



GOVERNMENT OF PAKISTAN

MINISTRY OF NATIONAL
FOOD SECURITY & RESEARCH
ECONOMIC WING

AGRICULTURE TRADE ANALYSIS

MONTHLY REPORT

*Insights on Pakistan's Agricultural Trade
Performance, Trends and Opportunities*



REPORTING PERIOD
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DATA SOURCE
**PAKISTAN SINGLE
WINDOW (PSW)**



Ensuring Food Security



Promoting Research & Innovation



Building a Resilient Agriculture Sector

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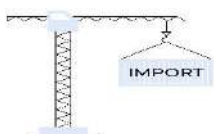
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Top Agri-export Performers (Quantity)

(August 2026-27 vs. August 2022-26)

- Oil Seeds, Nuts & Kernels (365%)
- Tobacco (105%)
- Fish & Fish Preparation (20%)
- Rice (22%)
- Basmati Rice (58%)



Top Agri-import Commodities (August 2026-27 vs. August 2025-25)

- Tea (13%)
- Spice (34%)
- Milk, Cream & Milk Food for Infants (14%)
- Sugar (12%)

Agricultural Commodities with Declining Imports:

(August 2026-27 vs. August 2025-26)

- Soyabean (100%)
- Pulses (54%)
- Dry Fruit & Nuts (30%)
- Palm Oil (29%)

Top Exports Destinations

- UAE (\$77.4 Mn)
- China (\$48.3 Mn)
- Saudi Arabia (\$34.7 Mn)
- Philippines (\$34 Mn)

Top Imports Sources

- Indonesia (\$274.3 Mn)
- Kenya (\$57 Mn)
- Malaysia (\$22.1 Mn)
- China (\$18.9 Mn)

Executive Summary

Grand Total (Exports & Imports)

- **Grand total exports** increased **4%**, rising from **US\$2,419** million (August FY-2026) to **US\$2,508** million (August FY-2027), while **total imports** grew faster at **7.4%**, from **US\$5,273.83** million (August FY-2026) to **US\$5,664.91** million (August FY-2027).
- Overall **trade deficit** widened by approximately **10.6%**, from **US\$ 2,854.83** million to **US\$3,156.91** million.

Food Group (Exports & Imports)

- **Food-group exports** increased modestly by **14%**, from **US\$349.31** million in August FY 2025-26 to **US\$399.00** million in August FY 2026-27, while **food-group imports** decline by **32.4%**, from **US\$725.89** million to **US\$490.42** million over the same period.
- The **food-group trade deficit** decline by approximately **75.7%**, decreasing from **US\$376.58** million in August FY 2025-26 to **US\$91.42** million in August FY 2026-27.
- The increase in **food import values** was driven primarily by higher imports of **TEA (19%)**, **MILK, CREAM & MILK FOOD FOR INFANTS (13%)**, and **SPICES (12%)**. Meanwhile, the modest increase in **food export values** was supported by strong growth in **RICE (31%)**, **TOBACCO (230%)**, **OILSEEDS, NUTS & KERNELS (427%)**, and **MEAT & MEAT PREPARATIONS (29%)**, partly offset by sharp declines in **FRUITS (41%)** and **VEGETABLES (37%)**.

Sectoral and Regional Highlights (Exports & Imports)

- On the export side, crop products and crop-derived processed products dominate the food group (**79%** share in August 2026-27) while **LIVESTOCK** is the fastest-growing sub-sector (**26%** YoY); livestock exports, however, are highly concentrated in Gulf markets, a notable concentration risk despite the strong growth.
- Regionally, **ASIA** remains by far the largest export market and the primary driver of export growth, while **EUROPE** was the main underperformer, with exports falling **27%** year-on-year.
- On the import side, crop products and crop-derived processed products account for 98% of food-group imports and are overwhelmingly sourced from a single country, **INDONESIA** (over **US\$274** million in August 2026-27); the **33%** YoY decline in crop imports is the primary driver of the overall food-group import contraction.
- Regionally, import markets are considerably more concentrated than export markets: **ASIA** (driven by Indonesia) remains the largest import source, while **AMERICA** and **OCEANIA** recorded the steepest YoY declines, down **77%** and **92%** respectively.
- Overall, export market concentration is rising but remains comparatively low, whereas import markets - both by sub-sector and by region - are already highly concentrated, underscoring greater exposure to supply disruption on the import side than on the export side.

New and Lost Markets (Exports & Imports), August FY 2026-27

In August FY 2026–27, the **Basmati rice** category completely lost export markets worth **\$0.19** million in **Comoros, Dominica, Sierra Leone, and Martinique**. However, during the same period, it gained a market worth **\$1.06** million in **Iran**.

The **Other Rice** category completely lost export markets worth **\$1.14** million in **Comoros, Dominica, El Salvador, Gabon, and Ukraine**. However, during the same period, it gained markets worth **\$8.04** million in **Guinea-Bissau and Gambia**.

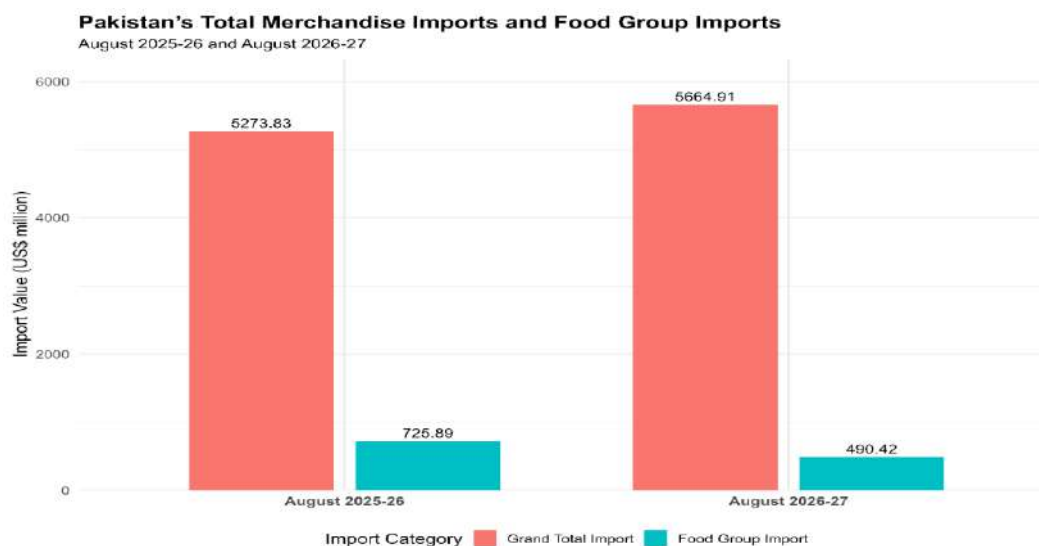
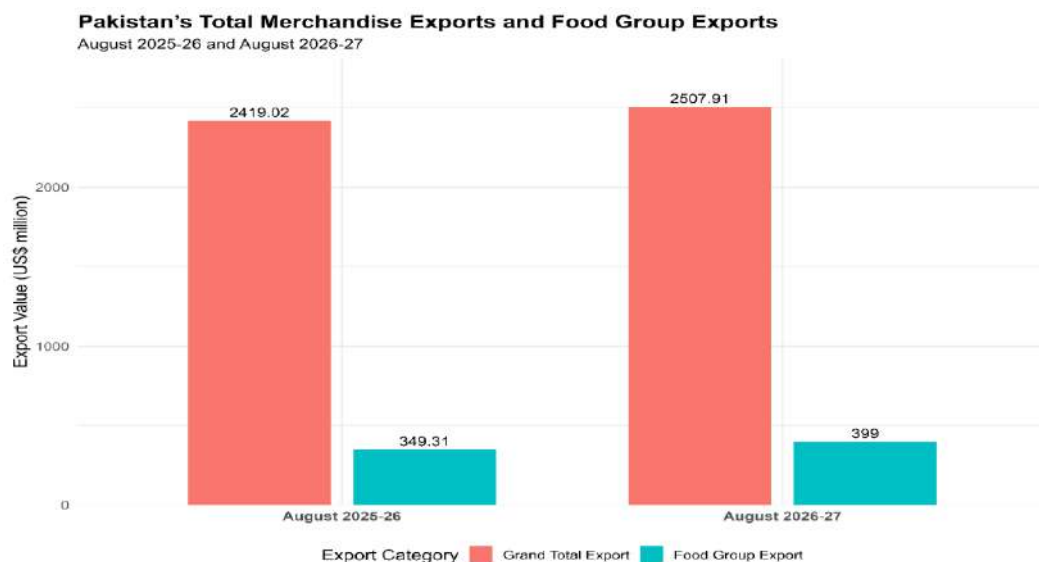
Sugar confectionery, valued at **\$0.13** million, lost export markets in **Honduras, Sierra Leone, and Venezuela**, while **sweet biscuits**, valued at **\$0.13** million, lost markets in **Gabon and Myanmar**.

Tobacco gained new markets worth **\$1.96** million in **Sudan and Algeria**, while **mangoes (\$2.42 million)** and **bovine carcasses (\$1.28 million)** gained markets in **Iran**.

In August FY 2026–27, the **top three new import markets** were **Latvia (\$0.06 million)** for **dried shelled peas**, **Iceland (\$0.04 million)** for **fats and oils**, and **Ecuador** for **prepared pineapples**.

Compared with August 2025–26, Pakistan's agricultural imports from Afghanistan in August 2026–27 recorded a combined decline of approximately **US\$36.6 million in value** and **176,891 metric tonnes in quantity**. The decline was primarily attributable to **Fresh Grapes** (US\$17.10 million; 45,286 MT), **Fresh Tomatoes** (US\$12.64 million; 95,317 MT), **Fresh Cucumbers & Gherkins** (US\$4.26 million; 27,862 MT), and **Fresh Apricots** (US\$1.34 million; 4,509 MT). Fresh Grapes accounted for the largest decline in import value, while Fresh Tomatoes recorded the largest decline in import quantity.

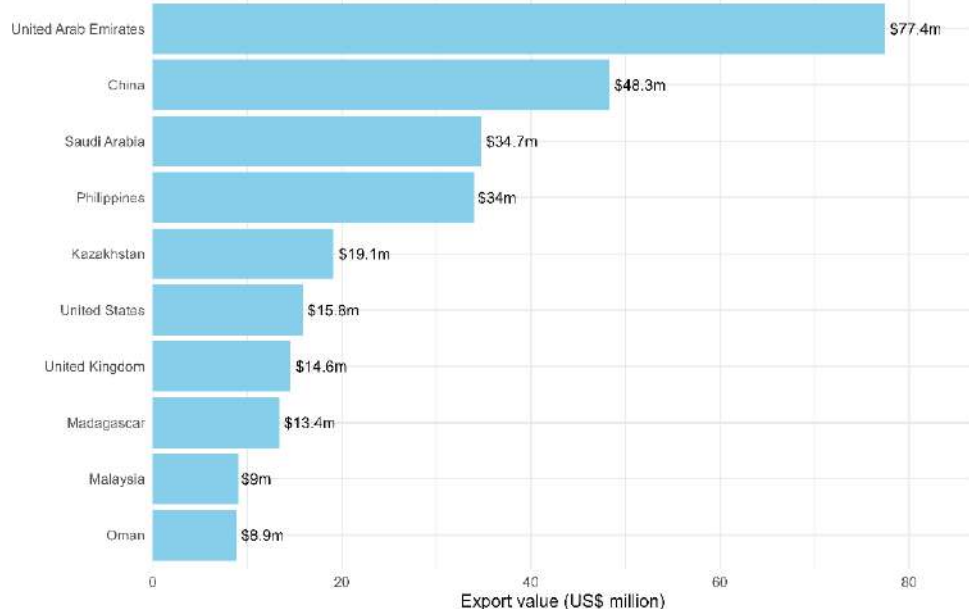
Merchandise and Food Group Exports and Imports



Food Group Export Profile

Top 10 Export Destinations

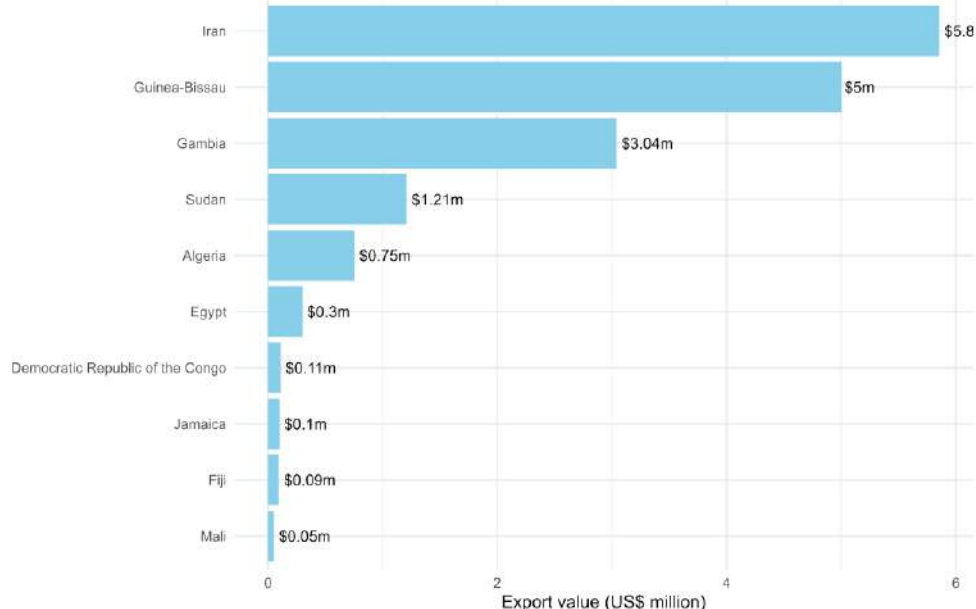
August 2026-27



The UAE is the clear top export destination in August 2026-27 at \$77.4M, over 60% larger than second-ranked China (\$48.3M), followed by Saudi Arabia (\$34.7M) and the Philippines (\$34M) in a close third/fourth tier. The list is heavily weighted toward Asia and the Middle East (7 of 10 markets), with only the US and UK representing Western markets, and the drop-off from the top 4 (all above \$30M) to the remaining six (all under \$20M) reinforces the concentration trend seen in the CR5/CR10 data — a handful of destinations account for a disproportionate share of exports.

New Export Markets

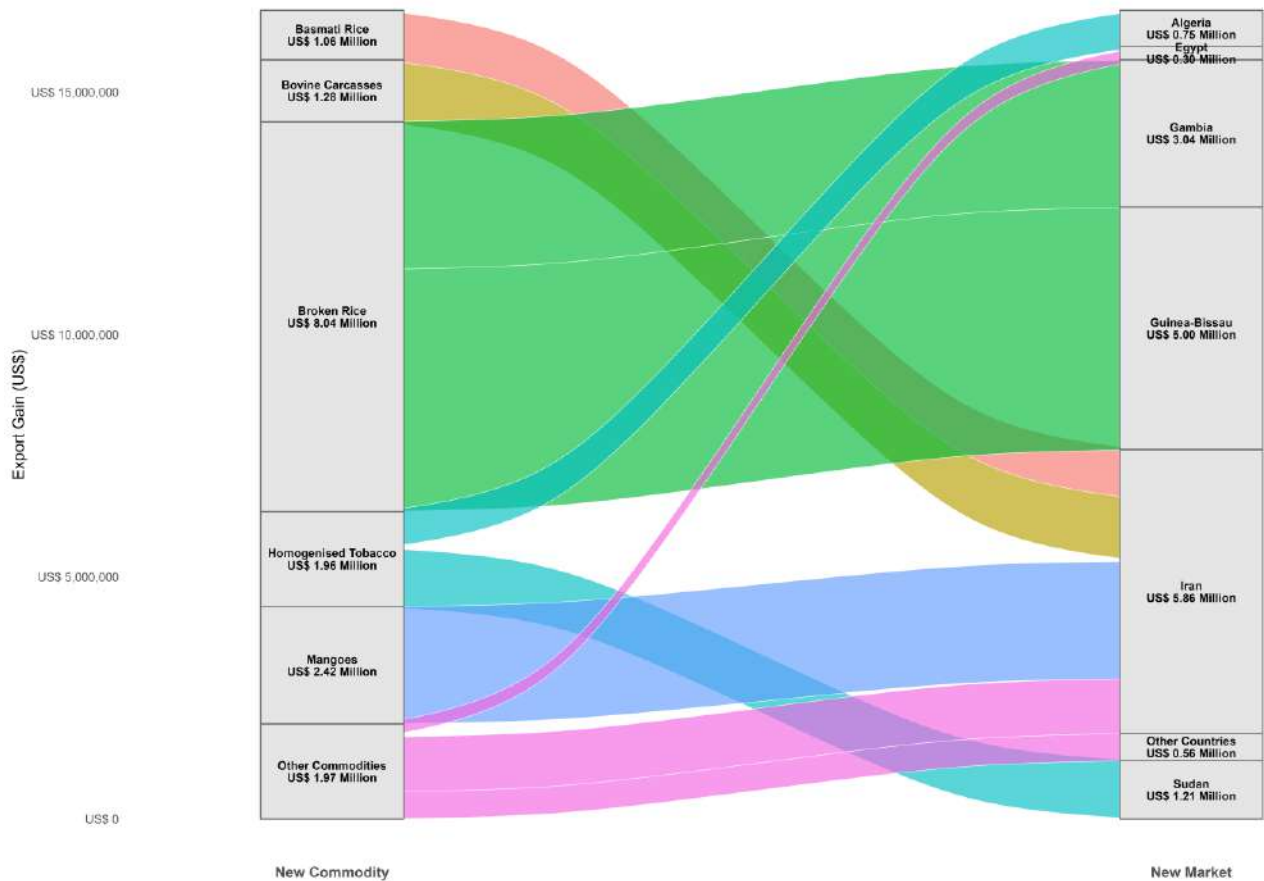
Markets entering Pakistan's export destinations in August 2026-27



Ten new markets opened up in August 2026-27, led by Iran (\$5.8M) and Guinea-Bissau (\$5M), which together account for the large majority of new-market value; Gambia adds a further \$3.04M. The list is dominated by African and Middle Eastern countries (Iran, Guinea-Bissau, Gambia, Sudan, Algeria, Egypt, DR Congo, Mali), with only Jamaica and Fiji outside that pattern, and the remaining seven markets are all under \$1.3M - meaningful diversification in the number of destinations, even if the dollar value is modest next to the concentration seen among the top existing markets.

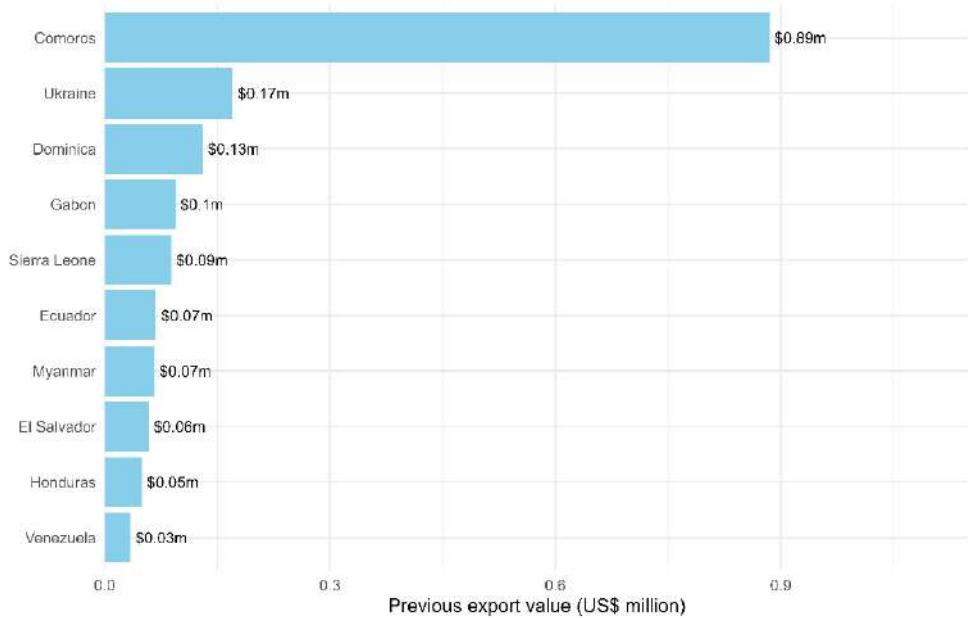
New Agricultural Export Markets: Commodity–Destination Linkages (August 2026-27)

Top 5 commodities and top 6 destinations shown individually, rest grouped as "Other" | US\$



Lost Export Markets

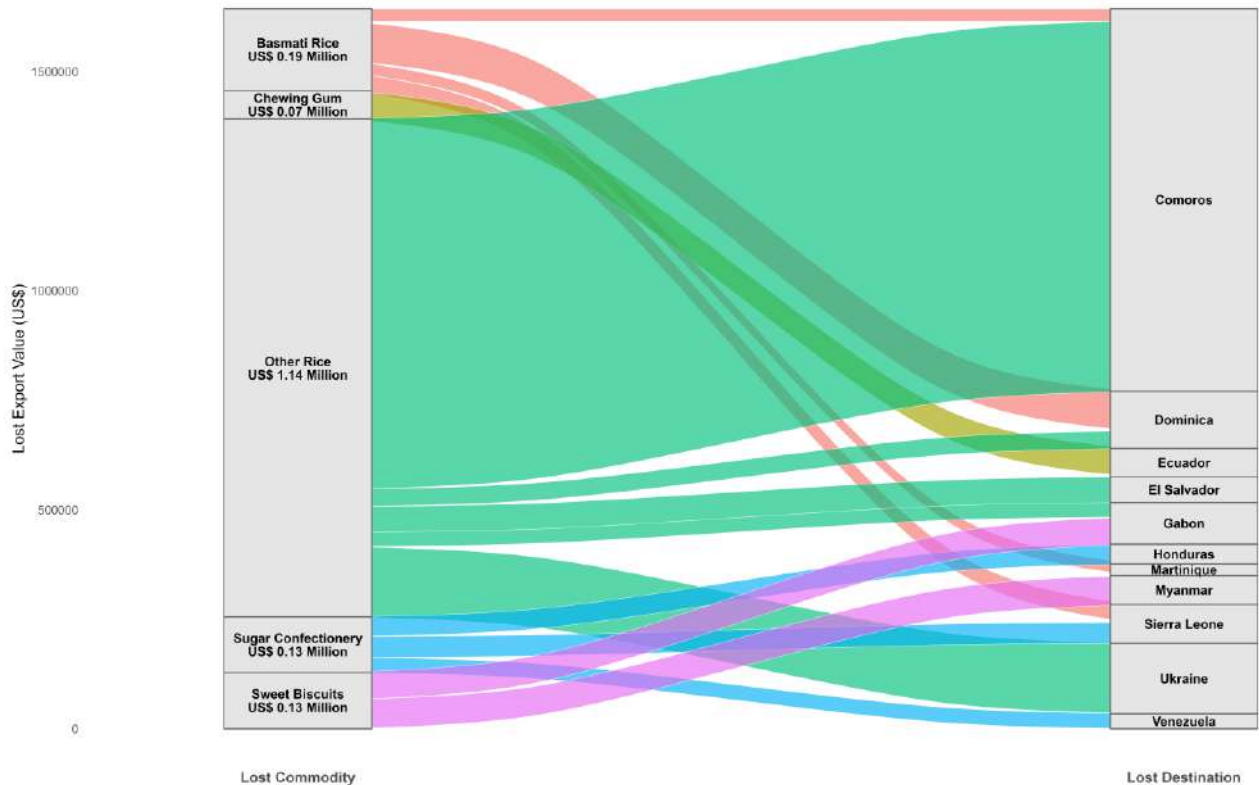
Markets with exports in August 2025-26 but none in August 2026-27



Ten markets that had exports in August 2025-26 recorded none in August 2026-27, but the losses are minor - Comoros is the largest at just \$0.89M, and every other lost market is under \$0.2M, with most below \$0.1M. Given the new-market gains seen in the previous chart (led by \$5.8M from Iran and \$5M from Guinea-Bissau alone), these losses are negligible by comparison, market entry is far outpacing market exit both in count and value.

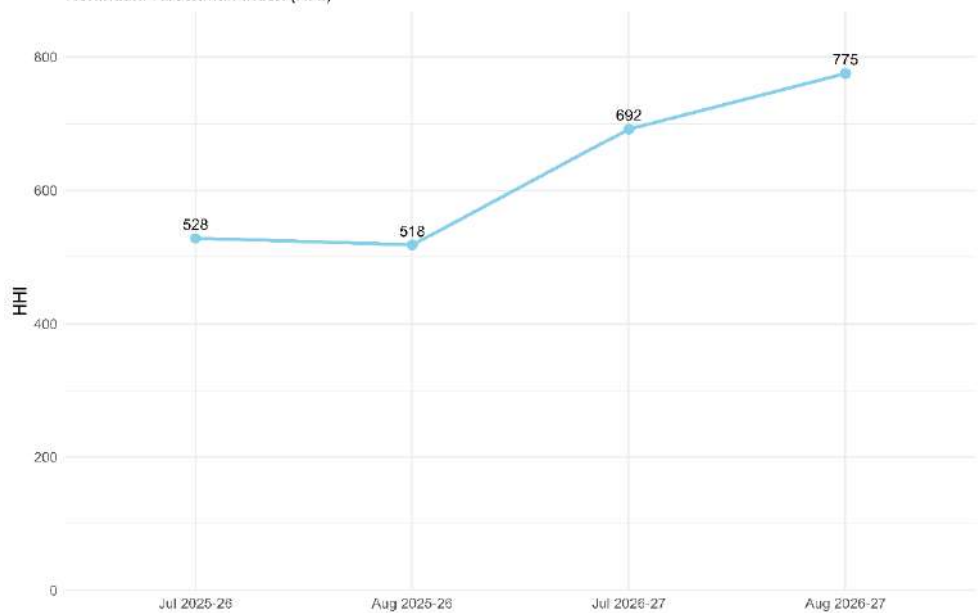
Lost Agricultural Export Markets: Commodity–Destination Linkages (August 2026-27)

Top 15 lost commodity–destination flows | US\$



Export Market Concentration

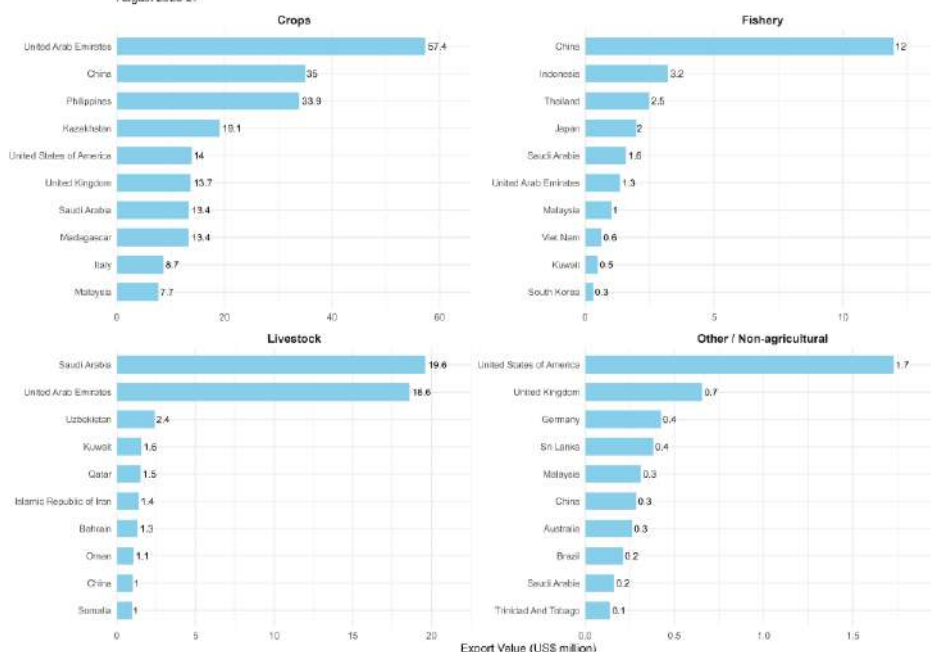
Herfindahl-Hirschman Index (HHI)



Export market concentration stayed roughly flat and low (518–528 HHI) through 2025-26, but rose sharply in 2026-27, jumping to 692 in July and 775 in August. While the index is still within the "low concentration" range (below 1,500), the steady upward trend suggests exports are becoming more reliant on fewer destination markets, a trend worth monitoring if it continues.

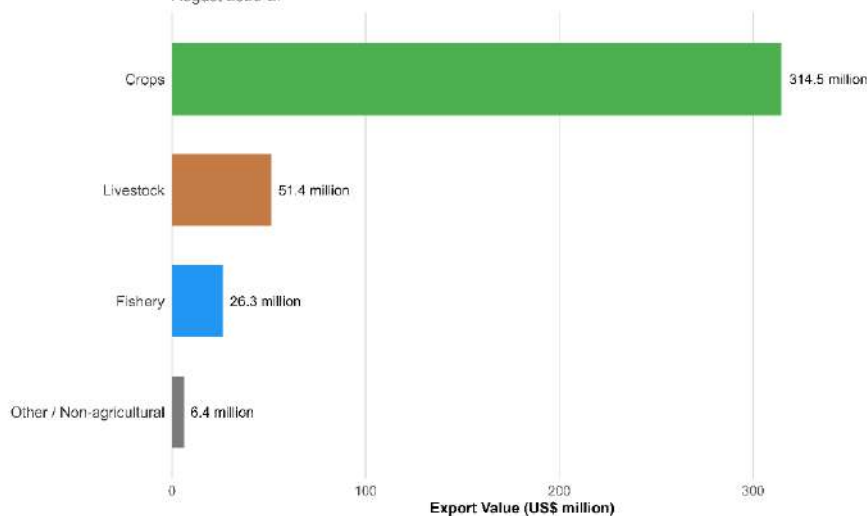
Sectoral Based Exports Analysis

Top 10 Export Markets by Food Group Sub-Sector
August 2026-27



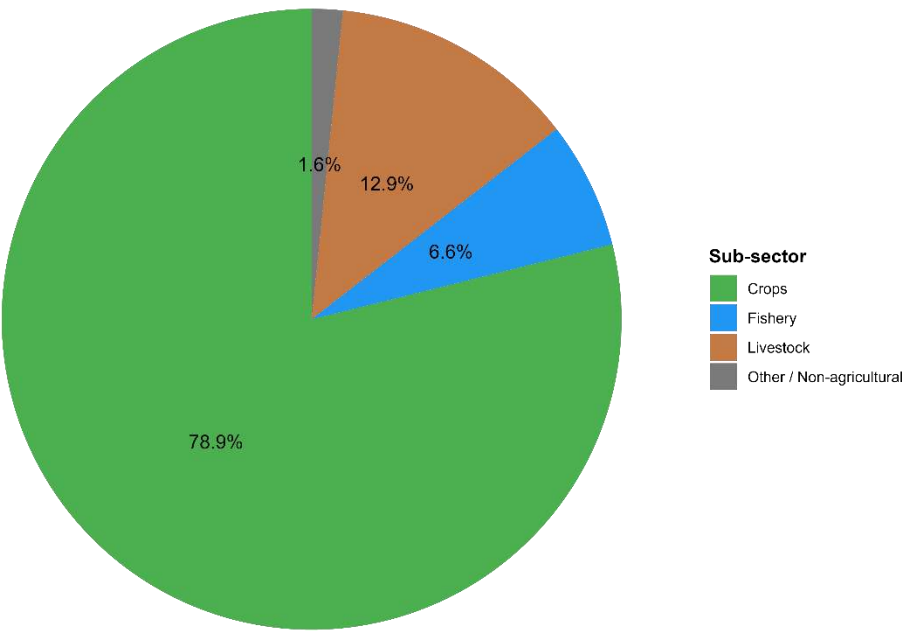
Each sub-sector leans on a distinct set of buyers: crops are led by the UAE (\$57.4M) and China (\$35M), with a reasonably long tail down to Malaysia (\$7.7M); fishery is dominated almost entirely by China (\$12M) - more than triple the next market, Indonesia (\$3.2M); livestock is concentrated in Gulf markets, with Saudi Arabia (\$19.6M) and the UAE (\$18.6M) far outstripping the rest (all under \$2.5M); and "Other/Non-agricultural" is led by the US (\$1.7M) but stays small and thin across the board (nothing above \$0.7M beyond that). The Gulf and Middle East dominance in livestock, and China's near-monopoly in fishery, visually confirm the high HHI/CR10 and low diversification scores seen for those two sub-sectors, while crops' more spread-out top 10 explains its comparatively better diversification

Food Group Exports by Agricultural Sub-Sector and Other Products
August 2026-27



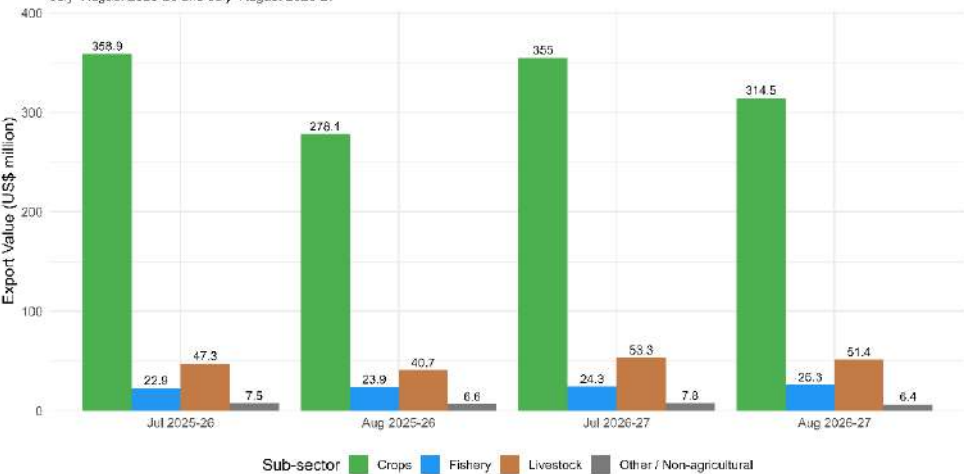
Agricultural exports in August FY 2026-27 were heavily concentrated in the Crops sub-sector, which accounted for US\$314.8 million, or approximately 79% of total food-group exports of US\$399.0 million. Livestock exports amounted to US\$51.4 million, followed by Fishery exports at US\$26.3 million and Other/Non-agricultural products at US\$6.4 million. Overall, the increase in food-group exports from US\$349.31 million to US\$399.00 million (14.2%) was therefore primarily associated with the strong contribution of the Crops sub-sector, which remained the dominant component of Pakistan's food-group exports.

Composition of Food Group Exports by Subsector
August 2026-27



In August 2026-27, crops dominate Pakistan's food group exports at 78.9% of the total, followed by livestock (12.9%) and fishery (6.6%), with the "Other/Non-agricultural" category marginal at 1.6%. This heavy concentration in crops highlights limited diversification across the food export basket.

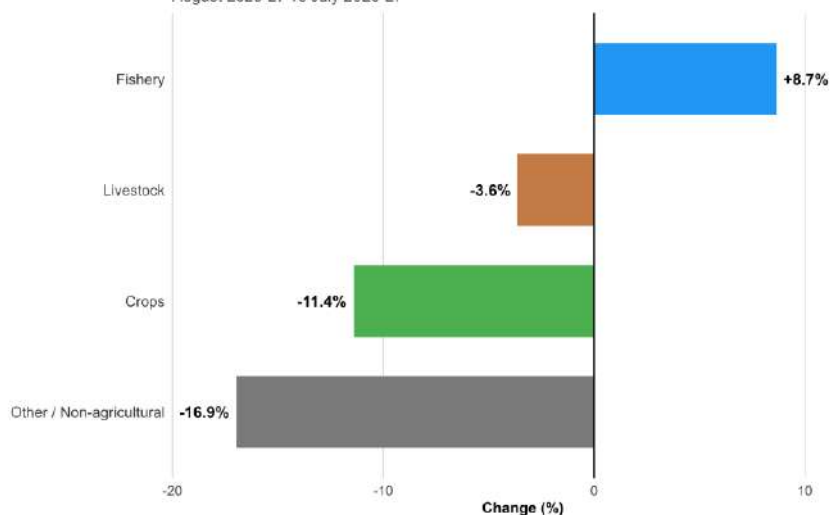
Food Group Exports by Agricultural Sub-Sector and Other Products
July–August 2025-26 and July–August 2026-27



Crops remain the dominant export sub-sector across all four periods, though both years show the same July-to-August seasonal dip (2025-26: \$358.9M→\$278.1M; 2026-27: \$355M→\$314.5M).

Month-on-Month Growth in Food Group Exports by Sub-Sector

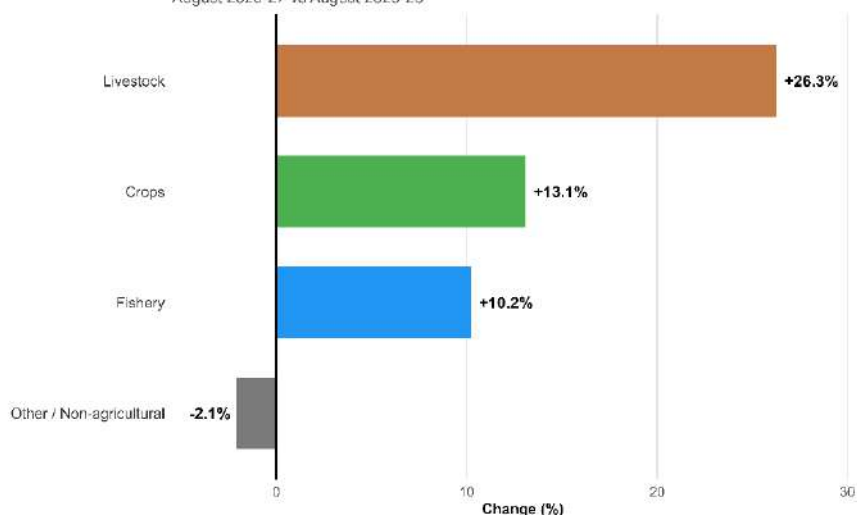
August 2026-27 vs July 2026-27



Fishery was the only sub-sector to grow from July to August 2026-27, up 8.7%, while every other sub-sector declined over the same month. The drop-off was steepest for "Other/Non-agricultural" (-16.9%), followed by crops (-11.3%) and a milder decline in livestock (-3.6%) - indicating a broad-based monthly pullback across most of the export base, with fishery the lone exception.

Year-on-Year Growth in Food Group Exports by Agricultural Sub-Sector

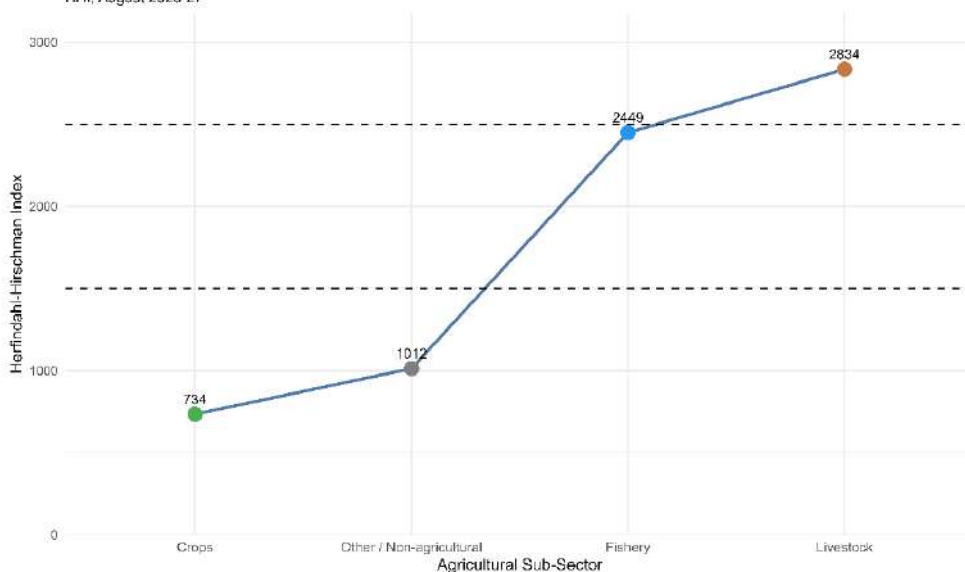
August 2026-27 vs August 2025-26



Livestock led YoY growth at +26.3%, well ahead of crops (+13.1%) and fishery (+10.2%), while "Other/Non-agricultural" was the only sub-sector to contract, down 2.1%. Since crops carry by far the largest export base, their solid +13.1% growth likely drives most of the absolute dollar gain even though livestock grew faster in percentage terms.

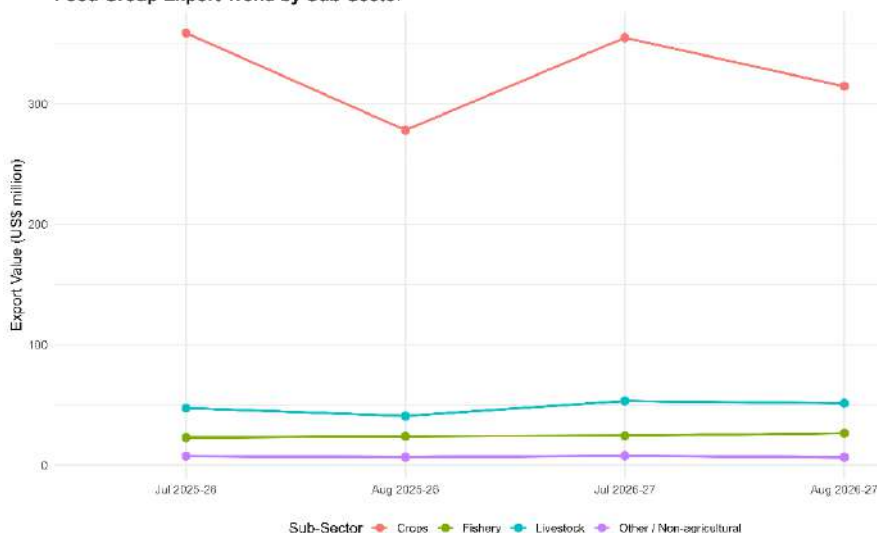
Export Market Concentration by Sub-Sector

HHI, August 2026-27



Market concentration varies sharply by sub-sector: crops (734) and "Other/Non-agricultural" (1012) sit in the low-concentration range, spreading exports across many destinations, while fishery (2449) sits just at the moderate/high boundary and livestock (2834) crosses into high concentration - meaning livestock exports rely heavily on just a few markets. This is notable given livestock is also the fastest-growing sub-sector (+26.3% YoY), so its growth is being driven by a narrow set of buyers, a potential vulnerability if any of those markets pull back.

Food Group Export Trend by Sub-Sector

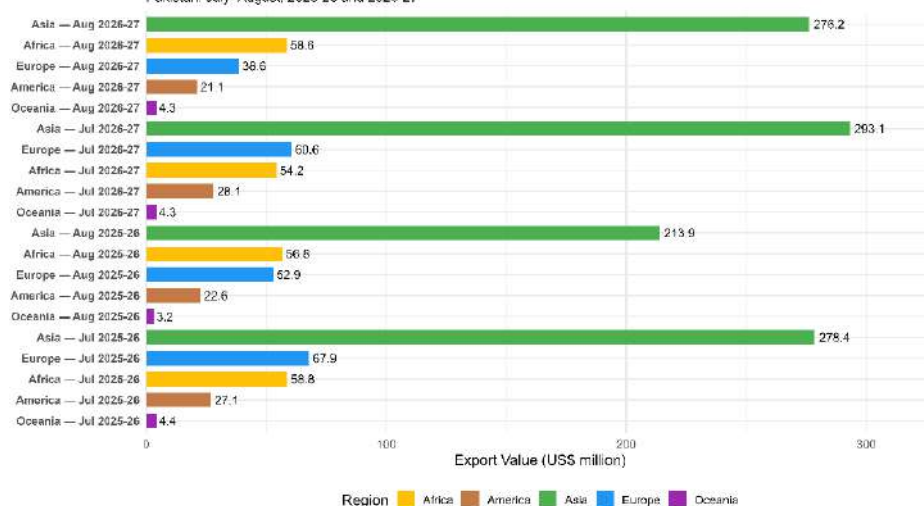


Crops trace a clear seasonal zigzag well above the other sub-sectors, dipping each August (\$358.9M→\$278.1M in 2025-26, \$355M→\$314.5M in 2026-27) before recovering - while livestock, fishery, and "Other/Non-agricultural" stay tightly bunched near the bottom of the chart, all under \$55M throughout. Livestock and fishery show a modest upward drift from 2025-26 into 2026-27, consistent with their YoY growth rates, but the scale gap makes clear that crops alone set the overall trend for total food group exports.

Regional Based Exports Analysis

Food Group Exports by Region

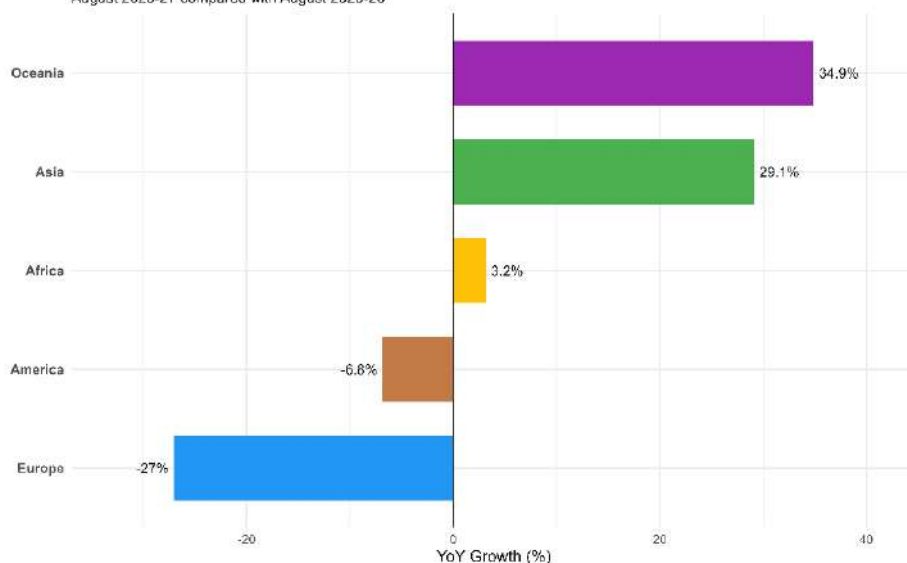
Pakistan: July–August, 2025-26 and 2026-27



Asia dominates food group exports by a wide margin across all four periods (all above \$210M, vs. under \$70M for every other region), and shows the same July-to-August seasonal dip seen in the crops data. The most notable shift is Europe, which fell sharply from \$52.9M in August 2025-26 to \$38.6M in August 2026-27 (down ~27% YoY) — a clear underperformer relative to the total export growth seen elsewhere. Africa held roughly steady and even edged up slightly YoY (56.8→58.6), while America and Oceania stayed small and largely flat throughout, with Oceania consistently the smallest region by a wide margin.

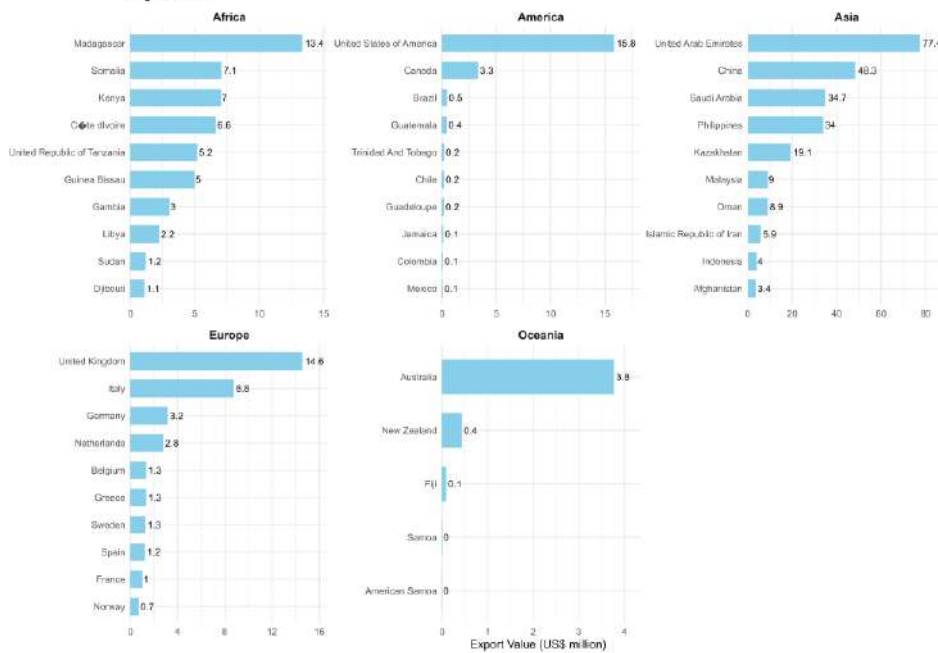
Year-on-Year Growth in Food Group Exports

August 2026-27 compared with August 2025-26



Oceania (+34.9%) and Asia (+29.1%) posted the strongest YoY growth, though Oceania's gain comes off a tiny base (roughly \$3.2M→\$4.3M), so its outsized percentage carries little weight next to Asia's much larger dollar contribution. Africa grew modestly (+3.2%), while America (-6.8%) and especially Europe (-27%) declined — Europe's drop is the standout concern here, confirming the sharp fall seen in the regional totals chart and making it the clear underperformer among Pakistan's export regions.

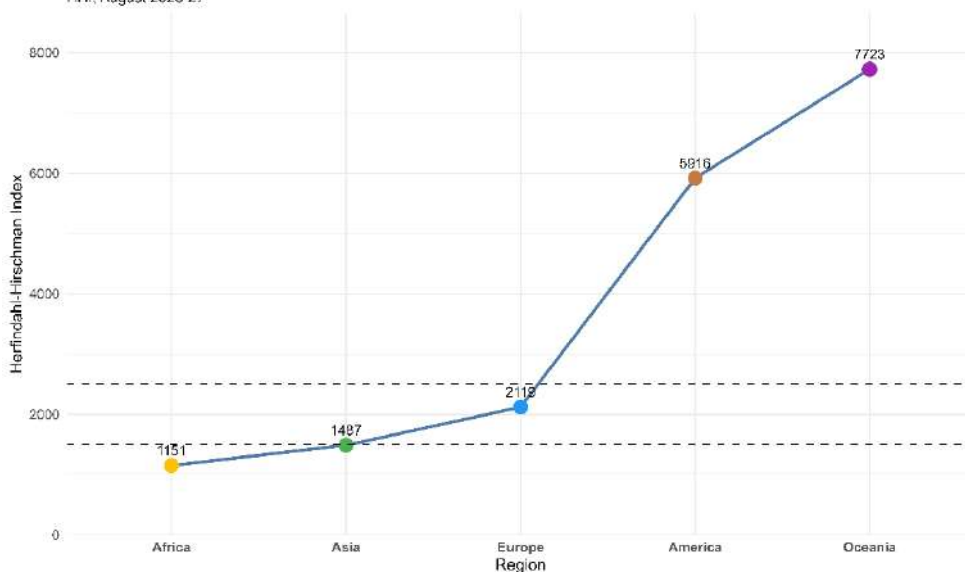
Top 10 Export Markets by Region
August 2026-27



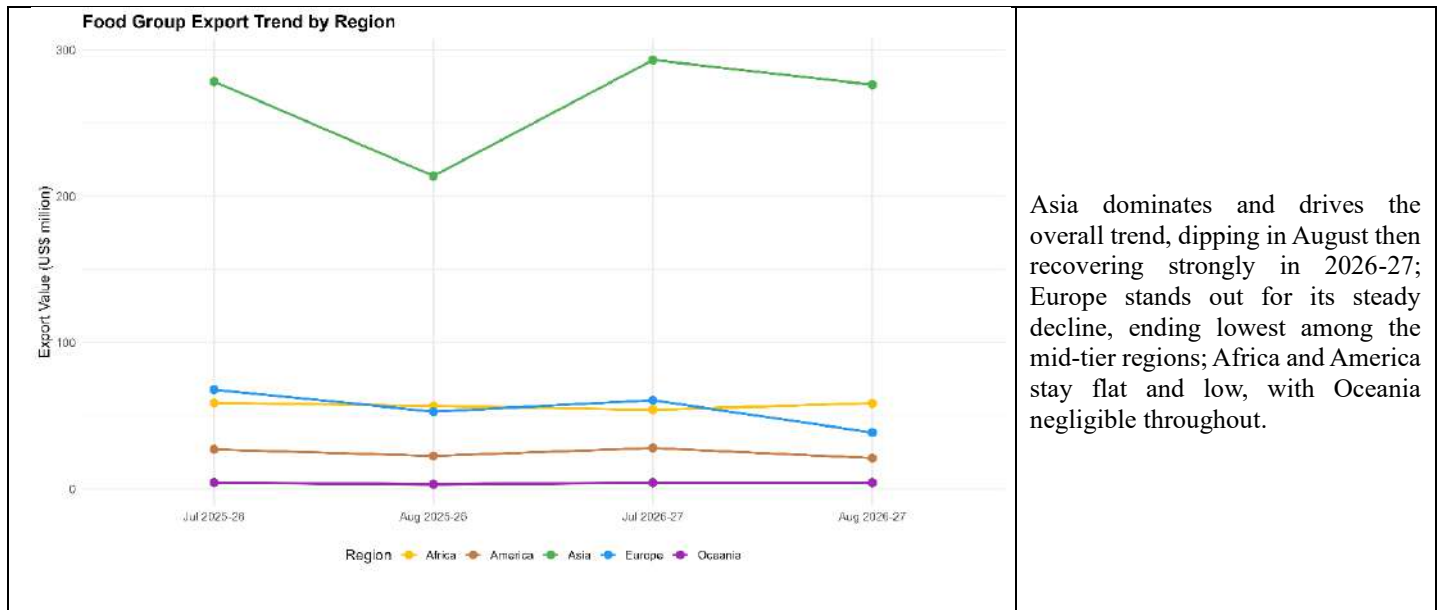
Each region's top-10 breakdown shows very different concentration levels: Asia's top market, the UAE (\$77.4M), dwarfs everything else in this entire chart and is followed by a reasonably graded field down to Afghanistan (\$3.4M); America is extremely top-heavy, with the US (\$15.8M) alone roughly 5x the next market (Canada, \$3.3M) and the remaining eight countries all under \$0.5M; Africa is led by Madagascar (\$13.4M) with a moderately spread tail; Europe is led by the UK (\$14.6M) and Italy (\$8.8M), with a longer, more even tail than America; and Oceania is essentially a single-market region — Australia (\$3.8M) accounts for nearly all activity, with New Zealand a distant second (\$0.4M) and Samoa/American Samoa showing zero. This confirms the CR5/HHI findings directly: Oceania and America's extreme concentration scores trace back to one or two countries dominating their entire top-10 list, while Africa and Europe's more gradual drop-offs explain their comparatively better diversification.

Export Market Concentration by Region

HHI, August 2026-27



Concentration rises sharply moving from Africa (1151, low) and Asia (1487, low) through Europe (2119, moderate) into America (5916) and Oceania (7723), both firmly in high-concentration territory. Given Oceania and America are also the smallest regions by export value, their extreme HHI likely reflects exports reliant on just one or two countries rather than a genuinely diversified base — worth noting that concentration here mostly reflects small denominators, not necessarily strategic risk, unlike Europe's more moderate but still-elevated 2119 on a much larger export base.



Source: Pakistan Single Window

Table 1 Agricultural Export Commodity Groups Showing Increases and Decreases in Quantity & Value
(August FY 2026–27 vs. August FY 2025–26)

(Quantity in M.T)					
No	Description	August FY 2026-27	August FY 2025-26	Change (%)	Remark
1	Rice	308481	252237	22	Increase
2	1. BASMATI	77795	49240	58	Increase
3	2. OTHERS	230686	202997	14	Increase
4	FISH & FISH PREPARATIONS	12870	10696	20	Increase
5	FRUITS	18861	45464	-59	Decline
6	VEGETABLES	30589	50998	-40	Decline
7	TOBACCO	2055	1004	105	Increase
8	SPICES	2389	2314	3	Increase
9	OILSEEDS, NUTS & KERNELS	32514	6997	365	Increase
10	MEAT & MEAT PREPARATIONS	8664	8036	8	Increase
11	ALL OTHER FOOD ITEMS				

(Value in USD “000”)					
No	Description	August FY 2026-27	August FY 2025-26	Change (%)	Remark
1	Rice	191791	146278	31	Increase
2	1. BASMATI	87612	51534	70	Increase
3	2. OTHERS	104179	94744	10	Increase
4	FISH & FISH PREPARATIONS	25247	23909	6	Increase
5	FRUITS	18460	31543	-41	Decline
6	VEGETABLES	8426	13387	-37	Decline
7	TOBACCO	5853	1771	230	Increase
8	SPICES	6751	6310	7	Increase
9	OILSEEDS, NUTS & KERNELS	35971	6830	427	Increase
10	MEAT & MEAT PREPARATIONS	47146	36438	29	Increase
11	ALL OTHER FOOD ITEMS	59352	82846	-28	Decline

Table 2: Top 15 Agriculture Exports Partner Countries

Rank	Country	August FY 2026-27 (\$Mn)	%Share	July FY 2026-27 (\$Mn)	%Δ MoM	August FY 2025-26 (\$Mn)	%Δ YoY	Remark YoY
1	UAE	77	19.4	80	-4	44	76	Increase
2	China	48	12.1	27	78	19	159	Increase
3	Saudi Arabia	35	8.7	27	27	28	25	Increase

4	Philippines	34	8.5	56	-40	1	2357	Increase
5	Kazakhstan	19	4.8	10	83	11	68	Increase
6	USA	16	4.0	19	-18	0	-	-
7	UK	15	3.6	25	-42	16	-9	Decline
8	Madagascar	13	3.3	5	183	13	4	Increase
9	Malaysia	9	2.3	9	1	5	81	Increase
10	Oman	9	2.2	9	-2	9	-5	Decline
11	Italy	9	2.2	10	-14	9	-7	Decline
12	Somalia	7	1.8	8	-10	5	39	Increase
13	Kenya	7	1.8	5	40	10	-27	Decline
14	Cote d Ivoire	7	1.7	3	105	0	-	-
15	Iran	6	1.5	7	-22	0	-	-

Table 3:Export Market Concentration and Diversification

(Jul–Aug 2025-26 vs 2026-27)

Periods	HHI	No of Markets	Concentration	CR10	Normalized Shannon	Remark
Aug 2026-27	774	122	Low	69.0	0.671	Diversified
Jul 2026-27	692	127	Low	63.7	0.691	Diversified
Aug 2025-26	518	123	Low	60.8	0.714	Diversified
Jul 2025-26	528	123	Low	61.1	0.720	Diversified

Table 4:Sub-Sector-wise Food Exports Showing increase and decline

(July FY 2026-27 vs. FY 2025-26)

Sub-Agricultural Sector	August FY 2026-27 (\$Mn)	%Share	July FY 2026-27 (\$Mn)	%Δ MoM	August FY 2025-26 (\$Mn)	%Δ YoY	Remark YoY
Crops	314.8	78.9	355.0	-11.3	278.1	13.2	Increase
Livestock	51.4	12.9	53.3	-3.6	40.7	26.3	Increase
Fishery	26.4	6.6	24.3	8.7	23.9	10.2	Increase
Forestry	-	-	-	-	-	-	-
Other / non-agricultural	6.4	1.6	7.8	-16.9	6.6	-2.1	Decline

Table 5:Export Market Concentration and Diversification by Sub-Sector

(August 2026-27)

Subsectors	HHI	N0 of Markets	Concentration	CR10	Normalized Shannon	Remark
Crops	734.2	115	Low	69	0.68	Diversified
Livestock	2834.3	25	High	96	0.53	Concentrated
Fishery	2448.8	22	Moderate	95	0.63	Diversified
Forestry	-	-	-	-	-	-
Other/ non-agricultural	1012.4	68	Low	71	0.73	Diversified

Table 6: Regional Food Group Exports Showing Increase and Decline

(August FY 2026-27 vs. FY 2025-26)

Reagon	August FY 2026-27 (\$Mn)	%Share	July FY 2026-27 (\$Mn)	%Δ MoM	August FY 2025-26 (\$Mn)	%Δ YoY	Remark YoY
Asia	276.5	69.3	293.1	-5.7	213.9	29.3	Increase
Africa	58.6	14.7	54.2	8.1	56.8	3.2	Increase
Europe	38.6	9.7	60.6	-36.3	52.9	-27.0	Decline
America	21.1	5.3	28.1	-25.0	22.6	-6.8	Decline
Oceania	4.3	1.1	4.3	-0.6	3.2	34.9	Increase

Table 7: Regional Food Exports by Agricultural Sub-Sectors
(August 2026)

(Values in USD Million)				
Reagon	Crops	Livestock	Fishery	Other/non-agricultural
Asia	198.58	50.09	25.89	1.89
Africa	57.24	1.13	-	0.19
Europe	36.33	-	0.45	1.81
America	18.64	0.15	0.01	2.27
Oceania	4.00	0.05	-	0.28

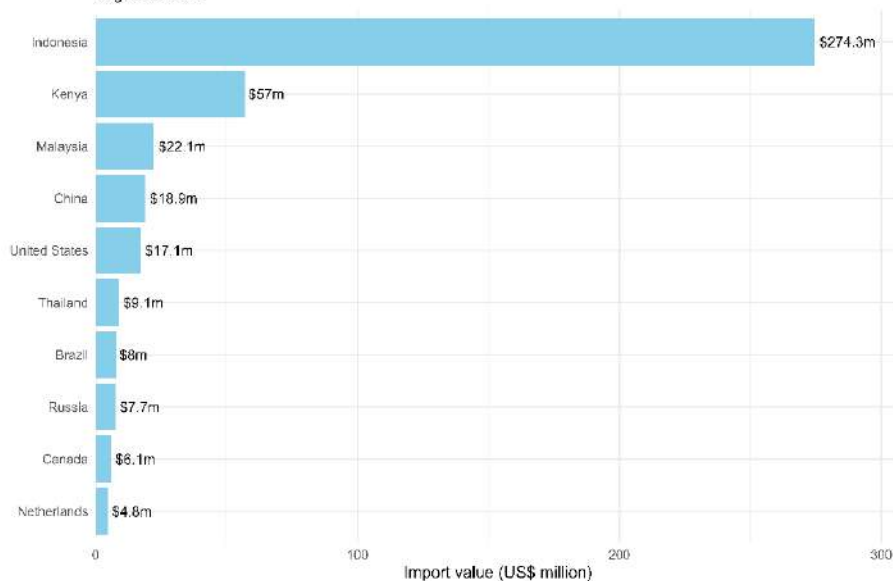
Table 8: Export Market Concentration and Diversification by Region
(August 2026-27)

Reagon	HHI	No of Markets	Concentration	CR5	Normalized Shannon	Remark
Asia	1487	38	Low	77	0.65	Diversified
Africa	1151	33	Low	67	0.71	Diversified
Europe	2119	28	Moderate	79	0.62	Diversified
America	5916	17	High	96	0.33	Concentrated
Oceania	7723	5	High	100	0.29	Concentrated

Food Group Imports Profile

Top 10 Import Destinations

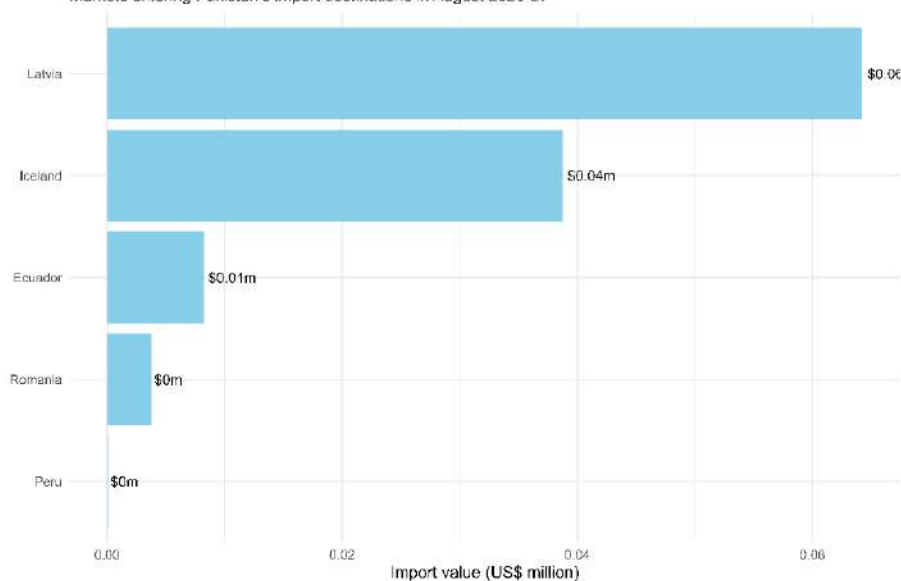
August 2026-27



Indonesia is overwhelmingly the top import source at \$274.3M, nearly 5x Kenya, the second-largest at \$57M, and accounts for well over half of the top 10's combined value. After Kenya, the field drops off sharply and flattens out, with Malaysia through the Netherlands all clustered between \$4.8M and \$22.1M, indicating imports are heavily concentrated in a single dominant source rather than spread across a diversified set of partners.

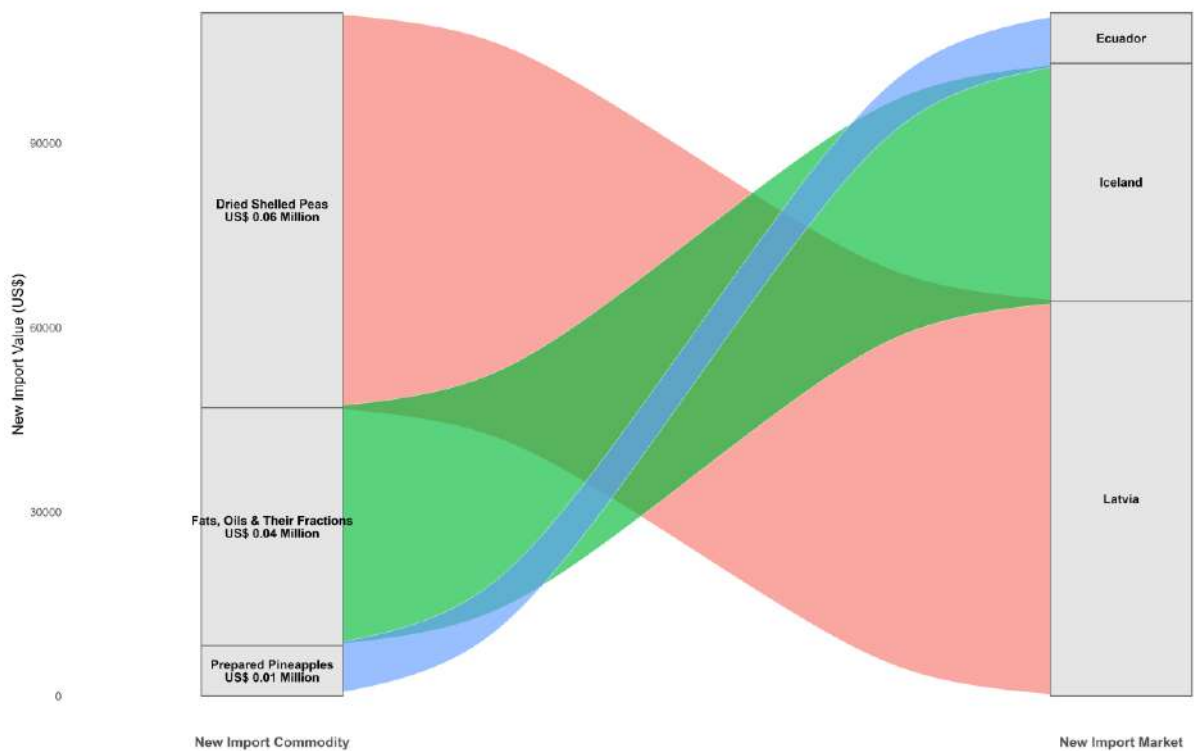
New Import Markets

Markets entering Pakistan's import destinations in August 2026-27



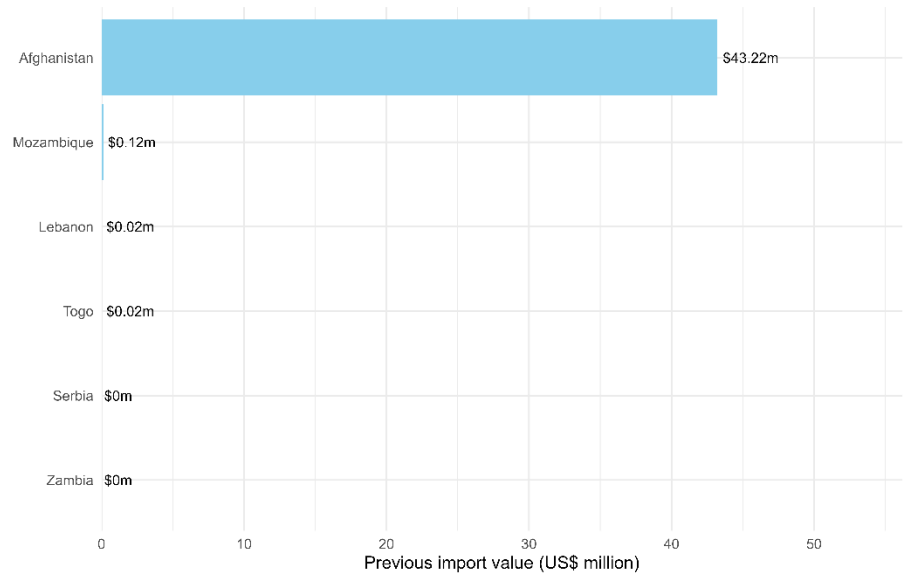
Five new import markets emerged in August 2026-27, led by Latvia (~\$0.06M) and Iceland (\$0.04M), with Ecuador, Romania, and Peru all rounding under \$0.01M. In dollar terms these are negligible against Pakistan's overall import base — this reflects a small expansion in the number of source countries rather than any meaningful shift in import value.

New Agricultural Import Markets: Commodity–Source Linkages (August 2026-27)
Top 5 new commodity–market flows | US\$



Lost Import Markets

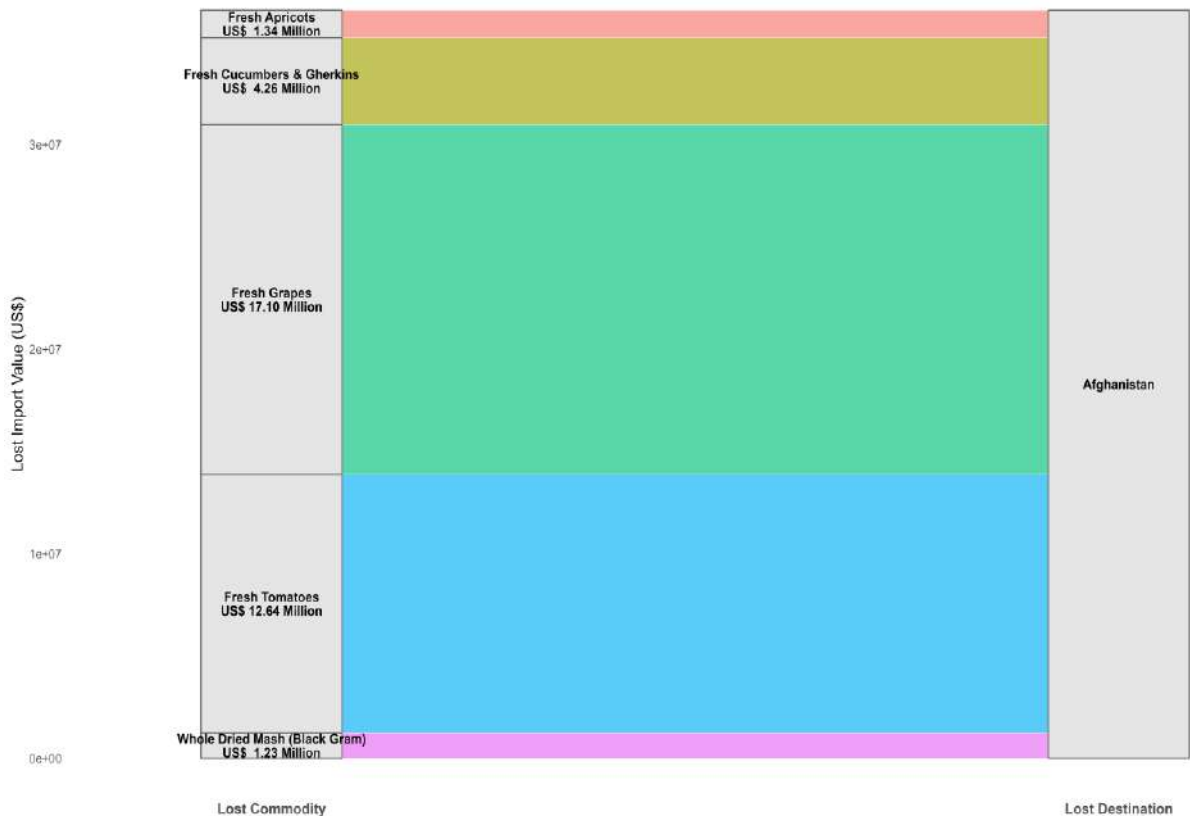
Markets with imports in August 2025-26 but none in August 2026-27



Afghanistan stands out sharply here, at \$43.22M it dwarfs every other lost market by nearly 400x, while Mozambique, Lebanon, Togo, Serbia, and Zambia are all under \$0.12M and effectively negligible. Unlike the earlier export-side lost-markets chart, this loss is substantial in absolute terms and likely worth flagging on its own, since it could materially affect Pakistan's total import composition for August 2026-27 depending on what Afghanistan was supplying.

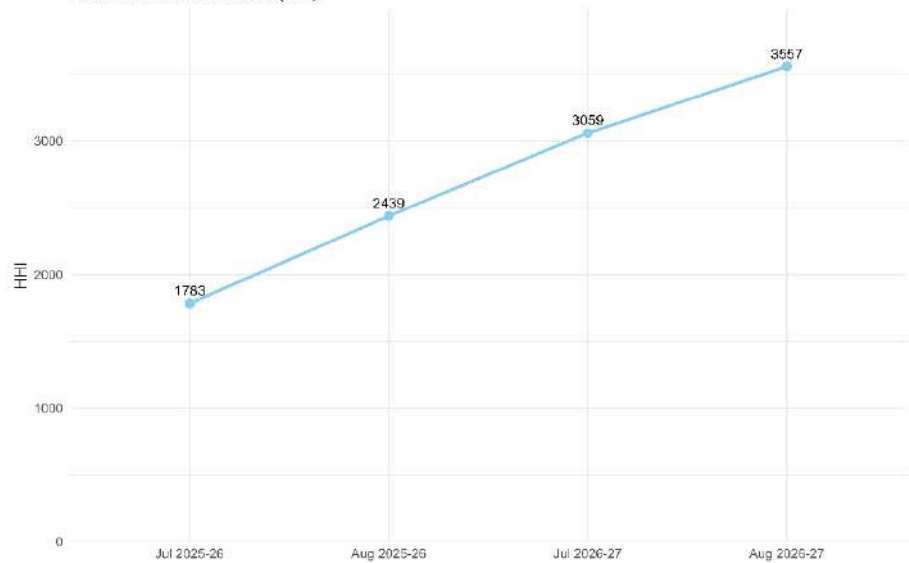
Lost Agricultural Import Markets: Commodity–Destination Linkages (August 2026-27)

Top 5 lost commodity–destination flows | US\$



Import Market Concentration

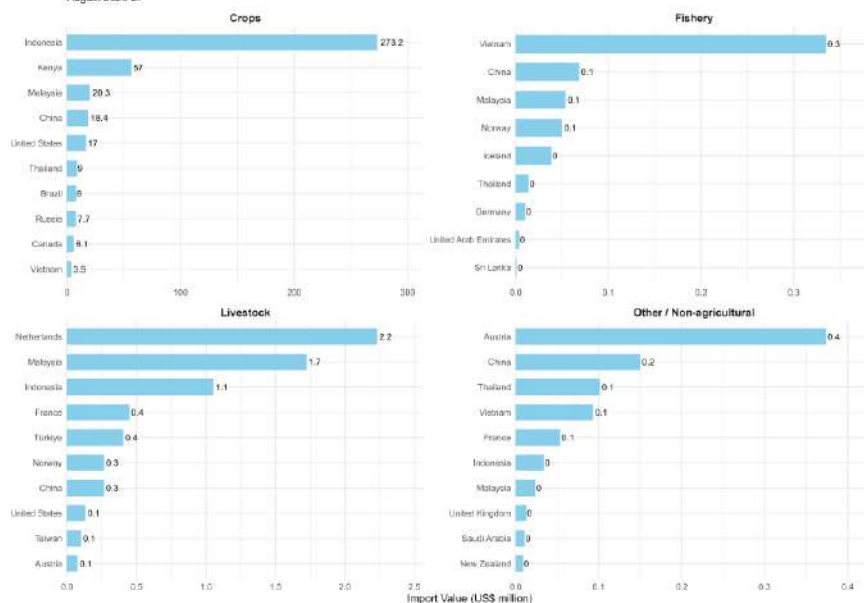
Herfindahl-Hirschman Index (HHI)



Import market concentration has risen sharply and consistently across all four periods, climbing from moderate concentration (1783) in July 2025-26 to high concentration (3557) by August 2026-27 — crossing the 2500 high-concentration threshold as early as August 2025-26. This is a much steeper and more advanced trend than seen on the export side (which stayed low, around 500-775), and lines up directly with the crops sub-sector's near-total reliance on Indonesia seen in the top-10 markets chart.

Sectoral Based Imports Analysis

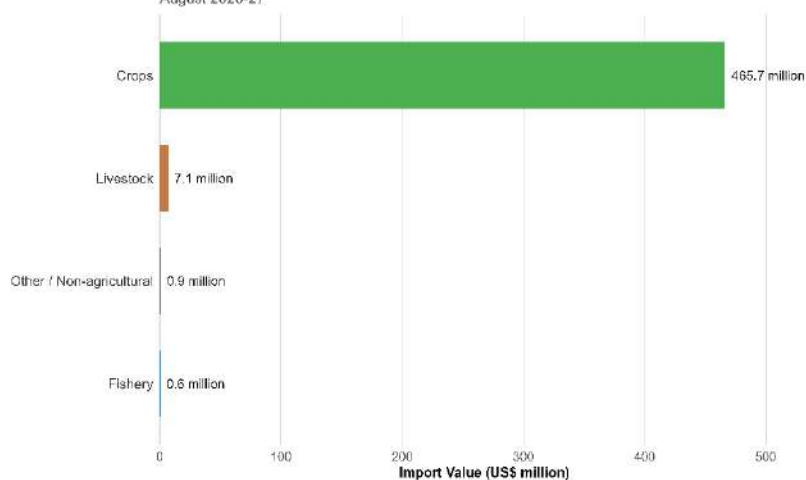
Top 10 Import Markets by Food Group Sub-Sector
August 2026-27



Crops imports are almost entirely driven by Indonesia (\$273.2M), nearly 5x Kenya, the second-largest source (\$57M), matching the extreme concentration seen in the overall top-10 import chart. The other three sub-sectors are far smaller in scale (all under \$2.5M) with much flatter, more distributed top-10 lists: Netherlands leads livestock (\$2.2M), Vietnam leads fishery (\$0.3M), and Austria leads "Other/Non-agricultural" (\$0.4M), none showing the single-country dominance seen in crops. This confirms that Pakistan's overall import concentration is essentially a crops-driven phenomenon, centered almost entirely on Indonesia.

Write a message...

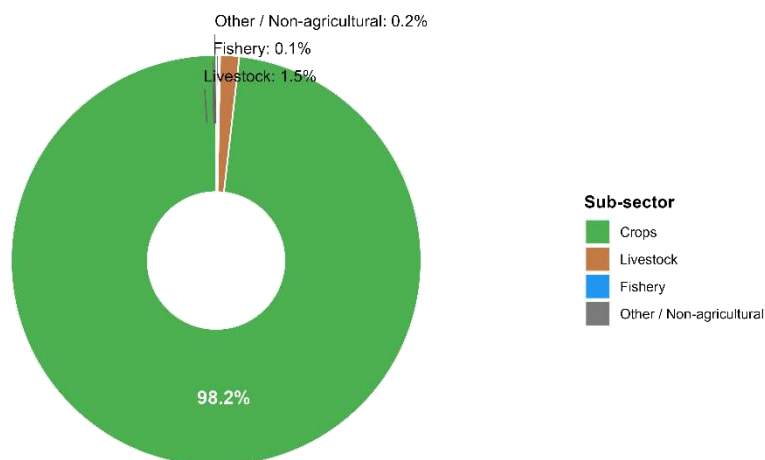
Food Group Imports by Agricultural Sub-Sector and Other Products
August 2026-27



Crops overwhelmingly dominate food group imports at \$465.7M in August 2026-27, more than 65 times larger than the next sub-sector, livestock (\$7.1M), while "Other/Non-agricultural" (\$0.9M) and fishery (\$0.6M) are negligible by comparison. This matches the pie chart's 97.7% crops share and confirms that essentially all of Pakistan's food group import activity, and by extension its Indonesia-driven concentration risk, sits within the crops category alone.

Composition of Food Group Imports by Subsector

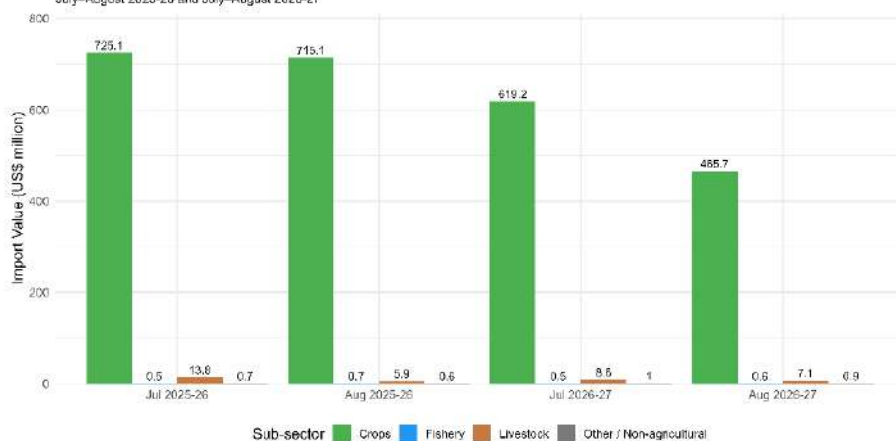
August 2026-27



Crops make up 98.2% of food group imports in August 2026-27, with livestock (1.5%), "Other/Non-agricultural" (0.2%), and fishery (0.1%) together barely registering.

Food Group Imports by Agricultural Sub-Sector and Other Products

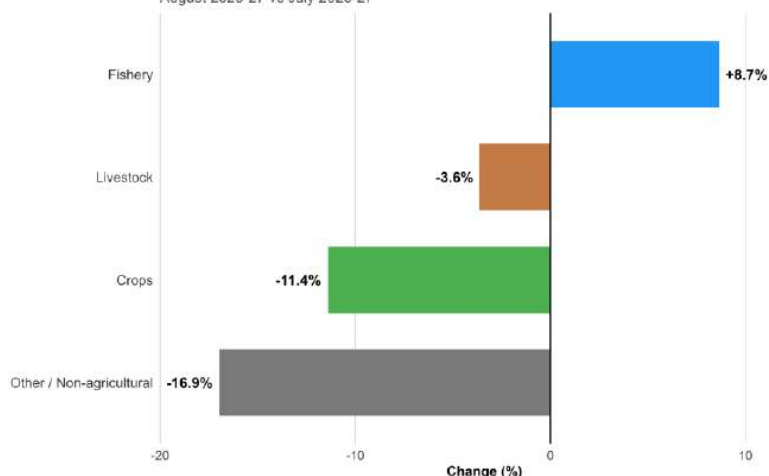
July–August 2025-26 and July–August 2026-27



Crops imports have declined steadily and substantially across all four periods, falling from \$725.1M in July 2025-26 to \$465.7M in August 2026-27 — a roughly 36% drop over the year, with a consistent downward trend rather than a seasonal bounce. Livestock, fishery, and "Other/Non-agricultural" remain minor throughout (all under \$14M), so this steady crops decline is effectively the entire story of falling food group imports over this period — worth noting this runs opposite to the crops export trend, which held roughly flat to rising across the same periods.

Month-on-Month Growth in Food Group Exports by Sub-Sector

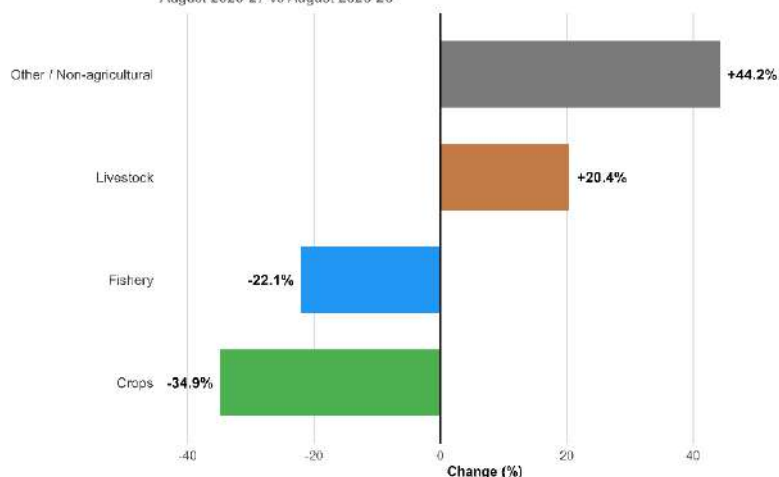
August 2026-27 vs July 2026-27



Other/Non-agricultural fell the most from July to August 2026-27 (-16.9%), followed by crops (-11.3%) and a smaller drop in livestock (-3.6%); fishery was the only sub-sector to grow (+8.7%). Since crops dominate total import value, their decline still drives most of the overall drop in dollar terms.

Year-on-Year Growth in Food Group Imports by Agricultural Sub-Sector

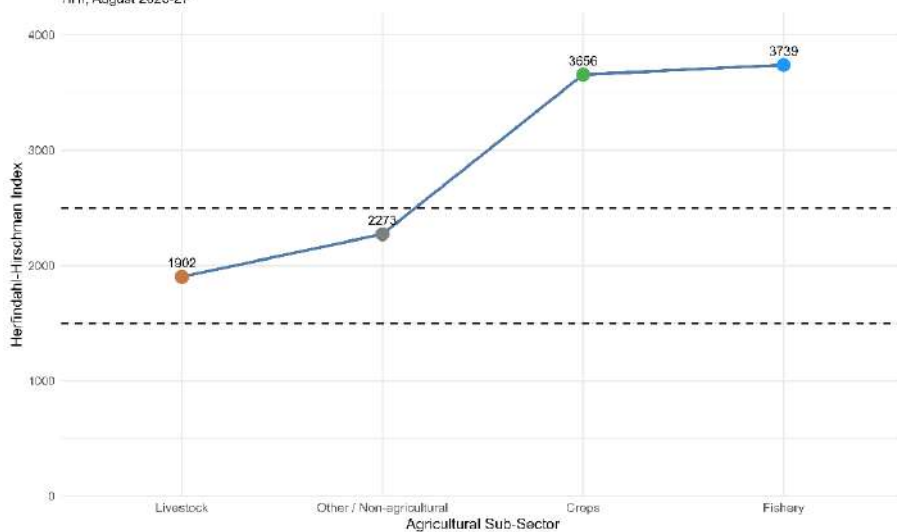
August 2026-27 vs August 2025-26



"Other/Non-agricultural" saw the strongest YoY growth (+44.2%), followed by livestock (+20.4%), while crops (-34.9%) and fishery (-22.1%) both declined sharply. Since crops dominate total import value (98%+), its steep 34.9% YoY drop is the main driver behind the overall decline in food group imports, even though the two smaller sub-sectors that grew posted larger percentage gains — their small base means they can't offset crops' loss in absolute dollar terms.

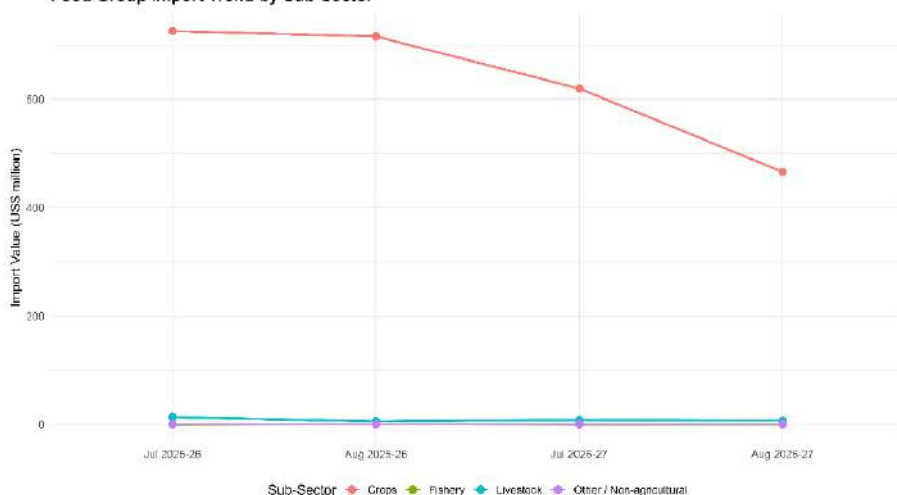
Import Market Concentration by Sub-Sector

HHI, August 2026-27



Fishery (3739) and crops (3656) sit firmly in high-concentration territory, while livestock (1902) and "Other/Non-agricultural" (2273) fall in the moderate range. This confirms that crops' near-total reliance on Indonesia isn't an isolated case — fishery shows even higher concentration despite being a tiny sub-sector by value, meaning Pakistan's import base is structurally narrow across its two most exposed categories, not just the dominant one.

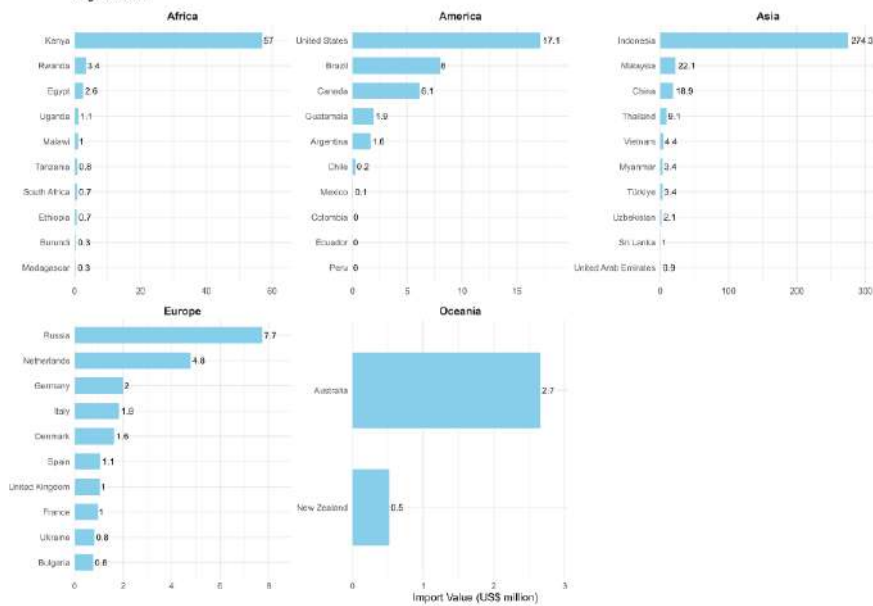
Food Group Import Trend by Sub-Sector



Crops trace a steady, accelerating decline across all four periods, from \$725.1M to \$465.7M, with the steepest drop occurring between July and August 2026-27, while fishery, livestock, and "Other/Non-agricultural" remain essentially flat near zero on this scale throughout. Since crops so heavily dominate import value, this chart visually confirms that the overall food group import decline is a single-sector trend, not a broad-based pullback across categories.

Regional Based Imports Analysis

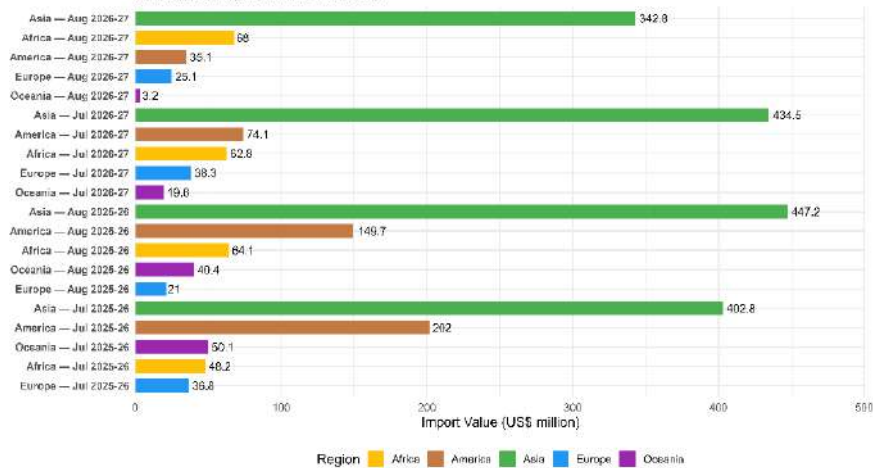
Top 10 Import Markets by Region
August 2026-27



Asia's top market is Indonesia at \$274.3M, far above any other single country in this entire chart and consistent with the crops/Indonesia dominance seen throughout, with a moderate tail down to the UAE (\$0.9M). America is led by the US (\$17.1M), roughly double Brazil, its next-largest source (\$8M), with a reasonably graded tail. Africa is dominated by Kenya (\$57M), over 16x Rwanda in second place (\$3.4M), while Europe (led by Russia, \$7.7M) and Oceania (just Australia, \$2.7M, and New Zealand, \$0.5M) round out much smaller, thinner import bases. This confirms Indonesia's outsized role isn't just a crops story but the single largest country-level import relationship Pakistan has across any region or sub-sector.

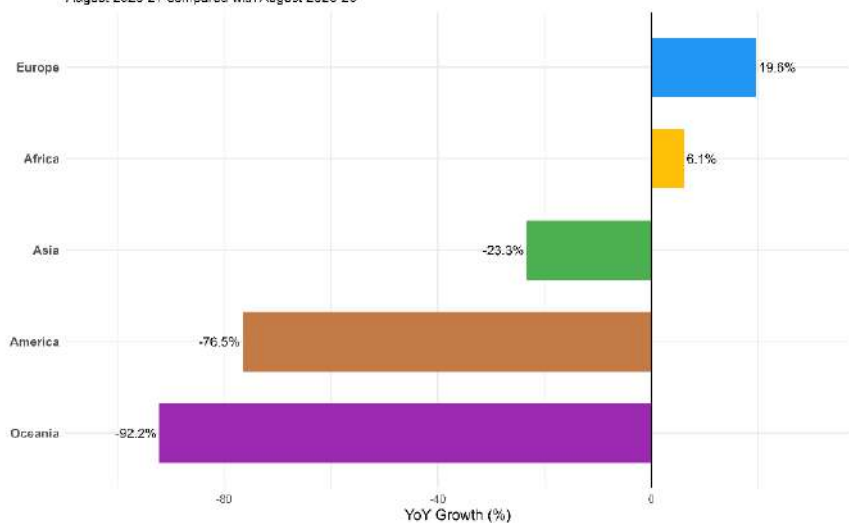
Food Group Imports by Region

Pakistan: July–August, 2025-26 and 2026-27



Asia dominates import value across all four periods (\$342.8M–\$447.2M), but shows a clear declining trend into 2026-27 — mirroring the crops import decline seen earlier, since Asia likely captures most of Indonesia's crop trade. America shows the sharpest relative collapse, falling from \$202M in July 2025-26 to just \$35.1M by August 2026-27 (an over 80% drop), a far steeper decline than any region on the export side. Africa and Europe stay comparatively small and roughly stable, while Oceania remains the smallest region throughout, consistent with the export-side pattern.

Year-on-Year Growth in Food Group Imports
August 2026-27 compared with August 2025-26



Oceania (-92.2%) and America (-76.5%) collapsed dramatically YoY, while Asia also declined (-23.3%) — consistent with the earlier crops-driven import decline. Europe (+19.6%) and Africa (+6.1%) were the only regions to grow, but given Asia dominates total import value, its 23.3% drop likely outweighs these gains in absolute dollar terms, making Asia the primary driver of the overall import contraction despite America and Oceania showing far steeper percentage declines.

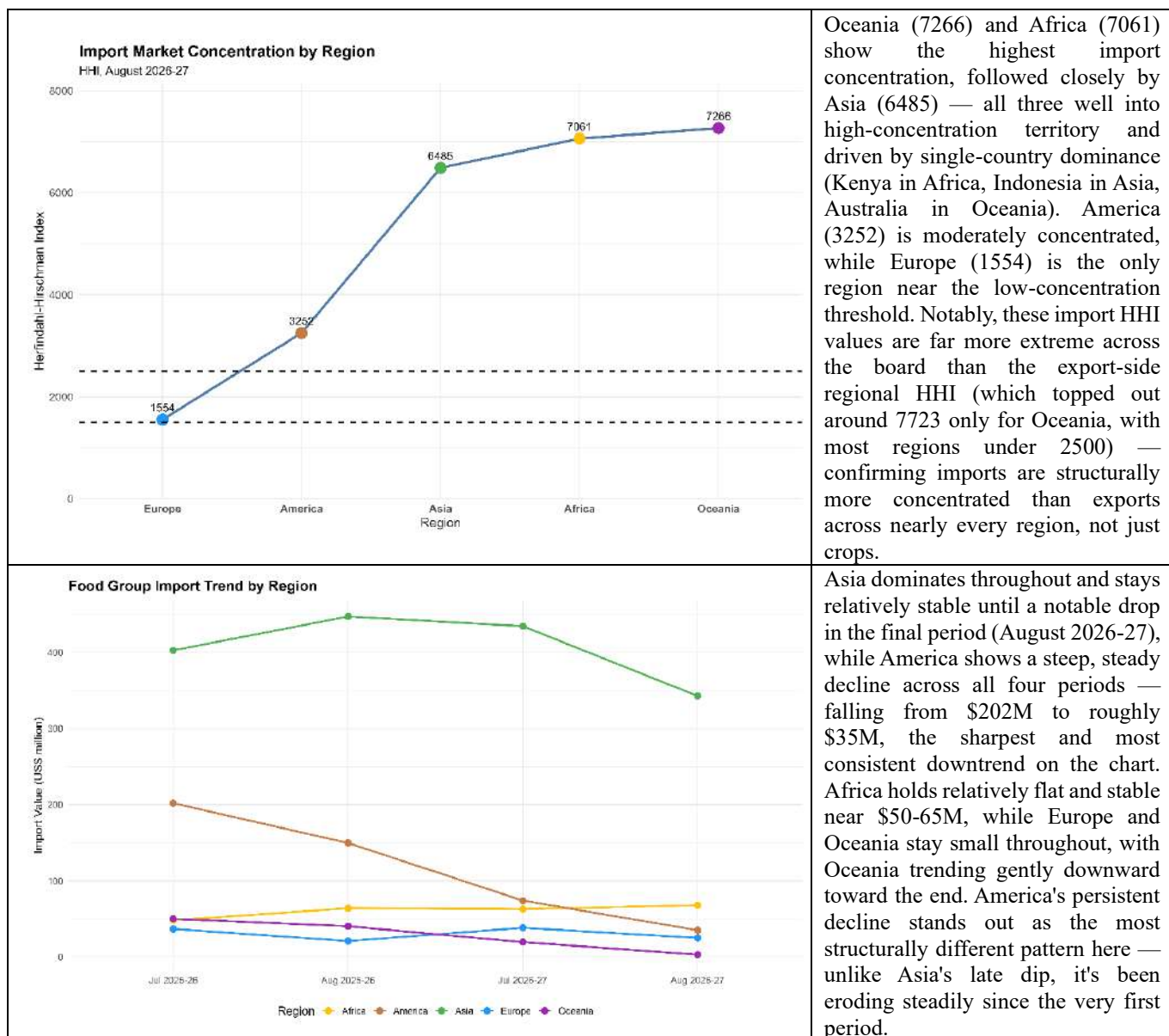


Table 9: Top Agricultural Import Commodity Groups Showing Increases and Decreases
(July FY 2026–27 vs. Average of January–June FY 2025–26)

						(Quantity in M.T)
No	Description	August FY 2026-27	August FY 2025-26	Change (%)	Remark	
1	MILK, CREAM & MILK FOOD FOR INFANTS	4,434	3,890	14	Increase	
2	WHEAT UNMILLED	451	-	-		
3	DRY FRUITS & NUTS	6,755	9,691	-30	Decline	
4	TEA	26,359	23,409	13	Increase	
5	SPICES	17,517	13,029	34	Increase	
6	SOYABEAN OIL	-	9,889	-100	Decline	
7	PALM OIL	230,035	323,130	-29	Decline	
8	SUGAR	183	164	12	Increase	
9	PULSES	48,236	104,746	-54	Decline	
10	ALL OTHERS FOOD ITEMS	66,300	465,783	-86	Decline	

(Value in USD “000”)

No	Description	August FY 2026-27	August FY 2025-26	Change (%)	Remark
1	MILK, CREAM & MILK FOOD FOR INFANTS	10,741	9,483	13	Increase
2	WHEAT UNMILLED	162	-		Increase
3	DRY FRUITS & NUTS	8,515	9,489	-10	Decline
4	TEA	65,165	54,988	19	Increase
5	SPICES	18,262	16,243	12	Increase
6	SOYABEAN OIL	0	10,898	-100	Decline
7	PALM OIL	272,129	337,481	-19	Decline
8	SUGAR	137	183	-25	Decline
9	PULSES	31,875	73,571	-57	Decline
10	ALL OTHERS FOOD ITEMS	83,435	213,554	-61	Decline

Table 10: Top 15 Agriculture Imports Partner Countries

Rank	Country	August FY 2026-27 (\$Mn)	%Share	July FY 2026-27 (\$Mn)	%Δ MoM	August FY 2025-26 (\$Mn)	%Δ YoY	Remark YoY
1	Indonesia	274.3	55.9	337.6	-19	326.8	-16	Decline
2	Kenya	57.0	11.6	50.2	13	45.5	25	Increase
3	Malaysia	22.1	4.5	41.5	-47	32.2	-31	Decline
4	China	18.9	3.8	20.2	-6	14.0	35	Increase
5	USA	17.1	3.5	14.9	15	10.5	63	Increase
6	Iran	16.2	3.3	11.5	40	3.5	367	Increase
7	Thailand	9.1	1.9	8.9	2	5.8	58	Increase
8	Brazil	8.0	1.6	26.3	-70	114.4	-93	Decline
9	Russian	7.7	1.5	12.7	-39	4.6	69	Increase
10	Canada	6.1	1.3	28.2	-78	10.1	-39	Decline
11	Netherlands	4.8	1.0	7.3	-34	2.0	139	Increase
12	Viet Nam	4.4	0.9	3.8	13	5.4	-20	Decline
13	Rwanda	3.4	0.7	3.8	-12	5.3	-36	Decline
14	Myanmar	3.4	0.7	10.7	-69	5.5	-38	Decline
15	Turkey	3.4	0.7	2.7	25	2.0	69	Increase

Table 11: Import Market Concentration and Diversification

(Jul–Aug 2025-26 vs 2026-27)

Periods	HHI	No of Markets	Concentration	CR10	Normalized Shannon	Remark
Aug 2026-27	3557	74	High	89.7	0.434	Concentrated
Jul 2026-27	3059	79	High	63.7	0.468	Concentrated
Aug 2025-26	2439	75	Moderate	89.1	0.492	Moderate-concentrated
Jul 2025-26	1783	79	Moderate	88.1	0.541	Moderate-concentrated

Table 112: Sub-Sector-wise Food Imports Showing Increase and Decline

(July FY 2026-27 vs. FY 2025-26)

Sub-Agricultural Sector	August FY 2026-27 (\$Mn)	%Share	July FY 2026-27 (\$Mn)	%Δ MoM	August FY 2025-26 (\$Mn)	%Δ YoY	Remark YoY
Crops	479	97.7	627	-24	718	-33	Decline
Livestock	9.88	2.02	12.8	-23	6.47	53	Increase
Fishery	0.58	0.11	0.54	7	0.74	-21	Decline
Forestry	-	-	-	-	-	-	-
Other / non-agricultural	0.93	0.19	1.07	-13	0.64	46	Increase

Table 123: Import Market Concentration and Diversification by Sub-Sector

(August 2026-27)

Subsectors	HHI	N0 of Markets	Concentration	CR10	Normalized Shannon	Remark
Crops	3656	71	High	90.3	0.43	Concentrated
Livestock	1902	25	Moderate	94.4	0.64	Moderate Concentrated
Fishery	3739	9	High	100	0.64	Concentrated
Forestry	-	-	-	-	-	-
Other/ non-agricultural	2273	19	Moderate	95.3	0.65	Moderate Concentrated

Table 134: Regional Food Group Imports Showing Increase and Decline

(August FY 2026-27 vs. FY 2025-26)

Reagon	August FY 2026-27 (\$Mn)	%Share	July FY 2026-27 (\$Mn)	%Δ MoM	August FY 2025-26 (\$Mn)	%Δ YoY	Remark YoY
Asia	342.8	72	434.5	-21	447.2	-23	Decline
Africa	68.0	14	62.8	8	64.1	6	Increased
Europe	25.1	5	38.3	-34	21.0	20	Increased
America	35.1	7	74.1	-53	149.7	-77	Decline
Oceania	3.2	0.7	19.6	-84	40.4	-92	Decline

Table 145: Regional Food Imports by Agricultural Sub-Sectors

(August 2026)

(Values in USD Million)

Reagon	Crops	Livestock	Fishery	Other/non-agricultural
Asia	338.22	3.71	0.48	0.43
Africa	68.01	-	-	0.000023
Europe	21.36	3.20	0.46	0.10
America	34.98	0.15	-	0.01
Oceania	3.11	0.06	-	0.01

Table 156: Import Market Concentration and Diversification by Region

(August 2026-27)

Reagon	HHI_0_10000	No of Markets	Concentration	CR5	Normalized Shannon	Remark
Africa	7061	12	High	96	0.31	Concentrated
America	3252	10	High	99	0.58	Concentrated
Asia	6485	24	High	96	0.28	Concentrated
Europe	1554	26	Moderate	72	0.71	Moderate Diversified
Oceania	7266	2	High	100	0.64	Concentrated

Items Classification

Item	Classification
Crops	Crop products and crop-derived processed products: cereals, rice, fruits, vegetables, spices, oilseeds, sugarcane & sugar, tobacco, milling products, bakery/cereal preparations, fruit/vegetable preparations, etc.
Livestock	Live animals and animal products: meat, edible offal, dairy, eggs, honey, etc.
Fishery	Fish, crustaceans, molluscs and fish-derived products, including fish flour.
Forestry	Wood, timber, charcoal, cork, bamboo and other identifiable forest products.
Other / Non-agricultural	Items such as salt/rock salt and water that are food-related but are not agricultural products.
Important classification rule	Chapter 16 was classified using the product description because it contains both meat and fish preparations. Chapter 22 water remains non-agricultural while vinegar is treated as crop-derived.