

2023

# Trade Analysis Series

## Oil Seeds and Oleaginous Fruits



**Turn Potential into Profit**

*Small and Medium Enterprises Development Authority*

**(SMEDA)**

Ministry of Industries & Production  
Government of Pakistan

[www.smeda.org.pk](http://www.smeda.org.pk)



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## 1. Oil Seeds and Oleaginous Fruits Description

The oil seeds and oleaginous fruit sector is a key SME sector of Pakistan with significant linkages with other sectors of the economy. The sector is contributing towards the economy of Pakistan in multiple ways by providing employment opportunities, generating national income, increasing foreign exchange and contributing to national trade.

In Pakistan, oil seeds and oleaginous fruit production are vital components of agriculture and the economy. Key crops include cottonseed, sunflower, and sesame seeds. Cottonseed serves as a byproduct of the cotton industry, producing edible oil extensively used in cooking. Sunflower cultivation has received government support to boost domestic oil production and enhance food security. Sesame seeds, a drought-resistant crop, hold cultural and culinary importance, contributing to both local consumption and exports. These crops provide livelihoods for millions of farmers, reduce reliance on imported oils, and play a pivotal role in Pakistan's agricultural sustainability and economic development.

The Harmonized Commodity Description and Coding System (referred as HS Codes) designated for trade of oil seeds and oleaginous fruit is “12”. The brief description of sub categories falling in this product category mainly include the following

**Table 1: Oil Seeds and Oleaginous Fruit HS Code Detail**

Product Category HS Codes	Product Description
<b>12</b>	Oil seeds and oleaginous fruits
<b>1201</b>	Soya beans
<b>1202</b>	Groundnuts (excl. roasted or otherwise cooked)
<b>1203</b>	Copra
<b>1204</b>	Linseed
<b>1205</b>	Rape or colza seeds
<b>1206</b>	Sunflower seeds
<b>1207</b>	Other oil seeds and oleaginous fruits, (excl. edible nuts, olives, soya)
<b>1208</b>	Flours and meals of oil seeds or oleaginous fruits (excl. mustard)
<b>1209</b>	Seeds, fruits and spores, for sowing (excl. leguminous vegetables and sweetcorn)
<b>1210</b>	Hop cones
<b>1211</b>	Plants and parts of plants, (incl. seeds and fruits, of a kind used primarily in perfumery)
<b>1212</b>	Locust beans, seaweeds and other algae, sugar beet and sugar cane,
<b>1213</b>	Cereal straw and husks
<b>1214</b>	Swedes, mangolds, fodder roots, hay, alfalfa, clover, sainfoin, forage kale, lupines

Source: Trade Map

## 2. Global Trade of Oil Seeds and Oleaginous Fruits

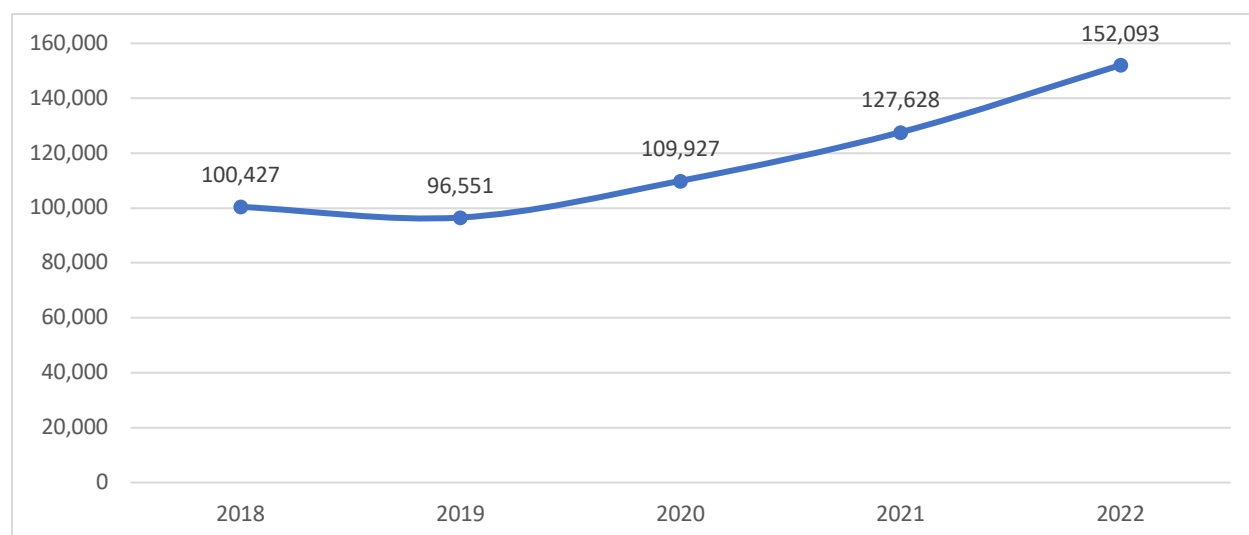
Oil seeds and oleaginous fruits is one of the most important products in international trade. In 2022, the aggregate exports value of oil seeds and oleaginous fruits was US \$ 152,093 millions. During last five year, world trade in oil seeds and oleaginous fruits decline due to COVID-19 and subsequent lockdowns and then shown huge growth during 2021-22. The last five years exports of oil seeds and oleaginous fruits in global trade are as follows:

**Table 2: Global Exports of Oil Seeds and Oleaginous Fruits – Last 5 Years (Value In US \$ Million)**

Description	2018	2019	2020	2021	2022
<b>World Exports (Value is US \$ Million)</b>	100,427	96,551	109,927	127,628	152,093
<b>Growth (%age)</b>	Base Year	-4%	14%	16%	19%

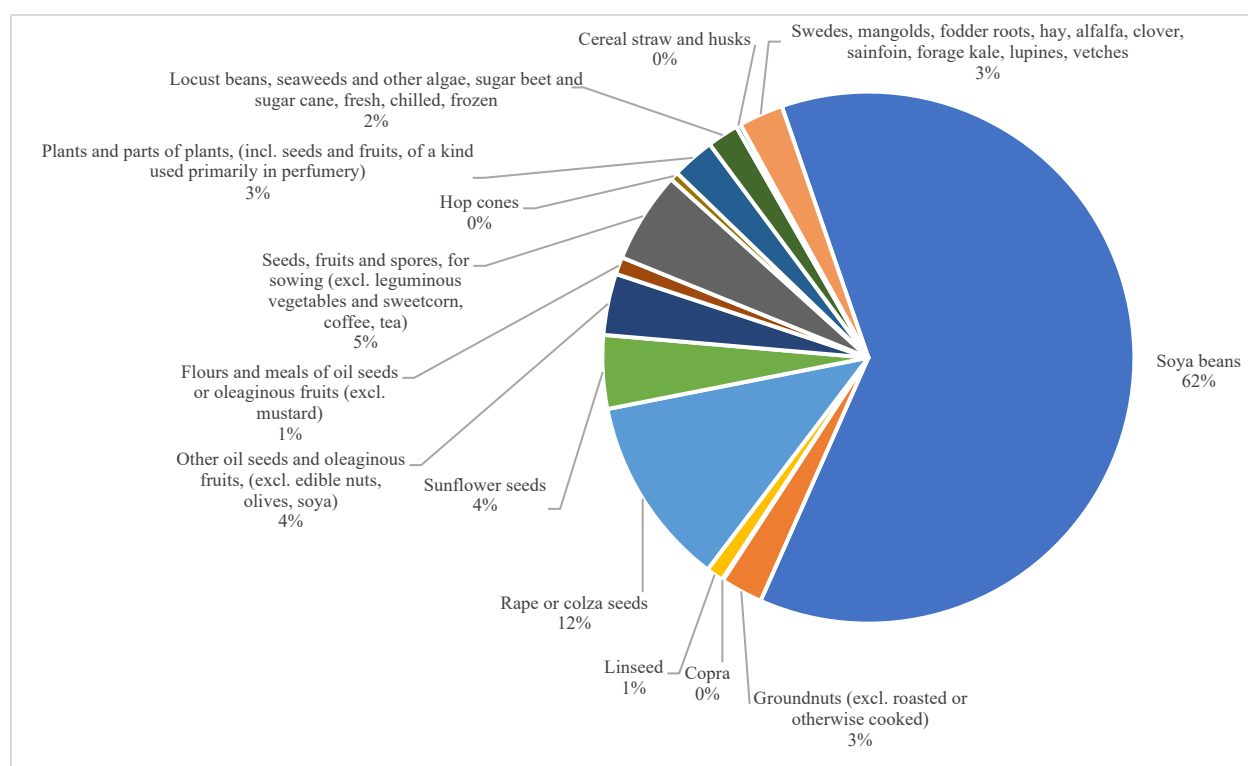
Source: Trade Map

**Figure 1: Growth Trend in World Exports of Oil seeds and Oleaginous fruits (Values in US \$ Million)**



### **Product Mix – Share in Exports**

Soya beans items hold the significant share of exports (i.e 62%) with in product category of oil seeds and oleaginous fruits followed by rape or colza seeds. The percentage share of different product categories in exports, exhibited below:

**Figure 2: Product Mix of Oil Seeds and Oleaginous Fruits Exports in 2022**

### Major Exporters

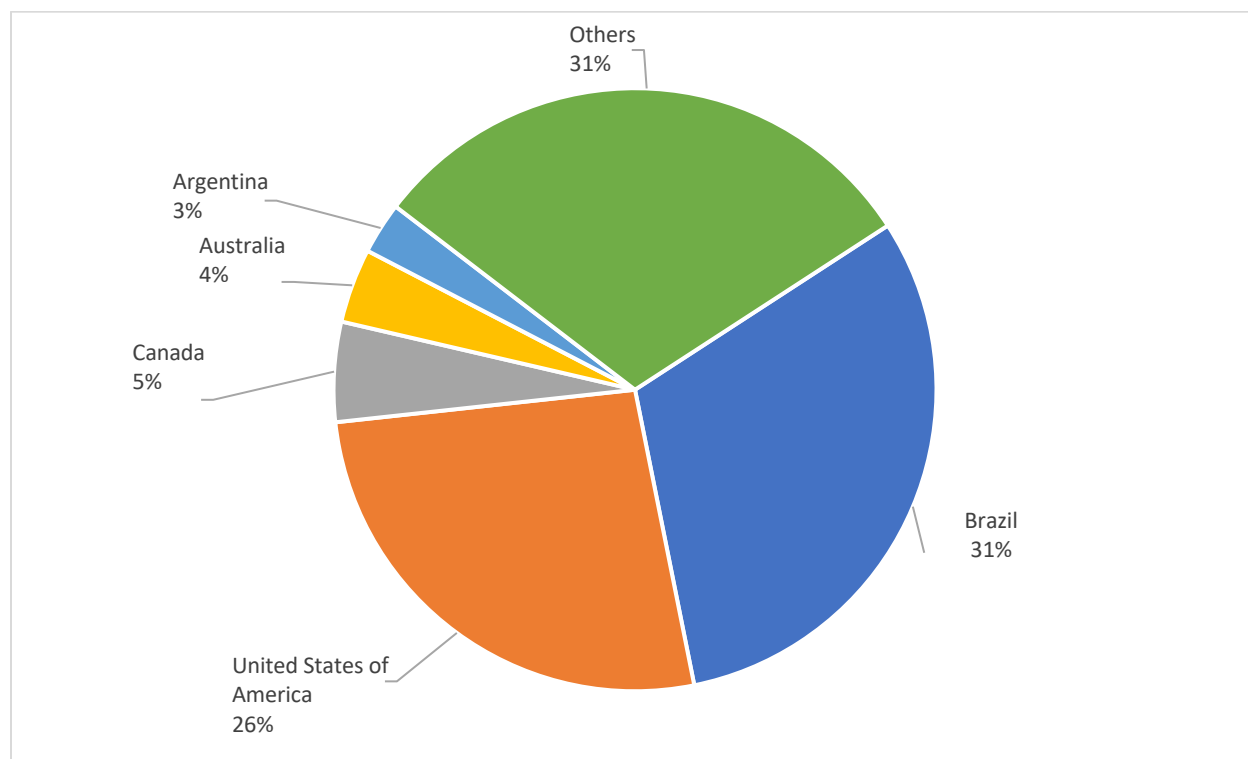
During the last 5 years, the exports of oil seeds and oleaginous fruits have been dominated by Brazil followed by United States of America. The export value and market share of the five biggest exporting countries in 2022 are provided in the table and figure below.

**Table 3: Major Oil Seeds and Oleaginous Fruits Exporting Countries in 2022**

Sr. No.	Country	Exports (Value in US Million)	Annual growth in value between 2018-2022 (%)
1	Brazil	47,172	11
2	United States of America	40,195	16
3	Canada	8,148	6
4	Australia	6,070	44
5	Argentina	4,220	18

Source: Trade Map

**Figure 3: Market Share of Major World Oil Seeds and Oleaginous Fruits Exporters in 2022**



### ***Major Importers***

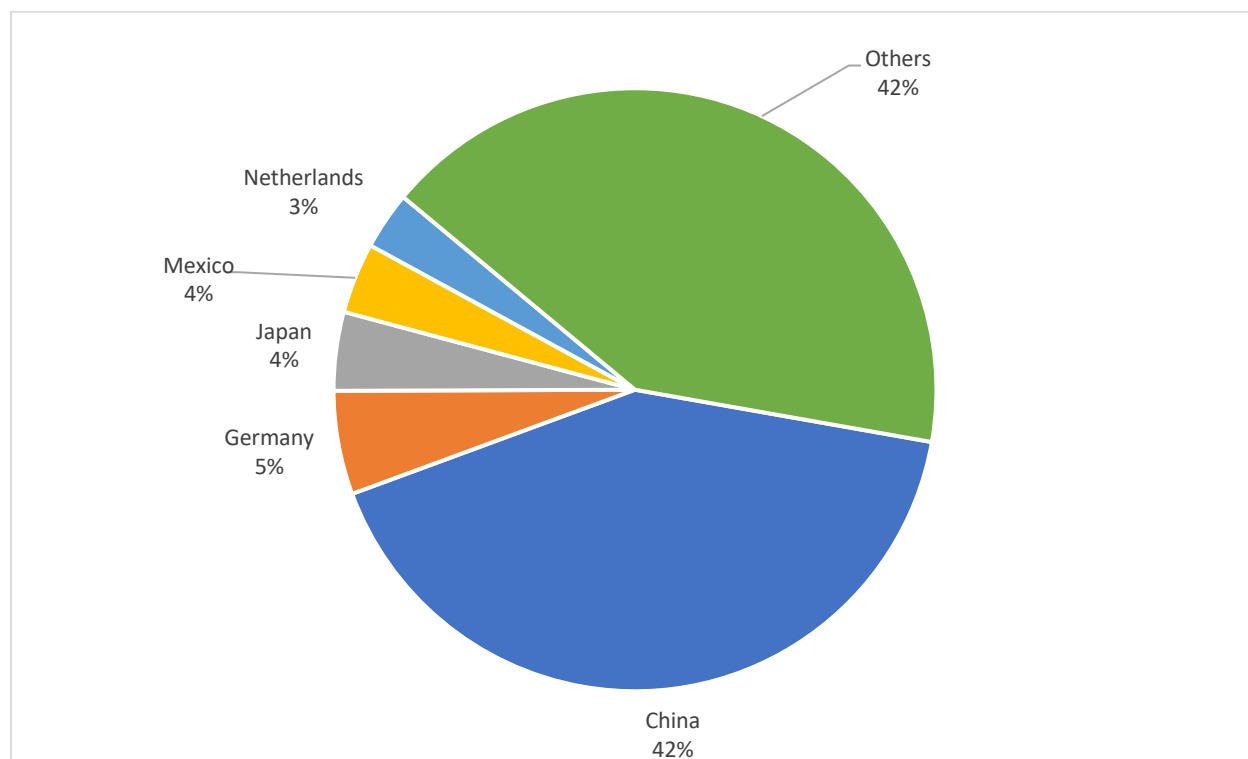
During 2022 - the largest importer of oil seeds and oleaginous fruits was China followed by Germany and Japan respectively. The import value in 2022 and annual growth in value between 2018- 2022 (%) of the five biggest importing countries are provided in the table and figure below

**Table 4: Major Oil Seeds and Oleaginous Fruits Importing Countries in 2022**

Sr. No.	Country	Import (value in US \$ Million)	Annual growth in value between 2018-2022 (%)
1	China	68,605	14
2	Germany	9,165	12
3	Japan	6,956	10
4	Mexico	6,244	20
5	Netherlands	5,099	6

Source: Trade Map

**Figure 4: Market Share of Major Oil seeds and Oleaginous fruits Importing Countries in 2022**



### 3. Pakistan's Exports of Oil Seeds and Oleaginous Fruits

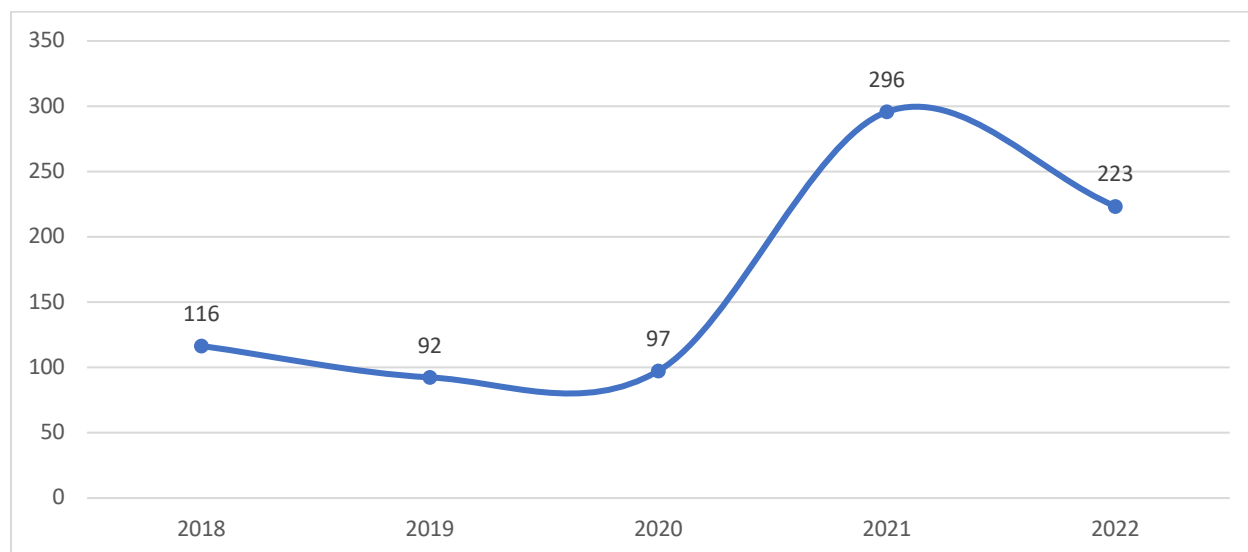
Pakistan is a relatively minor player in the global economy with respect to export of oil seeds and oleaginous fruits. Pakistan's total export value during year 2022 was US \$ 223 millions. The export value of the oil seeds and oleaginous fruits sector in the last 5 years are provided in the table below.

**Tale 5: Pakistan Oil Seeds and Oleaginous Fruits Exports – Last 5 Years (Value In US \$ Million)**

Description	2018	2019	2020	2021	2022
<b>Pakistan's Exports (value in US \$ Million)</b>	116	92	97	296	223
<b>Growth (%age)</b>	Base Year	-21%	5%	204%	-24%

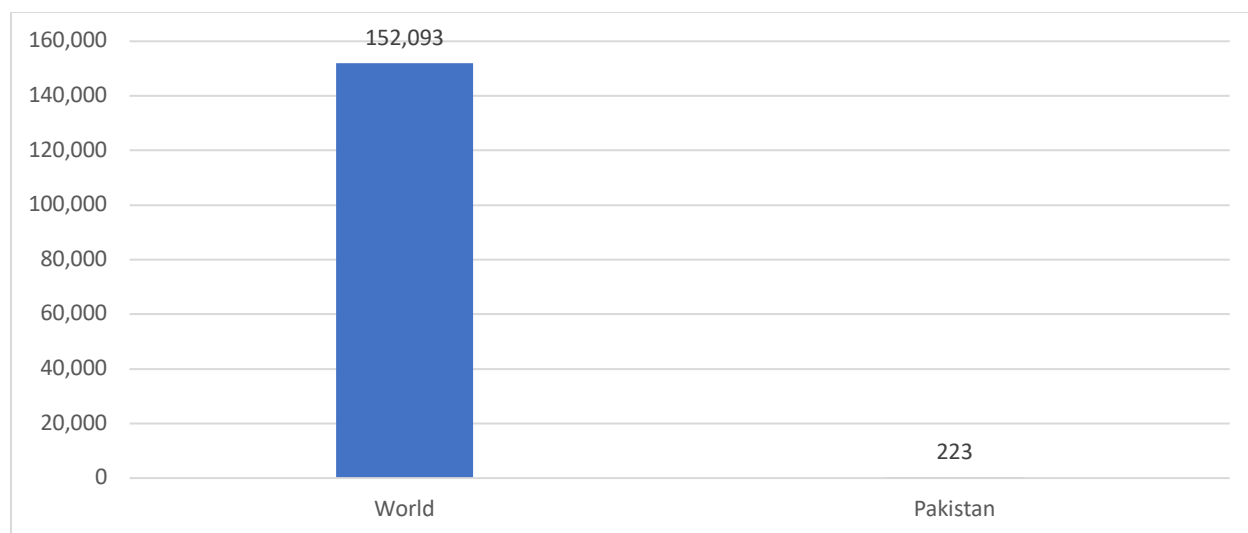
Source: Trade Map

**Figure 5: Growth Trend of Pakistan's Oil Seeds and Oleaginous Fruits Exports – Last 5 Years (Value In US \$ Millions)**



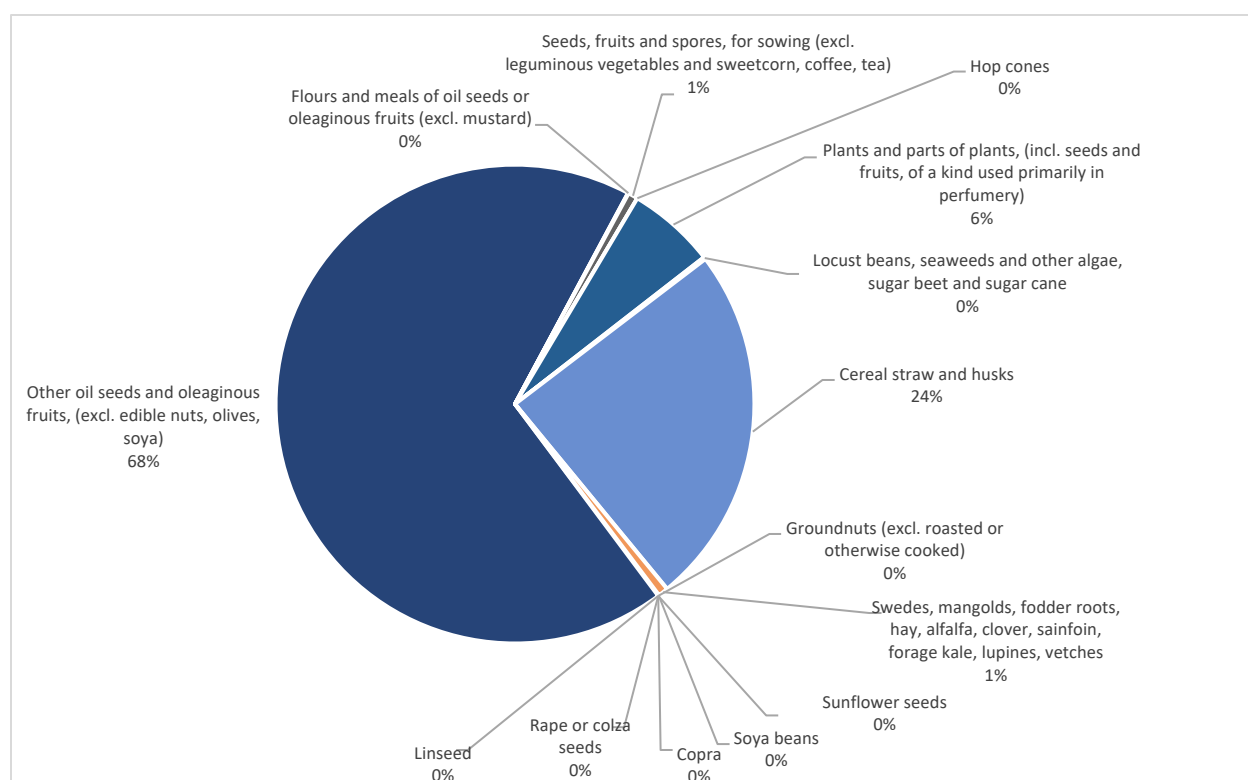
Although the export of oil seeds and oleaginous fruits from Pakistan has increased in last decade, however still Pakistan's share in global exports of oil seeds and oleaginous fruits is almost negligible. For instance, in year 2022, Pakistan total export of oil seeds and oleaginous fruits remained well below 1% of global export of oil seeds and oleaginous fruits that shows tremendous potential of export market for Pakistan's oil seeds and oleaginous fruits manufactures

**Figure 6: Pakistan's Share in Global Exports of Oil Seeds and Oleaginous Fruits in 2022 (Value In US \$ Million)**



### ***Pakistan's Exports Product Mix***

Pakistan's exports of oil seeds and oleaginous fruits are mainly concentrated in other oil seeds and oleaginous fruits, followed by Cereal straw and husks. The product mix of oil seeds and oleaginous fruits exports from Pakistan is exhibited below:

**Figure 7: Product Mix of Pakistan's Oil Seeds and Oleaginous Fruits In 2022**

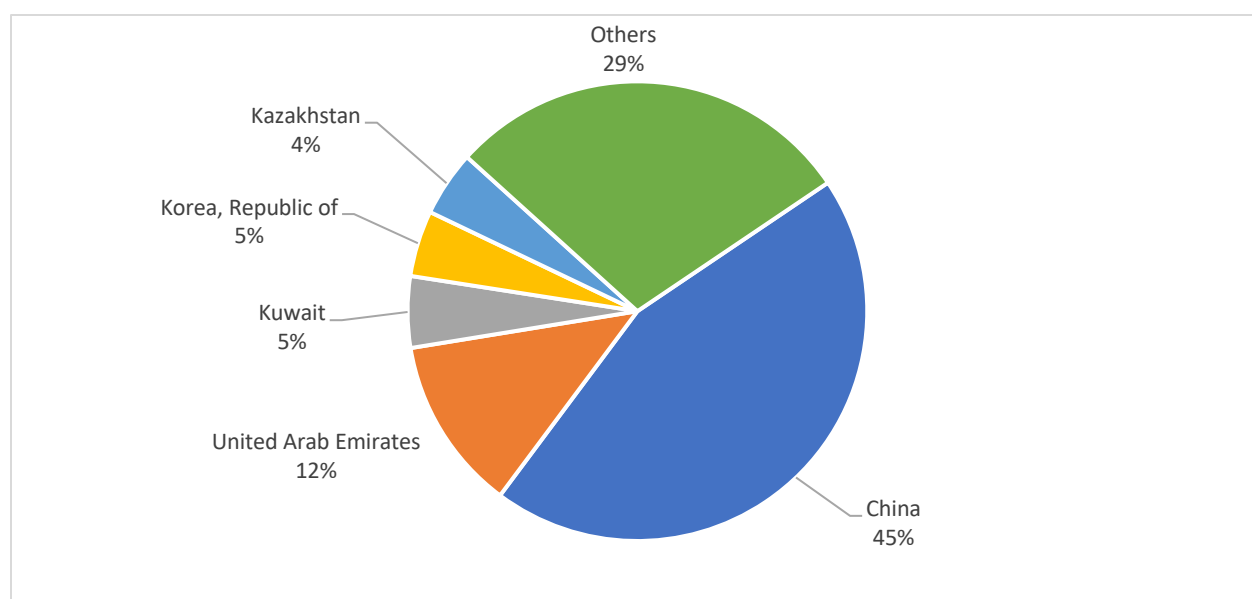
### ***Pakistan's Export Destinations***

During the year 2022, the largest importer of oil seeds and oleaginous fruits from Pakistan was China, followed by United Arab Emirates respectively. The import value in 2022 and for Pakistan annual growth in value between 2018-2022 (%) of the five biggest importing countries are provided in the tables and figures below.

**Table 6: Major Oil Seeds and Oleaginous Fruits Pakistan's Exports Destination In 2022**

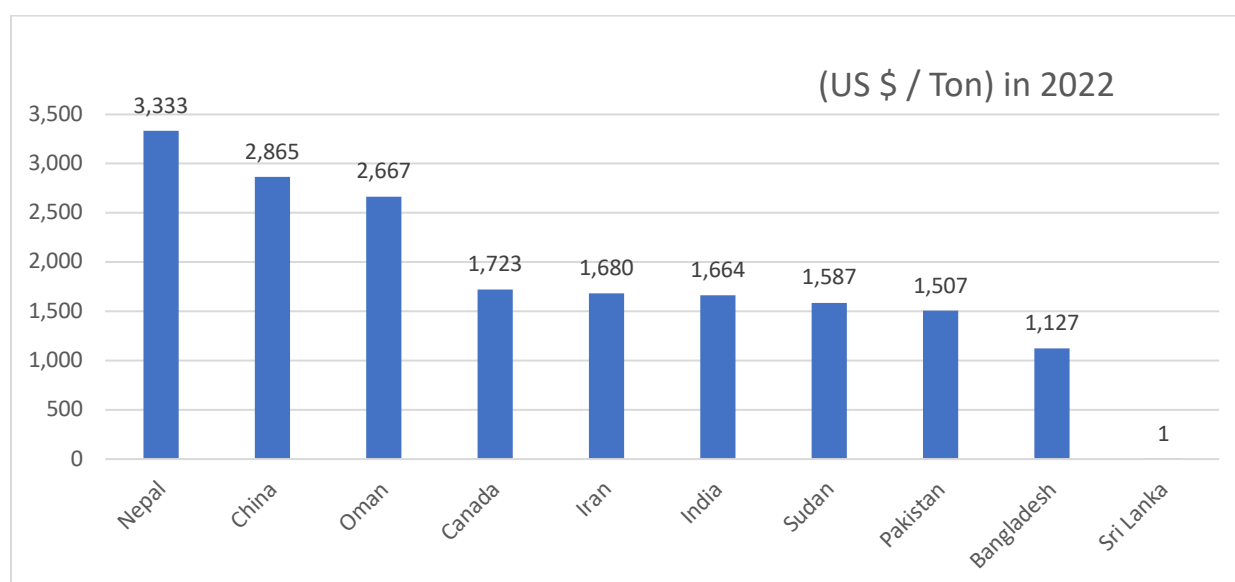
Sr. No.	Country	Export (Value in US \$ Million)	Annual growth in value between 2018-2022 (%)
1	China	100	159
2	United Arab Emirates	27	26
3	Kuwait	11	23
4	Korea, Republic of	10	8
5	Kazakhstan	10	5

Source: Trade Map

**Figure 8: Market Share of Pakistan's Top Export Destinations In 2022**

### ***Price Competitiveness***

Figure 7: Product Mix of Pakistan's Oil Seeds and Oleaginous Fruits In 2022, shows that Pakistan predominantly exports "other oil seeds and oleaginous fruits (excl. edible nuts, olives, soya)". Therefore, details of the top countries in terms of prices charged for other oil seeds and oleaginous fruits (excl. edible nuts, olives, soya) exported in 2022 are given in the following chart. It can be seen that the other oil seeds and oleaginous fruits (excl. edible nuts, olives, soya) exported by Pakistan is slightly at a higher price than that of the regional competitors including Bangladesh and Sri Lanka

**Figure 11: Price Comparison for Code 1207 "Other Oil seeds and oleaginous fruits (excl. edible nuts, olives, soya)"**

#### 4. Pakistan's Imports of Oil Seed and Oleaginous Fruit

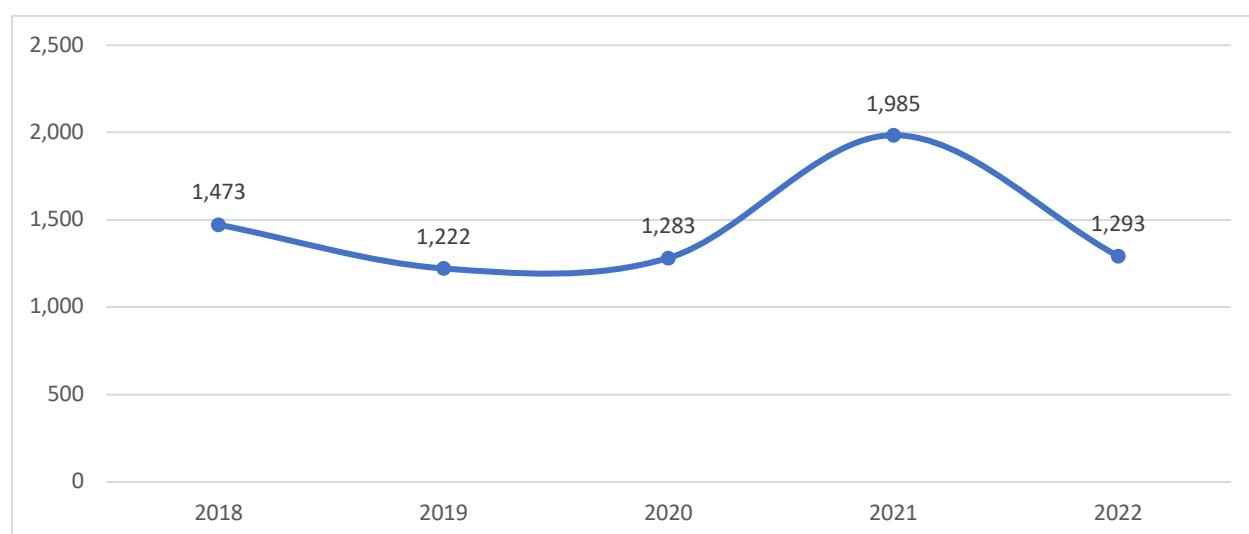
Pakistan's total value of imports in 2022 was US \$ 1293 millions. In last five years, highest import of oil seeds and oleaginous fruits was during 2021 which is US \$ 1,985 millions. The import value of oil seeds and oleaginous fruits in last five years and its growth trend is provided in the table and graph below.

**Table 7: Pakistan's Import of Oil Seeds and Oleaginous Fruits – Last 5 Years (Value in US \$ Millions)**

Description	2018	2019	2020	2021	2022
<b>Pakistan's Imports (Value in US \$ Millions)</b>	1,473	1,222	1,283	1,985	1,293
<b>Growth (%)</b>	Base Year	-17%	5%	55%	-35%

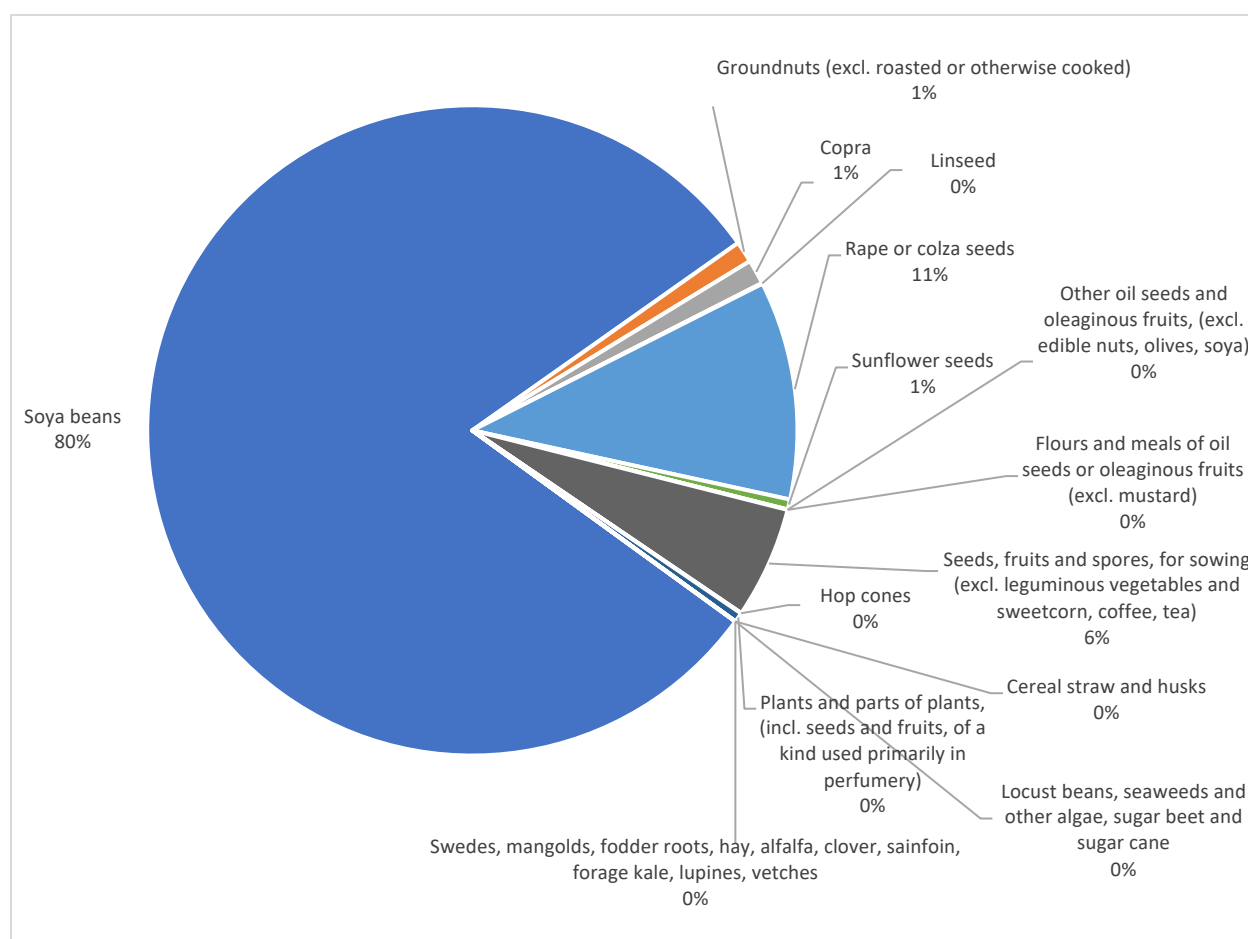
Source: Trade Map

**Figure 9: Growth Trend of Pakistan's Oil Seeds and Oleaginous Fruits Imports – Last 5 Years (Value In US \$ Millions)**



#### *Pakistan's Imports Product Mix*

Pakistan's import of oil seeds and oleaginous fruits is mainly concentrated in soya beans followed by rape or colza seeds. The product mix of oil seeds and oleaginous fruits imports from Pakistan is exhibited below:

**Figure 10: Product Mix of Oil Seeds and Oleaginous Fruits Imports To Pakistan in 2022**

### ***Pakistan's Import Partners***

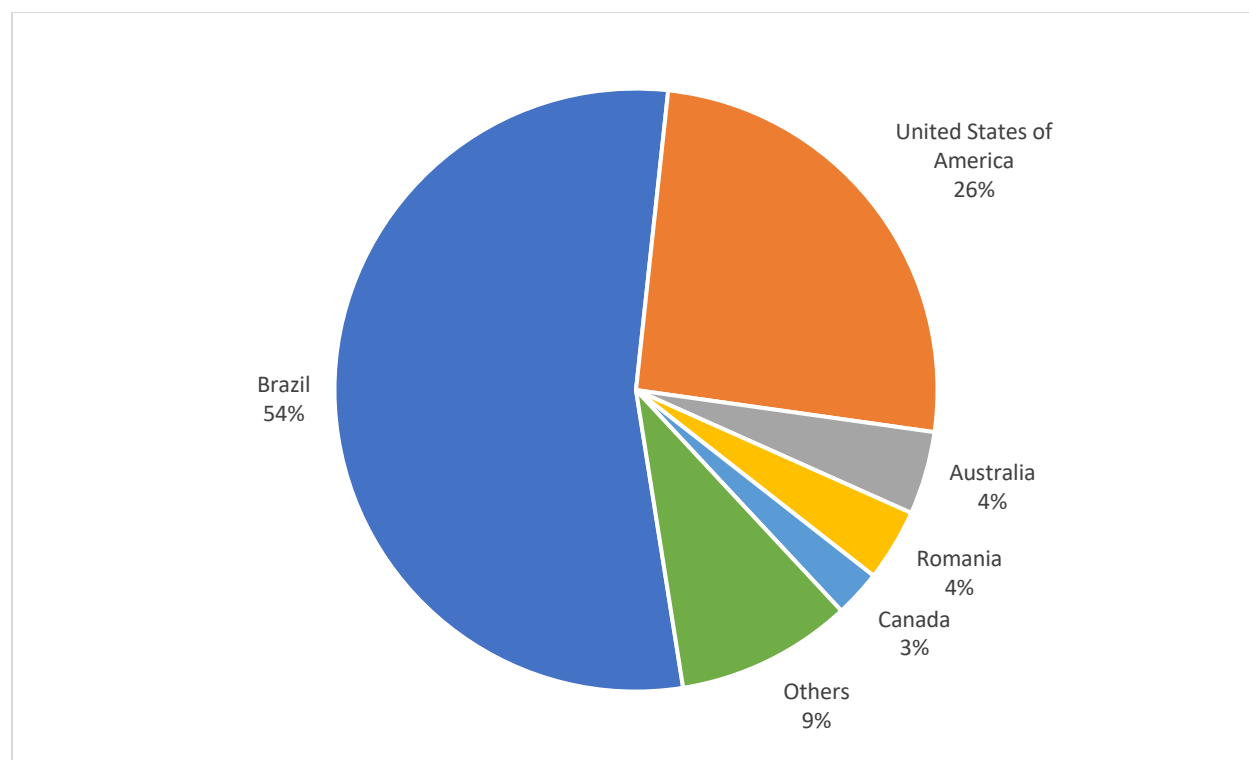
During the year 2022 - the largest oil seeds and oleaginous fruits exporting country to Pakistan was Brazil followed by United states of America and Australia respectively. The import value and annual growth in value between 2018-2022 (%) of the five biggest exporting countries in 2022 are provided in the table.

**Table 8: Market Share of Seeds and Oleaginous Fruits Export Pakistan in 2022**

Sr. No	Country	Imports (Value in US \$ Millions)	Annual growth in value between 2018-2022 (%)
1	Brazil	701	36
2	United States of America	330	-14
3	Australia	58	173
4	Romania	50	28
5	Canada	32	-40

Source: Trade Map

**Figure 11: Market Share of Major Oil Seeds and Oleaginous Fruits Exporting Countries to Pakistan in 2022**



## 5. Pakistan's Export Trade and Tariff

### Customs Tariffs/Duties

Knowing customs duties (or tariffs) are important to take decision of choosing a product or service for importation or exportation economically feasible or not. In the same manner to claim refund or rebate again knowing custom duty is essential. Whole circle of import and export depends upon knowing and using the custom tariffs/duties or exemptions. Determining which customs duty is applicable to a product is a complex exercise and expert advice may be sought. Customs Act, 1969, Customs Rules 2001 are the relevant law and Pakistan Customs under FBR is the only authority to deal with custom tariffs and rules. Government often change duty structure and rules so these are keep evolving . Following is the link to check the customs tariffs/duties applicable in which Pakistan Customs is the final authority to the extent of Pakistan. <https://www.fbr.gov.pk/categ/customs-tariff/51149/70853/131188>

## 6. Prominent International Trade Fairs for Oil Seeds and Oleaginous Fruits

NAME OF TRADE FAIR	FREQUENCY	LOCATION	DURATION
World Congress on Oils & Fats	Varied	Varied	Varied
Gulfood	Annual	Dubai, UAE	5 days

<b>SIAL Paris</b>	Biennial	Paris, France	4 days
<b>Food Ingredients Europe (FIE)</b>	Biennial	Varied	3 days
<b>International Conference on Oil Palm and Oil Seeds (ICON)</b>	Biennial	Varied	3-4 days
<b>Alimentaria</b>	Biennial	Barcelona, Spain	4 days
<b>AOCS Annual Meeting &amp; Expo</b>	Annual	Varied	4-5 days
<b>Oilseed &amp; Grain Trade Summit</b>	Annual	Varied	2-3 days
<b>China International Edible Oil &amp; Olive Oil Exhibition</b>	Annual	Various cities in China	3-4 days
<b>International Sunflower Conference</b>	Approximately every 4 years	Varied	3-4 days