



Pakistan

UNLOCKING HIGH-VALUE INVESTMENT
OPPORTUNITIES ACROSS PAKISTAN'S
DAIRY, HORTICULTURE AND SPECIALTY
FOOD SECTORS

HAND-IN-HAND INVESTMENT FORUM
ROME, OCTOBER 2026



Why Pakistan?

24%

Agriculture's share of GDP

33%

Share of the labour force employed in agriculture

61%

Rural population

USD 411B

GDP

ACROSS PAKISTAN, FARMERS, PASTORALISTS AND FOOD ENTREPRENEURS PRODUCE **DISTINCTIVE AGRIFOOD PRODUCTS**, SUPPORTING RURAL LIVELIHOODS AND SERVING A **DOMESTIC MARKET** OF 241 MILLION PEOPLE.

*Yet much of their products' **potential value remains untapped** because of limited processing, weak cold chains, fragmented supply networks and insufficient access to premium markets.*



What is constraining Pakistan's agrifood sector?

FOUR STRUCTURAL
GAPS ARE LIMITING
PRODUCTIVITY, VALUE
ADDITION AND MARKET
RETURNS

01

Limited processing and value addition

Domestic capacity remains insufficient for premium products such as olive oil, camel milk powder and buffalo mozzarella, while much of the sector's output is sold with limited processing or branding

02

Weak collection and cold-chain systems

Inadequate chilling, storage and refrigerated transport increase spoilage and affect quality, particularly across the dairy and frozen-food value chains

03

Low productivity and limited access to modern technologies

Dairy yields remain below international benchmarks, while insufficient mechanization, irrigation and certified planting materials constrain production across several value chains

04

Fragmented markets and informal supply chains

Middlemen continue to dominate milk procurement, while weak traceability, quality testing and aggregation systems reduce producer returns and restrict access to premium markets

Where are the biggest investment opportunities?

SIX STRATEGIC INVESTMENTS FOR USD 39.7 MILLION TO EXPAND PREMIUM PRODUCTION, MODERNIZE PROCESSING AND STRENGTHEN MARKET ACCESS

01

Olive Oil

Develop commercial olive production and modern extraction capacity to supply branded, certified premium oils

USD 7.3M
Investment

USD 3.9M
NPV

21.0%
IRR

02

Camel Milk

Establish commercial camel farms, milk collection centers and processing capacity for growing domestic and export markets

USD 12.1M
Investment

USD 11.4M
NPV

32.0%
IRR

03

Mango Gelato

Transform Pakistan's premium Sindhri and Chaunsa mangoes into high-value artisanal frozen products

USD 0.6M
Investment

USD 0.2M
NPV

23.0%
IRR

04

Buffalo Farm

Develop a modern dairy farm with elite buffalo breeds, mechanized production and renewable energy

USD 9.4M
Investment

USD 3.9M
NPV

22.0%
IRR

05

Buffalo Milk Collection Centers

Build a traceable milk collection and cold-chain network to improve quality, reduce losses and increase farmer returns

USD 1.8M
Investment

USD 0.9M
NPV

19.0%
IRR

06

Buffalo Mozzarella Cheese

Convert premium buffalo milk into export-ready mozzarella and other high-value dairy products

USD 8.5M
Investment

USD 5.9M
NPV

32.0%
IRR

Why invest in Pakistan now?

A LARGE DOMESTIC MARKET, STRATEGIC TRADE ACCESS AND INVESTOR-FRIENDLY POLICIES CREATE THE CONDITIONS FOR AGRIFOOD GROWTH

Large Domestic Market

A population of 241 million creates substantial demand for dairy, specialty foods and premium consumer products

Strategic Trade Gateway

Pakistan connects South Asia, Central Asia, China and the Middle East

Preferential Market Access

EU GSP+ status, SAFTA membership and trade agreements support access to international markets

Competitive Investment Incentives

Special Economic Zones and Export Processing Zones provide tax breaks and duty exemptions

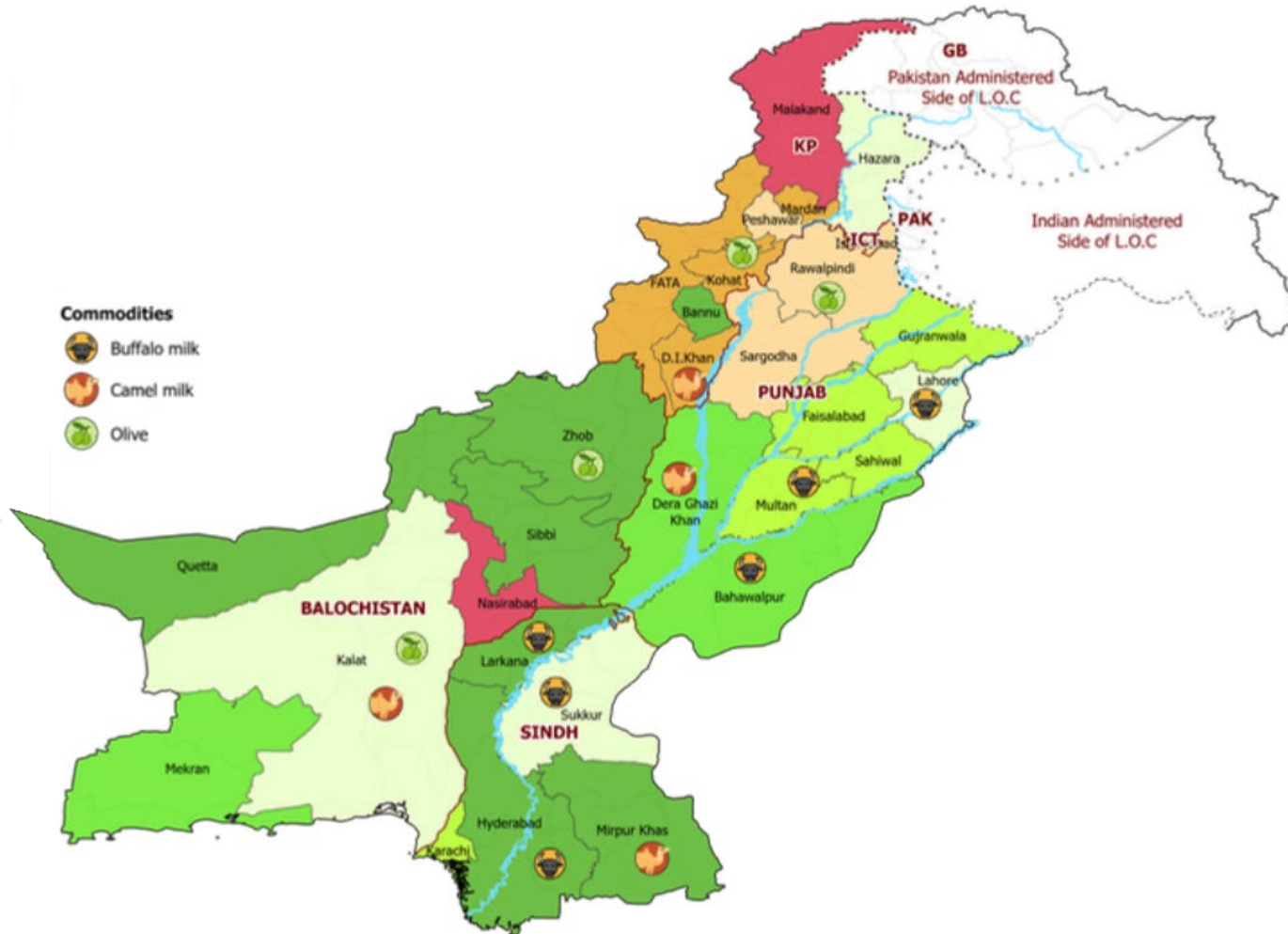
Reduced Equipment Costs

Machinery imports benefit from a 0% tariff and qualifying investments can access a 25% tax credit

Growing Premium Markets

Demand is expanding for camel dairy, olive oil, specialty cheeses and premium frozen desserts across Asia and the Gulf

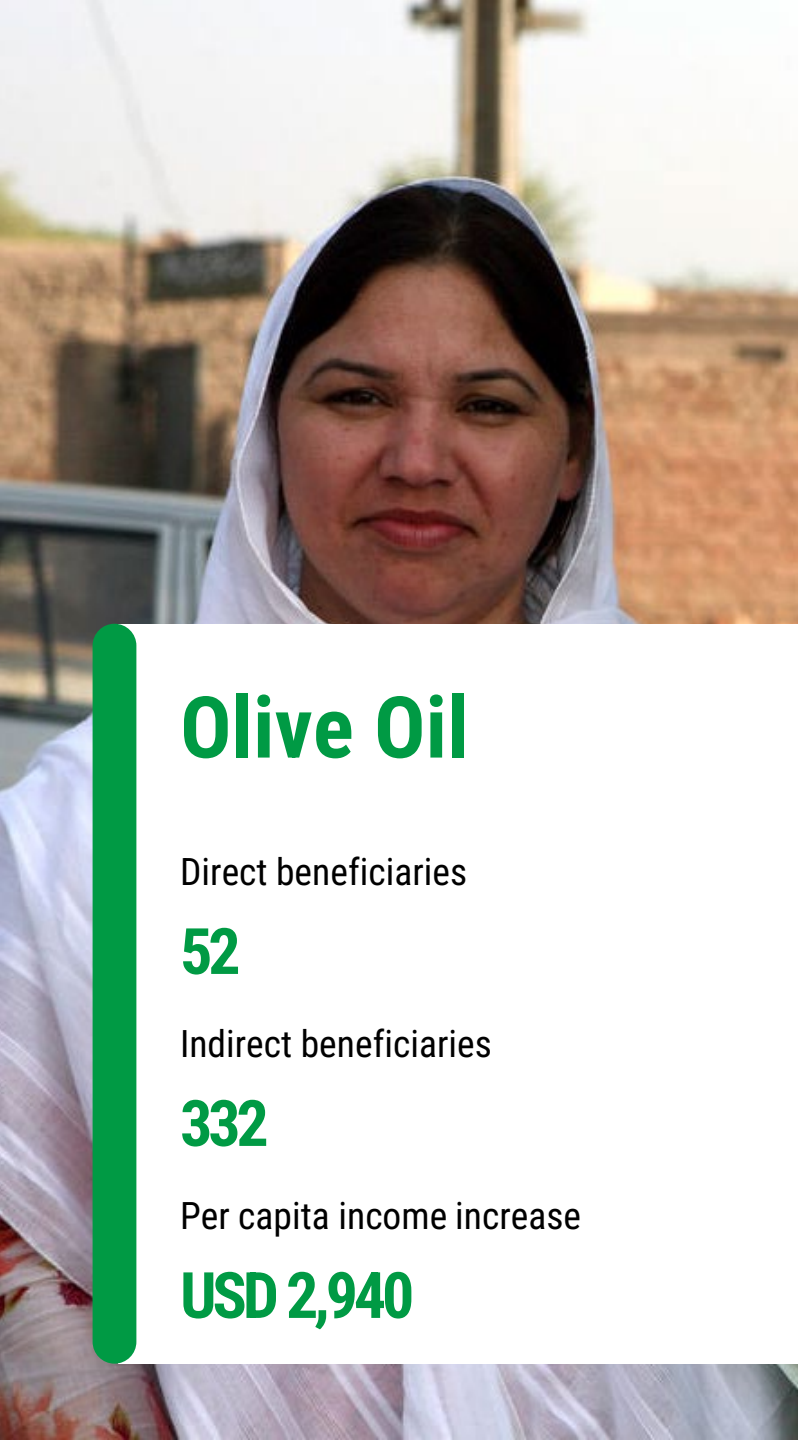
How do we know where to target these investments?



FAO'S GEOSPATIAL PLATFORM HELPS IDENTIFY AREAS WHERE AGRICULTURAL POTENTIAL IS GREATEST.

INVESTMENTS ARE TARGETED TO ADDRESS THE SPECIFIC CHALLENGES OF EACH TERRITORY, MAXIMIZING IMPACT.

- Critical with moderate agricultural opportunities
- Medium priority with moderate agricultural opportunities
- Low priority
- High priority
- Medium priority with high agricultural opportunities
- Low priority with high agricultural opportunities
- High performance



What impact can these investments deliver?

BUILDING MORE PRODUCTIVE, MODERN AND
HIGHER-VALUE AGRIFOOD CHAINS

Olive Oil

Direct beneficiaries

52

Indirect beneficiaries

332

Per capita income increase

USD 2,940

Camel Milk

Direct beneficiaries

75

Indirect beneficiaries

479

Per capita income increase

USD 4,368

Mango Gelato

Direct beneficiaries

82

Indirect beneficiaries

524

Per capita income increase

USD 955



Buffalo Farm

Direct beneficiaries

138

Indirect beneficiaries

882

Per capita income increase

USD 1,180

Buffalo Milk Collection Centers

Direct beneficiaries

69

Indirect beneficiaries

441

Per capita income increase

USD 616

Buffalo Mozzarella Cheese

Direct beneficiaries

131

Indirect beneficiaries

837

Per capita income increase

USD 6,107

How can you be part of this story?

THREE SIMPLE STEPS

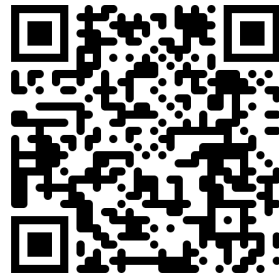
01 Explore the Investment Note

Download the **full investment note** or **investor deck** from the country page:



Access the most relevant document to you for more details on the country's investment cases.

02 Request a Bilateral Meeting



Schedule a one-on-one session with the country's delegation to discuss opportunities.



03 Join as an Investor/Partner



Engage with us as a DFI, MDB, or private investor to structure, derisk, and deploy capital.