Pakistan Food Group Trade Performance Review

FY2024-25 vs FY2025-26 | PRAL Provisional Data

Ministry of National Food Security & Research
Economic Wing

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1 Executive Overview

Pakistan’s food group trade position weakened significantly in FY2025-26 compared with FY2024-25. The PRAL data shows that food group exports declined sharply, while food group imports increased. As a result, the food group trade deficit widened from **USD 1.36 billion in FY2024-25** to **USD 4.20 billion in FY2025-26**.

Food group exports fell from **USD 6.88 billion** to **USD 4.96 billion**, a decline of **USD 1.92 billion**, or **27.9%**. In contrast, food group imports increased from **USD 8.24 billion** to **USD 9.16 billion**, an increase of **USD 917.0 million**, or **11.1%**.

The deterioration was mainly driven by a sharp decline in rice exports, the complete fall in sugar exports to zero, lower vegetable exports, and a rise in import values for palm oil, sugar, and all other food items.

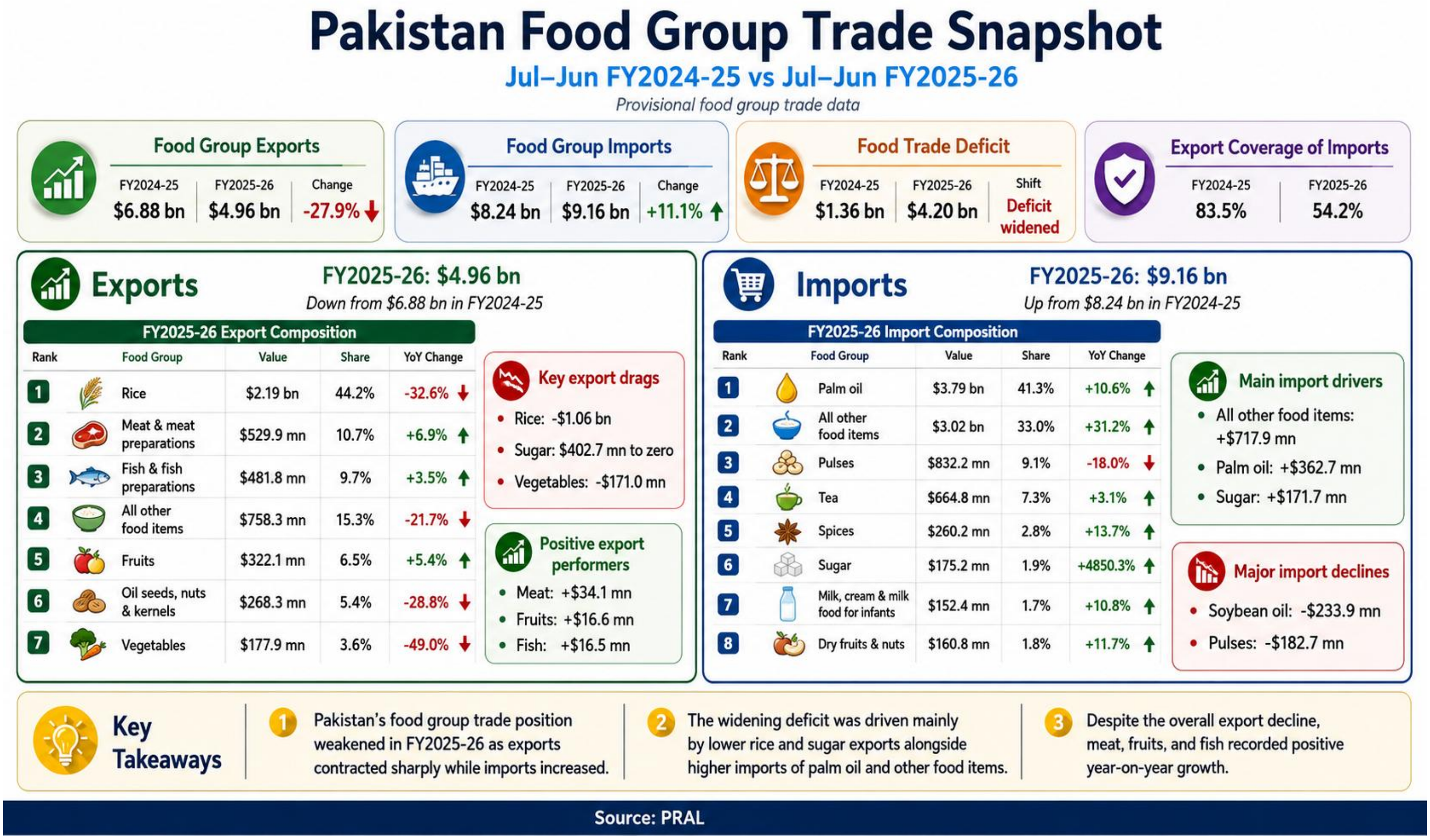


Figure 1-1: Pakistan Food Group Trade Snapshot FY25 vs FY26

2 Food Group Exports: Major Trends and Composition

Pakistan’s food group exports declined by **USD 1.92 billion** in FY2025-26. The decline was concentrated in a few major categories. Rice alone accounted for **44.2%** of food group exports. If rice, meat, fish, fruits, and all other food items are combined, they account for most of the food export basket. This shows that Pakistan’s food group export earnings remain concentrated in a limited number of categories.

	FOOD GROUP	FY26 USD Mn	% share in Food Group
	RICE	2,193	44%
	ALL OTHER FOOD ITEMS	758	15%
	MEAT AND MEAT PREPARATIONS	530	11%
	FISH & FISH PREPARATIONS	482	10%
	FRUITS	322	6%
	OIL SEEDS, NUTS AND KERNALS	268	5%
	VEGETABLES	178	4%
	TOBACCO	143	3%
	SPICES	87	2%
	SUGAR	0	0%
	LEGUMINOUS VEGETABLES (PULSES)	0	0%
	WHEAT	0	0%
	TOTAL FOOD GROUP	4,962	

Figure 2-1: Pakistan Food Group Exports FY 2025-26 Composition

2.1 Rice remained the largest export item, but declined sharply

Rice remained the dominant food export category in FY2025-26, with exports of **USD 2.19 billion**, accounting for **44.2%** of total food group exports. However, rice exports declined by **USD 1.06 billion**, or **32.6%**, compared with FY2024-25.

In quantity terms, rice exports fell from **5.65 million MT** to **4.23 million MT**, a decline of **1.41 million MT**, or **25.1%**.

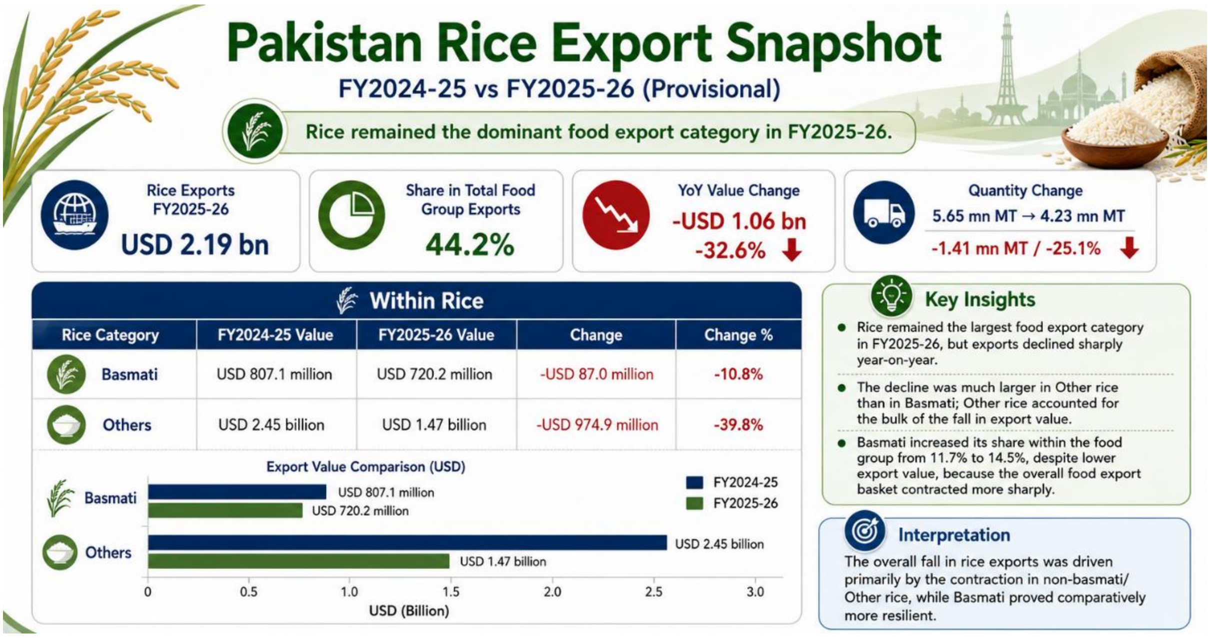


Figure 2-2: Pakistan Rice Exports Snapshot FY25 vs FY26

The decline was much larger in non-basmati/other rice than in basmati rice. Other rice accounted for the bulk of the fall in rice export value. Basmati rice, however, increased its share within the food group from **11.7%** to **14.5%**, despite lower export value, because the overall food export basket contracted more sharply.

2.1.1 Rice monthly export comparison (USD value)

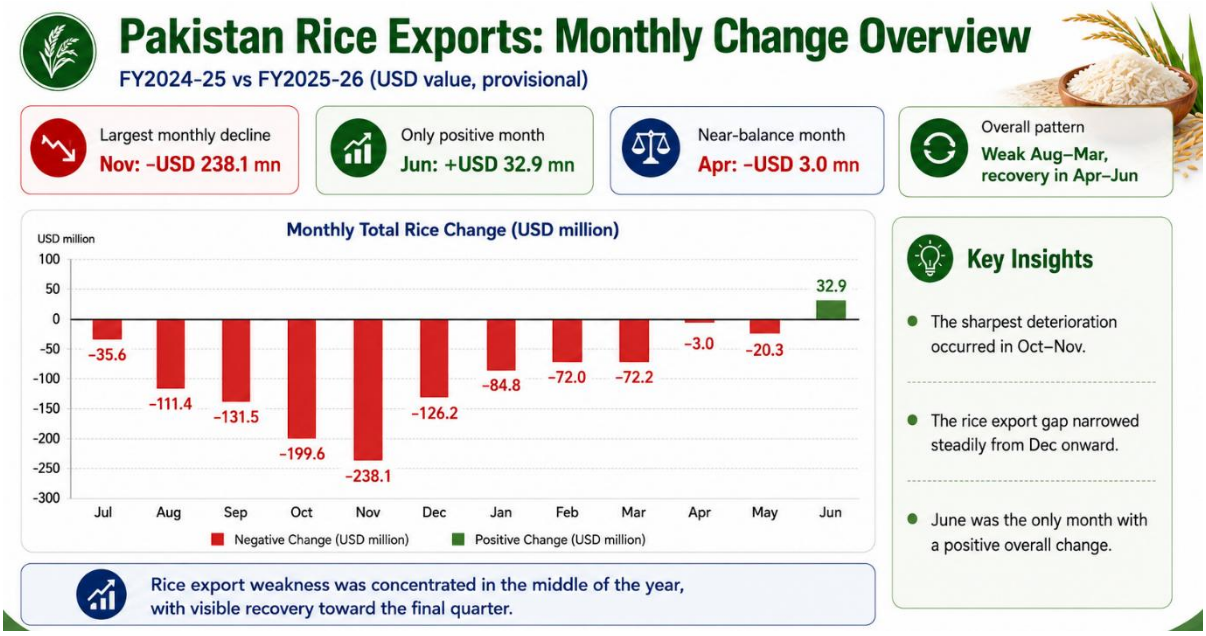


Figure 2-3: Pakistan Total Rice Exports Monthly Change Overview

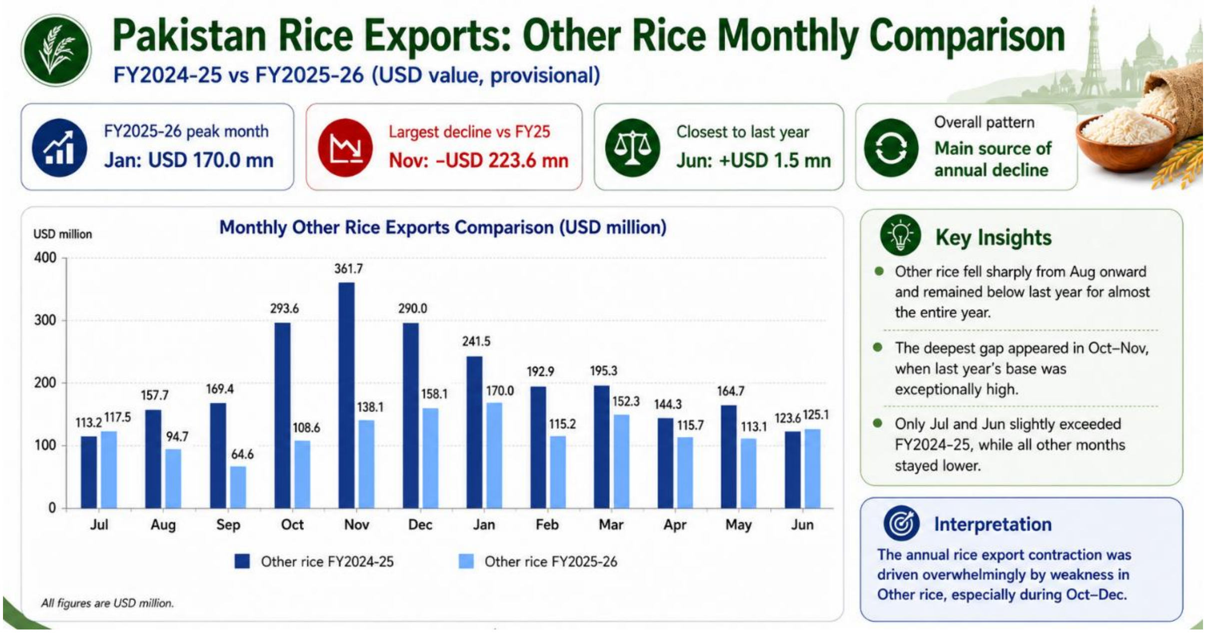


Figure 2-4: Pakistan Monthly Comparison of Other Rice

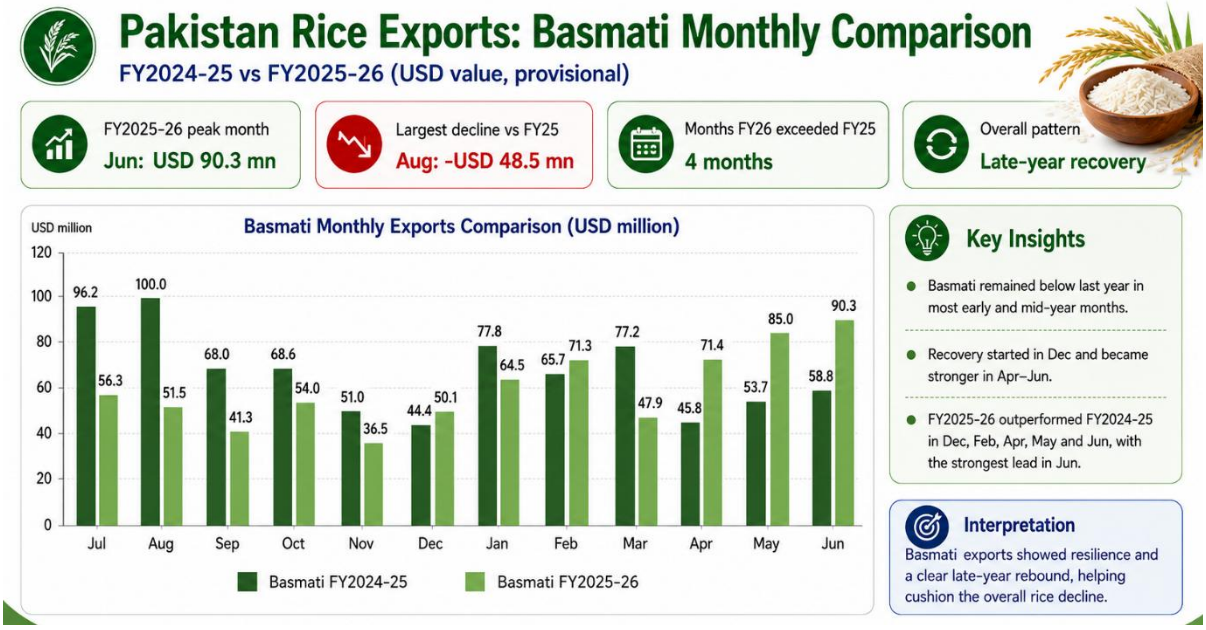
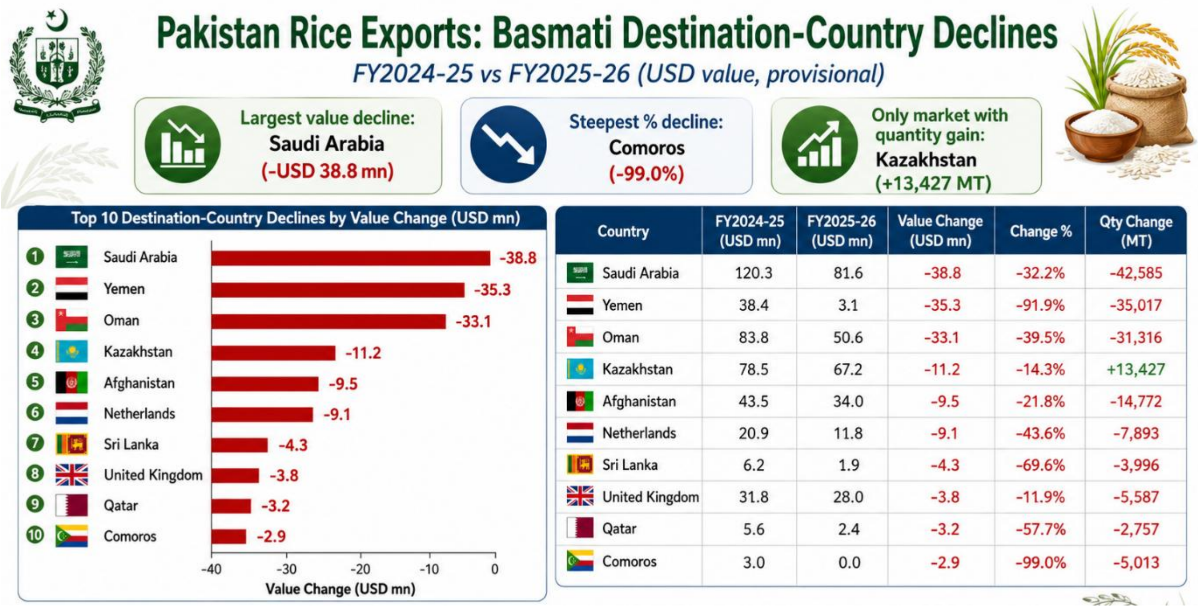


Figure 2-5: Pakistan Monthly Comparison of Basmati Rice

2.1.2 Top 10 destination-country declines: Basmati Rice



Country	FY2024-25 (USD mn)	FY2025-26 (USD mn)	Value Change (USD mn)	Change %	Qty Change (MT)
Saudi Arabia	120.3	81.6	-38.8	-32.2%	-42,585
Yemen	38.4	3.1	-35.3	-91.9%	-35,017
Oman	83.8	50.6	-33.1	-39.5%	-31,316
Kazakhstan	78.5	67.2	-11.2	-14.3%	+13,427
Afghanistan	43.5	34.0	-9.5	-21.8%	-14,772
Netherlands	20.9	11.8	-9.1	-43.6%	-7,893
Sri Lanka	6.2	1.9	-4.3	-69.6%	-3,996
United Kingdom	31.8	28.0	-3.8	-11.9%	-5,587
Qatar	5.6	2.4	-3.2	-57.7%	-2,757
Comoros	3.0	0.0	-2.9	-99.0%	-5,013

Figure 2-6: Top 10 destination-country declines: Basmati Rice

2.1.3 Top 10 destination-country declines: Other Rice

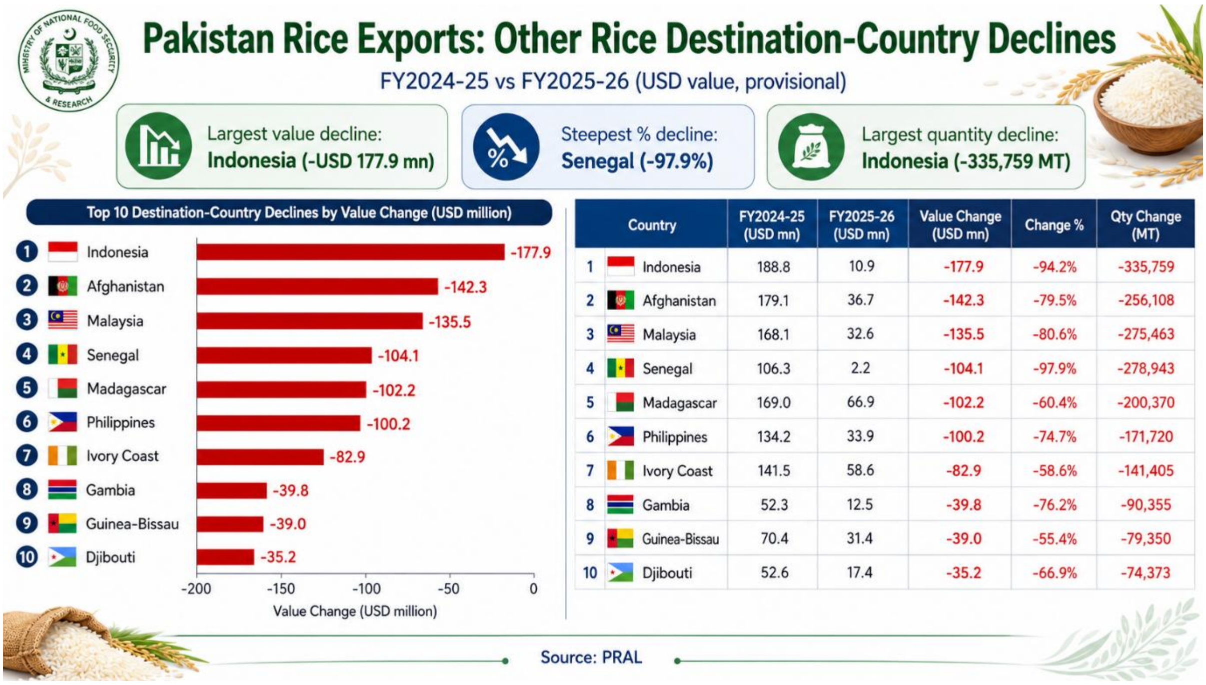


Figure 2-7: Top 10 destination-country declines: Other Rice

2.2 Fish & Fish Preparations

Fish & Fish Preparations exports moved from **USD 465.3 mn** to **USD 481.8 mn**, a change of **USD 16.5 mn (+3.5%)**. Quantity moved from **217,567 MT** to **213,405 MT (-1.9%)**.

The table below provides the main subgroup composition that drove the change in this category.

2.2.1 Fish & Fish Preparations: Top Change Drivers

Growth in fish exports was mainly supported by frozen fish, frozen cuttlefish/squid, and frozen sardines, which offset declines in jellyfish, frozen tunas, mackerel, and shrimps.

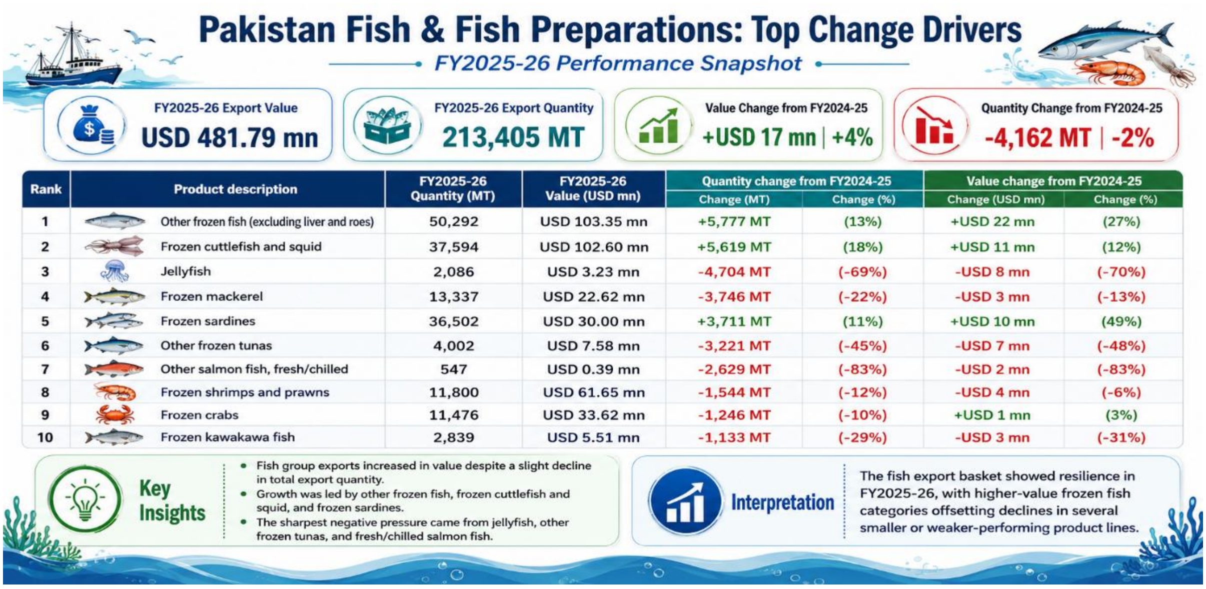


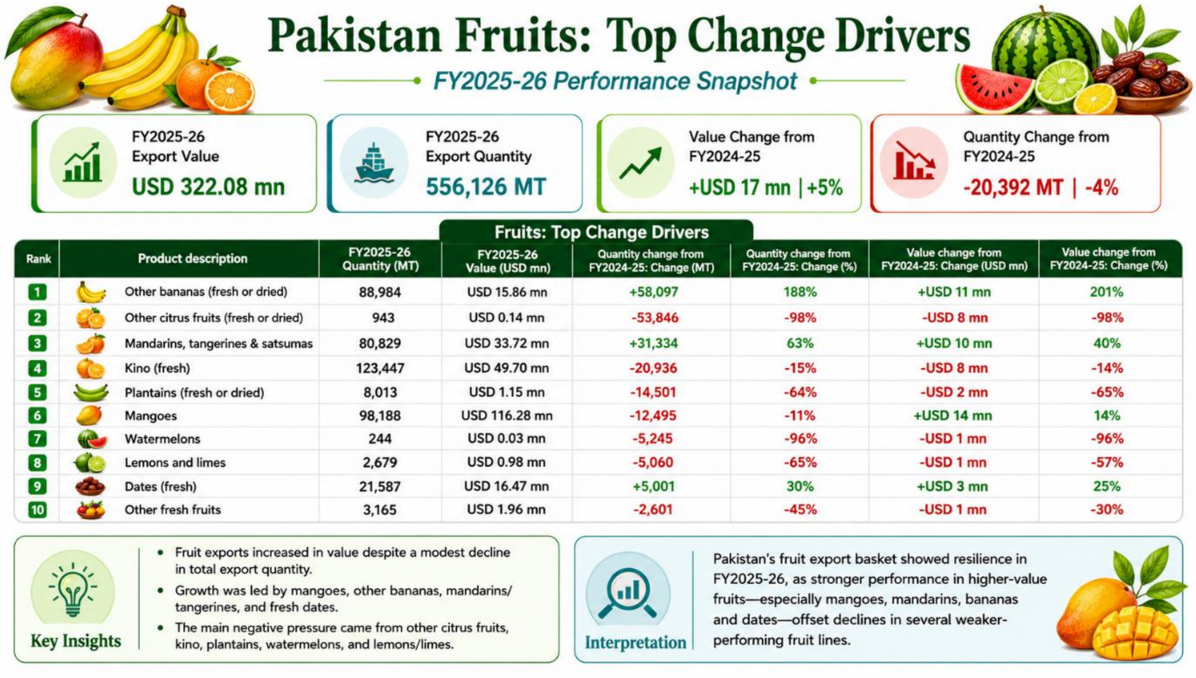
Figure 2-8: Fish & Fish Preparations: Top Change Drivers

2.3 Fruits

Fruits exports moved from **USD 305.5 mn** to **USD 322.1 mn**, a change of **USD 16.6 mn (+5.4%)**. Quantity moved from **576,518 MT** to **556,126 MT (-3.5%)**.

The table below provides the main subgroup composition that drove the change in this category.

2.3.1 Fruits: Top Change Drivers



Rank	Product description	FY2025-26 Quantity (MT)	FY2025-26 Value (USD mn)	Quantity change from FY2024-25: Change (MT)	Quantity change from FY2024-25: Change (%)	Value change from FY2024-25: Change (USD mn)	Value change from FY2024-25: Change (%)
1	Other bananas (fresh or dried)	88,984	USD 15.86 mn	+58,097	188%	+USD 11 mn	201%
2	Other citrus fruits (fresh or dried)	943	USD 0.14 mn	-53,846	-98%	-USD 8 mn	-98%
3	Mandarins, tangerines & satsumas	80,829	USD 33.72 mn	+31,334	63%	+USD 10 mn	40%
4	Kino (fresh)	123,447	USD 49.70 mn	-20,936	-15%	-USD 8 mn	-14%
5	Plantains (fresh or dried)	8,013	USD 1.15 mn	-14,501	-64%	-USD 2 mn	-65%
6	Mangoes	98,188	USD 116.28 mn	-12,495	-11%	+USD 14 mn	14%
7	Watermelons	244	USD 0.03 mn	-5,245	-96%	-USD 1 mn	-96%
8	Lemons and limes	2,679	USD 0.98 mn	-5,060	-65%	-USD 1 mn	-57%
9	Dates (fresh)	21,587	USD 16.47 mn	+5,001	30%	+USD 3 mn	25%
10	Other fresh fruits	3,165	USD 1.96 mn	-2,601	-45%	-USD 1 mn	-30%

Figure 2-9: Fruits: Top Change Drivers

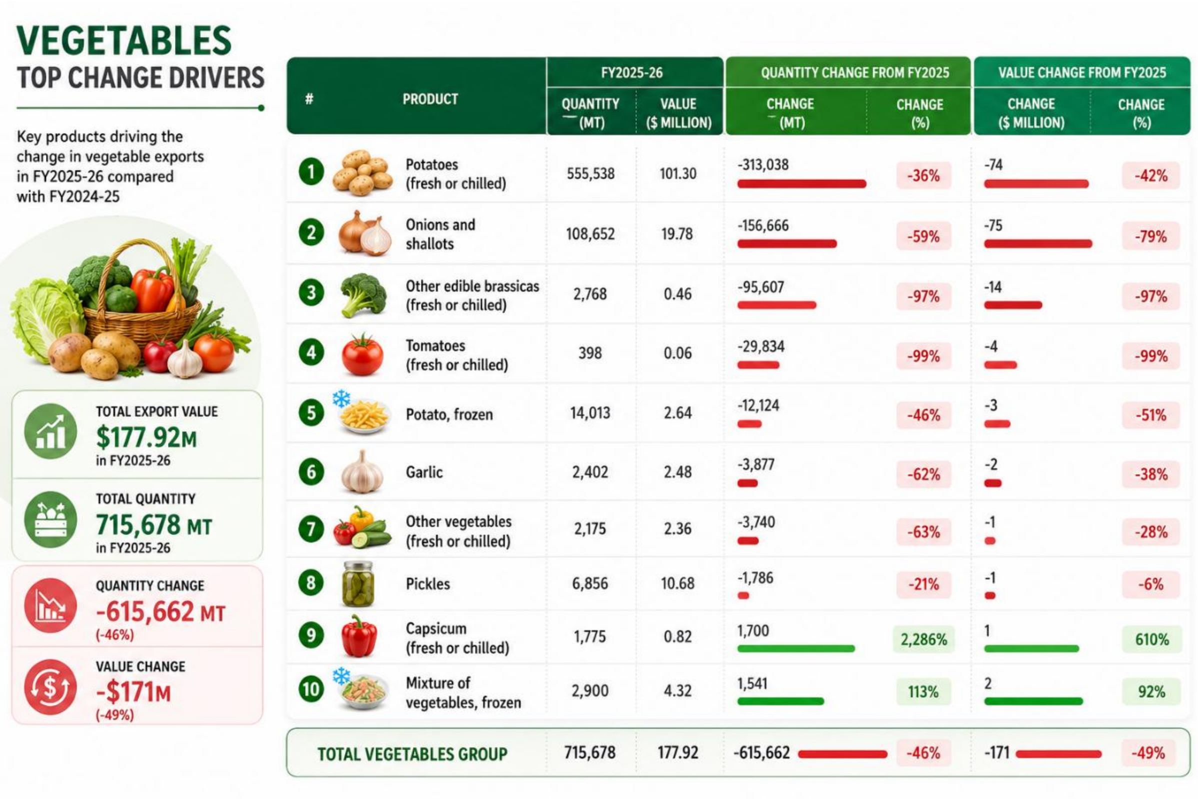
Fruit export growth was supported mainly by mangoes, bananas, mandarins, and dates, while declines in kino, other citrus fruits, plantains, lemons/limes, and watermelons reduced the overall gain.

2.4 Vegetables

Vegetable exports decreased from **USD 348.9 million** to **USD 177.9 million**, a decline of **USD 171.0 million**, or **49.0%**. Quantity also fell sharply from **1.33 million MT** to **715,678 MT**, a decrease of **615,662 MT**, or **46.2%**.

This indicates that the decline in vegetables was visible both in value and quantity.

2.4.1 Vegetables: Top Change Drivers



#	PRODUCT	FY2025-26		QUANTITY CHANGE FROM FY2025		VALUE CHANGE FROM FY2025	
		QUANTITY (MT)	VALUE ($ MILLION)	CHANGE (MT)	CHANGE (%)	CHANGE ($ MILLION)	CHANGE (%)
1	Potatoes (fresh or chilled)	555,538	101.30	-313,038	-36%	-74	-42%
2	Onions and shallots	108,652	19.78	-156,666	-59%	-75	-79%
3	Other edible brassicas (fresh or chilled)	2,768	0.46	-95,607	-97%	-14	-97%
4	Tomatoes (fresh or chilled)	398	0.06	-29,834	-99%	-4	-99%
5	Potato, frozen	14,013	2.64	-12,124	-46%	-3	-51%
6	Garlic	2,402	2.48	-3,877	-62%	-2	-38%
7	Other vegetables (fresh or chilled)	2,175	2.36	-3,740	-63%	-1	-28%
8	Pickles	6,856	10.68	-1,786	-21%	-1	-6%
9	Capsicum (fresh or chilled)	1,775	0.82	1,700	2,286%	1	610%
10	Mixture of vegetables, frozen	2,900	4.32	1,541	113%	2	92%
	TOTAL VEGETABLES GROUP	715,678	177.92	-615,662	-46%	-171	-49%

Figure 2-10: Vegetables: Top Change Drivers

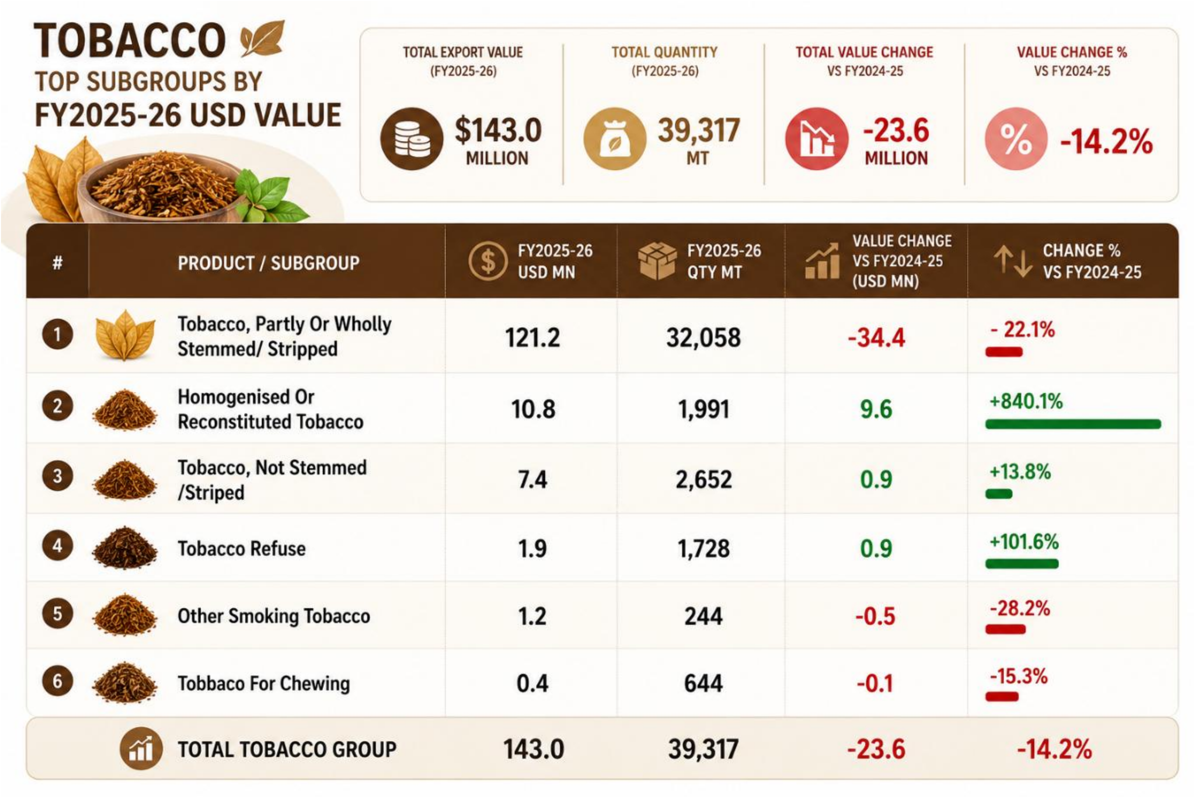
The decline in vegetable exports was heavily concentrated in potatoes and onions/shallots, with additional pressure from edible brassicas and tomatoes.

2.5 Tobacco

Tobacco exports moved from **USD 167.8 mn** to **USD 143.3 mn**, a change of **USD -24.5 mn (-14.6%)**. Quantity moved from **42,716 MT** to **42,430 MT (-0.7%)**.

The largest FY2025-26 HS-8 contributor was **Tobacco, Partly Or Wholly Stemmed/ Stripped**, with **USD 121.2 mn** and **32,058 MT**. The table below provides the main subgroup composition by FY2025-26 USD value.

2.5.1 Tobacco: top subgroups by FY2025-26 USD value



#	PRODUCT / SUBGROUP	FY2025-26 USD MN	FY2025-26 QTY MT	VALUE CHANGE VS FY2024-25 (USD MN)	CHANGE % VS FY2024-25
1	Tobacco, Partly Or Wholly Stemmed/ Stripped	121.2	32,058	-34.4	- 22.1%
2	Homogenised Or Reconstituted Tobacco	10.8	1,991	9.6	+840.1%
3	Tobacco, Not Stemmed /Striped	7.4	2,652	0.9	+13.8%
4	Tobacco Refuse	1.9	1,728	0.9	+101.6%
5	Other Smoking Tobacco	1.2	244	-0.5	-28.2%
6	Tobbaco For Chewing	0.4	644	-0.1	-15.3%
	TOTAL TOBACCO GROUP	143.0	39,317	-23.6	-14.2%

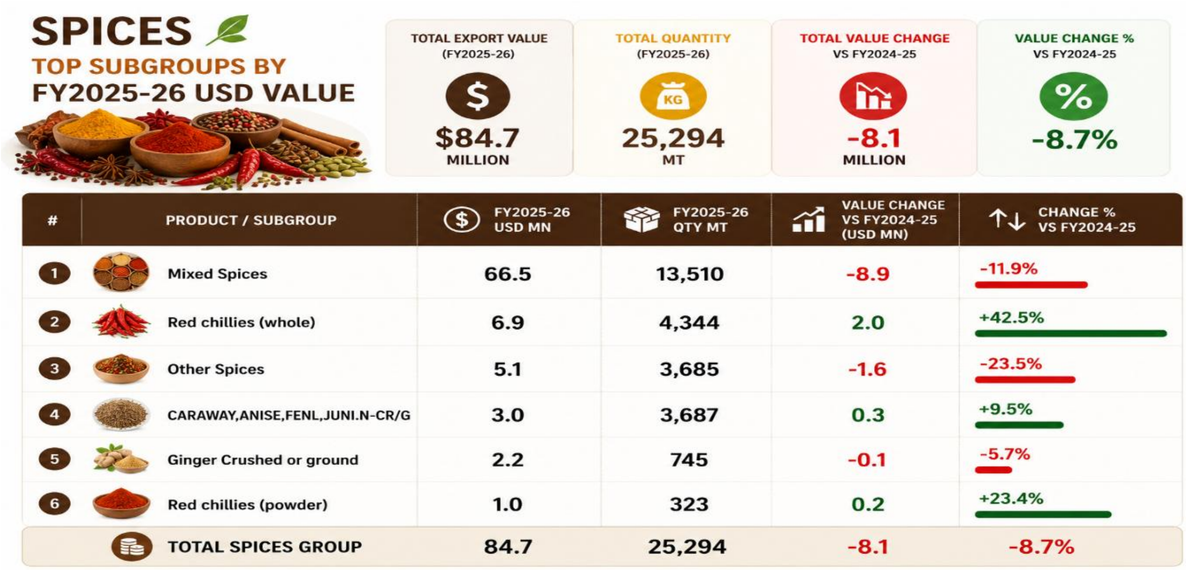
Figure 2-11: Tobacco: top subgroups by FY2025-26 USD value

2.6 Spices

Spices exports moved from **USD 95.5 mn** to **USD 87.3 mn**, a change of **USD -8.3 mn (-8.7%)**. Quantity moved from **27,393 MT** to **27,188 MT (-0.7%)**.

The largest FY2025-26 HS-8 contributor was **Mixed Spices**, with **USD 66.5 mn** and **13,510 MT**. The table below provides the main subgroup composition by FY2025-26 USD value.

2.6.1 Spices: top subgroups by FY2025-26 USD value



#	PRODUCT / SUBGROUP	FY2025-26 USD MN	FY2025-26 QTY MT	VALUE CHANGE VS FY2024-25 (USD MN)	CHANGE % VS FY2024-25
1	Mixed Spices	66.5	13,510	-8.9	-11.9%
2	Red chillies (whole)	6.9	4,344	2.0	+42.5%
3	Other Spices	5.1	3,685	-1.6	-23.5%
4	CARAWAY,ANISE,FENL,JUNI.N-CR/G	3.0	3,687	0.3	+9.5%
5	Ginger Crushed or ground	2.2	745	-0.1	-5.7%
6	Red chillies (powder)	1.0	323	0.2	+23.4%
	TOTAL SPICES GROUP	84.7	25,294	-8.1	-8.7%

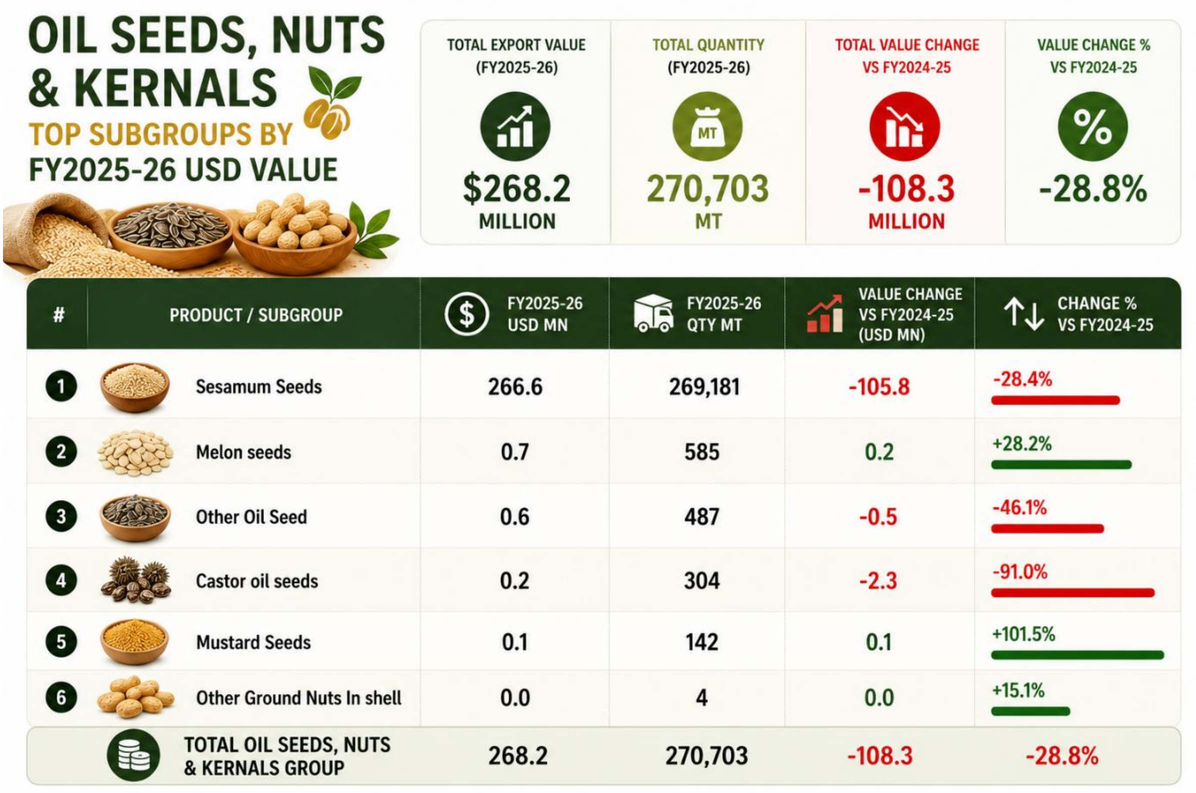
Figure 2-12: Spices: top subgroups by FY2025-26 USD value

2.7 Oil Seeds, Nuts and Kernals

Oil Seeds, Nuts and Kernals exports moved from **USD 376.7 mn** to **USD 268.3 mn**, a change of **USD -108.4 mn (-28.8%)**. Quantity moved from **323,537 MT** to **270,704 MT (-16.3%)**.

The largest FY2025-26 HS-8 contributor was **Sesamum Seeds**, with **USD 266.6 mn** and **269,181 MT**. The table below provides the main subgroup composition by FY2025-26 USD value.

2.7.1 Oil Seeds, Nuts and Kernals: top subgroups by FY2025-26 USD value



#	PRODUCT / SUBGROUP	FY2025-26 USD MN	FY2025-26 QTY MT	VALUE CHANGE VS FY2024-25 (USD MN)	CHANGE % VS FY2024-25
1	Sesamum Seeds	266.6	269,181	-105.8	-28.4%
2	Melon seeds	0.7	585	0.2	+28.2%
3	Other Oil Seed	0.6	487	-0.5	-46.1%
4	Castor oil seeds	0.2	304	-2.3	-91.0%
5	Mustard Seeds	0.1	142	0.1	+101.5%
6	Other Ground Nuts In shell	0.0	4	0.0	+15.1%
	TOTAL OIL SEEDS, NUTS & KERNALS GROUP	268.2	270,703	-108.3	-28.8%

Figure 2-13: Oil Seeds, Nuts and Kernals: top subgroups by FY2025-26 USD value

2.8 Meat and Meat Preparations

Meat and Meat Preparations exports moved from **USD 495.8 mn** to **USD 529.9 mn**, a change of USD **34.1 mn (+6.9%)**. Quantity moved from **114,912 MT** to **114,789 MT (-0.1%)**.

2.8.1 Meat and Meat Preparations: Top Change Drivers

#	PRODUCT DESCRIPTION	FY2025-26		QUANTITY CHANGE FROM FY2024-25		VALUE CHANGE FROM FY2024-25	
		QUANTITY (MT)	VALUE (USD MILLION)	CHANGE (MT)	CHANGE (%)	CHANGE (USD MILLION)	CHANGE (%)
1	Carcasses of bovine animals frozen	6,478	19.50	2,148	50%	5	32%
2	Cuts & offal of fowls frozen	3,289	0.87	-1,830	-36%	-1	-40%
3	Carcasses of sheep fresh/chilled	257	2.25	-1,404	-85%	-12	-84%
4	Carcasses of lamb fresh/chilled	6,755	58.99	-1,347	-17%	-9	-13%
5	Carcasses of bovine animals fresh/chilled	84,256	396.89	1,161	1%	44	13%
6	Edible offal of bovine animals frozen	3,526	8.36	1,021	41%	2	29%
7	Other cuts with bone of bovine animals	3,373	9.17	977	41%	1	13%
8	Edible offal of bovine animals fresh/chilled	866	2.09	-748	-46%	-3	-57%
9	Other prepared/preserved meat of bovine animals	2,161	14.58	602	39%	7	90%
10	Other meat of bovine animals dried/smoked	691	1.04	-512	-43%	-1	-43%
	TOTAL MEAT GROUP	114,789	529.88	-123	0%	34	7%

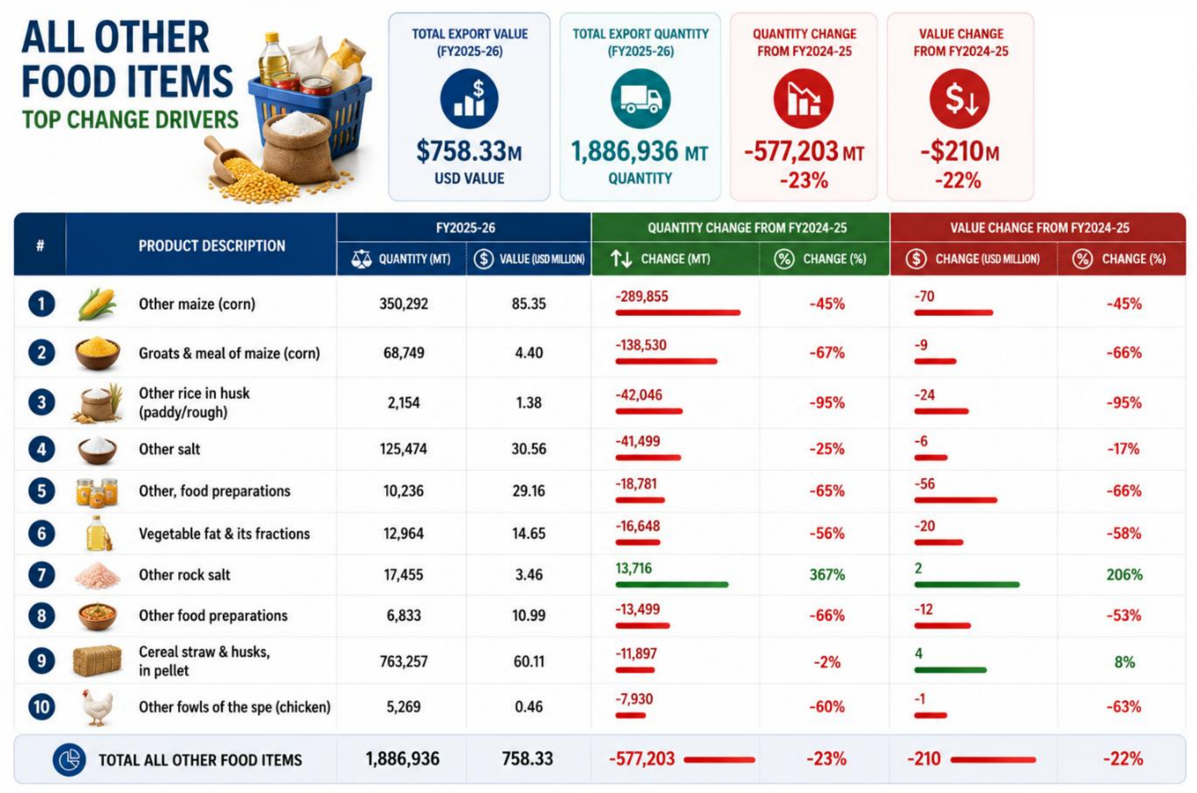
Figure 2-14: Meat and Meat Preparations: Top Change Drivers

Meat export growth was driven mainly by fresh/chilled bovine carcasses and prepared/preserved bovine meat, while sheep and lamb carcasses declined.

2.9 All Other Food Items

All Other Food Items exports moved from **USD 968.0 mn** to **USD 758.3 mn**, a change of **USD -209.7 mn (-21.7%)**. Quantity moved from **2.46 mn MT** to **1.89 mn MT (-23.4%)**.

2.9.1 All Other Food Items: Top Change Drivers



#	PRODUCT DESCRIPTION	FY2025-26		QUANTITY CHANGE FROM FY2024-25		VALUE CHANGE FROM FY2024-25	
		QUANTITY (MT)	VALUE (USD MILLION)	CHANGE (MT)	CHANGE (%)	CHANGE (USD MILLION)	CHANGE (%)
1	Other maize (corn)	350,292	85.35	-289,855	-45%	-70	-45%
2	Groats & meal of maize (corn)	68,749	4.40	-138,530	-67%	-9	-66%
3	Other rice in husk (paddy/rough)	2,154	1.38	-42,046	-95%	-24	-95%
4	Other salt	125,474	30.56	-41,499	-25%	-6	-17%
5	Other, food preparations	10,236	29.16	-18,781	-65%	-56	-66%
6	Vegetable fat & its fractions	12,964	14.65	-16,648	-56%	-20	-58%
7	Other rock salt	17,455	3.46	13,716	367%	2	206%
8	Other food preparations	6,833	10.99	-13,499	-66%	-12	-53%
9	Cereal straw & husks, in pellet	763,257	60.11	-11,897	-2%	4	8%
10	Other fowls of the spe (chicken)	5,269	0.46	-7,930	-60%	-1	-63%
	TOTAL ALL OTHER FOOD ITEMS	1,886,936	758.33	-577,203	-23%	-210	-22%

Figure 2-15: All Other Food Items: Top Change Drivers

The decline was mainly linked to maize, maize groats/meal, rice in husk, food preparations, and vegetable fats, despite some positive movement in rock salt and cereal straw/husks.

2.10 Sugar exports fell to zero

Sugar exports were reported at **USD 402.7 million** in FY2024-25 but **zero** in FY2025-26. In quantity terms, sugar exports fell from **749,469 MT** to **zero**. This alone accounted for about **USD 402.7 million** of the total export decline.

2.11 Possible Drivers Behind Major Export Declines

The export decline was concentrated in a few major products and categories, particularly rice, sugar, vegetables, oil seeds/nuts/kernels, maize-related items, and tobacco. To assess whether the decline was supply-driven, export performance was compared with available production data. The comparison shows that production decline explains only part of the export weakness. In several major items, domestic production increased, but exports still declined, indicating that market access, policy restrictions, border disruption, price movement, and destination-market demand were also important factors.

2.11.1 Production and Export Linkage

Item	Production MMT 2023-24	Production MMT 2024-25	Production Change	Relevance for Export Decline
Rice	9.86	9.71	-1.5%	Mild production decline may have contributed, but export decline was much sharper, especially in Other Rice.
Sugar*	5.90	7.67	+30.0%	Production increased, but exports fell to zero; decline is therefore unlikely to be explained by production shortage alone.
Potato	8.43	10.01	+18.7%	Production increased, but exports fell sharply; production does not explain the decline.
Onion	2.30	2.75	+19.2%	Production increased, but exports declined; market access or trade disruption is more relevant.
Sesamum seed	0.30	0.44	+44.7%	Production increased strongly, but export value declined; price/unit-value or destination-market factors may be important.
Maize	9.74	9.04	-7.2%	Production decline may have contributed slightly to lower maize-related exports.
Tobacco	0.19	0.24	+28.0%	Production increased, but exports declined; the fall appears more related to export demand, pricing, or product-level movement.

* For sugar, production years are 2024-25 and 2025-26.

The production comparison suggests that rice and maize had some supply-side weakness, but the decline in exports was much larger than the fall in production. For sugar, potatoes, onions, sesamum seed and tobacco, production increased while export performance weakened. Therefore, the decline in these categories should not be attributed to production shortfall alone.

2.11.2 Afghanistan Market Disruption

Afghanistan was an important destination for several food export items in FY2024-25, particularly sugar, other rice (nearly a billion USD decline category), vegetables and all other food items. The PRAL data shows a sharp fall in exports to Afghanistan in FY2025-26, especially after October. This timing is important because major Pakistan Afghanistan border crossings, including Torkham and Chaman, were reported closed for trade and pedestrian movement from around mid-October 2025 amid border tensions. Later reporting also noted that limited reopening was mainly for humanitarian/refugee movement, while cross-border trade remained restricted.

Period	FY2024-25 exports to Afghanistan USD Mn	FY2025-26 exports to Afghanistan USD Mn	Change USD Mn
Jul–Sep	187.6	111.5	-76.2
Oct–Jun	675.0	32.1	-642.9

PRAL data shows that Pakistan's food exports to Afghanistan during Oct-Jun fell from USD 675.0 million in FY2024-25 to only USD 32.1 million in FY2025-26, a decline of about USD 642.9 million. Collectively fell from USD 862.6 million in FY 2024-25 to USD 143.6 million in FY 2025-26, a decline of USD 719 million. This indicates a strong temporal association between the border/trade-route disruption and the collapse of Afghanistan-bound food exports. The impact was most visible in sugar, other rice, vegetables and all other food items.

Category / Item	Afghanistan FY2024-25 USD Mn	Afghanistan FY2025-26 USD Mn	Change USD Mn
Sugar	262.8	0.0	- 262.8
All Other Food Items	214.0	45.8	-168.2
Other Rice	179.1	36.7	142.3
Vegetables	100.4	6.5	-93.9
Fruits	58.3	18.7	-39.6
Basmati Rice	43.5	34.0	-9.5

The Afghanistan factor should therefore be treated as an important explanatory factors for the export decline, particularly because production increased in several affected commodities such as sugar, potatoes and onions.

2.11.3 Product-Specific Interpretation

2.11.3.1 Rice

Rice production declined only slightly, from 9.86 million tons to 9.71 million tons, a fall of 1.5%. However, rice exports declined much more sharply, with total rice export value falling by USD 1.06 billion and quantity falling by 1.41 million MT. This indicates that the rice export decline was not a production issue. The larger fall was concentrated in Other Rice, which declined by USD 974.9 million, while Basmati declined by USD 87.0 million. Market losses in Indonesia, Afghanistan, Malaysia, Senegal, Madagascar and the Philippines were especially important. The fall in Other Rice exports to Afghanistan alone was USD 142.3 million, suggesting that market access and destination-level demand were major factors.

2.11.3.2 Sugar

Sugar production increased significantly, from 5.90 million tons to 7.67 million tons, an increase of 30.0%. Despite this, sugar exports fell from USD 402.7 million to zero. This clearly shows that the decline in sugar exports was not caused by lower production. The more relevant explanations are likely to be export policy/permission, domestic stock management, and loss of Afghanistan-bound trade. Afghanistan alone accounted for a decline of USD 262.8 million in sugar exports. Therefore, sugar should be presented as a policy and market-access driven export shock rather than a production-driven decline.

2.11.3.3 Vegetables

Vegetable exports declined sharply despite higher production of key vegetables. Potato production increased by 18.7%, while onion production increased by 19.2%. However, fresh/chilled potato exports declined by USD 74 million, and onion/shallot exports declined by USD 75 million. This indicates that the vegetable export decline was not driven by production shortage. The fall was more likely associated with trade-route disruption, market access and destination demand. Afghanistan was particularly important, as vegetable exports to Afghanistan fell from USD 100.4 million to USD 6.5 million, a decline of USD 93.9 million.

2.11.3.4 Oil Seeds, Nuts and Kernels

The decline in this category was almost entirely linked to sesamum seeds. Sesamum seed production increased from 301,213 tons to 435,959 tons, an increase of 44.7%, while sesamum seed exports declined by USD 105.8 million. Since production increased strongly, the decline appears more related to export prices, international demand, buyer-side conditions, or market concentration rather than domestic output. This category should therefore be interpreted as a price/market-performance issue rather than a production shortfall.

2.11.3.5 All Other Food Items / Maize

Within All Other Food Items, maize was one of the largest negative contributors, with exports of declining by USD 70 million. Maize production declined from 9.74 million tons to 9.04 million tons, a fall of 7.2%, so lower production may have contributed to reduced maize export availability. However, the decline in All Other Food Items was also linked to Afghanistan-bound trade, which fell by USD 168.2 million. Therefore, both supply-side weakness in maize and market-access disruption appear relevant.

2.11.3.6 Tobacco

Tobacco production increased from 186,283 tons to 238,397 tons, a rise of 28.0%, while tobacco exports declined by USD 24.5 million. The decline was concentrated in partly or wholly stemmed/stripped tobacco, which fell by USD 34.4 million. Since production increased, the export decline appears more likely related to product-level demand, prices, buyer markets, or export composition rather than domestic production availability.

3 Food Group Imports: Major Trends and Composition

Food group imports increased from **USD 8.24 billion** in FY2024-25 to **USD 9.16 billion** in FY2025-26. The increase was driven mainly by palm oil, all other food items, and sugar.

3.1 Palm oil remained the largest import item

Palm oil imports increased from **USD 3.42 billion** to **USD 3.79 billion**, an increase of **USD 362.7 million**, or **10.6%**. In quantity terms, palm oil imports increased from **3.24 million MT** to **3.48 million MT**, a rise of **239,270 MT**, or **7.4%**.

Palm oil accounted for **41.3%** of total food group imports in FY2025-26, remaining by far the largest import category in the food group.

3.2 All other food items recorded the largest import increase

“All others food items” increased from **USD 2.30 billion** to **USD 3.02 billion**, a rise of **USD 717.9 million**, or **31.2%**. This was the single largest increase in value among the listed import categories.

Its share in total food group imports increased from **27.9%** in FY2024-25 to **33.0%** in FY2025-26.

3.3 Sugar imports increased sharply from a low base

Sugar imports rose from **USD 3.5 million** to **USD 175.2 million**, an increase of **USD 171.7 million**. In quantity terms, sugar imports increased from **3,624 MT** to **309,697 MT**.

At the same time, the export data shows sugar exports falling from **USD 402.7 million** to **zero**. The dataset therefore shows a clear shift in the recorded food group trade position for sugar: from export earnings in FY2024-25 to import expenditure in FY2025-26.

3.4 Pulses and soybean oil imports declined

Two major categories recorded lower import values:

Category	FY2024-25 Value	FY2025-26 Value	Change	Change %
Soybean Oil	USD 343.5 million	USD 109.7 million	-USD 233.9 million	-68.1%
Pulses	USD 1.01 billion	USD 832.2 million	-USD 182.7 million	-18.0%

Pulses remained a major import category despite the decline, with a **9.1%** share in total food group imports in FY2025-26. Soybean oil's share fell from **4.2%** to **1.2%**.

3.5 Tea, spices, dry fruits, and milk-related imports increased moderately

Tea imports increased from **USD 644.8 million** to **USD 664.8 million**, rising by **USD 19.9 million**, or **3.1%**. Spices increased by **USD 31.5 million**, or **13.7%**, while dry fruits and nuts increased by **USD 16.9 million**, or **11.7%**. Milk, cream, and milk food for infants increased by **USD 14.9 million**, or **10.8%**.

4 Key Insights from the Data

Insight 1: The food trade deficit widened because exports fell while imports increased

The most important finding is the simultaneous movement in opposite directions: exports declined by **USD 1.92 billion**, while imports increased by **USD 917.0 million**. Together, these movements widened the food group trade deficit by **USD 2.84 billion**.

Insight 2: Rice was the largest source of export decline

Rice exports declined by **USD 1.06 billion**, accounting for more than half of the total food export decline. Within rice, the decline was concentrated in "Other Rice Category," which fell by **USD 974.9 million**.

Insight 3: Sugar moved from export value to import value in the reported period

The export data reports sugar exports of **USD 402.7 million** in FY2024-25 and **zero** in FY2025-26. The import data reports sugar imports increasing from **USD 3.5 million** to **USD 175.2 million**.

Insight 4: Import pressure remained concentrated in palm oil and all other food items

Palm oil and all other food items together accounted for about **74.3%** of food group imports in FY2025-26. Palm oil alone accounted for **41.3%**, while all other food items accounted for **33.0%**.

Insight 5: Some export categories improved despite the overall decline

Meat and meat preparations, fish and fish preparations, and fruits all showed export growth. Their combined increase was about **USD 67.2 million**, which partially offset the much larger decline in rice, sugar, vegetables, oil seeds/nuts/kernals, and all other food items.

5 Conclusion

The PRAL data shows a clear weakening of Pakistan's food group trade position in FY2025-26. Food group exports declined from **USD 6.88 billion** to **USD 4.96 billion**, while imports increased from **USD 8.24 billion** to **USD 9.16 billion**. Consequently, the food group trade deficit widened from **USD 1.36 billion** to **USD 4.20 billion**.

The export decline was mainly associated with rice, sugar, vegetables, oil seeds/nuts/kernals, and all other food items. On the import side, the increase was mainly associated with all other food items, palm oil, and sugar. At the same time, meat, fish, and fruit exports showed positive growth, while soybean oil and pulses imports declined.

6 Annextures

6.1 Pakistan food group exports FY25 vs FY26 - Provisional

FOOD GROUP	Quantity (MT)				Value ($Million)				$ Value share in Food Group	
	FY25	FY26	Change (MT)	Change (%)	FY25	FY26	Change ($Million)	Change (%)	FY25	FY26
1.RICE	5,646,092	4,231,098	**-1,414,993**	**-25%**	3,255	2,193	**-1,062**	**-33%**	47%	44%
a) BASMATI	777,781	691,737	**-86,044**	**-11%**	807	720	**-87**	**-11%**	12%	15%
b) OTHERS	4,868,311	3,539,362	**-1,328,949**	**-27%**	2,448	1,473	**-975**	**-40%**	36%	30%
2.FISH & FISH PREPARATIONS	217,567	213,405	**-4,162**	**-2%**	465	482	**17**	**4%**	7%	10%
3.FRUITS	576,518	556,126	**-20,392**	**-4%**	306	322	**17**	**5%**	4%	6%
4.VEGETABLES	1,331,340	715,678	**-615,662**	**-46%**	349	178	**-171**	**-49%**	5%	4%
5.LEGUMINOUS VEGETABLES (PULSES)	0	0	**0**	**0%**	0	0	**0**	**0%**	0%	0%
6.TOBACCO	42,716	42,430	**-286**	**-1%**	168	143	**-25**	**-15%**	2%	3%
7.WHEAT	0	0	**0**	**0%**	0	0	**0**	**0%**	0%	0%
8.SPICES	27,393	27,188	**-205**	**-1%**	96	87	**-8**	**-9%**	1%	2%
9.OIL SEEDS, NUTS AND KERNALS	323,537	270,704	**-52,833**	**-16%**	377	268	**-108**	**-29%**	5%	5%
10.SUGAR	749,469	0	**-749,469**	**-100%**	403	-	**-403**	**-100%**	6%	0%
11.MEAT AND MEAT PREPARATIONS	114,912	114,789	**-123**	**0%**	496	530	**34**	**7%**	7%	11%
12.ALL OTHER FOOD ITEMS	2,464,139	1,886,936	**-577,203**	**-23%**	968	758	**-210**	**-22%**	14%	15%
TOTAL FOOD GROUP					**6,881**	**4,962**	**-1,919**	**-28%**		

6.2 Pakistan food group imports FY25 vs FY26 - Provisional

FOOD GROUP	Quantity (MT)				Value ($Million)				$ Value share in Food Group	
	FY25	FY26	Change (MT)	Change (%)	FY25	FY26	Change ($Million)	Change (%)	FY25	FY26
1. MILK,CREAM & MILK FOOD FOR INFANTS	51,927	52,382	455	1%	138	152	15	11%	2%	2%
2. WHEAT UNMILLED	10,988	1,848	-9,140	-83%	2	1	-2	-77%	0%	0%
3. DRY FRUITS & NUTS	162,289	163,891	1,602	1%	144	161	17	12%	2%	2%
4. TEA	258,043	266,481	8,438	3%	645	665	20	3%	8%	7%
5. SPICES	209,537	219,862	10,325	5%	229	260	31	14%	3%	3%
6. SOYABEAN OIL	321,211	98,633	-222,578	-69%	344	110	-234	-68%	4%	1%
7. PALM OIL	3,244,751	3,484,021	239,270	7%	3,424	3,787	363	11%	42%	41%
8. SUGAR	3,624	309,697	306,073	8446%	4	175	172	4850%	0%	2%
9. PULSES (LEGUMINOUS VEGETABLES)	1,421,419	1,398,356	-23,063	-2%	1,015	832	-183	-18%	12%	9%
10. ALL OTHERS FOOD ITEMS	3,932,132	5,233,107	1,300,976	33%	2,301	3,019	718	31%	28%	33%
TOTAL FOOD GROUP					**8,245**	**9,162**	**917**	**11%**		