

Agricultural Sector (Agri-Tech)

Sector Pitch

August 2025



Pakistan's recently reformed economy and vibrant and talented population have contributed to the nation's appeal as an investment destination

Pakistan Value Proposition

Reformed Economy



USD 3.3Tn¹

Expected GDP in 2050 (from USD >410Bn² today)



B-

Improved Credit Rating³ from CCC-



Top 10

In Business Entry Regulations ranking⁴



Stabilized Inflation

At lowest levels since 1968⁵



Stabilized Currency

Achieved since 2023 in coordination with IMF



10-Year Tax Holidays

and other fiscal and trade incentives in Special Economic Zones⁶



Vibrant Demographics and Talent



255 million

Large and growing population⁷



64%

Population younger than 30⁷



7th largest

Workforce Globally⁸



2 million

University students enrolled every year⁹



1. Goldman Sachs; 2. National Accounts Committee; 3 Fitch Ratings; 4. World Bank's B-READY assessment; 5. US (St Louis) Federal Reserve Bank; 6. Pakistan Government; 7. United Nations; 8. CIA World Factbook; 9. Higher Education Commission

To develop critical mass, Pakistan is advancing strategic initiatives to boost private investment in critical sectors of the economy

SIFIC ESTABLISHMENT

SIFIC has been established to act as a **single window to create a thriving business environment and develop favorable policies to increase ease of doing business**



ECONOMIC AGENDA LAUNCHED

Pakistan launched Uraan Pakistan, aimed at economic development across 5 pillars:



OPPORTUNITIES PIPELINE DEVELOPMENT

The government is working on developing a **pipeline of internationally competitive investment opportunities geared towards full operational and commercial facilitation**



Pakistan is actively seeking to partner with global stakeholders, to **leverage international expertise and investments while safeguarding the viability and profitability of each project from an investor's standpoint.**



Pakistan is working on the key enablers required to attract the private sector across Pakistan's multiple economic sectors

1 Consistent Policy Framework

Consistent FDI, tax, and industrial policies with long-term orientation and minimal reversal risk



2 One-Window Investor Facilitation

Seamless processing of approvals, permits, and licenses. A single, empowered agency that owns this end-to-end journey



3 Ease of Repatriation of Profits

Steadfast assurances to repatriate profits and convert currency without friction



4 Legal & Contract Enforcement

Independent, fast-track commercial courts and adherence to international arbitration standards



5 Political and Macro Stability

Strong stability in terms of macroeconomic environment (inflation, debt, currency) and cross-party consensus



6 Positive Global Perception

A globally resonant and visible narrative shift for Pakistan showcasing its viability



Pakistan is currently working on incentives geared to catalysing private sector investment across multiple sectors

The government continues to enact major steps that reinforce attractiveness and viability of the private sector

1 Ensures investment protection

Implementation of key investment regulations, such as:

- Foreign Private **Investment Promotion and Protection Act**
- **Bilateral Investment Treaties** with Friendly Countries
- **Special Economic and Technology Zones (SEZs, STZs)** regulation

2 Preserves security and safety

- Pre-approved **site access** for **Special Economic Zones (SEZs)**
- **Specialized, highly trained security units** for investor protection
- **Enhanced law enforcement and monitoring** at industrial zones
- Controlled, heavily surveilled, and **secure project sites**



2 Pak-China Trade Relations

- **China and Pakistan** have developed key treaties and agreements, including:
 - Bilateral Investment Treaty: China–Pakistan Economic Corridor (**CPEC**)
 - **China-Pakistan Free Trade Agreement (CPFTA)**

3 Enables global trade access

- **Export Facilitation Scheme (EFS)**
- Signed **major trade agreements (PTAs & FTAs)**
- **Connected to key global markets**
- Access to **South Asian Free Trade Area**, and more



These efforts have garnered international recognition, as Pakistan has been featured in the international media as a re-emerging attractive investment destination

Where Pakistan Has Been Featured

BARRON'S

Bloomberg

FitchRatings

ARAB NEWS

Key Articles

**Pakistan Isn't That Risky Anymore.
Its Economy Is a Mini-Miracle.**

**Pakistan Economy Grows Faster Than
Expected on IMF Aid Boost**















Pakistan economy moving in
'right direction' — IMF chief

PAKISTAN: Staying the Course on Implementing Structural Reforms Critical to Turn Economic Stabilization into Sustained, Inclusive Growth, says World Bank

International recognition highlights Pakistan's renewed economic attractiveness and stability

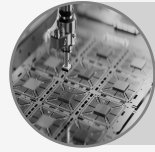
As a matter of fact, multiple global and regional entities have announced recent FDI projects in Pakistan

Examples of Foreign Direct Investment (FDI) projects in Pakistan

FDI projects (non-exhaustive)		
<p>Hangzhou Newsea (China) USD 50-70Mn</p>  <p>– Joint venture to expand API manufacturing capacity in Pakistan</p>	<p>AD Ports (UAE) USD 220Mn</p>  <p>– 50-year concession agreement to manage, operate and develop the Karachi Gateway Terminal</p> 	<p>Al Mirqab Capital (Qatar) Power Construction Corp. (China) USD 2.09Bn</p>   <p>– Construction of coal-powered power plant in Port Qasim</p>  
<p>DP World (UAE) and National Logistics Corp. (Pakistan) JV investment not public</p>  <p>– Development of 50km freight corridor from Karachi Port to Pripri</p> 	<p>Air Arabia (UAE) and Lakson Group (Pakistan) JV investment not public</p>  <p>– Joint venture with Pakistan's Lakson Group to launch low-cost airline Fly Jinnah in 2022</p> 	<p>Other Announcements and MoUs (non-exhaustive)</p>   

Moving forward, Pakistan aims to propel domestic growth across 15 investment areas

Pakistan's Focus Investment Areas



Semiconductors



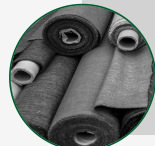
Power Sector



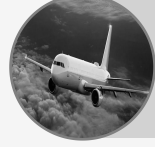
Pharmaceutical Sector



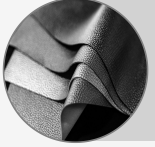
Petroleum Sector



Textiles



Aviation



Leather: Tanned, Footwear,
Gloves and Garments



Real Estate



Food & Agriculture



Iron, Steel & Copper



ICT, Fintech & Software



Automotive:
Electric Vehicles (EVs) and
Traditional Automobiles



Chemicals & Petrochemicals



Solar Power



Agri-Tech

Focus of this Presentation

Pakistan has a significant agriculture sector which contributes to 23% to GDP with a small but growing presence of Agri-tech solution providers

Pakistan's Agriculture Sector



23%
GDP contribution



39%
Employment generation



+8 Mn
Rural livelihood support



Food Security
Ensured



Raw material
to the industrial sector



USD 10+ Bn
FX contributed

Key Sectors

Growth rate of 1.5% in 2023, Livestock being the largest contributor

Agri-Tech

- **+100 companies** in eco-system with over **3 billion PKR** raised
- Multiple service providers across eco-system including **e-commerce, procurement and smart farming solutions**
- Potential to **improve yields by +30%**, generate **\$8 Bn additional value**



Livestock

- Largest contributor to agriculture, accounting for **62.68%** of value addition and **14.36%** of GDP
- Pakistan ranks among **top-10 beef producing countries in 2025** while is the **eleventh largest** poultry producer globally, achieving a **7.3%** annual growth rate over the past decade
- Pakistan **Growth rate 15'-23': 3.78%**



Crops

- **Key crops** (i.e., Sugarcane, Rice, Wheat, Maize, Barley) accounted for **18.23%** of value addition and **4.18%** of GDP
- **Secondary crops** contributed **14.49%** to value addition and **3.32%** to GDP
- **Growth rate 15'-23': -2.49%**



Fisheries

- Fisheries **enhance food security** by reducing reliance on beef and poultry
- In 2023, total fish production reached **700,000 MT**, reflecting a **0.6% increase** from the previous year's **696,000 MT**
- **Growth rate 15'-23': 1.44%**



Pakistan's strategic edge: A digitally savvy, China-aligned agriculture powerhouse with huge upside in terms of long-term supply of ample land and labor



Strategic Bilateral Partnership with China

- Pakistan and China share an **iron-clad strategic partnership**
- This diplomatic foundation offers **secure and mutually beneficial investment conditions** for Chinese enterprises
- Meat and poultry sector is positioned as a **priority area** under this bilateral framework



Enabling Digital Infrastructure

- Pakistan has recorded a **massive growth in smartphone and digital penetration** with access rising from 10% in 2014 to **just over 50% by 2020**
- The growth of the sector is further aided by the **widespread availability of cheap and accessible mobile data** and decent 4G coverage across the vast country



Strategic Geopolitical Location

- **Strategic proximity to GCC, China, and Africa** positions Pakistan as a regional hub
- Export corridors via **Karachi, Gwadar, and Sialkot**



Abundant Arable Land & Labor

- **Per- capita cultivated land is ~2× that of China**, offering scope to expand crop production significantly
- **Large, low-cost agricultural workforce** ideal for labor-intensive farming and processing activities

Investors gain from targeted government policies designed to catalyze the entire agricultural and related agri-tech sector

Key opportunity enablers and incentives

Ease of Doing Business

Special Investment Facilitation Council (SIFC)
Central body for facilitating and fast-tracking foreign and domestic investments

2023 Pakistan Investment Policy
Allow 60% stake for foreign investors in agricultural projects

Foreign Private Investment Act
Allow 100% repatriation of dividends



Public investment in Agriculture

USD 2.5 Billion Public Investment in Agriculture Sector (26 Projects)
Grain storage is identified as a crucial sector for food security

Investment in agricultural infrastructure and value-chain development
New roads, canals and underground water pumping, Government-owned warehousing



Fiscal Support

Subsidies and Input Support
On Wheat, Fertilizers, Mechanization, Crop, Livestock

Trade and Tax Incentives
Zero customs duties on imported seeds, harvesters, planters, dryers, Sales tax exemptions on agri-machinery and seedlings



Farming Support

R&D funding
On selected crops and collaboration with international research centers including smart solution providers

Climate Smart Agriculture Measures
Water Management & Irrigation, Water efficient technologies

ESG measures
Carbon Reduction, Waste Management etc.



Sector investors are poised to benefit from a robust ecosystem of supportive regulators, competent oversight bodies and an effective industry lobby

Ministry of National Food Security & Research (MNFS&R)

- Develops and implements national policies and regulatory frameworks related to crops, livestock, fisheries, food safety and trade
- Responsible for **setting macro-level policies** aimed at attracting FDI into Agri-sector



Key Sector Players and Stakeholders

Pakistan Agricultural Coalition - PAC

- Represents Agri-sector interests
- **Facilitate partnerships**, and connect stakeholders (e.g., PAC's "Agri-Connections" events)
- Promote **sector competitiveness** at home and abroad



Green Pakistan Initiative

- **Drives sector modernization**, including overseeing tech and mechanization adoption
- **Fosters financial inclusion** through direct farmer support and credit line accessibility













Special Investment Facilitation Council (SIFC)

- **Facilitates and fast-tracks foreign and domestic investments** in Agri-sector
- Provides a **streamlined, one-window operation for investor support** and coordination across government entities

Pakistan is home to a diverse array of exciting Agri-tech solution providers with a broad range of service offerings spanning the entire agricultural value chain

Non-Exhaustive

Select Leading Players in Pakistan

 	<p>Khushaal Watan, with over 16 million monthly users, is Telenor Pakistan's digital agriculture suite. Offerings include advisory, health and crop insurance, telehealth for livestock, digital helpline for female farmers, and agriculture entertainment</p>
 	<p>Bakhabar Kissan, with +6 million call centre users, provides tailored information and advisory services by connecting farmers to agricultural experts for advice on optimising their crop yield, better farm management practices, weather, pest, and other advisory</p>
 	<p>Crop2X is a company that uses custom IoT sensors, AI, and agronomist expertise to provide data-driven crop monitoring solutions to farmers. Their technology offers real-time insights on soil conditions, pest control, and irrigation, delivered through user-friendly apps and SMS to accommodate various literacy levels</p>
 	<p>Kissan Dukan is an agri-fintech platform that uniquely integrates an e-commerce marketplace with financial services, offering digital micro-loans and weather-indexed crop insurance to protect farmers from financial shocks</p>
 	<p>Buraq Integrated Solutions specializes in designing and implementing IoT-based drip irrigation systems that conserve water and energy. Their technology uses solar pumps, sensors, and PLC controllers, providing farmers with a web-based portal to monitor irrigation time and water consumption</p>
 	<p>Alpha Robotics is a high-tech service company that specializes in the research, development, and sale of agricultural drones. Their UAVs are highly efficient, capable of spraying 13 acres per hour, and reduce the use of pesticides and water by over 30% and 90% respectively.</p>

Pakistan has identified a number of opportunities in the Agri-Tech eco-system readily available to investors

Non-Exhaustive, Preliminary

Investment Opportunities

- 1 Precision Farming and IoT Integration
- 2 Smart Irrigation Systems
- 3 Agri-Fintech & Digital Marketplaces
- 4 Fertilizer Efficiency Solutions
- 5 Automated Post-Harvest Storage & Logistics
- 6 Agricultural Robotics & Mechanization

Potential Local Partners (*non-exhaustive*)



Agri-tech solutions hold significant upside potential in three sub-areas Pakistan has already earmarked for further development

Grain Silos Fintech Eco-System

Efficient adoption of Agri-tech solutions offers opportunities integrate the sector more closely to formal financial eco-system

- Foster greater farmer financial inclusion through tech driven financing solutions (e.g. Electronic Warehouse Receipts)
- Reduces post-harvest losses & supports tarceability



Source: Kearney

Livestock Fattening Digital Quality Assurance

Foster greater markets access through enhanced traceability and quality control

- Agri-tech solutions can streamline compliance with export certifications and SPS protocols by enhancing traceability, disease control, and data management



Shrimp Farming Smart-Farming Solutions

Agri-tech solutions offer possibility for stronger returns and through more efficient farming practices

- GIS tools, satellite imagery, and drone-based surveillance
- enabling precision site planning and real-time farm condition tracking
- Smart Hatchery Management Systems or broodstock tracking and survival rate improvement



Strategic Alignment – Uraan Pakistan & China’s Vision for High-Quality Development

Strategic Elements	URAAN Pakistan (5Es Framework)	Xi Jinping’s Vision
Innovation-Driven Agriculture	Tech-enabled livestock (IoT, feed algorithms) & smart grain silos (sensors, digital traceability)	New productive forces: high-tech, intelligent, and green transformation of traditional sectors
Export Diversification	Livestock fattening & shrimp farming for halal and seafood exports	Strengthening food security and global supply chains through agri-modernization
Green Development	Climate-resilient grain silos & eco-friendly aquaculture (biofloc, RAS)	Ecological modernization and green infrastructure under Belt & Road

Thank You

