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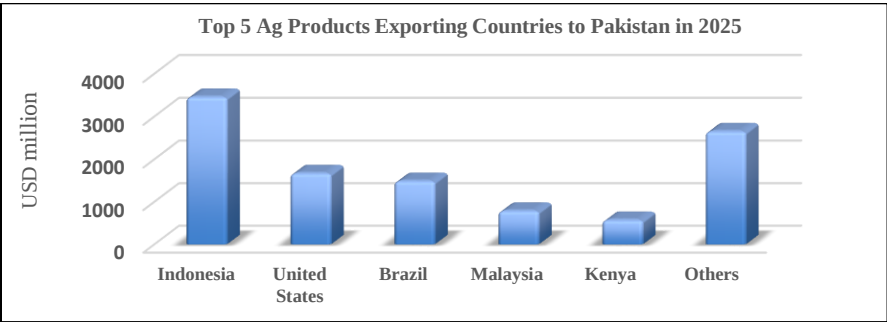
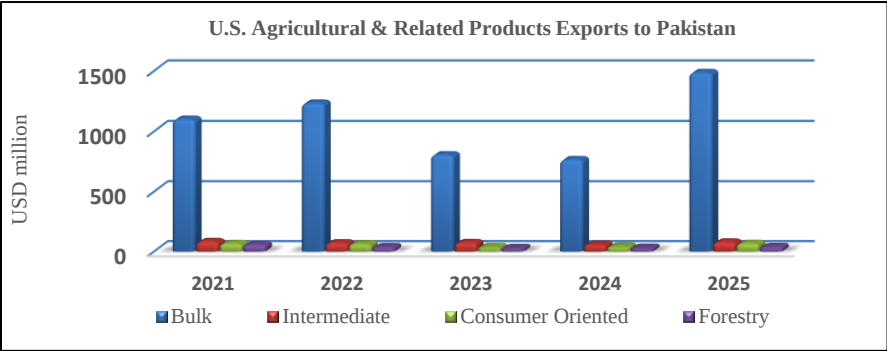
Report Highlights:

Pakistan remains a key market for U.S. food and agricultural products, with U.S. exports exceeding \$1.6 billion in 2025 (the highest level recorded since at least CY1970). The leading U.S. exports to Pakistan that helped achieve last year's record total included: cotton, soybeans, planting seeds, tree nuts, forestry products, dairy items, and pulses. Pakistan offers good and increasingly diverse opportunities for U.S. food and agricultural exporters, with a growing demand for packaged and processed foods driven by rapid urbanization and an increasingly young population demographic. U.S. suppliers can better position themselves for success by gaining market insights and tailoring products to local consumer preferences. This Exporter Guide offers an overview of the market, its key trends, and practical recommendations to help U.S. companies navigate and conduct business effectively in Pakistan.

MARKET FACT SHEET: PAKISTAN

Executive Summary: Pakistan, the world’s fifth most populous nation with over 252 million people, has an increasingly young demographic, with 27 percent of the population between the ages of 15 and 29 and nearly 60 percent under 65. The new generation is becoming more focused on healthier eating habits and mindful living. At the same time, Pakistan’s culinary landscape remains one of the most diverse in South Asia, shaped by its geography, history, and rich ethnic variety.

U.S. Agricultural Trade with the Pakistan: Pakistan was the 22nd largest export market for U.S. agricultural and related products in 2025. The value of trade in these products between the United States and Pakistan in 2025 totaled \$1.89 billion, led by cotton (\$746 million), soybeans (\$721 million), planting seeds (\$51 million), tree nuts (\$39 million), forestry products (\$37 million), dairy products (\$21 million), and pulses (\$19 million). The country’s overall trade with the United States has reached \$2.7 billion in the first-four months of 2026.



Food Processing: The food and beverage processing sector is one of Pakistan’s most important industries, contributing significantly to value-added production and employment. For U.S. companies, this sector offers strong potential for expanding exports, particularly in bulk commodities and consumer-ready food products.

Food Retail: Pakistan’s food retail sector is rapidly modernizing, with rising demand for high-quality, consumer-oriented products. This shift creates strong opportunities for U.S. exporters to engage with an expanding base of affluent shoppers who are willing to pay a premium for superior brands and imported goods.

Food Service: The food service sector is growing rapidly, fueled by shifting consumer preferences and a young, growing population. U.S. fast-food brands already hold a strong presence in the HRI franchise market, and the sector continues to rely heavily on certain imported ingredients creating solid opportunities for U.S. suppliers.

Quick Facts

Top U.S. Ag Related Exports to Pakistan

Cotton, Soybeans, Planting Seeds, Tree Nuts, Forestry Products, Dairy Products, and Pulses

Top Food Retailers in Pakistan

Imtiaz, Naheed, Metro, Carrefour, Al Fatah, Punjab Cash & Carry, CSD, et al.

Population/Economic Indicators

Population: 252 million
GDP: \$452 billion (FY26)
Per Capita Income: \$1,901 (FY26)
Economic Growth Rate: 3.7% (FY26)

Strengths	Weaknesses
- Strong reputation of U.S. products - U.S. products perceived as high quality and safe - U.S. diversity in food and beverage products	- Willingness of U.S. suppliers to meet buyers' requirements for smaller quantities via mixed shipments - Limited knowledge of the taste and benefits of U.S. products
Opportunities	Threats
- Growing demand for U.S. soybeans and wood products - Young population is embracing a new lifestyle, prioritizing quality over price - Growth of e-commerce platforms provide space for imported products	- Non-tariff barriers, including Urdu labeling and Halal certification - The fluctuating value of Pakistani Rupee against the U.S. Dollar - High tariffs discouraging imports

Data Sources:

Trade Data Monitor, State Bank of Pakistan, Pakistan Bureau of Statistics, Economic Survey of Pakistan, and industry sources

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SECTION 1: MARKET OVERVIEW

Economic Overview:

Pakistan, the world's fifth most populous nation with over 252 million people, has an increasingly young population, with 27 percent falling between the ages of 15 and 29, and nearly 60 percent under the age of 65. This youthful demographic has led to rising awareness and interest in healthy eating habits. Pakistan's economy accelerated its recent momentum in FY26 and recorded growth of 3.7 percent compared to 3.18 percent last year. Per capita income reached \$1,901, up from \$1,824 the previous year, supported by improved economic activity and a stable exchange rate. Average CPI inflation stood at 6.2 percent for July-April of FY26, compared with 4.7 percent in the corresponding period the previous year, which was marked by an exceptionally low inflation environment. Despite this inflationary uptick, price pressures remained largely contained for most of the period due to prudent macroeconomic management, improved supply conditions, strengthened market oversight, and measures to curb hoarding and smuggling. The onset of major conflict in the Middle East toward the end of February 2026 introduced fresh external pressures, however, particularly through spiking global energy prices that roiled Pakistan's imported energy dependent market, with the initial impact becoming more visible in the Sensitive Price Indicator (SPI).

Pakistan's agriculture sector contributes 23.4 percent to national GDP and accounts for 33.1 percent of employment. In FY26, the sector achieved growth of 2.89 percent, compared to 1.53 percent in FY25. The livestock sector, a major component of Pakistan's agriculture and an important contributor to the overall economy, expanded by 3.75 percent in FY26, compared with 2.95 percent last year. The output of key crops, including rice, sugarcane, maize, and wheat, registered less robust growth at 0.65 percent across the category in FY26 compared to the previous year. Among those, cotton declined marginally by 0.5 percent to 7.05 million bales. Conversely, Pakistan's sugarcane output rose to 89.45 million tons, wheat production reached 29.61 million tons, and rice production increased to 9.99 million tons all up from their FY25 levels of 84.24 million, 28.40 million, and 9.72 million tons, respectively.

Compared with the agricultural sector, Pakistan's manufacturing sector recorded much stronger growth of 6.6 percent in FY26. This improvement was supported by relatively favorable macroeconomic conditions, including easing inflation, lower interest rates, exchange rate stability, and strengthening external and fiscal sector balances, which collectively created a more supportive environment for industrial activity. The sector remained challenged and below potential, however, due to weak market sentiments, persistent structural bottlenecks, elevated input costs, and a heavy reliance on imports.

Foreign direct investment in Pakistan has been trending down in recent years overall, but strength in certain sectors remains significant. There are over 25 U.S. firms involved in Pakistan's food and agricultural sector, primarily in the form of joint-venture and other investments, including franchising and distributorships. Leading U.S. agribusiness names such as Corteva, Cargill, and FMC have all established a solid presence, while Massey Ferguson assembles tractors locally and supports small-scale farmers with modern equipment. Major U.S. food and beverage companies including PepsiCo, Coca-Cola, and Mondelēz operate significant processing facilities in the country. In addition, firms like Valmont supply advanced irrigation solutions, and U.S. livestock genetics companies are tapping into

rising demand from Pakistan’s expanding dairy industry. The U.S. arm of Louis Dreyfus maintains active commodity-trading operations, and John Deere continues to supply tractors and mechanized sugarcane harvesters, although it does not operate any production facilities in the country.

Food Purchasing Behavior:

Pakistan’s urban food retail sector is undergoing a steady transformation as modern grocery chains expand, even though traditional shops and open markets still dominate everyday food purchases. Most households continue to rely on neighborhood stores for staple items such as wheat flour, pulses, edible oils, fruits, vegetables, milk, and meat due to convenience, perceived freshness, and limited household storage space. At the same time, lifestyle changes and rising disposable incomes are driving urban consumers toward packaged and processed foods. Young professionals and higher-income families are increasingly gravitating toward modern retail outlets that offer greater product variety, easier access, co-located restaurants, and a broad selection of imported products. For affluent urban dwellers, one-stop grocery shopping is becoming a popular family activity, supported by the affordability, strategic locations, and diverse offerings of modern stores. Demand for specialty and high-value foods including dates, cereals, beverages, chocolates, almonds, cakes, fruits, and fruit juices surges during Islamic holidays, especially Eid and Ramadan, presenting strong opportunities for U.S. food brands.

Consumer Demographic Trends and Labor Force:

Pakistan’s growing and youthful demographic profile offers strong potential for additional food-sector investment, driven by a large population and a sizeable, expanding middle class. The country’s upper-middle-income segment is a key force behind rising consumer spending, creating opportunities for companies offering products that address varied and evolving dietary preferences. While Pakistan’s middle class is estimated at more than 60 million people, their income levels are considerably lower than those of middle-income consumers in the United States or in other more developed economies. Even so, this segment shows broad acceptance of both locally produced and imported foods, and growing interest in internationally branded goods. The upper-middle-income group, estimated at around 17 million people has relatively high per capita purchasing power, further strengthening demand for quality and premium food products.

Advantages and Challenges for U.S. Suppliers

Advantages	Challenges
Pakistan has a large young population that is driving demand for consumer products.	Shipments from the United States take longer vs. some other sources. In addition to time and cost, this can also trigger relatively strict shelf-life requirements upon arrival.
The expatriate community seeks out specialty U.S. food products and prefers Western-style dining.	U.S. exporters often struggle to comply with Pakistan’s Urdu labeling and Halal certification requirements.
Consumers are prioritizing quality, seeking products from domestic and international sources.	U.S. products in Pakistan face stiff competition from similar products from the UK, Australia, and Europe.
Urban Pakistan is witnessing a gradual shift towards modern retailing.	Imported food products in Pakistan face hefty tariffs, with duties ranging from 35 percent to 75 percent.
U.S. products enjoy a strong reputation for quality, taste, and wholesome nature.	Proximity to Pakistan allows certain competitor countries to enjoy a comparative advantage.
Dining out is a popular trend among Pakistan’s upper and middle-class consumers.	U.S. suppliers often struggle to meet Pakistan’s industry demand for specialty products in small quantities.

Pakistan's urban population is receptive to new products and eager to try novel flavors.	Pakistan offers competitively priced local options for snack foods, condiments, and processed foods.
Modern retailers in Pakistan significantly shape consumer purchasing patterns by offering a diverse range of imported products.	In Pakistan, importers typically prefer starting business deals with small orders.
Franchising has brought western-style fast-food restaurant chains, bakeries, and coffee shops to Pakistan, transforming the retail food landscape.	Market penetration of imported products is largely concentrated in major cities.

SECTION II: EXPORTER BUSINESS TIPS

General Consumer Tastes and Preferences:

Pakistan's food sector offers strong potential for U.S. companies offering quality, appealing taste or packaging, and Halal-certified products. Success in this market requires a solid understanding of local consumer preferences and cultural considerations. Pakistani shoppers generally favor fresh, affordable foods available in neighborhood stores. Interest in healthy eating is rising, especially among educated consumers and is increasingly highlighted across media outlets. Fresh foods, fruit juices, fruit-concentrate beverages, organic products, sugar-free confectionery, high-fiber packaged items, dairy products, and vitamin- or calcium-fortified foods and beverages are particularly popular with middle- and upper-income consumers. Nearly 96 percent of the population is Muslim, so products containing meat must be Halal-certified to ensure proper slaughter and sourcing. Halal certification is also required for products entering the food service sector. The import and sale of alcoholic beverages is prohibited.

Traditional and modern snack foods, such as confectionaries, pastries, cakes, biscuits, ice cream, or sweet and savory snacks are very popular. Easy-to-prepare frozen foods and instant noodles are also popular. Local flavors are preferred, and local food manufacturers are constantly developing new products using a combination of local and imported flavors. The rise of the urban middle class has increased the acceptance of packaged and ready-to-eat food products. Pakistanis are more willing to try new foods while eating out, but tend to prefer traditional fare at home. Chinese, Italian, Thai, Moroccan, and Middle Eastern foods are among the fastest-growing international cuisines in Pakistan.

Finding a Business Partner:

Building a reliable partnership with an experienced local importer or distributor is essential for entering the Pakistani market. These partners often request exclusive rights to represent a specific product or brand. U.S. exporters should meet potential partners in person and thoroughly review their business credentials through banks, trade associations, and standard due-diligence processes.

Restaurant franchises offer another entry point for introducing new food products. Major cities like Karachi and Lahore continue to see rapid growth in quick-service restaurants, casual dining, and café chains. While most ingredients are sourced locally, some franchises require specialized items or imports that are not widely available in Pakistan. Exporters should consult with local importers to confirm whether they are approved suppliers for these franchises. The hotel industry also demands select high-value food products that are not commonly found in retail channels. Although fresh fruits and vegetables are generally accessible, premium items such as cherries, plums, broccoli, lettuce, certain meat cuts, and seafood like shrimp and crab can be challenging to procure locally, creating additional opportunities for U.S. suppliers.

General points to discuss with the importer include:

- Ensure the imports comply with regulations, and that the item(s) are not on the negative list.
- Specifically, the importer must ensure that shipments comply with all national [Import Policy Order](#) regulations and that the item(s) are not on the restricted or banned negative list [Pakistan - Trade Barriers](#).
- The terms and conditions of imports are specified in the letter of credit.
- Bulk vegetable oils are the only food products subject to random testing to ensure fitness for human consumption at the time of arrival.
- Imported food products, including ingredients, must have at least 50 percent of their original shelf life remaining at the time of importation - calculated from the date of filing the "Import General Manifest" (IGM) in accordance with the Customs Act of 1969.
- Importer should possess a compulsory letter of credit or register the contract with a bank to import goods into Pakistan.

Exporters should consider the following in their discussions before selecting a distributor:

- Do they have a national or regional distribution network?
- How is their distribution network structured?
- Who are their customers? Do they sell to retailers, hotels, or restaurants?
- What are their capabilities? Do they have experience handling perishable or value-added foods?
- Are they interested in marketing your products? If so, how will marketing costs be handled?
- Are they paying listing fees to retailers?
- Are they managing similar brands or products from other suppliers?
- What are the margins and costs charged by the distributor?

Ensuring secure payment arrangements is a key factor when working with a Pakistani importer. Until a solid business relationship is established, exporters may prefer to request an irrevocable letter of credit. Some Pakistani importers are also accustomed to operating without credit and may agree to pay cash before shipment. Although FAS Islamabad receives very few reports of payment issues involving Pakistani importers, the office is unable to intervene in contractual disputes or act as a collection agent when differences over payment occur.

Regional Trade Shows and Reverse Trade Missions:

U.S. companies can benefit from participating in major regional trade shows such as Gulfood, SIAL, ANUGA, and FHA, which provide valuable opportunities to connect with Pakistani importers, traders, and distributors. To further support partnership building, FAS Islamabad regularly organizes buyer missions to the U.S. in various sectors or possibly to U.S. food/ag sector trade shows. These missions help familiarize Pakistani buyers with U.S. market trends, product offerings, and the processes involved in conducting business with leading American suppliers.

SECTION III: IMPORT FOOD STANDARDS, REGULATIONS, AND IMPORT PROCEDURES

Pakistan imposes high import duties on most food products, hindering the growth of food imports. Import tariffs on consumer food products range from zero to 150 percent, but most products face

exorbitant duties ranging from 35 to 75 percent. It should be noted that Pakistan maintains formal Free Trade Agreements with China, Malaysia, and Sri Lanka, and also engages in broader trade and transit arrangements with the Gulf Cooperation Council (GCC) and several Central Asian countries. Pakistan's Ministry of Commerce published a new [Import Policy Order](#) on April 22, 2022, which details the procedures and requirements to export food products to Pakistan.

General Import Procedures:

The clearing agent is required to furnish the following documents to the authorities for food and beverage products imported into Pakistan:

- Bill of Lading
- Invoice
- Packing List
- Certificate of Origin
- Health Certificate
- Permits, wherever applicable (Animal and Plant Quarantine)
- Sanitary of Phytosanitary Certificate (depending on product type)

Pakistan's Halal Certification and Urdu Labeling Requirements:

Requirements for all imported consumer-packaged food and beverage products include:

- The shipment shall be accompanied by a Halal certificate issued by a Halal certification body, accreditation with an accrediting body that is a member of either the Standard Metrology Institute for Islamic Countries (SMIIC) or the International Halal Accreditation Forum (IHAF).
- The logo of the Halal certification body shall be printed on the consumer packaging.
- All consumer food and beverage imports must have 50% of the shelf life remaining, from the date of filing the Import General Manifest (IGM), and 66% of the shelf life remaining from the date of manufacturing.
- Labeling of nutritional values and usage instructions must be in Urdu and English language.
- The labeling shall not be in the form of stickers, overprinting, or stamps.
- Urdu labeling is not required for bulk packaging meant for industrial consumers. However, a Halal certificate is required for all food products regardless of the size and type of packaging.

U.S. manufacturers and exporters are encouraged to work closely with their importers to ensure that their labels meet Pakistan's requirements at the time of import. Other import restrictions include a ban on selling alcohol and U.S. beef.

SECTION IV: MARKET SECTOR STRUCTURE AND TRENDS

Retail Sector:

Pakistan's modern food retail sector is expanding rapidly, driven by the rise of hypermarkets and strong local retail chains. Major European brands such as Metro and Carrefour have partnered with Pakistani groups to launch large self-service stores in key cities including Karachi, Hyderabad, Lahore, Multan, Sialkot, Faisalabad, and Islamabad. These formats are capitalizing on economies of scale and offering

consumers a true one-stop shopping destination, creating a distinct competitive edge over small supermarkets and traditional retailers.

More than a dozen domestic retail chains are also thriving in Pakistan's major urban centers. Well-established brands like Al Fatah, Naheed, Chase Up, Shaheen, D. Watson, Save Mart, and the military-run CSD stores generally operate outlets ranging between 55,000 and 70,000 square feet. Imtiaz Hypermarket has significantly transformed Pakistan's retail landscape by expanding to over 30 large-format stores nationwide, with sizes ranging from 70,000 to 130,000 square feet. Pakistani consumers continue to show strong interest in imported products, even as both international and local retailers face challenges such as Urdu labeling requirements, exchange rate fluctuations, high tariffs, and broader economic instability when sourcing foreign goods.

Pakistan's e-commerce sector, while still emerging, is on an upward growth trajectory. The size of the online grocery market remains difficult to quantify, as adoption has been gradual due to factors such as lower internet penetration, payment system limitations, delivery constraints, and relatively high device costs. Modern online grocery platforms currently hold a small share compared to traditional retail channels. However, as digital adoption improves, U.S. retailers may find promising entry points by building early partnerships within Pakistan's evolving food retail environment.

To stay aligned with global trends and strengthen their international networks, Pakistani importers and retailers actively participate in leading trade exhibitions. These include major regional trade shows like Gulfood, ANUGA, SIAL, and FHA, as well as key U.S. trade shows such as the Summer Fancy Food Show, the National Restaurant Association Show, the Sweets and Snacks Expo, and the Private Label Manufacturing Association Show.

Food Service Sector:

The food service industry is capitalizing on changing lifestyles, an expanding young population, the opening of new malls in urban cities, and an increase in the number of working women. Domestic demand for quick-service food is also growing. The U.S. franchises operating in Pakistan include KFC, McDonald's, Texas Chicken, Domino's, Papa John's, Hardees, Subway, P.F. Chang's, Dunkin Donuts, Baskin Robbins, Cold Stone Creamery, IHOP, and Cinnabon. These chains focus on specialized products to attract consumers in the 15-29 age group. Key imports include frozen potato products, cheese, ice cream, dressings, sauces, whipping cream, bakery ingredients, mixes, and condiments.

High-end coffee shops offering specialty and flavored coffees also show promising potential. This trend is being promoted both by international and local coffee chains. Coffee shops tend to use various imported coffee ingredients including creamers, honey, flavorings, and roasted coffee.

Similarly, the number of high-end bakery outlets is growing in the urban areas of Pakistan. These bakeries tend to use imported ingredients including bakery yeast, dough, flavors, icing, and cocoa in their specialized products to improve quality and taste. In addition, the small frozen fruit and vegetable sector is growing to meet the demands of the restaurant sector.

Food Processing Sector:

The food processing industry is the second largest industry in Pakistan after textiles. The major products undergoing value-added transformation are fruits, vegetables, flour, sugar, pulses, grains, frozen and

packaged food, edible oils, and dairy products. Food processors regularly introduce new products using improved technology, innovative packaging, and aggressive marketing. For ingredients that are unavailable in Pakistan, processors turn to imports and typically source through importers specializing in food ingredients. U.S. food ingredient imports include dried fruits and nuts, essential oils, protein isolates, starch, vegetable saps, thickeners, lactose, sugar and sugar syrups, mayonnaise, mixed seasonings, sauces and preparations, yeast, milk powder, baking powders, sweeteners, vinegar, and gelatin and gelatin derivatives.

The food processing industry in Pakistan has traditionally been dominated by three international conglomerates: Nestlé (dairy, juices, baby food, cereal, confectionery, and noodles); Unilever (tea, ice cream, dressing, and sauces), and Friesland Campina Engro Foods (milk and cream, tea whitener, and frozen dessert). National Foods, Shan Foods, Mehran Foods (mainly in spices and condiments) and Mitchell's Farm (confectionary, jam, and squashes) are some of the local renowned food processing companies in Pakistan. Although the consumption of unprocessed meat and seafood remains popular among Pakistani consumers because of its perceived freshness and taste, there is a small, but growing, frozen food sector focusing on processed meat and seafood products, which provides opportunities for U.S. exporters. The increase in demand for frozen foods has been made possible by the increase in malls, supermarkets, hypermarkets, and local manufacturers such as K&N's, Season Foods, Monsalwa, Euro, Sabroso, PK Foods, and Sufi Foods. These companies have made a significant impact on the market with their ready-to-eat frozen food products.

Although Pakistan is the world's fourth-largest milk producer, there is still a growing demand for imported dairy product ingredients. Opportunities exist for milk powder, cheese, butter, yogurt, ice cream, and ghee. Nurpur, Adams, and Deen's are major dairy-based brands in the market.

In the fruit and vegetable sector, there are more than 25 processing plants. Most of these are citrus-based owing to the extensive local citrus production (e.g., mandarins, kinnow, grapefruit, sweet oranges, bitter oranges, limes, and lemons) grown in the Punjab, Sindh, KPK, and Balochistan provinces. Value-added products include jams, jellies, marmalades, squashes, and canned fruits. Pakistan is a leading producer of mangoes, which are grown in Southern Punjab and Sindh. The major mango processing plants are located in Peshawar, Lahore, and Karachi. Value-added products include jams, jellies, marmalades, squashes, and canned fruits.

The total demand for edible oil is estimated at three million tons. Pakistan produces 23 percent of its oilseeds domestically, with the remaining 77 percent imported. Vegetable oil is used for vegetable ghee and the cooking oil industry. Vegetable oil processing is one of the largest sectors in Pakistan, with around 160 small- and medium-sized vegetable ghee and cooking oil units spread across Pakistan. The beverage processing industry is composed of two broad sectors: (1) juices, squashes, and syrups; and (2) carbonated beverages. Both sectors are growing, and major market players include Pepsi, Coca-Cola, Nestle, Mitchell's, Shezan, and Maza. Their production units are mostly located in Punjab, specifically the cities of Lahore, Sargodha, and Bahawalpur.

SECTION V: AGRICULTURAL and FOOD IMPORTS

Best Product Prospects:

Products Present in the Market with Good Sales Potential

Description	Imports from the World CY - 2025 (USD million)	Imports from U.S. CY – 2025 (USD million)	Key Constraints	Market Factors
Cotton	1805	746	Price competitiveness with Brazil, Cote d'Ivoire, Turkey, etc. Fumigation requirements.	Local production is inadequate and long staple fiber is required for export-oriented products. Contamination of locally grown cotton is an issue.
Soybeans	1159	721	Price competitiveness with Brazil.	Primarily for poultry feed, but livestock and aquaculture are also helping push import demand upward.
Planting Seeds	163	47	Hybrid corn, cotton, and vegetable seed are lacking.	Strong demand for hybrid seeds to achieve higher-local production.
Forestry Products	191	37	Competition: Canada, Europe, Burma, Malaysia, and Russia.	Near-total dependence on imports.
Tree Nuts	120	39	Competition from Afghanistan and Iran.	Growing seasonal demand, health consciousness, and value additions.

Dairy Products	201	21	Competition from foreign suppliers like the EU, Turkey, New Zealand, Poland, and Malaysia.	The increasing popularity of imported brands and shortage of quality domestic products. Demand is growing for powdered milk for processing.
Pulses	520	23	Price competitiveness and freight advantage for countries like Myanmar.	Local production is inadequate, thus domestic consumption is increasingly met through imports.

Source: TDM

VI: POST CONTACTS AND FURTHER INFORMATION

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Attachments:

No Attachments