advantages	Challenges
Pakistan has a large young population that is more focused on consumer items	Shipments from the United States take longer
Expatriate community looks for specialty U.S. food products and dine in Western-style restaurant	U.S. suppliers have not been flexible in terms of specialty products of smaller quantities required by the industry
Consumers are seeking quality products from both domestic and international supplier	Competition from other countries like the United Kingdom, Australia, New Zealand, South Africa, and Europe
Gradual transformation of the modern retailing in urban centers	Imported food products are subject to high tariffs which range from 25 – 65 percent and a high duty structure for all value-added food ingredients
U.S. products are popular for quality, taste, and wholesomeness	Proximity to other countries provide competitors a comparative advantage
Eating out culture is becoming popular at upper- and middle-income levels	Inability of U.S. exporters to meet Pakistan’s new Halal certification and Urdu labeling requirements
Urban population creates demand and welcomes new products as they are open to try novel tastes	Locally produced snack foods, salad dressings, sauces, jams and other processed foods are relatively inexpensive
International retailers that market a wide range of imported products in the sector have great influence on purchasing patterns	Local importers prefer to initiate business deals with small orders which is usually not welcomed by many U.S. exporters

Advantages	Challenges
Franchising has been introduced and the retail food sector is transitioning to a modern structure with a growing number of western-style fast food restaurant chains, bakeries, and coffee shops	Market penetration for imported products is mostly concentrated in major cities

SECTION II: EXPORTER BUSINESS TIPS

General Consumer Tastes and Preferences: Pakistan consumers prefer fresh foodstuffs that are readily available in their neighborhood at affordable prices. Healthy eating is becoming more popular among educated consumers and is featured in newspapers, magazines, and television. Fresh foods, fruit juices, fruit concentrated-based beverages, organic foods, sugar-free confectionary, packaged food with higher fiber content, dairy products, and vitamin and calcium fortified packaged foods and beverages are all gaining acceptance among middle and upper-income consumers. Pakistan is 96 percent Muslim, leaving only four percent of the population to consume pork. Products with meat ingredients must be certified Halal to ensure that the meat is sourced from livestock slaughtered in accordance with the tenets of Islam. Food and ingredients destined for the food service sector must also be certified Halal where appropriate. The import and sale of alcohol is also prohibited for religious reasons.

Traditional and modern snack foods, such as confectionaries, pastries, cakes, biscuits, ice cream, or sweet and savory snacks are very popular among Pakistanis. Frozen foods and instant noodles, which are easy to prepare for children, are popular among working mothers. Local flavors are preferred and local food manufacturers are exploring opportunities to produce new products using a combination of local and imported flavors. The rise of the urban middle class has increased the acceptance of packaged, convenience, and ready-to-eat food products. Pakistanis are more willing to try new foods while eating out but tend to prefer traditional fare at home. Chinese, Italian, Thai, Moroccan, and Middle Eastern foods are among the fastest growing new cuisines in Pakistan.

Finding a Business Partner: If an exporter is interested in the Pakistani market, the first step is to locate a reliable importer and distributor. The professional distributors who are keen to manage brands are developing in Pakistan and many are interested in expanding their product lines. These importers typically seek exclusive rights to market a particular product or brand. The food import business is relatively new and exporters should meet potential importers and research their business profile carefully through banks and trade associations. Restaurant franchises are one way of introducing new products. An increasing number of restaurant chains are opening in Pakistan, especially in Karachi and Lahore. These include fast food, casual dining, and cafés. While most of these companies' source food ingredients produced in Pakistan, some require specialized ingredients or imports of certain items that are not readily available. Exporters should check with importers to see if they are approved suppliers for franchises. Additionally, Pakistan's hotel sector features niche high-value food products not readily found in Pakistan. Global hotel chains and excellent local chains operate here. Fresh fruits and vegetables are readily available in Pakistan, but certain high-quality fruits and vegetables (e.g., cherries, plums, broccoli, and lettuce), meat (e.g., steak), and fish products (e.g., shrimp and crab) can be difficult to source locally.

Regional Trade Shows and Reverse Trade Missions: Although the security situation in Pakistan has steadily improved since 2014, indiscriminate acts of violence do still occur. Therefore, U.S. companies should consider participation in regional trade shows (focusing on either the Middle East, South Asia, or Europe) in order to reach potential Pakistani buyers, traders, and distributors. For match making services, FAS Islamabad is organizing reverse trade missions to the United States. These trade missions are designed to educate Pakistani buyers about the market situation, product availability, and mechanics of trade with the key companies in the United States.

A Pakistani importer should ensure that:

- Importation is in accordance with regulations and the item(s) are not on the negative list.
- The terms and conditions of importation are specified in the letter of credit.
- Bulk vegetable oils are the only food products subject to random testing to ensure fitness for human consumption at time of arrival.
- Imported food products, including ingredients, must have at least 50 percent of their original shelf life remaining at the time of importation - calculated from the date of filing the "Import General Manifest" (IGM) in accordance with the Customs Act of 1969.
- Possess a compulsory letter of credit or register the contract with a bank in order to import goods into Pakistan.

Exporters should consider following guidelines before selecting a distributor:

- Do they have a national or regional distribution network?
- How is their distribution network structured?
- Who are their customers? Do they sell to retailers, hotels or restaurants?
- What are their capabilities? Do they have experience handling perishable or value-added foods?
- Are they interested in marketing your products? If so, how will marketing costs be handled?
- Are they paying listing fees to retailers?
- Are they managing similar brands or products from other suppliers?
- What are the margins and costs charged by the distributor?

Ensuring payment is a critical consideration when establishing a relationship with an importer. Until a working relationship is established, exporters may wish to consider requiring an irrevocable letter of credit. Some Pakistani importers are accustomed to operating without credit and may be willing to pay cash prior to shipment. While FAS Islamabad receives few inquiries concerning delinquent Pakistani

importers, our office cannot mediate contractual disputes or serve as a collection agent when differences over payment arise.

SECTION III: IMPORT FOOD STANDARDS, REGULATIONS AND IMPORT PROCEDURES

Pakistan imposes high import duties on most food products. It should be noted that Pakistan has very few trade agreements, the exceptions being agreements with China, Malaysia, and Sri Lanka.

Pakistan's New Halal Certification and Urdu Labeling Requirements:

On July 1, 2019, Pakistan's Ministry of Commerce (MOC) implemented onerous new requirements stipulated in Statutory Regulatory Order (SRO) 237 for all imported consumer-packaged food and beverage products. The government asserts that the new standards will improve food safety and consumer education.

- The accreditation authority of the country that validates the Halal Certificate or Halal Certificate issuing authority needs to be a member of either the Standard Metrology Institute for Islamic Countries (SMIIC) or the International Halal Accreditation Forum (IHAF), or else the Halal Certificate shall not be acceptable.
- All consumer food and beverage imported products must have 50% of shelf life remaining, from date of filing Import General Manifest (IGM), and 66% of the shelf life remaining from the date of manufacturing.
- Labeling of nutritional values and usage instructions must be in Urdu and English language.
- All products (case packaging and the contents of the case) must have a halal logo.
- Adhesive labels are not permitted.
- Urdu labelling is not required for bulk packaged industrial products.

The retail industry recognizes that meeting new labeling requirements may make small shipments uncompetitive. Currently, importers are trying to convince the government to relax the new rules and are asking the government to introduce them over a two-to three-year period. The U.S. manufacturers and exporters are encouraged to work closely with their importers to ensure that their labels meet Pakistan's requirements at the time of import. The food and livestock industry also have some limitations, including a ban on selling alcohol and importation of U.S. beef into Pakistan due to non-harmonization of health certificates for beef between the United States and Pakistan.

SECTION IV: MARKET SECTOR STRUCTURE AND TRENDS

Food Retail Sector Growth and Trends: The modern food retail industry in Pakistan grew substantially in the past ten years. The well-known European supermarkets, Metro, Carrefour, and Tesco, in collaboration with Pakistani and regional groups, opened several self-service outlets in Karachi, Lahore, Multan, Sialkot, Faisalabad, and Islamabad. These hypermarkets are typically located

on 50,000 to 100,000 square feet to take advantage of scale and create a unique one-stop shopping experience in Pakistan that differentiates them from smaller supermarkets and traditional small retailers. There are also more than dozen local food retail chains successfully operating in the urban cities of Pakistan. These leading retail chains include Imtiaz, Al-Fatah, Naheed, Agha's, Greenvalley, Chase-up, Shaheen, D-Watson, Save Mart, CSD, Utility Stores Corporation, and Punjab Cash and Carry.

Pakistan's e-commerce industry is relatively small but has the potential to grow fast, especially post pandemic. The size of the online grocery market is difficult to determine. To date, Pakistani consumers have been slow to embrace online shopping, due to the relatively high cost of computers, low internet penetration rates, payment issues, and the need for better delivery options. However, during the pandemic, internet retail sales have increased significantly, due to rising demand among urban consumers and the prevalence of mobile phones. While the pandemic spurred progress in online grocery shopping, it was from a low base. Modern, online grocery retailers still have a long way to go to saturate the market and replace traditional retail formats.

The expansion of international retailers in Pakistan is fully supported by the existing government by providing them a favorable business environment to facilitate foreign direct investment. U.S. retail companies may wish to take advantage of a steadily improving security situation and begin exploring opportunities in Pakistan's growing food retail sector by identifying relevant partners.

Food Service Sector Growth and Trends: The food service industry in Pakistan is capitalizing on changing lifestyles, a growing, young population, opening of new malls in urban cities, modern retailing, and an increase in the number of working women. Domestic demand for fast food is also growing. Most of the major U.S. fast food chains are represented in Pakistan, although they are concentrated in the large urban centers. The franchises operating in Pakistan include KFC, Pizza Hut, Burger King, McDonald's, Hardees, Dunkin Donuts, Domino's Pizza, Papa John's, Baskin Robbins, Subway, TGI Fridays, Texas Chicken, and IHOP. These food chains are focusing on specialized products to attract consumers in the 15-49 age group. Products used by franchise restaurants are generally imported and large international chains will continue to import directly through their agents. Key imports include frozen french fries, cheese, ice cream, dressings, sauces, whipping cream, bakery ingredients, mixes, and condiments. However, the sales are expected to drop significantly in 2020, due to pandemic-related decreases in demand. Restaurants and cafés had to temporarily close their doors, during which time they could only offer take away and delivery services. Food service outlets reopened in August, but only under strict conditions, such as outdoor dining.

The same potential exists for high-end coffee shops, as specialty and flavored coffees. This trend is being promoted both by international coffee chains and their Pakistani competitors. Coffee shops tend to use various imported coffee ingredients including creamers, honey, flavorings, and roasted coffee. During the last few years, the high-end bakery concept has become popular in the urban areas of Pakistan. These bakeries tend to use imported ingredients including bakery yeast, dough, flavors, icing, and cocoa in their specialized products to improve quality and taste. In addition, the small frozen fruit and vegetable sector is growing to meet the demands of the restaurant sector.

Food Processing Sector Growth and Trends: The food and beverage processing industry is the second largest industry of Pakistan after textiles, accounting for 27 percent of the value-added production and 16 percent of employment in the manufacturing sector. The food and beverage

processing sector is comprised of the processing of fruits, vegetables, flour, sugar, pulses, grains, frozen and packaged food, edible oil, and dairy products. Food processors are slowly introducing new products and traditional recipes using improved technology, innovative packaging, and aggressive marketing. For ingredients that are not available in Pakistan, processors turn to imports and typically source through importers specializing in food ingredients. Food ingredients sourced by Pakistani food processing companies from the United States include dried fruits and nuts, essential oils, protein isolates, starch, vegetable saps, thickeners, lactose, sugar and sugar syrups, mayonnaise, mixed seasonings, sauces and preparations, yeast, milk powder, baking powders, sweeteners and other preparations for beverages, vinegar, and gelatin and gelatin derivatives.

Although Pakistan is the world's fourth largest milk producer, it also consumes most of its production. Demand for dairy products continues to grow, thereby providing tremendous opportunities for exporters of such dairy products as milk powder, cheese, butter, yoghurt, ice cream, and ghee. In the fruits and vegetable sector, there are more than 25 processing plants. Most of these are citrus-based owing to extensive acreage dedicated to citrus production (e.g. mandarin, kinnow, grapefruit, sweet orange, bitter orange, lime, and lemon) grown in the Punjab, Sindh, KPK, and Baluchistan provinces. Value-added products include jams, jellies, marmalades, squashes, and canned fruits. Pakistan is also one of the leading producers of mangoes, which are grown in Southern Punjab and Sindh. The major mango processing plants are located in Peshawar, Lahore and Karachi. Value-added products include jams, jellies, marmalades, squashes, and canned fruits. Pakistan is one of the largest producers of field crops such as rice and wheat, which are used in the production of a variety of different products such as cereals, pasta, and snacks.

Although the consumption of unprocessed meat and seafood remains popular among Pakistani consumers because of its perceived freshness and taste, there is a small, but growing, frozen food sector focusing on processed meat and seafood products, which provides opportunities for U.S. exporters. The increase in demand for frozen foods has been made possible by the rise of malls, supermarkets, hypermarkets and local manufacturers such as Dawn foods, K&N's, Season foods, Sabroso, PK foods, and Sufi foods which have made a significant impact in the market with their ready-to-eat frozen food products.

The total availability of edible oil in Pakistan is estimated at three million tons. Pakistan produces 23 percent of its oilseeds domestically, whereas the remaining 77 percent is imported. These oilseeds are used extensively in the vegetable ghee and cooking oil industry of Pakistan which is one of the largest manufacturing industries in Pakistan. There are 160 small- and medium-sized vegetable ghee and cooking oil units spread all across Pakistan.

The beverage processing industry is mainly categorized into two broad sectors: (1) juices, squashes, and syrups and (2) aerated beverages. Both sectors have recorded an impressive growth with major players in the market being Pepsi, Coca Cola, Nestle, Mitchells, Shezan, and Maza. Their production units are mostly located in the Punjab, specifically the cities of Lahore, Sargodha and Bahawalpur.

SECTION V: AGRICULTURAL and FOOD IMPORTS

Best Product Prospects

Products Present in the Market with Good Sales Potential

Description BICO	Total Imports CY - 2019 (USD millions)	Imports from U.S. CY – 2019 (USD millions)	Key Constraints	Market Factors
Cotton	1050	628	Price competitiveness with India, Brazil, and Egypt etc.	Local production is inadequate and long staple fiber is required for export-oriented products. Cotton contamination is a big local issue.
Soybeans	652	384	Price competition with Brazil.	Total dependence on imports.
Forestry Products	210	54	Competition from Canada, Europe, Burma, Malaysia, and Russia.	Total dependence on imports.
Pulses	367	29	Price competitiveness and freight advantage for countries like Myanmar and India.	Local production is inadequate and domestic consumption is met through imports.
Tree Nuts	110	33	Competition from Afghanistan and Iran.	Growing seasonal demand, health consciousness, and value additions.
Dairy Products	207	31	Competition from foreign suppliers like EU, Turkey, New Zealand, Poland, and Malaysia.	Increasing popularity of imported brands and shortage of quality domestic products. Demand is growing for powdered milk for processing.
Planting Seeds	117	30	Hybrid seed for corns and vegetables is not available.	High demand of hybrid seeds to achieve high local production.
Live Animals	25	13	Competition from countries like Australia and Holland.	Preference for imported animals for higher productivity and better genetic potential.
Soybean Oil	53	10	Price competition with Brazil and Argentina	Total dependence on imports.

Source: TDM

VI: POST CONTACTS AND FURTHER INFORMATION

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Attachments:

No Attachments