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Report Name: Grain and Feed Update

Country: Pakistan

Post: Islamabad

Report Category: Grain and Feed

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Report Highlights:

This report revises the Grain and Feed Update (PK024-022) published on December 27th, 2024. The wheat production, supply and distribution (PSD) table is corrected, and the rice PSD table is updated. There are no significant changes to the 2024/25 wheat production, supply and demand outlook. Due to slight reductions in both area and yield, the 2024/25 rice production estimate is revised down to 9.5 million tons. Despite this slight reduction in exportable supplies, export prospects remain bright, and the 2024/2025 rice export forecast is increased to 5.8 million tons.

Wheat:

There are no significant changes to the 2024/25 wheat production, supply and demand outlook. Pakistan has not imported any wheat this marketing year and is unlikely to import any during the remainder of the year. The government's ban on imports and exports remains in effect. An estimated 500,000 tons of wheat equivalent is exported to Afghanistan via unofficial channels.

Farmers have completed planting the 2025/26 crop, and preliminary estimates indicate that area is about three percent less than in 2024/25. Continued uncertainty about the government's wheat procurement policy discouraged some farmers from planting. The government has yet to clarify whether they will buy the 2025/26 crop at a fixed support price and has not yet announced any minimum support price. A positive note for the 2025/26 crop is that the Indus River System Authority (IRSA) estimates irrigation water availability to be fifteen percent higher than the last year and one percent more than the ten-year average. Almost all wheat area is irrigated.

Table 1: Production, Supply and Distribution Data Statistics:

Wheat	2022/2023		2023/2024		2024/2025	
Market Year Begins	May 2022		May 2023		May 2024	
Pakistan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	8,977	8,977	9,033	9,033	9,630	9,630
Beginning Stocks (1000 MT)	4,530	4,530	3,919	3,919	4,967	4,967
Production (1000 MT)	26,209	26,209	28,161	28,161	31,400	31,400
MY Imports (1000 MT)	2,680	2,680	3,587	3,587	100	100
TY Imports (1000 MT)	2,731	2,731	3,586	3,586	100	100
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	33,419	33,419	35,667	35,667	36,467	36,467
MY Exports (1000 MT)	500	500	500	500	500	500
TY Exports (1000 MT)	500	500	500	500	500	500
Feed and Residual (1000 MT)	1,700	1,700	1,900	1,900	2,200	2,200
FSI Consumption (1000 MT)	27,300	27,300	28,300	28,300	29,000	29,000
Total Consumption (1000 MT)	29,000	29,000	30,200	30,200	31,200	31,200
Ending Stocks (1000 MT)	3,919	3,919	4,967	4,967	4,767	4,767
Total Distribution (1000 MT)	33,419	33,419	35,667	35,667	36,467	36,467
Yield (MT/HA)	2.9196	2.9196	3.1176	3.1176	3.2606	3.2606
(1000 HA), (1000 MT), (MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Wheat begins in July for all countries. TY 2024/2025 = July 2024 - June 2025						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Rice, Milled:

Due to reports of slightly lower area and yields, the 2024/25 rice production estimate is revised down to 9.5 million tons. An extended period of extremely high temperatures just prior to harvest negatively impacted productivity. Though the 9.5-million-ton crop is slightly less than last year, it would still be the second largest production on record.

Rice Exports:

In 2023/24, Pakistan exported a record 6.55 million tons. A record high exportable surplus, competitive prices, and India's export ban fueled the banner export year. Table 2 show that exports consisted of

899,881 tons of basmati rice (14 percent) and 5.652 million tons (86 percent) of other varieties. Long grain export prices averaged \$582 per metric ton, while basmati averaged \$1,250 per ton.

Table 2: Rice Exports in 2023/24 (metric tons)

Months	Basmati	Others	Total
Nov 2023	53,495	612,514	666,009
Dec 2023	74,261	775,765	850,026
Jan 2024	80,295	671,738	752,033
Feb 2024	72,915	536,380	609,295
March 2024	72,919	545,000	617,919
April 2024	66,863	463,035	529,899
May 2024	66,902	439,414	506,317
June 2024	94,675	330,379	425,054
July 2024	91,303	178,617	269,920
August 2024	95,646	251,413	347,059
September 2024	65,063	309,265	374,328
October 2024	65,544	538,600	604,145
Total	899,881	5,652,123	6,552,004

Source: Pakistan Bureau of Statistics

Outlook and Challenges

While the extraordinary performance of the previous marketing year will be difficult to sustain, Pakistan's rice remains competitive in global markets. As a result of expectations of continued demand from Far Eastern countries such as Indonesia, Malaysia, Singapore, and the Philippines, 2024/25 rice exports are projected at 5.8 million tons. Indonesia has been a significant buyer of Pakistani rice during the last marketing year and this trend is likely to continue. The industry is also focusing on Philippines market, anticipating strong demand from the country.

To sustain the export momentum, exporters are also targeting non-traditional markets in Africa, Central and South America. East Africa. Kenya and Mauritius are expected to remain a solid market for Pakistan's white rice.

A continuous challenge is the detention of Pakistani rice shipments at EU ports due to samples exceeding maximum residue levels (MRL) for mycotoxins and pesticides. Exporters and authorities are actively working to reduce the spike in MRL violations that have been detected at export destinations in recent months.

Table 3: Production, Supply and Distribution Data Statistics:

Rice, Milled Market Year Begins Pakistan	2022/2023		2023/2024		2024/2025	
	Nov 2022		Nov 2023		Nov 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2,975	2,975	3,637	3,637	3,800	3,700
Beginning Stocks (1000 MT)	2,377	2,377	2,024	2,024	1,354	1,333
Milled Production (1000 MT)	7,322	7,322	9,869	9,860	10,000	9,500
Rough Production (1000 MT)	10984	10984	14805	14791	15002	14251
Milling Rate (.9999) (1000 MT)	6,666	6,666	6,666	6,666	6,666	6,666
MY Imports (1000 MT)	7	7	5	5	0	5
TY Imports (1000 MT)	7	7	5	5	0	5
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	9,706	9,706	11,898	11,889	11,354	10,838
MY Exports (1000 MT)	3,757	3,757	6,544	6,556	5,500	5,800
TY Exports (1000 MT)	4,528	4,528	6,000	6,500	5,300	5,500
Consumption and Residual (1000 MT)	3,925	3,925	4,000	4,000	4,100	4,100
Ending Stocks (1000 MT)	2,024	2,024	1,354	1,333	1,754	938
Total Distribution (1000 MT)	9,706	9,706	11,898	11,889	11,354	10,838
Yield (Rough) (MT/HA)	3.6921	3.6921	4.0707	4.0668	3.9479	3.8516
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2024/2025 = January 2025 - December 2025						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments