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## **Report Highlights:**

Following the resumption of genetically engineered soybean imports after two years, soybean imports are forecast to rebound to 2 million tons in 2025/26. With a slight increase in domestic production expected, rapeseed imports are forecast to decline. Meanwhile, population growth will continue to drive consumer demand for cooking oil, and palm oil imports are expected to continue rising. Domestic oilseed production is forecast to increase slightly in 2025/26, as farmers switch from wheat to rapeseed.

# **Executive Summary**

# Government Approves Genetically Engineered (GE) Soybean Imports

The National Biosafety Committee (NBC) and the Environmental Protection Agency (EPA) began approving GE soybean imports in December 2024, and GE soybean arrivals resumed in February 2025. As a fully functional import approval process is in place, a strong rebound in soybean imports is expected in 2025/26. However, as of late March 2025, the NBC and EPA had yet to authorize GE rapeseed imports.

# Domestic Oilseed Production Expected to Increase Marginally

With farmers replacing some wheat area with rapeseed, total oilseed production in 2025/26 is forecast to reach 3.05 million tons, 6 percent higher than in 2024/25.

# Palm Oil Imports Continue Growing

In line with population growth, palm oil imports are forecast to grow about 3 percent during 2025/26, reaching 3.7 million tons.

#### **Oilseeds**

#### **Oilseed Production:**

Due to projected increases in both cottonseed and rapeseed output, total oilseed production in 2025/26 is forecast to reach 3.05 million tons, 6 percent higher than in 2024/25. Sunflower seed production in 2025/26 is expected to remain flat. Beginning in 2024, the government stopped providing a wheat minimum support price, reducing incentives for farmers to plant wheat and encouraging them to search for alternative crops, including rapeseed. As a result, some wheat area shifted to rapeseed in 2025/26.

Cottonseed, rapeseed, and sunflower seed are the only oilseeds with significant domestic production. Cottonseed is primarily ground into cake for dairy cattle feed, while rapeseed and sunflower seed are mainly produced for their oil. If cotton is excluded, as it is produced for fiber, total oilseed area is only about 3 percent of Pakistan's 24.1 million hectares of crop area.

Local soybean production is negligible. Despite many previous programs and the government's continued efforts to expand soybean production, farmers prefer other crops as soybeans have proven to be low-yielding and unprofitable. No growth in soybean production is expected in 2025/26.

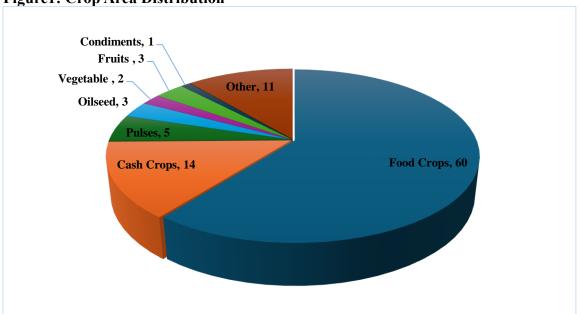


Figure1: Crop Area Distribution

**Source: Ministry of National Food Security (MNFSR)** 

Food Crops = Wheat, Rice, Jowar, Maize, Bajra and Barley. Cash Crops = Sugarcane, Cotton, Tobacco, Jute, Sugarbeet, Guarseed & Sunhemp Pulses = Gram, Mung, Masoor, Mash, Mattar, Other Kharif & Other Rabi Pulses. Oilseeds = Rapeseed/Mustard Seed, Sesame, Groundnut, Soybean, Sunflower

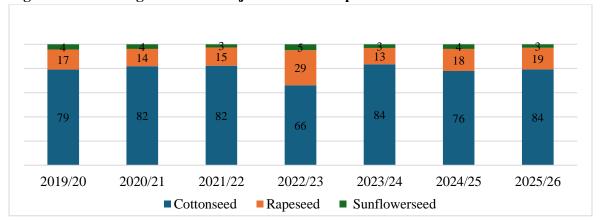


Figure 2: Percentage Share of Major Oilseed Crops in Domestic Production

#### **Cottonseed:**

Cottonseed is the principal oilseed crop grown, accounting for about 84 percent of domestic oilseed production during 2025/26. With an anticipated increase in domestic cotton production, cottonseed output is projected to reach 2.4 million tons in 2025/26, which is a 11 percent increase compared to 2024/25. The April/May planting season will be critical for cotton, as the increase in production largely depends on the amount of early sown area. In Punjab, cotton is typically planted in May or June. However, due to increased pest pressure and fluctuating weather patterns, yields have been declining in recent years. To address this, the government is encouraging early planting during 2025/26.

#### Rapeseed:

Rapeseed production in 2025/26 is forecast to reach 565,000 tons, a 10 percent increase over output in 2024/25. This growth is due to an expected increase in area as farmers replace some wheat area with rapeseed. Rapeseed is planted in October –November, which coincides with the wheat sowing season. The 35 percent decline in wheat prices prior to the planting season caused some farmers to switch from wheat to rapeseed. Rapeseed is considered a low input and less risky crop.

#### **Sunflowerseed:**

Sunflower seed production is forecast to remain stable. Sunflower planting starts in February and competes with early cotton, corn and sugarcane crops for area. Those other crops are more profitable, keeping a lid on sunflower seed output.

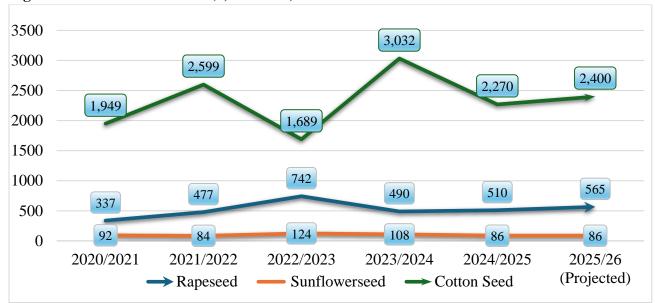


Figure 3: Oilseed Production (1,000 Tons)

Source: USDA and Pakistan Bureau of Statistics (PBS)

# **Consumption:**

Total oilseed consumption is forecast to reach 5.68 million tons, which is 14 percent higher than the estimated use of 2024/25. This higher consumption forecast is due to expectations for increased availability of imported GE soybeans in 2025/26, and minor increases in domestic cottonseed and rapeseed supplies. Crushing during the period is expected to reach 5.52 million tons, which would be 5 percent higher than estimated use in 2024/25. The higher crushing forecast is due to the expected increase in soybean supplies.

The October 2022 ban on GE soybean imports increased poultry feed prices, caused a significant decline in poultry production, and led to higher broiler meat prices. However, with expectations for at least a doubling in soybean imports, meal availability will increase, leading to a decrease in feed prices; consequently, demand from the poultry sector is expected to increase in 2025/26 period.

The poultry sector produces about 41 percent of total meat production (2.4 million tons). Per capita consumption meat consumption is still quite low; consequently, great potential exists for expansion of the poultry sector and increased demand for oilseed meal.

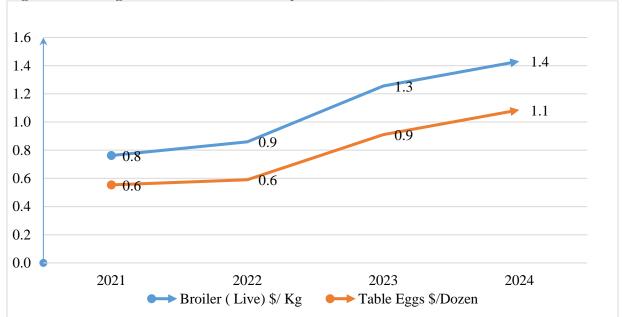


Figure 4: Average Market Price of Poultry Products (\$)

Source: Pakistan Bureau of Statistics (PBS) and Pakistan Poultry Association (PPA)

#### Trade:

Total oilseed imports for 2025/26 are projected to reach 2.65 million tons, a 20 percent increase compared to 2024/25. This increase is largely due to the expected increase in soybean imports, which are forecast to reach 2 million tons, the same level as before ban in 2021/2022. In November/December 2024, government regulators began authorizing GE commodity imports and issuing import licenses. The licenses are valid for a year. The first shipment (65,000 tons) of U.S. soybeans since removal of the ban arrived in February 2025.

With the expected gain in domestic output, the import forecast for rapeseed during 2025/26 is decreased marginally to 600,000 tons. Since the ban on GE commodities, rapeseed from Australia has dominated the import market, capturing over 70 percent of the market share. As of March 2025, the government had only approved GE soybean imports, with GE rapeseed applications pending. It is unclear when/if GE rapeseed imports will resume in 2025/26.

The import forecast for soybeans in 2024/25 has been revised to 1.5 million tons, based on the current pace of imports and domestic use, which is expected to average 200,000 tons per month for rest of the marketing year.

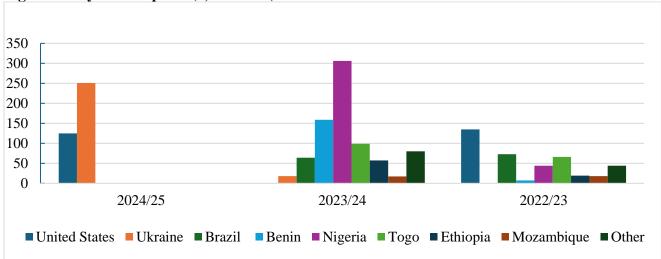


Figure 5: Soybean Imports (1,000 Tons)

Source: Trade Data Monitor LLC

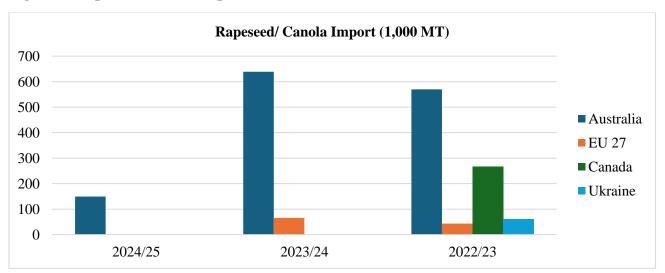


Figure 6: Rapeseed/Canola Import (1000 Tons)

Source: Trade Data Monitor LLC

#### **Policy:**

Following amendments to the Biosafety Rules and Regulations (BRR) in 2024, the Ministry of Climate Change (MOCC) implemented a system that allows importers to obtain licenses for GE commodity imports. The import licenses are valid for a year. The amended BRR contains a "sunset clause" which sets the import license approval system to expire in January 2027. The government put this clause in the amended BRR as a condition for allowing soybean imports, with the unrealistic expectation that within three years domestic oilseed production would increase to a level to replace the need for imports.

Federal and provincial governments continue to encourage producers to expand oilseed area and production. While some wheat acreage shifted to rapeseed/canola in 2025, most farmers still prefer planting wheat. Despite considerable government programs to increase output, domestic production accounts for only 14 percent of oil consumption.

The duty structure for oilseeds is unchanged as outlined in the table below.

Table 1: Duty Structure on Oilseeds, SBM, and Edible Oil (1\$= Rs 278)

	Rapeseed	Sunflower	Soybeans	SBM	RBDPO	Palm	CDSO
						Olein	
Custom Duty	3%	3%	3%	11%	Rs.10,800	Rs.9,050	Rs.10,500
Duty	-	-	-		15%	15%	
Discount							
Indonesia							
Additional	2%	2%	2%	2%	2%	2%	2%
Duty							
Income Tax	2%	2%	2%	5.5%	2%	2%	2%
Reg. Duty					Rs.50/MT	Rs.50/MT	Rs.50/MT
Sales Tax	18%	18%	18%	18%	18%	18%	18%

RBDPO: Refined Bleached Deodorized Palm Oil.

CPO: Crude Palm Oil. SBM: Soybean Meal

CDSO: Crude Deodorized Soybean Oil.

Table 2: Total Oilseeds-Production, Supply and Distribution (1,000 HA) (1,000 MT)

Oilseed	2023/2024		2024/2025		2025/2026	
Marketing Year Begins	Oct-23		Oct-24		Oct-25	
	USDA	New	USDA	New	USDA	New
	Official	Post	Official	Post	Official	Post
Area Planted (1000 HA)		2,872		2,467	1	2,607
Area Harvested (1000 HA)		2,863		2,466	ı	2,607
Beginning Stocks (1000 MT)		118		307		399
Production (1000 MT)	-	3,794	-	2,867	-	3,053
MY Imports (1000 MT)	-	1,605	-	2,200	-	2,650
Total Supply (1000 MT)	-	5,517	-	5,374	-	6,102
MY Exports (1000 MT)	-	0	-	0	-	0
Crush (1000 MT)	-	4,940	-	4,795	-	5,520
Food Use Dom. Cons. (1000 MT)	-	0	-	0	-	0
Feed Waste Dom. Cons. (1000 MT)	-	270	-	180	-	180
Total Dom. Cons. (1000 MT)	-	5,210	-	4,975	-	5,700
Ending Stocks (1000 MT)	-	307	-	399	-	402
Total Distribution (1000 MT)	-	5,517	-	5,374	-	6,102

Table 3: Cottonseed-Production, Supply and Distribution. (1,000 HA) (1,000 MT)

Oilseed, Cottonseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2	2023	Oct 2024		Oct 2025	
Pakistan	USDA	New	USDA	New	USDA	New
1 akistan	Official	Post	Official	Post	Official	Post
Area Planted (Cotton) (1000 HA)	2,600	2,400	2,400	2,000	-	2,100
Area Harvested (1000 HA)	2,400	2,400	2,000	2,000	1	2,100
Seed to Lint Ratio (RATIO)	-	-	1	ı	1	-
Beginning Stocks (1000 MT)	40	40	172	185	1	155
Production (1000 MT)	3,032	3,195	2,166	2,270	1	2,400
MY Imports (1000 MT)	-	-	1	ı	1	-
Total Supply (1000 MT)	3,072	3,235	2,338	2,455	1	2,555
MY Exports (1000 MT)	-	-	-	-	-	-
Crush (1000 MT)	2,730	2,850	2,210	2,200	1	2,250
Food Use Dom. Cons. (1000 MT)	-	-	1	ı	1	-
Feed Waste Dom. Cons. (1000 MT)	170	200	83	100	-	100
Total Dom. Cons. (1000 MT)	2,900	3,050	2,293	2,300	1	2,350
Ending Stocks (1000 MT)	172	185	45	155	-	205
Total Distribution (1000 MT)	3,072	3,235	2,338	2,455	-	2,555
Yield (MT/HA)	1.26	1.33	1.08	1.14	-	1.14
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Table 4: Rapeseed-Production, Supply and Distribution (1,000 HA) (1,000 MT)

Oilseed, Rapeseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	C	oct 2023	et 2023 Oct 2024		Oct 2025	
Pakistan	USDA	New	USDA	New	USDA	New
rakistan	Official	Post	Official	Post	Official	Post
Area Planted (1000 HA)	425	390	450	400	-	440
Area Harvested (1000 HA)	382	382	400	400	1	440
Beginning Stocks (1000 MT)	63	63	28	28	1	58
Production (1000 MT)	490	490	510	510	1	565
MY Imports (1000 MT)	705	705	650	650	1	600
Total Supply (1000 MT)	1,258	1,258	1,188	1,188	1	1,223
MY Exports (1000 MT)	-	-	-	-	-	-
Crush (1000 MT)	1,200	1,200	1,080	1,080	-	1,145
Food Use Dom. Cons. (1000 MT)	-	-	-	-	-	-
Feed Waste Dom. Cons. (1000	30	30	50	50	-	50
MT)	50	30		50		
Total Dom. Cons. (1000 MT)	1,230	1,230	1,130	1,130	I	1,195
Ending Stocks (1000 MT)	28	28	58	58	-	28
Total Distribution (1000 MT)	1,258	1,258	1,188	1,188	-	1,223
Yield (MT/HA)	1.28	1.28	1.28	1.28	1	1.28
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Table 5: Sunflower Seed-Production, Supply and Distribution. (1,000 HA) (1,000 MT)

Oilseed, Sunflower seed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 20	023	Oct 2024		Oct 2025	
Pakistan	USDA	New	USDA	New	USDA	New
	Official	Post	Official	Post	Official	Post
Area Planted (1000 HA)	80	80	80	65	0	65
Area Harvested (1000 HA)	80	80	80	65	0	65
Beginning Stocks (1000 MT)	11	11	9	9	0	20
Production (1000 MT)	108	108	105	86	0	86
MY Imports (1000 MT)	100	100	50	50	0	50
Total Supply (1000 MT)	219	219	164	145	0	156
MY Exports (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	190	190	130	115	0	125
Food Use Dom.Cons (1000 MT)	0	0	0	0	0	0
Feed Waste Dom.Cons (1000 MT)	20	20	20	10	0	10
Total Dom. Cons. (1000 MT)	210	210	150	125	0	135
Ending Stocks (1000 MT)	9	9	14	20	0	21
Total Distribution (1000 MT)	219	219	164	145	0	156
Yield (MT/HA)	1.35	1.35	1.3125	1.3231	0	1.3231
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Table 6: Soybean- Production, Supply and Distribution  $(1,000\ HA)\ (1,000\ MT)$ 

Oilseed, Soybean	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2	023	Oct 2024		Oct 2025	
Pakistan	USDA	New	USDA	New	USDA	New
	Official	Post	Official	Post	Official	Post
Area Planted (1000 HA)	2	2	2	2	1	2
Area Harvested (1000 HA)	1	1	1	1	1	2
Beginning Stocks (1000 MT)	4	4	85	85	1	166
Production (1000 MT)	1	1	1	1	1	2
MY Imports (1000 MT)	800	800	1,700	1,500	-	2,000
Total Supply (1000 MT)	805	805	1,786	1,586	-	2,168
MY Exports (1000 MT)	-	-	-	-	-	-
Crush (1000 MT)	700	700	1,600	1,400	-	2,000
Food Use Dom.Cons (1000 MT)	-	1	1	ı	1	ı
Feed Waste Dom.Cons (1000 MT)	20	20	20	20	-	20
Total Dom. Cons. (1000 MT)	720	720	1,620	1,420	-	2,020
Ending Stocks (1000 MT)	85	85	166	166	1	148
Total Distribution (1000 MT)	805	805	1,786	1,586	-	2,168
Yield (MT/HA)	1	1	1	1	-	1
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**Table 7: Soybean Import Matrix (1,000 Tons)** 

Marketing Year	2021/22	2022/23	2023/24	2024/25
	(Oct-Sep)	(Oct-Sep)	(Oct-Sep)	(Oct-Feb)
United States	770	135	-	196
Benin	-	7	159	-
Brazil	1,125	73	64	77
Nigeria		44	306	1
Canada	104	1	10	15
Ethiopia	-	19	57	-
Mozambique	-	18	17	-
Togo	-	66	99	-
Ukraine	-	-	18	255
Other	-	50	70	
Total	2,000	413	800	544

Source: Trade Data Monitor LLC

#### **MEAL:**

#### **Production:**

The total meal production for 2025/26 is projected to reach 3.32 million tons, a 19 percent increase compared to 2024/25. This increase is mainly due to the forecast 40 percent increase in soybean meal crush, resulting from the expected higher soybean imports. Driven by the expected higher domestic availability, cottonseed meal production is expected to reach 1.04 million tons, while rapeseed meal production is forecasted at 668,000 tons in 2025/26.

## **Consumption:**

The poultry industry's latent demand, coupled with the increased availability of imported soybeans, is expected to significantly boost crushing and meal consumption in 2025/26. Meal consumption is forecast to reach approximately 3.32 million tons, marking a 17 percent increase compared to the previous year. This growth reflects the strong potential for growth in the poultry sector, and the critical role of soybean meal as the best protein source in poultry feed rations.

Soybean meal supplies have been inadequate since the GE soybean import ban in October 2022. This led to higher feed prices and reduced profitability for poultry producers. These challenges caused some small feed millers and poultry farms to cease business. But the resumption of soybean imports, and expectations for reliable imports throughout the rest of 2025/26, is expected to boost latent poultry industry demand, driving crush and feed production.

The poultry sector is comprised of 15,000 poultry farms, with farm sizes ranging from 5,000 to 500,000 birds. About 150 registered mills supply compound feed for the larger poultry farms, and many more unregistered smaller feed producers formulate feed for small scale farms. The large ruminant sector (dairy and beef cattle and buffalo) is second biggest user of oilseed meal and is growing at about 3.8 percent per year.

#### **Prices:**

With the expected increase in crushing activity and meal supplies, prices are expected to decline in 2025/26, leading to a commensurate decrease in poultry meat prices. After the ban on GE soybean imports, poultry feed prices more than doubled, going from \$190 per ton in late 2022 to \$400 per ton in late 2024. With the increase in soybean imports, those prices already started to fall in the first quarter of 2025. Cottonseed meal prices were about \$255 per ton as of March 2025, and are expected to remain stable during 2025/26.

Table 8: Total Meal-Production, Supply and Distribution. (1,000 MT)

	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oc	Oct-23		24	Oct-25	
Pakistan	USDA	New	USDA	New	USDA	New
	Official	Post	Official	Post	Official	Post
Crush (1000 MT)	-	4,940	1	4,795	ı	5,525
Beginning Stocks (1000 MT)	-	70	1	81	ı	140
Production (1000 MT)	-	2,649	1	2,793	ı	3,329
MY Imports (1000 MT)	-	196	1	100	ı	0
Total Supply (1000 MT)	-	2,915	1	2,974	ı	3,469
MY Exports (1000 MT)	-	2	ı	0	ı	0
Industrial Dom. Cons. (1000 MT)	-	0	1	0	ı	0
Food Use Dom. Cons. (1000 MT)	-	0	-	0	-	0
Feed Waste Dom. Cons. (1000 MT)	-	2,831	1	2,839	ı	3,323
Total Dom. Cons. (1000 MT)	-	2,831	1	2,839	ı	3,323
Ending Stocks (1000 MT)	-	81	-	140	-	146
Total Distribution (1000 MT)	-	2,915	-	2,980	-	3,469

Table 9: Cotton Seed Meal-Production, Supply and Distribution (1,000 MT)

Meal, Cottonseed	2023/2	2024	2024/2	2025	2025/2026	
Market Year Begins	Oct-23		Oct-24		Oct-25	
Pakistan	USDA	New	USDA	New	USDA	New
	Official	Post	Official	Post	Official	Post
Crush (1000 MT)	2,730	2,850	2,210	2,200	-	2,250
Extr. Rate, (PERCENT)	0.465	0.465	0.465	0.465	-	0.465
Beginning Stocks (1000 MT)	17	17	19	22	-	28
Production (1000 MT)	1,272	1,325	1,029	1,025	-	1,048
MY Imports (1000 MT)	0	0	0	0	-	0
Total Supply (1000 MT)	1,289	1,342	1,048	1,047	-	1,076
MY Exports (1000 MT)	0	0	0	0	-	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	-	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	-	0
Feed Waste Dom. Cons. (1000 MT)	1,270	1,320	1,025	1,025	-	1,055
Total Dom. Cons. (1000 MT)	1,270	1,320	1,025	1,025	-	1,055
Ending Stocks (1000 MT)	19	22	23	28	-	21
Total Distribution (1000 MT)	1,289	1,342	1,048	1,053	-	1,076
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Table 10: Rapeseed Meal- Production, Supply and Distribution. (1,000 MT)

Meal, Rapeseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct-	-23	Oct-24		Oct-25	
Pakistan	USDA	New	USDA	New	USDA	New
	Official	Post	Official	Post	Official	Post
Crush (1000 MT)	1,200	1,200	1,080	1,080	-	1,145
Extr. Rate, (PERCENT)	0.582	0.582	0.581	0.581	0.000	0.581
Beginning Stocks (1000 MT)	12	12	9	9	0	26
Production (1000 MT)	698	698	627	627	0	668
MY Imports (1000 MT)	1	1	0	0	0	0
Total Supply (1000 MT)	711	711	636	636	0	694
MY Exports (1000 MT)	2	2	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	700	700	610	610	0	665
Total Dom. Cons. (1000 MT)	700	700	610	610	0	665
Ending Stocks (1000 MT)	9	9	26	26	0	29
Total Distribution (1000 MT)	711	711	636	636	0	694
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Table 11: Sunflower Seed Meal- Production, Supply and Distribution. (1,000 MT)

Meal, Sunflower Seed	2023/2	2024	2024/2	2025	2025/2026	
Market Year Begins	Oct-	23	Oct-24		Oct-25	
Pakistan	USDA	New	USDA	New	USDA	New
	Official	Post	Official	Post	Official	Post
Crush (1000 MT)	190	190	130	115	0	125
Extr. Rate, (PERCENT)	0.426	0.426	0.423	0.423	0.000	0.423
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	81	81	55	49	0	53
MY Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	81	81	55	49	0	53
MY Exports (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	81	81	55	49	0	53
Total Dom. Cons. (1000 MT)	81	81	55	49	0	53
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	81	81	55	49	0	53
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Table 12: Soybean Meal- Production, Supply and Distribution. (1,000 MT)

Meal, Soybean	2023/2024		2024/2025		2025/2026	
Market Year Begins		Oct-23	Oct-24		Oct-25	
Pakistan	USDA	New	USDA	New	USDA	New
1 akistan	Official	Post	Official	Post	Official	Post
Crush (1000 MT)	700	700	1,600	1,400	-	2,000
Extr. Rate, (PERCENT)	0.78	0.78	0.78	0.78	1	0.78
Beginning Stocks (1000 MT)	41	41	50	50	ı	86
Production (1000 MT)	545	545	1,248	1,092	-	1,560
MY Imports (1000 MT)	195	195	100	100	ı	-
Total Supply (1000 MT)	781	781	1,398	1,242	ı	1,646
MY Exports (1000 MT)	1	1	1	1	ı	-
Industrial Dom. Cons. (1000 MT)	-	1	1	1	1	-
Food Use Dom.Cons (1000 MT)	-	1	ı	ı	ı	-
Feed Waste Dom.Cons (1000 MT)	730	730	1,310	1,155	1	1,550
Total Dom. Cons. (1000 MT)	730	730	1,310	1,155	ı	1,550
Ending Stocks (1000 MT)	50	50	87	86	-	96
Total Distribution (1000 MT)	781	781	1,398	1,242	-	1,646
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# OIL Production:

With expectations for higher soy crush and increased domestic production of cottonseed and rapeseed, total oil production is forecast to increase approximately 13 percent in 2025/26.

Domestic oilseed production supplies less than 20 percent of Pakistan's edible oil demand, with the remainder imported (mainly palm oil) or derived from imported soybeans and rapeseed. Due to its lower cost, palm oil dominates the edible oil market, accounting for more than 75 percent of consumption. It is widely used both at home and in the food processing industry.

In response to rising demand and limited domestic production, the Sindh Coastal Development Authority, in partnership with Malaysian companies, is promoting palm cultivation and production to reduce the reliance on edible oil imports. However, to date this initiative has yet to yield results.

# **Consumption:**

Total oil consumption in 2025/26 is forecast to reach 5.13 million tons, marking a 5 percent increase compared to the estimated usage in 2024/25. This increase in oil consumption is driven by population growth and higher demand for edible oils. Palm oil will continue to account for about 75 percent of domestic consumption.

The demand for edible oil has risen steadily over the past two decades, driven by population growth and development of the food service industry. Palm oil, rapeseed/canola oil, and soybean oil are the most widely available edible oils in the market. Palm oil remains the preferred choice due to its lower cost. In recent years, olive oil and corn oil have gained popularity, though these are mainly consumed by higher-income groups, as their prices are more than double that of other oils. The per capita oil consumption is approximately 22 kilograms per year.

#### **Trade:**

To meet the growing demand, palm oil imports are projected to reach 3.7 million tons in 2025/26, reflecting a 3 percent increase over the 2024/25 import estimate. Meanwhile, the forecast for soybean oil imports in 2024/25 has been reduced to 200,000 tons, marking a 20 percent decrease compared to the 2025/26 projection. This reduction is due to an increase in soybean seed imports and expected growth in domestic soybean crushing and oil production.

Based on the pace of imports during the first four months of 2024/25, the palm oil import forecast has been revised upward to 3.6 million tons for 2024/25.



Figure 7: Palm oil Imports (1,000 Tons)

180 160 140 120 100 80 60 40 20 0 (Oct-Sep) (Oct-Sep) (Oct-Sep) (Oct-Feb) 2021/22 2022/23 2023/24 2024/25 ■ Argentina ■ Paraguay ■ Brazil

Figure 8: Soybean oil Imports (1,000 Tons)

## **Prices:**

Local prices tend to fluctuate based on international price trends. Palm oil prices rose between October and December 2024, leading to higher retail prices in local markets. However, by the start of 2025, international prices began to decline, but local retail prices have remained high. As of late March 2025, the average price of edible oil in Pakistan was \$2.06 per kilogram.

**Table 13: Total Oil- Production, Supply and Distribution. (1,000 MT)** 

Oil, Total	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct-23		Oct-24		Oct	-25
Pakistan	USDA	New	USDA	New	USDA	New
	Official	Post	Official	Post	Official	Post
Crush (1000 MT)	-	4,940		4,795	-	5,520
Beginning Stocks (1000 MT)	-	275		234	-	291
Production (1000 MT)	-	1,123		1,079	-	1,230
MY Imports (1000 MT)	-	3,204		3,865	-	3,905
Total Supply (1000 MT)	-	4,602		5,178	-	5,426
MY Exports (1000 MT)	-	2		0	-	0
Industrial Dom. Cons. (1000 MT)	-	125		130	-	130
Food Use Dom. Cons. (1000 MT)	-	4,215		4,731	-	4,980
Feed Waste Dom. Cons. (1000 MT)	-	26		26	-	26
Total Dom. Cons. (1000 MT)	-	4,366		4,887	-	5,136
Ending Stocks (1000 MT)	-	234		291	-	290
Total Distribution (1000 MT)	_	4,602		5,178	-	5,426

Table 14: Cottonseed Oil- Production, Supply and Distribution. (1,000 MT)

Oil, Cottonseed	2023/2024		2024/2	2025	2025/2026			
Market Year Begins	Oct-23		Oct-	-24	Oct-25			
Pakistan	USDA	New	USDA	New	USDA	New		
	Official	Post	Official	Post	Official	Post		
Crush (1000 MT)	2,730	2,850	2,210	2,200	0	2,250		
Extr. Rate, (PERCENT)	0.155	0.155	0.155	0.155	0	0.155		
Beginning Stocks (1000 MT)	9	9	28	26	0	18		
Production (1000 MT)	424	442	343	342	0	350		
MY Imports (1000 MT)	0	0	0	0	0	0		
Total Supply (1000 MT)	433	451	371	368	0	368		
MY Exports (1000 MT)	0	0	0	0	0	0		
Industrial Dom.Cons(1000 MT)	35	35	35	35	0	35		
Food Use Dom.Cons(1000 MT)	370	390	315	315	0	315		
Feed Waste Dom.Cons(1000 MT)	0	0	0	0	0	0		
Total Dom. Cons. (1000 MT)	405	425	350	350	0	350		
Ending Stocks (1000 MT)	28	26	21	18	0	18		
Total Distribution (1000 MT)	433	451	371	368	0	368		
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Table 15: Rapeseed Oil- Production, Supply and Distribution. (1,000 MT)

Oil, Rapeseed	2023/2024		2024/2	2025	2025/2026			
Market Year Begins	Oct-23		Oct-	24	Oct-25			
Pakistan	USDA	New	USDA	New	USDA	New		
	Official	Post	Official	Post	Official	Post		
Crush (1000 MT)	1,200	1,200	1,080	1,080	0	1,145		
Extr. Rate (PERCENT)	0.395	0.395	0.395	0.395	0	0.395		
Beginning Stocks (1000 MT)	31	31	27	27	0	23		
Production (1000 MT)	474	474	427	427	0	453		
MY Imports (1000 MT)	0	0	10	10	0	0		
Total Supply (1000 MT)	505	505	464	464	0	476		
MY Exports (1000 MT)	2	2	0	0	0	0		
Industrial Dom.Cons(1000 MT)	10	10	10	10	0	10		
Food Use Dom.Cons(1000 MT)	465	465	430	430	0	440		
Feed Waste Dom.Cons(1000 MT)	1	1	1	1	0	1		
Total Dom. Cons. (1000 MT)	476	476	441	441	0	451		
Ending Stocks (1000 MT)	27	27	23	23	0	25		
Total Distribution (1000 MT)	505	505	464	464	0	476		
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Table 16: Sunflower seed Oil- Production, Supply and Distribution. (1,000 MT)

Oil, Sunflower seed	2023/2024		2024/2025		2025/2026			
Market Year Begins	Oct-23		Oct-	24	Oct-25			
Pakistan	USDA	New	USDA	New	USDA	New		
	Official	Post	Official	Post	Official	Post		
Crush (1000 MT)	190	190	130	115	0	125		
Extr. Rate, (PERCENT)	0.4	0.4	0.4	0.4	0	0.4		
Beginning Stocks (1000 MT)	0	0	0	0	0	0		
Production (1000 MT)	76	76	52	46	0	50		
MY Imports (1000 MT)	6	6	5	5	0	5		
Total Supply (1000 MT)	82	82	57	51	0	55		
MY Exports (1000 MT)	0	0	0	0	0	0		
Industrial Dom.Cons(1000 MT)	0	0	0	0	0	0		
Food Use Dom.Cons(1000 MT)	82	82	57	51	0	55		
Feed Waste Dom.Cons(1000 MT)	0	0	0	0	0	0		
Total Dom. Cons. (1000 MT)	82	82	57	51	0	55		
Ending Stocks (1000 MT)	0	0	0	0	0	0		
Total Distribution (1000 MT)	82	82	57	51	0	55		
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Table 17: Soybean Oil- Production, Supply and Distribution. (1,000 MT)

Oil, Soybean	2023/2024		2024	/2025	2025/2026		
Market Year Begins	Oct-23		Oct	t-24	Oct-25		
Pakistan	USDA	USDA New		USDA New		New	
	Official	Post	Official	Post	Official	Post	
Crush (1000 MT)	700	700	1,600	1,400	0	2,000	
Extr. Rate, (PERCENT)	0.187	0.187	0.188	0.188	0	0.188	
Beginning Stocks (1000 MT)	55	55	21	21	0	50	
Production (1000 MT)	131	131	301	264	0	377	
MY Imports (1000 MT)	65	98	250	250	0	200	
Total Supply (1000 MT)	251	284	572	535	0	627	
MY Exports (1000 MT)	0	0	0	0	0	0	
Industrial Dom.Cons(1000 MT)	10	10	10	10	0	10	
Food Use Dom.Cons(1000 MT)	220	253	510	475	0	570	
Feed Waste Dom.Cons(1000 MT)	0	0	0	0	0	0	
Total Dom. Cons. (1000 MT)	230	263	520	485	0	580	
Ending Stocks (1000 MT)	21	21	52	50	0	47	
Total Distribution (1000 MT)	251	284	572	535	0	627	

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Table 18: Palm Oil- Production, Supply and Distribution. (1,000 MT)

Oil, Palm	2023/2024		2	024/2025	2025/2026		
Market Year Begins		Oct-23		Oct-24	Oct-25		
Pakistan	USDA	New	USDA	New	USDA	New	
	Official	Post	Official	Post	Official	Post	
Area Planted (1000 HA)	0	0	0	0	0	0	
Area Harvested (1000 HA)	0	0	0	0	0	0	
Trees (1000 TREES)	0	0	0	0	0	0	
Beginning Stocks (1000 MT)	180	180	160	160	0	200	
Production (1000 MT)	0	0	0	0	0	0	
MY Imports (1000 MT)	3,100	3,100	3,300	3,600	0	3,700	
Total Supply (1000 MT)	3,280	3,280	3,460	3,760	0	3,900	
MY Exports (1000 MT)	0	0	0	0	0	0	
Industrial Dom.Cons(1000 MT)	70	70	70	75	0	75	
Food Use Dom.Cons(1000 MT)	3,025	3,025	3,140	3,460	0	3,600	
Feed Waste Dom.Cons(1000 MT)	25	25	25	25	0	25	
Total Dom. Cons. (1000 MT)	3,120	3,120	3,235	3,560	0	3,700	
Ending Stocks (1000 MT)	160	160	225	200	0	200	
Total Distribution (1000 MT)	3,280	3,280	3,460	3,760	0	3,900	
Yield (MT/HA)	0	0	0	0	0	0	

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# **Attachments:**

No Attachments