

Pakistan Fruits and Vegetables - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

<https://marketpublishers.com/r/PD6B06079F3BEN.html>

Date: July 2024

Pages: 120

Price: US\$ 4,750.00 (Single User License)

ID: PD6B06079F3BEN

Abstracts

The Pakistan Fruits and Vegetables Market size is estimated at USD 9.13 billion in 2024, and is expected to reach USD 12.98 billion by 2029, growing at a CAGR of 7.30% during the forecast period (2024-2029).

Key Highlights

According to the FAO, fruit production amounted to 9.82 million metric ton in 2020. Mangoes accounted for the highest production of 2.3 million metric ton, followed by oranges with a production of 1.6 million metric ton. Similarly, in 2020, vegetable production accounted for 5.5 million ton, where about 40% of the production was only attributed to onions with over 2 million metric ton, followed by tomatoes, carrots, and turnips. Following cereals exports, fruit exports hold the largest share of the agriculture export revenue of the country. The value of the country's fruit exports grew by over 17% reaching USD 492 million in 2021.

Different climates in the country 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. Horticulture in Pakistan emerged as an important sector contributing over 18% 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 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 specific items. For example, Dubai is the biggest market for Pakistani mango, followed by England and Saudi Arabia. Sri Lanka is the only biggest market for Pakistani fresh apples. Hence, all these aforementioned factors are anticipated to positively impact the fruits and vegetable market of Pakistan during the forecast period.

Pakistan Fruits and Vegetables Market Trends

High Export Potential of Fruits

Fruits are considered one of the most important agricultural commodities in Pakistan due to their high export value. Pakistan is one of the leading producers of Citrus and Mangoes in the world due to favorable environmental conditions, and it is mostly produced in Sindh and Punjab regions in the country. Due to their high export potential, the government is implementing various projects and strategies to increase fruit production in the country. For example, the Government of Pakistan initiated the implementation of a new project "National Programme for Enhancing Command Area of Barani Areas of Pakistan". The project started in the year 2021, and it aims to bring over 18,000 ha under fruit crops in five years. Furthermore, the government formulated strategies, such as 'Pakistan Fruits and Vegetables Export Strategy 2023-2027 as part of the National Priority Sectors Export Strategy (NPSES) Initiative, to increase the horticulture exports of the country in the next five years. According to the Food and Agriculture Organization Statistics (FAOSTAT), the total fruit production in Pakistan increased from 9.48 million metric ton to 11.13 million metric ton during the period 2018-2021. Owing to the increased fruit production in the country, fruit exports of the country are gradually increased over the past few years. According to the ITC Trade Map, the fruit exports of the country recorded a growth of 17.7% in 2021 reaching USD 492 million. Citrus and Mangoes are the most exported fruits in the country accounting for over 60% of the total fruit exports of Pakistan. Thus, the high export potential of fruits supported by various government initiatives and increased domestic production is anticipated to drive the fruits and vegetables market in Pakistan in coming years.

Increasing demand for Vegetables

Owing to low domestic production, Pakistan depends on vegetable imports for meeting the domestic demand. According to the International Trade Center, vegetable imports

dominate the Pakistani market compared to fruit imports. The value of vegetable imports in the country increased by about 50% during the period 2018-2021. The country imported vegetables worth more than USD 946 million in the year 2021 with Australia, Afghanistan, Russia, and Canada being 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. Furthermore, recent floods in the country are expected to further increase vegetable imports in the following years. According to a report published by ICIMOD (International Centre for Integrated Mountain Development), Sindh province is the most affected area in the country, where the vegetable losses are estimated at USD 374 million affecting the three key vegetable crops Onions, Tomato, and Chilli. The growing domestic demand for vegetables in addition to the low domestic production is anticipated to drive vegetable imports driving the studied market.

Pakistan Fruits and Vegetables Industry Overview

Additional Benefits:

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