

Pakistan Fruits and Vegetables Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Pakistani fruits and vegetables market is projected to register a CAGR of 5.9% during the forecast period 2022-2027.

As an impact of the COVID-19 pandemic, the Pakistani fruits and vegetables market suffered from a few challenges related to production, supply chain, and trade movement. Farmers were affected by poor returns, varying from one-third the usual or a complete loss. Pakistan, one of the leading countries to export a variety of its fruit produce globally, faced export challenges that hampered the usual trade movements due to repeated lockdowns and related trade restriction protocols worldwide.

According to the FAO, fruit production amounted to 9 million ton in 2018. Mangoes accounted for the highest production of 2.3 million ton, followed by oranges with the production of 1.5 million ton. Similarly, vegetable production accounted for 5.4 million ton, where 40% of the production was only attributed to onions with 2.1 million ton, followed by tomatoes, carrots, and turnips. According to the Pakistan Bureau of Statistics, Pakistan exported 768,200 ton of fruit worth USD 415.0 million in 2018. Different climates result in the availability of many vegetable varieties in markets around the year. Around 35 kinds of vegetables are grown across numerous ecosystems in Pakistan, ranging from the dry zone to the wet zone, low elevation to high elevation, rain-fed to irrigated, and low input to high input systems, such as plastic houses. According to Pakistan Engineering Services 2019 Report, the agricultural sector provides almost 38.5% of employment. Also, horticulture in Pakistan has emerged as an important sector since it contributes a good 18.5% to the national agriculture GDP. A large number of horticultural products are produced to fulfill the domestic demand for fruit and vegetables for the rapidly expanding population as well as to cater to the rising demand arising in potential export markets. Out of the total annual agriculture production of the country, the major contributors are Punjab, Sindh, Balochistan, and NWFP. Mango, kino, apple, dates, pine nuts, oranges, and guava are a few of the majorly exported fruits, and potato, onion, mushroom, garlic, chili, etc., are among the vegetables exported globally. Pakistan is heavily relying on one market for each item. For example, Dubai is the biggest market for Pakistani mango, followed by England and Saudi Arabia.

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Sri Lanka is the only biggest market for Pakistani fresh apples. Hence, all these aforementioned factors are anticipated to positively impact the fruits and vegetables market of Pakistan during the forecast period.

Pakistan Fruits & Vegetables Market Trends

Increasing Production of Fruits and Vegetables

In 2019, Pakistan had a total cropped area of 22.1 million hectares. Of this, 65.8% were under food crops, 24.2% were under cash crops, 6.7% were under pulses, and 3.3% were under edible oilseeds. Vegetables constitute an integral component of the cropping pattern, but the increasing pressure on food and cash crops has limited the area under vegetables to about 0.62 million hectares, which is 3.1% of the total cropped area. Vegetable crops are very important due to their higher yield potential, higher return and high nutritional value, and suitability for small landholding farmers. Vegetables provide proteins, minerals, and vitamins required for human nutrition. In Pakistan, the daily per capita intake is low, amounting to about 100 grams compared to the recommended consumption of about 285 grams. In line with the population increase, land degradation, and water scarcity, there is a need to substantially increase vegetable production in the years to come and attain self-sufficiency as well as increase the exportable surplus. Pakistan has a wide range of agro-climatic conditions, allowing the country to produce a wide variety of tropical and sub-tropical fruits and vegetables. Some of the major fruits and vegetables produced are mangoes, oranges, apples, onions, tomatoes, carrots, and watermelons, among others. Onions, carrots, and tomatoes together make up around 49% of the gross vegetable production in Pakistan. In 2020, Pakistan produced approximately 5.5 million ton of vegetables. Out of the total production, the major states producing vegetables like potatoes, onions, and tomatoes are Punjab, Sindh, and Baluchistan. Other vegetables like mushrooms, garlic, and chilly are also produced on a larger scale for export purposes. Thus, the increasing population and rising health awareness are anticipated to drive the market during the forecast period.

Vegetable Imports Dominate the Market's Revenue Share

According to the International Trade Center, vegetable imports dominate the Pakistani market compared to fruit imports. Australia, Afghanistan, Russia, Canada, and Vietnam are the major exporters of vegetables to Pakistan. Vegetables like potatoes, tomatoes, onions, shallots, garlic, leeks, cabbage, cauliflower, kohlrabi, kale, lettuce, chicory, carrots, turnips, cucumbers, gherkins, and coconuts are majorly imported in Pakistan. The growing domestic demand for vegetables is driving the vegetable imports in the country.

Pakistan Fruits & Vegetables Market Competitor Analysis

Additional Benefits:

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3 months of analyst support

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