



GOVERNMENT OF PAKISTAN
MINISTRY OF NATIONAL FOOD SECURITY AND RESEARCH



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From

Dr. Haroon Sarwar Awan
Economic Consultant

To

- 1- Executive Director General, MOC, Islamabad
- 2- Director Debt, MOF, Islamabad
- 3- Consultant Agriculture, Ministry of Planning,
- 4- Chief (Food & Agriculture), PC, Islamabad
- 5- Joint Secretary (Admin), MOWR, Islamabad
- 6- Secretary Industries & Production, MOIP, Islamabad
- 7- Coordinator to PM (Agri & Food Security), PMO, Islamabad
- 8- Secretary Agriculture, Government of GB,
- 9- Secretary Agriculture, Government of AJK,
- 10- Secretary, Sindh Agriculture Department,
- 11- , Agriculture Department KPK,
- 12- Balochistan, ,
- 13- Secretary, Livestock AJK,
- 14- Secretary, Livestock Sindh,
- 15- Secretary, Livestock KP,
- 16- Secretary, Agri Livestock and Fisheries GB,
- 17- Secretary, Livestock Punjab,
- 18- Secretary, Government of Balochistan, Quetta
- 19- Secretary, Irrigation Balochistan, Balochistan
- 20- Secretary, Irrigation AJK, AJK
- 21- Secretary Irrigation, Irrigation, GB
- 22- Secretary, Irrigation Punjab, Punjab
- 23- Secretary, Irrigation KP, KP
- 24- Secretary, Irrigation Sindh, Sindh
- 25- Chairman, REAP,
- 26- Chairman, All Pakistan Meat Exporters and Processors Association,
- 27- Chairman, Pakistan Fruits and Vegetables Association,
- 28- Director, GCI, GCI
- 29- GCLI, GCLI, GCLI
- 30- Director M, SIFC, SIFC

SUBJECT: MEETING OF AGRICULTURE WORKING GROUP WITH KSA - SAUDI-PAKISTAN ECONOMIC COOPERATION FRAMEWORK

The subject meeting of Agriculture working group of Pakistan and KSA was held on 15-12-2025. The Saudi team hosted the meeting, while the Secretary NFS&R, officers from the Ministry, and representatives from SIFC, participated from the Committee Room of M/o NFS&R.

The representatives from GCLI, provincial agriculture departments, and the private sector attended virtually. List of participants is annexed,

The meeting began with a round of introductions, after which the KSA team presented their analysis of Pakistan's horticulture sub-sector using a three-pillar framework: landscape overview, opportunities and interventions, and roadmap. The executive summary highlighted that Pakistan ranks 48th globally in horticulture exports, with 75% of exports coming from five main commodities, and identified over five key strengths and more than ten major challenges. The team noted that while the Ministry of National Food Security & Research (M/O NFS&R) had previously recommended focusing on meat and poultry, horticulture was prioritized for immediate potential, with livestock and poultry sectors to be considered in the future once infrastructure is developed. The landscape overview outlined the strengths and challenges along the horticulture value chain. The opportunities and interventions pillar emphasized Pakistan's potential across farming, production, processing, and exports, with four fruits; mangoes, citrus, dates, and bananas, and four vegetables; onions, potatoes, cabbages, and tomatoes, prioritized for export. Key markets and intervention areas, including on-farm production, processing, and logistics and distribution, were identified.

The Secretary highlighted the Government of Pakistan's recognition of horticulture as an important sector with potential to transform into a trade-oriented industry. He noted that horticulture contributes only about 5% of overall agricultural output and that processing remains below 5%. Common challenges across sectors include limited cold chain infrastructure, inadequate refrigerated transportation, and logistical gaps. The Secretary emphasized that focusing on a single sub-sector alone would not drive meaningful transformation and outlined a comprehensive end-to-end government approach covering infrastructure, policy, and regulatory reforms. He shared progress in the livestock sector, including the national Foot and Mouth Disease (FMD) control program and animal tracking systems, noting Pakistan's large livestock potential with approximately 251 million animals. Aquaculture and fisheries were also highlighted for their competitive advantages, particularly disease-free inland fisheries and shrimp exports. While supporting a focused approach on horticulture, the Secretary stressed the need for parallel workstreams in other agri-food sectors with similar challenges.

The KSA team agreed with the Secretary's observations, drawing on international examples from China, Thailand, and Bangladesh, which demonstrated that successful export-led growth is achieved through sequenced, focused interventions rather than attempting to develop all sectors simultaneously. Horticulture was identified as capable of delivering relatively quick and tangible results, with potential exports of USD 4 billion with limited additional investment. A phased approach was suggested, beginning with a five-year focus on horticulture, followed by gradual expansion into livestock and broader agriculture to achieve full integration of the agri-food value chain by 2030–2032. The KSA team proposed 14 interventions largely requiring minimal fiscal outlay, focusing on policy and institutional measures, regulatory reforms, human capital development, compliance and standards strengthening, and leveraging existing trade agreements. Initiating comprehensive reforms in livestock at this stage would require significant financial investment, estimated at USD 2–3 million, reinforcing the rationale for a phased, prioritized approach.

The Secretary expressed full agreement but emphasized that trade enhancement must be balanced with food security and domestic nutrition requirements. He stressed that Pakistan's large and growing population necessitates multi-pronged strategies to ensure the availability of a balanced diet, including proteins and carbohydrates, alongside export-led growth. Mr. Shadi Shehab endorsed the proposed sequencing approach, agreeing that an initial focus on horticulture

for four to five years would be effective, after which attention could expand to other sectors. Key areas for collaboration were identified, including food security, pest and disease control, cold chain system development, and support for food processing industries, particularly for mangoes, dates, and citrus.

In response to previous engagements with SALIC, the Secretary shared lessons from two pilot initiatives: alfalfa production faced challenges due to quality and high capital expenditure requirements, while rice cultivation was constrained by private sector limitations. The Green Pakistan Initiative proposes new alfalfa projects covering approximately 30,000 acres. On horticulture, constraints include limited processing capacity, inadequate cold storage, weak logistics, and seed quality issues, such as disease incidence in bananas. The supply-side challenges were noted as the primary limitation (~90%), with market access representing a smaller portion (~10%). Short shelf-life restricts sea transport, forcing reliance on air freight and increasing costs. Potato and onion exports are subject to cyclical production and price fluctuations, affecting processing viability, though mango pulp processing presents a valuable opportunity. The Secretary advised rationalizing export ambitions, including the USD 4.2 billion target, with a broader product mix to achieve realistic growth.

Muhammad Ashraf from the Ministry of Commerce highlighted that Pakistan's priority horticulture products mainly cater to ethnic or niche markets. Mangoes are typically soft, highly sweet varieties, whereas international markets prefer firmer types like Tommy Atkins or Kent, suitable for long-duration sea shipment. Similarly, citrus exports are constrained by the predominance of kinnow, which has limited appeal as a table fruit. Dates cater mainly to Muslim populations, while banana production is impacted by disease and declining yields. Potatoes and onions dominate vegetable exports but suffer from cyclical production, price volatility, and processing challenges. He emphasized that addressing supply-side bottlenecks is critical to unlock export potential.

The host noted high logistics costs, particularly for air transport, and suggested that consistent quality and proper branding could justify premium pricing. Muhammad Ashraf clarified that sea transport is operational but limited by short shelf-life of most products; for example, tomatoes can only be shipped to GCC markets by sea, while Europe requires a minimum 35–40 day shelf-life. The host concluded that this limitation provides a strategic advantage for GCC exports.

Mr. Shadi requested a summarized version of the minutes highlighting key points and suggested prioritizing and numbering them according to importance, with input on the earlier slides to be shared by the end of the week. The Secretary concluded the meeting by thanking participants for their candid inputs and emphasizing the Government's eagerness to continue engagement in mutually beneficial ways.

LIST OF PARTICIPANTS (In Person)

S#	Name	Designation, Institute
1	Mr. Amir Mohyudin	Secretary NFS&R
2	Dr. Haroon Sarwar Awan	Economic Consultant, M/o NFS&R
3	Muhammad Anwar Bhatti	Sector Specialist, SIFC
4	Dr. Muhammad Azam Niazi	Coord(Agri), SIFC
5	Dr. Ghulam Jellani	PSO/Director (Hort), PARC
6	Muhammad Khalifa	JS, MoIP

7	Muhammad Yasir	CAO, MoIP
8	Dr. Muhammad Junaid	Consultant, MoNFS&R
9	Mr. Ayaz	Director(M), SIFC
10	Dr. Muhammad. Shahab	RA Agri, SIFC
11	Dr. Imtiaz Hussain	PD, PARC
12	Muhammad Ashraf	Executive Director General, M/o Commerce

Online

S. No	Name / Designation	S. No	Name / Designation
1	Engr. Shadi Shehab, KSA	2	Secretary, Food Department GB
3	Dr. Arif Rehman, Chief M/o PD&SI	4	DG Agriculture Extension, GB
5	Mr. Sohail, GCI	6	Mansoor Alam, Secretary Agriculture, Livestock and Fisheries, GB
7	Chairman REAP	8	Col. Shah Nawaz, GCLI
9	Mr. Ahmed Umair, Coordinator to PM	10	Mr. Shakil Ahmed, ADG PMC Agriculture Dept of Sindh
11	Secretary, Food Department, Sindh	12	Dr. Hizbullah Bhutto DG Livestock Sindh
13	Secretary Food, AJK	14	Director General, Agriculture Research Sindh
15	Secretary Agriculture & Livestock AJK	16	DG, agriculture Extension Balochistan
17	Secretary Agriculture, KP	18	Secretary PC&CMD
19	Secretary Livestock, KP	20	Mr. Sohail Anjum
21	Mr. Sajid, Director Planning KP	22	Mr. Haseeb Khan
23	Secretary, Agriculture Department, Punjab		



Dr. Haroon Sarwar Awan
Economic Consultant

Copy for information to:-

1- PS to Minister., MONFSR, Islamabad



Dr. Haroon Sarwar Awan
Economic Consultant

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Shagufta Yasmin
Monitoring Officer-VI
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