



# Unlocking Pakistan's Red Gold

An Investment in Aflatoxin-Free Chilli  
Processing to Reclaim Global Leadership



# Pakistan is a Global Chilli Powerhouse

## #4

Global Producer Ranking

## 150,000+

Tonnes of Annual Production

## ~63,000

Hectares Under Cultivation



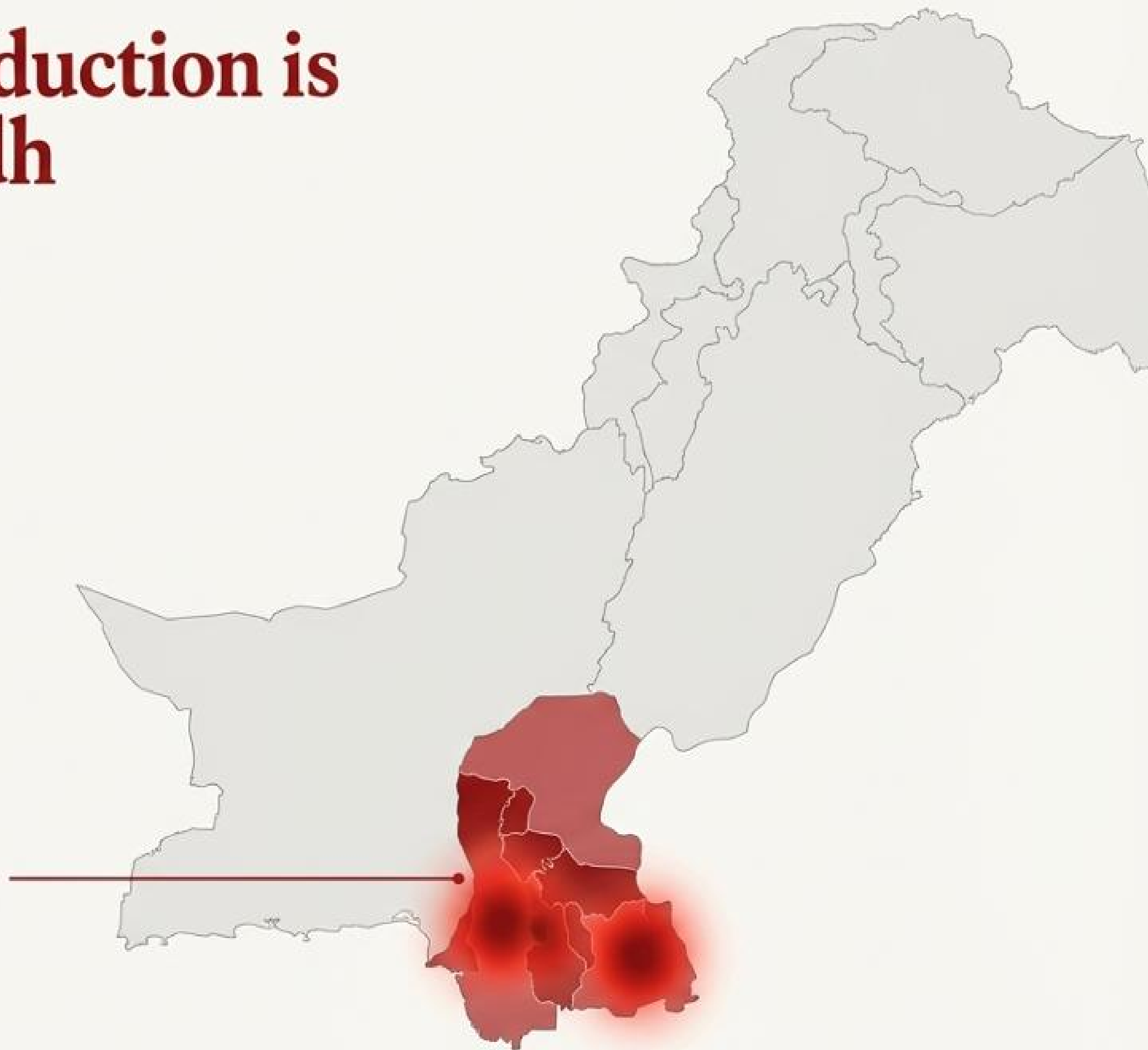
Pakistan's scale of production places it among the top chilli producers in the world, creating a massive raw material base for value-added processing and export.

# The Epicenter of Production is Concentrated in Sindh

A single region, Sindh, accounts for the vast majority of national output, creating a highly efficient cluster for sourcing and processing.

## 74-88%

of Pakistan's total chilli production is concentrated in the Sindh province, specifically the Kunri, Mirpurkhas, and Umerkot districts.

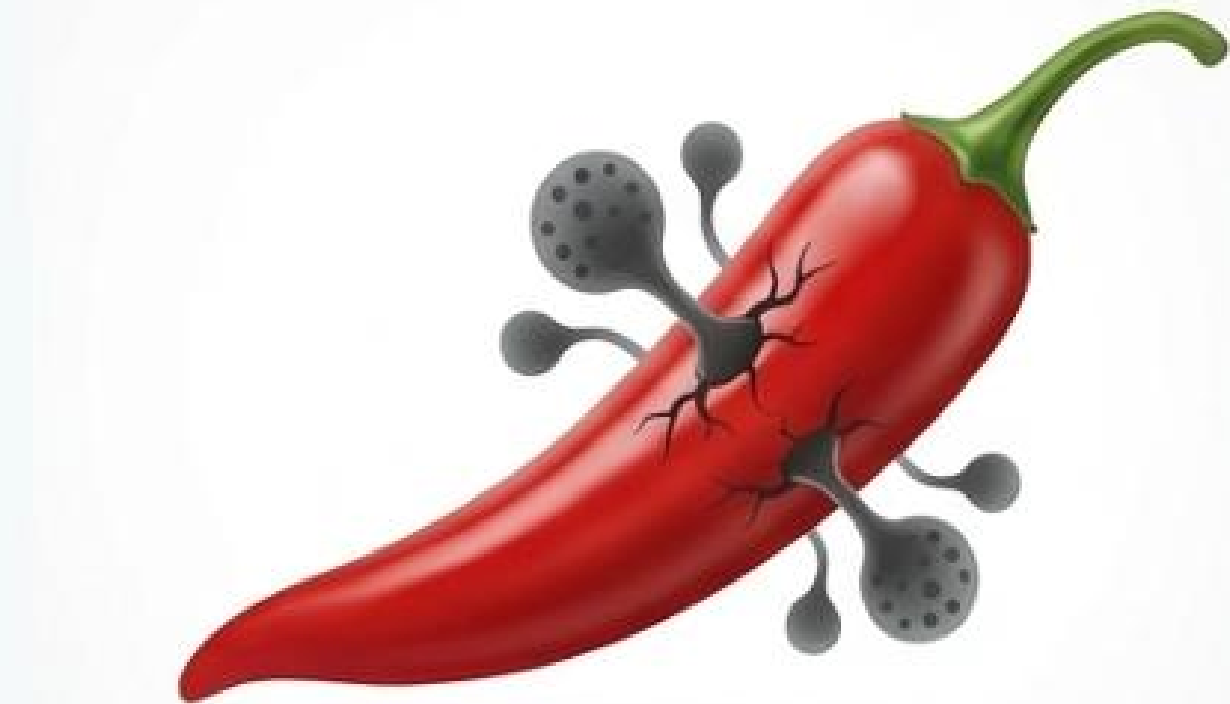


# A Global Leader, Held Back by a Hidden Barrier



## The Aflatoxin Contamination Crisis

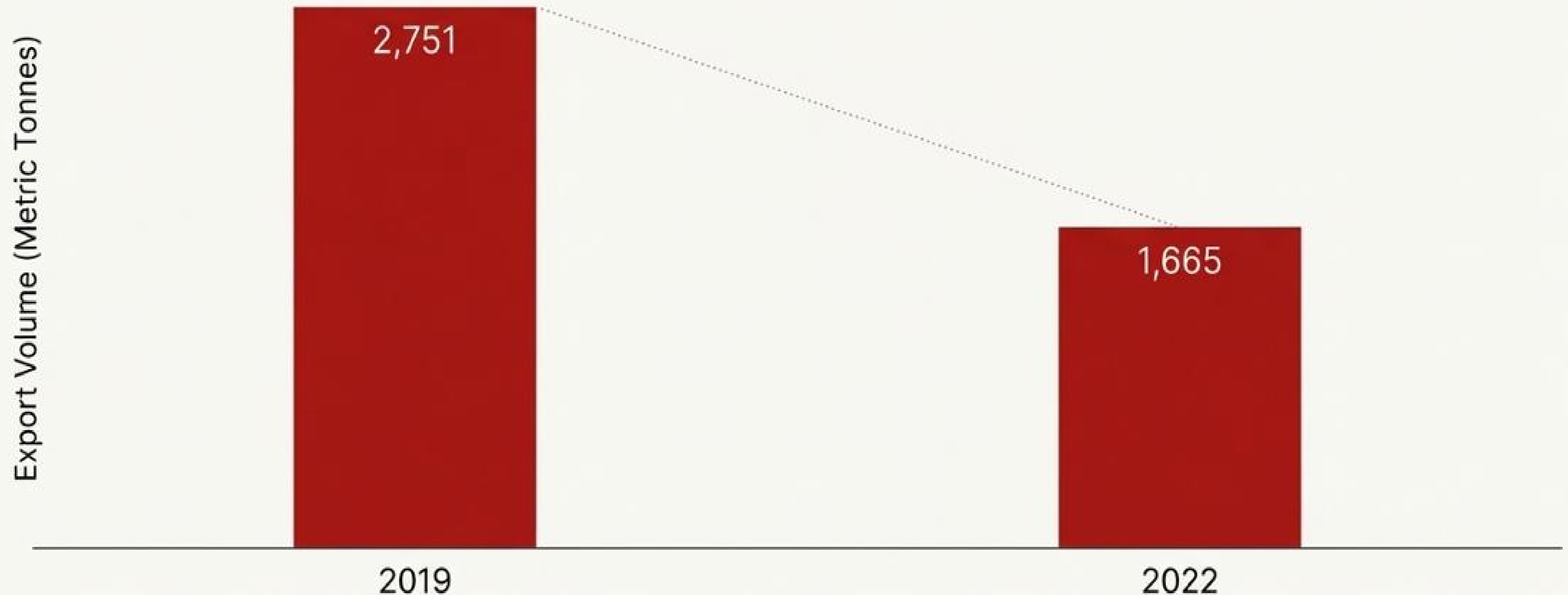
Aflatoxin is a toxic compound produced by specific molds that thrive during traditional, open-air drying methods. Exposure to soil, moisture, and fungal spores creates unsafe levels of contamination.



International markets like the EU, US, and Japan have extremely strict limits on aflatoxin ( $\sim 5\text{--}10\text{ }\mu\text{g/kg}$ ), which Pakistani chillies frequently exceed.

# The High Cost of Contamination: A Collapse in Exports

Failure to control aflatoxin has made Pakistan's chillies unacceptable in high-value markets, leading to a dramatic decline in export volumes.



# The Point of Failure: Outdated Post-Harvest Handling

The primary source of aflatoxin contamination is the traditional practice of drying chillies on open ground.

## Traditional Method



Open-air sun drying.

**Duration:** 10–14 days.

**Risks:** High exposure to soil, humidity, rain, and fungal spores.

## Modern Method



Mechanical, controlled drying.

**Duration:** 1–2 days.

**Benefit:** Eliminates environmental exposure, halting aflatoxin development.

# The Blueprint for Purity & Profit

A Greenfield Aflatoxin-Free Chilli Processing & Packaging Facility

## Core Objective:

To establish a state-of-the-art facility that dries, grades, cleans, processes, and packages chillies to meet the world's most stringent food safety standards.

## Key Standards to be Met:



HACCP



ISO 22000



FSSC 22000



# A Controlled Process for Guaranteed Quality



# A Portfolio of Premium, Export-Ready Products

The facility will produce a range of value-added products tailored for diverse international buyers, from retail consumers to industrial food processors.



## Aflatoxin-Free Dried Whole Chillies

For premium grocery and spice markets.



## Aflatoxin-Free Chilli Powder

For retail and food service.



## Value-Added Products

Crushed flakes and custom  
spice blends.



## Bulk Industrial Ingredients

For sauces and processed foods.

# Unlocking Access to High-Value Global Markets

With guaranteed aflatoxin control, Pakistan can move from a low-value, volume-driven exporter to a **premium, quality-focused supplier**.

## Key Target Markets

- **Restore Access:** EU, US, Japan (markets with the strictest standards and highest price premiums).
- **Expand Presence:** Middle East, GCC, North America, Africa.
- **New Strategic Opportunity:** Fulfill China's massive demand for over **200,000 tonnes** of chillies annually through contract supply.



# Positioned for Success at the Heart of Production

**Primary Location: Sindh Province**  
(Kunri/Umerkot/Mirpurkhas)

**Rationale:** Sited directly within the largest chilli cluster (74-88% of national output) to minimize logistics costs, ensure fresh raw material supply, and access existing intermediate stocks.

**Secondary Zone: Southern Punjab**

**Rationale:** A supplementary zone to tap into growing cultivation areas.



# A Catalyst for Economic Growth and Rural Development

## Economic Benefits



Increased foreign exchange earnings



Significant reduction in post-harvest losses (10%+)



Higher farmer incomes through quality premiums



Skilled job creation in rural processing zones

## Development Impact



National food safety improvement



Technology transfer to the agricultural sector



Enhanced compliance with global trade standards

# The Investment Case: A Bankable, Impactful, and Strategic Opportunity

- ✓ **LEVERAGES A DOMINANT POSITION**  
Capitalizes on Pakistan's existing status as the world's 4th largest chilli producer.
- ✓ **SOLVES A CRITICAL BOTTLENECK**  
Directly addresses the aflatoxin issue that currently blocks high-value export markets.
- ✓ **TAPS INTO EXPANDING GLOBAL DEMAND**  
Unlocks access to premium markets and meets the massive, growing demand from regions like China.
- ✓ **DELIVERS SUPERIOR RETURNS**  
Generates strong financial returns, boosts foreign exchange earnings, and creates positive development impact.

# The Future is Aflatoxin-Free.

Let's Unlock Pakistan's Chilli Potential. Together.  
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# Potential Private Partners in Pakistan

| Company Name                                      | Core Business / Relevant Capability       | Why They're a Match                                                        |
|---------------------------------------------------|-------------------------------------------|----------------------------------------------------------------------------|
| <b>National Foods Limited</b>                     | Major food processor & exporter of spices | Large spice processing, export quality systems, cold storage & safety labs |
| <b>Mehran Spice &amp; Food Industries</b>         | Spice processing for export markets       | Strong capability in chilli sauces/powders & international spice trade     |
| <b>Siemens Foods / Surma Foods (Group)</b>        | Spice processing & export                 | Established spice exporter with global spice customers                     |
| <b>Rafhan Maize Products Co. Ltd (Ajinomoto)</b>  | Food processing with quality systems      | Not a chilli specialist but strong food safety/traceability capabilities   |
| <b>Hussnain Spices &amp; Food Industries</b>      | Spice processing & bulk export            | Focus on large-scale spice grinding & packaging                            |
| <b>Royal Herbs &amp; Spices (Pvt) Ltd</b>         | Chillies, spices & dried produce          | Exporter of spice products (including chillies)                            |
| <b>Saima Group / Saima Agri &amp; Exports</b>     | Agri commodity export including chillies  | Export experience, can integrate aflatoxin-free sourcing & sorting         |
| <b>Agritech Pvt. Ltd. / Evosys Agri Solutions</b> | Agri value chain services                 | Cold chain + traceability + processing partner potential                   |
| <b>Pak Agri Exports (Pvt) Ltd</b>                 | Chillies & produce export                 | Focus on aflatoxin-free categorization & quality standards                 |

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