Policy Support for Healthy Diets and Food Security in Pakistan

1. Nutrition and Food Security Challenges in Pakistan

Over the past decade, Pakistan has experienced a steady deterioration in access to healthy diets, alongside persistent and, in some cases, worsening nutrition outcomes. Affordability is the most immediate indicator of food access. Between 2017 and 2024, the daily cost of a healthy diet rose from approximately PPP $2.97 to PPP $3.95 per person, an increase of nearly one-third. Relative to income, the cost increased from about 21.5 percent of GDP per capita to roughly 26 percent, indicating that food prices have risen faster than average income. As a result, more than 60 percent of the population was unable to afford a healthy diet by 2024 (Table 1). This erosion in affordability has been accompanied by a rise in undernourishment, with the number of undernourished individuals increasing from about 31 million to nearly 41 million over the past decade, raising prevalence from 14.7 percent to 16.5 percent. These trends are reflected in persistent child stunting and anemia among women, alongside a sharp increase in adult obesity.

Table 1: Food Security and Nutrition Trends in Pakistan

Indicators	Change over past decade	
Unaffordability	In 2017: 130.9 million (58.6%)	In 2024: 151.4 million (60.3%)
Undernourishment	In 2014: 31.1 million (14.7%)	In 2024: 40.9 million (16.5%)
Stunted growth in children	In 2014: 13.1 million (42.6%)	In 2024: 10.7 million (33.6%)
Anemia among women of reproductive age	In 2014: 23.7 million (46.1%)	In 2023: 28.2 million (46.5%)
Obesity in adults	In 2014: 16.6 million (14.5%)	In 2022: 31 million (23%)

Notes: Authors' compilation based on FAO data. Indicators cover the past decade (approximately 2014–2024), with reference years varying slightly due to data availability.

In comparative terms, Pakistan's food security and nutrition outcomes remain weak relative to most middle-income economies. As summarized in Table 2, Pakistan performs poorly on key indicators, with outcomes generally worse than lower-middle-income averages and far behind upper-middle-income benchmarks. Taken together, these patterns explain Pakistan's ranking of 109th out of 127 countries in the Global Hunger Index 2024 and underscore the depth of the country's structural food security and nutrition challenge.

Table 2: Food Security and Nutrition Indicators in Pakistan Relative to Country Income Groups

Indicators	Year	Pakistan	Comparison across income groups			
			LI	LMI	UMI	HI
Unaffordability	2024	60.3	72	46.6	19.4	5.8
Undernourishment	2024	16.5	27.7	12.8	2.6	<2.5
Stunted growth in children	2024	33.6	35.8	28.9	10.8	4
Anemia among women of reproductive age	2023	46.5	35.7	43.8	20.1	17.4
Obesity in adults	2022	23	9.6	11.2	15.8	25.7

Notes: Indicators are expressed as a percentage of the population. LI = Low-income countries; LMI = Lower-middle-income countries; UMI = Upper-middle-income countries; HI = High-income countries. Authors' compilation based on FAO data.

2. Institutional Architecture for Food Security and Nutrition

Following the Eighteenth Constitutional Amendment in 2010, responsibility for food security and nutrition was largely devolved to the provinces, while national policy formulation, coordination, and international engagement remain with the federal government. At the federal level, the Ministry of National Food Security and Research is the lead institution, responsible for agricultural and food policy, food grain procurement, fertilizer management, price stabilization, and international liaison. Strategic planning and cross-sector coordination are anchored in the Planning Commission of Pakistan, which hosts a dedicated Member for Food Security and Climate Change and convenes the National Nutrition Forum.

Federal efforts are supported by sectoral institutions, including the Ministry of National Health Services, Regulation and Coordination, which oversees nutrition policy through the National Nutrition Institute and Federal Nutrition Cell, and the Ministry of Poverty Alleviation and Social Safety, which manages income support through programmes such as the Benazir Income Support Programme. Recent additions to the institutional landscape include the National Agri-Trade and Food Safety Authority, the National Seed Development Authority, and the Land Information and Management System, aimed at improving food safety, seed systems, and data-driven agricultural planning.

At the provincial level, governments are responsible for implementation and service delivery through food authorities, food departments, and planning, health, and agriculture departments. Punjab and Sindh have more formalized multisector nutrition arrangements, while Khyber Pakhtunkhwa and Balochistan operate comparable structures through provincial authorities and district-level coordination. Overall, Pakistan's institutional framework is extensive but fragmented, with effectiveness hinging on coordination across federal and provincial actors.

As summarized in Table 3, Pakistan's progress toward Sustainable Development Goal 2 remains uneven. While some nutrition outcomes are on track, food insecurity, agricultural productivity, and key policy and spending indicators show limited or stagnant progress, pointing to persistent structural and governance constraints.

Table 3: Pakistan's Progress toward Sustainable Development Goal 2

	Description	Status
2.1.1	Prevalence of undernourishment	On Track
2.1.2	Prevalence of moderate or severe food insecurity in the population, based on the Food Insecurity Experience Scale (FIES)	Stagnant
2.2.1	Prevalence of stunting among children under 5 years of age	Moderately Improving
2.2.2	Prevalence of malnutrition among children under 5 years of age, by:	
	- Wasting	On Track
	- Overweight	Moderately Improving
2.2.3	Prevalence of anaemia in women aged 15 to 49 years, by pregnancy status	On Track
	- Pregnant	On Track
	- Non-pregnant	On Track
2.3.1	Volume of production per labour unit by classes of farming/pastoral/forestry enterprise size	Moderately Improving
2.3.2	Average income of small-scale food producers, by sex and indigenous status	Moderately Improving
2.4.1	Proportion of agricultural area under productive and sustainable agriculture	On Track
2.5.1	Number of (a) plant and (b) animal genetic resources for food and agriculture	

	secured in either medium- or long-term conservation facilities	
	- Plant	On Track
	- Animal	Stagnant
2.a.1	The agriculture orientation index for government expenditures	Stagnant
2.a.2	Total official flows to the agriculture sector	On Track
2.b.1	Agricultural export subsidies	Stagnant

Source: Pakistan SDGs Status Report 2023; Ministry of Planning, Development and Special Initiatives.

3. Analytical Framework for Food Security and Nutrition

A healthy diet, as defined by the United Nations Food Systems Summit (2021), promotes health and prevents disease by providing adequate nutrients from a diverse range of nutritious foods, without excessive intake and while avoiding substances harmful to health. While universal in principle, healthy diets are inherently context-specific, reflecting differences in food systems, cultural practices, and resource availability.

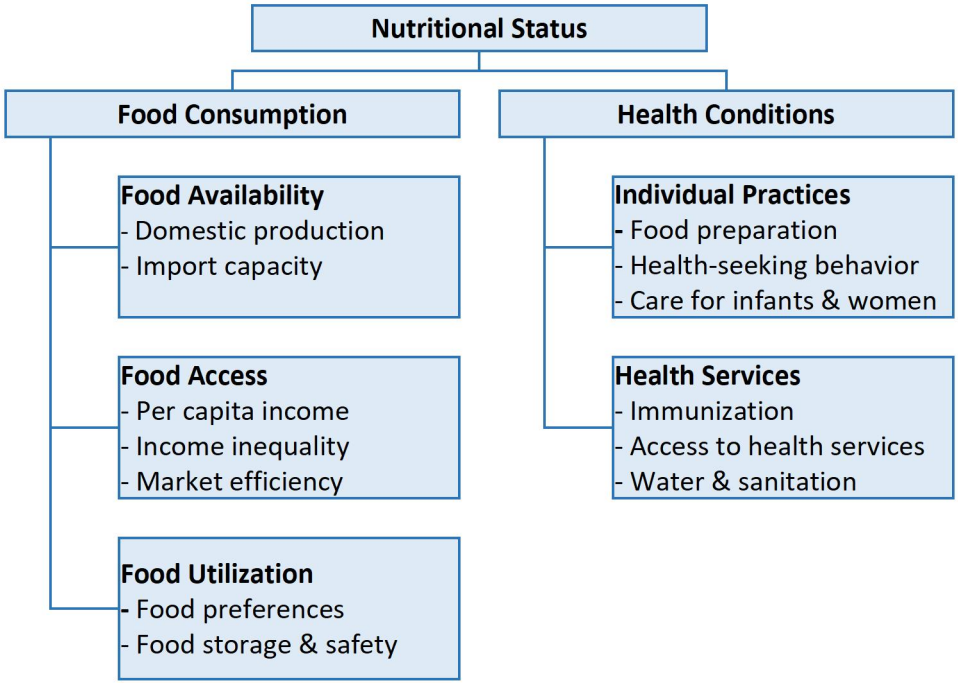

Figure 1: Analytical Framework of the Determinants of Food Security and Nutrition

Within the framework derived from FAO, nutrition outcomes arise from the interaction between food consumption and health conditions. While health factors such as care practices and access to water, sanitation, and health services mediate how nutrients are absorbed and utilized, food consumption constitutes the core transmission channel through which food systems shape nutrition. Food consumption, in turn, is determined by three interlinked pillars: availability, access, and utilization. The sections that follow examine each of these dimensions in turn.

2.1 Food Availability

Food availability in Pakistan is increasingly constrained by slow growth in domestic agricultural production relative to rapid population growth and rising food demand. Although aggregate output has expanded, persistently low crop yields have prevented production from keeping pace with nutrition needs, particularly for staples and nutrient-rich foods. As shown in Table 4, yields for major crops such as wheat, rice, maize, pulses, and vegetables remain well below the best performers in

South Asia and far below Asian and global frontiers, with yields in comparator countries often two to three times higher. These large productivity gaps limit food availability, sustain high domestic prices, and undermine diet affordability. Closing yield gaps through a fundamental transformation of the agricultural sector is therefore central to achieving food security and meeting Pakistan's nutrition needs.

Table 4: Pakistan's Crop Yields Compared with Regional and Global Yield Frontiers

Yield in Pakistan		**Highest in South Asia**		**Highest in Asia**		**Highest in World**	
Crop	Yield	Country	Yield	Country	Yield	Country	Yield
Barley	1,022	India	2,955	Oman	9,249	Oman	9,249
Chickpeas	307	India	1,208	Jordan	8,755	Jordan	8,755
Lentils	607	Bangladesh	1,348	China	2,555	China	2,555
Maize	6,051	Bangladesh	8,911	Oman	25,050	Oman	25,050
Millet	1,101	Afghanistan	1,586	Azerbaijan	27,078	Azerbaijan	27,078
Onion	14,414	Afghanistan	17,580	South Korea	73,657	South Korea	73,657
Potato	24,920	India	25,050	Jordan	38,758	New Zealand	50,683
Rice	3,905	Bangladesh	4,915	Tajikistan	10,296	Tajikistan	10,296
Sorghum	827	Sri Lanka	1,843	Oman	49,578	Oman	49,578
Sugarcane	70,435	India	83,940	Iran	98,157	Peru	119,323
Wheat	3,011	India	3,526	Saudi Arabia	6,733	Ireland	9,728

Notes: Author's elaboration based on FAOSTAT data. Yield is expressed in kilograms per hectare (kg/ha) and represents three-year average (2021-2023) to minimize year-specific fluctuations.

Beyond domestic production, Pakistan's ability to rely on imports to supplement food availability is constrained by persistent external imbalances. While aggregate national exports increased from about US$12 billion in 2003 to roughly US$32 billion in 2024, imports expanded much faster, reaching nearly US$57 billion and resulting in recurring trade deficits. Similar pressures are evident in the agrifood sector, where agricultural imports have consistently exceeded exports, reflecting limited value addition and continued dependence on imported food and agricultural inputs.

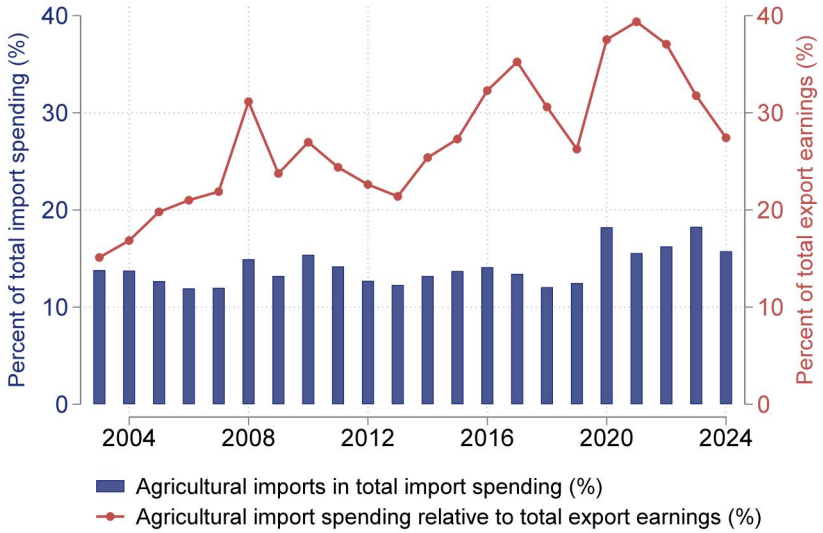

Figure 2: Share of agricultural trade in Pakistan's total imports and exports

Agricultural imports now absorb a growing share of Pakistan's scarce foreign-exchange resources (Figure 2, based on data from ITC TradeMap). Their share in total import spending has risen sharply since 2020, while import spending relative to export earnings exceeded 35 percent for much of the

past decade, constraining reliance on imports as a food security strategy. Persistently low agricultural yields, compounded by restricted import capacity, have worsened food availability in Pakistan.

2.2 Food Access

Food access in Pakistan is primarily constrained by affordability, particularly for poor and vulnerable households. Nearly half of average household expenditure is devoted to food, making access highly sensitive to income shocks and price increases. Since 2018, low economic growth and elevated inflation, especially food inflation, have sharply eroded real purchasing power. These pressures have been compounded by high pre-existing multidimensional poverty, the global commodity price surge following the Russia–Ukraine conflict, and climate-related supply disruptions in 2022. As a result, a large share of the population remains unable to afford healthy diets despite food being physically available in markets.

Macroeconomic conditions have further tightened access. Real GDP growth averaged only 1.7 percent between 2023 and 2025, below population growth, while cumulative headline inflation since March 2022 exceeded 60 percent, with food inflation close to 59 percent. Furthermore, nominal wages, particularly for low-income households, have lagged behind prices. Consequently, nearly 45 percent of the population lives below the US$4.2 per day poverty line, and over 93 million people experience multidimensional poverty, translating into reduced economic access to food for more than half the population.

Government subsidies and social protection play a mitigating role but remain limited in effectiveness. Federal subsidies and transfers for 2025–26 are budgeted at Rs 3,114 billion, or 2.4 percent of GDP, with Rs 716 billion allocated to the Benazir Income Support Programme. However, only a small share directly supports food and nutrition, as a substantial portion is absorbed by non-food subsidies, particularly in the energy sector. Provinces account for an additional Rs 676 billion in food security and nutrition-related spending, mainly in Punjab and Sindh. Persistent affordability constraints point to gaps in targeting and composition, underscoring the need for better-aligned income support to improve food access.

2.3 Food Utilization & Nutrition

Food utilization refers to how available and accessible food is consumed and converted into nutritional outcomes, shaped by dietary practices, food preparation, intra-household allocation, and the health environment. In Pakistan, utilization constraints remain significant. While 91 percent of households have access to improved drinking water, up to 70 percent consume bacterially contaminated water, contributing to widespread diarrhoeal disease and an estimated 53,000 annual deaths among children under five. Basic sanitation coverage stands at about 71 percent, slightly below the South Asia average. These deficits in water quality, sanitation, and hygiene limit the effective biological utilization of food, particularly for children and women, and contribute to persistent malnutrition despite improvements in food availability and access.

2.4 Food Stability: Availability, Access, and Utilization Over Time

Food stability refers to the consistency of food availability, access, and utilization over time, without disruption from economic, policy, or climate shocks. In Pakistan, food stability is frequently undermined by fragmented governance arrangements and abrupt policy shifts. Overlapping institutional mandates and uneven coordination across federal and provincial levels weaken

implementation and delay responses to shocks, while the absence of unified monitoring frameworks limits accountability. Policy instability further exacerbates vulnerability. Recent experience illustrates how abrupt and poorly sequenced policy changes can impose significant economic costs on farmers. Under commitments agreed with the IMF, the government initiated a phase-out of the Minimum Support Price system and public procurement of key crops, including wheat. In the 2024–25 season, the absence of a pre-announced support price and procurement, particularly in Punjab, exposed farmers to sharp price declines, resulting in estimated income losses of approximately Rs 2.2 trillion. Strengthening food stability requires clear institutional roles, effective inter-agency coordination, and predictable, rule-based policies that enable gradual adjustment by producers, traders, and consumers, thereby safeguarding food access and market stability over time.

4. Policy Recommendations

The policy recommendations are grouped into trade policy, fiscal policy, and administrative reforms to ensure policy predictability and coordination through better institutional arrangements. Each policy action is paired with a targeted outcome linked to the food security framework, clarifying how the proposed measures contribute to food availability, access, and utilization, with a particular focus on food consumption outcomes.

4.1. Trade Policy

Policy Actions	*Targeted Outcomes*
- Introduce a time-bound, pre-announced "Protect and Upgrade" tariff regime that provides short- to medium-term protection to selected import-competing agrifood products such as cereals, pulses, and other locally producible staples. However, there should be a clear commitment to a gradual reduction of tariffs on as domestic productivity improves.	Temporary protection allows domestic producers to upgrade productivity and raise crop yields. By strengthening domestic supply chains and creating a more predictable environment for investment in processing industries, it directly improves food availability.
- Reduce import tariffs on essential agrifood productivity inputs, including quality seeds, fertilizer raw materials, farm machinery, irrigation equipment, cold-chain equipment, and animal vaccines and feed additives. - Furthermore, digitize and fast-track border clearance procedures for essential agrifood inputs through risk-based inspections and pre-arrival processing.	Reducing tariffs on productivity-enhancing equipment and intermediate goods, alongside selective protection for import-competing products, shifts import composition toward inputs that support more productive, mechanized farming. Faster and more predictable border clearance lowers input costs and ensures timely access to essential inputs, raising farm-level productivity and thereby improving food availability through stronger domestic production.
- Strengthen sanitary and phytosanitary (SPS) infrastructure by upgrading standards and accreditation bodies, expanding testing and	Improved compliance and faster clearance for agrifood exports enhance export competitiveness, reduce spoilage in perishable

laboratory facilities to meet the SPS requirements of major trading partners, and fully digitizing the application, issuance, and cross-border electronic exchange of SPS certificates with key trading partners. - Digitize export clearance and logistics for perishable agrifood products, particularly fruits and vegetables, which constitute a major share of agricultural exports, through dedicated green channels and time-bound clearance targets.	products, and increase foreign exchange earnings, thereby strengthening import capacity and supporting food availability.
- Introduce higher tariffs on imports of sugar-sweetened beverages (SSBs) and ultra-processed foods (UPFs). SSBs include drinks with added sugars such as sodas, energy drinks, sweetened juices, and flavored milks, while UPFs refer to industrially formulated foods high in sugar, salt, unhealthy fats, and additives, including packaged snacks, instant noodles, and confectionery. - Apply tighter regulatory controls on imports of SSBs and UPFs, including mandatory front-of-pack nutrition labeling, ingredient disclosure requirements, limits on trans fats and added sugars, and compliance with national food composition and labeling standards.	Higher tariffs and stricter import regulations discourage the consumption of unhealthy foods, shift demand toward healthier alternatives, and reduce diet-related health risks, thereby supporting improved food utilization and nutrition outcomes.

4.2. Fiscal Policy

Policy Actions	*Targeted Outcomes*
- Expand nutrition-sensitive cash transfer programs by indexing benefit levels to the cost of a nutritious food basket for nutritionally vulnerable groups, including children under five, pregnant and lactating women, and anemic women. Improve target efficiency through integrated poverty and nutrition mapping with geographic prioritization by scaling budgetary allocations in districts with a high prevalence of undernutrition and food unaffordability.	In the context of low per capita incomes and rising food prices, indexed nutrition-sensitive cash transfers provide immediate income support to the most vulnerable households, protect purchasing power for nutritious foods, and thereby strengthen food access and utilization.

- Increase excise (health) taxes on domestically produced sugar-sweetened beverages (SSBs) and ultra-processed foods (UPFs) to internalize health externalities and discourage the production and consumption of unhealthy foods.	Higher excise taxes curb unhealthy dietary choices, encourage substitution toward healthier foods, and reduce diet-related health risks, including rising obesity, thereby supporting improved food utilization and nutrition outcomes.

- Launch a multi-year Agrifood Productivity and Food Security Investment Plan that consolidates budgetary allocations, implementation responsibilities, and monitoring and evaluation within a single fiscal framework. The program should finance the following:
  - (i) Farm productivity upgrading: Improve access to quality inputs, intermediate goods, and productivity-enhancing equipment to support more mechanized farming, higher yields, and stronger domestic supply.
  - (ii) International integration of agrifood value chains: Upgrade public laboratories and testing capacity, strengthen inspection and accreditation services, expand traceability systems, and support compliance with internationally recognized standards such as GlobalG.A.P., BRC, HACCP, and ISO 22000 to improve market access and export readiness.
  - (iii) Agrifood logistics and resilience infrastructure: Allocate sustained investment to irrigation systems, rural roads, storage facilities, and cold-chain infrastructure to reduce post-harvest losses, improve connectivity, and stabilize supply.
  - (iv) Health and hygiene service delivery: Earmark fiscal resources for nutrition interventions and WASH (water, sanitation, and hygiene) services in districts with high burdens of undernutrition and food insecurity.
	Coupled with the “Protect and Upgrade” tariff regime, which provides time-bound protection and creates space for domestic producers and processors to adjust, the Agrifood Productivity and Food Security Investment Plan to deliver the “upgrade” through coordinated, multi-year financing of productivity and system improvements. Together, this package raises agrifood productivity and strengthens food security over the long term in a sustainable manner.

4.3. Administrative Reforms

Policy Actions	*Targeted Outcomes*
Clearly delineate and rationalize institutional mandates across federal and provincial agencies involved in food security and nutrition to eliminate overlaps, close implementation gaps, and strengthen accountability mechanisms.	Improved governance and coordination enhance policy effectiveness across food availability, access, and utilization.
Avoid sudden and ad hoc policy changes by adopting predictable, rule-based trade and agricultural policy instruments, including pre-announced tariff bands and trigger-based measures linked to price or stock indicators.	Policy predictability improves market efficiency, stabilizes prices, and strengthens food access during shocks.

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