



GOVERNMENT OF
PAKISTAN

Investment in Dairy Inputs & Processed Dairy Products in Pakistan

巴基斯坦乳制品投入品及加工乳制品投资推介

PRESENTED BY

Ministry of National Food Security & Research 国家粮食安全
与研究部

2026



巨大的产能基础

MASSIVE PRODUCTION CAPACITY

巴基斯坦年产牛奶 7234 万吨 (PBS 2024-25) ，是全球最大的牛奶生产国之一。巨大的原奶盈余为工业加工和高附加值产品提供了充足的原料保障。



有利的投资环境

ENABLING INVESTMENT ENVIRONMENT

稳固的双边关系及 SPS (卫生与植物卫生) 标准的相互协调，为面向中国的出口业务提供了稳定、安全且长期的政策支持与投资环境。



价值链潜力

VALUE CHAIN POTENTIAL

行业具备从牧场现代化到深加工的综合全产业链整合潜力。产品质量与加工能力完全能够满足中国市场对高品质乳制品的进口需求。

巴基斯坦拥有得天独厚的乳制品资源与政策优势，是连接中国与中东市场的战略枢纽。

巴基斯坦乳制品行业快照

PAKISTAN DAIRY SECTOR SNAPSHOT (FY 2025)



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No. 1 Tier

72.34

百万吨 年产量

Million Tonnes Annual Production



3.2%

年度增长率

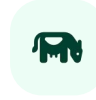
Consistent YOY Expansion



30+

运营加工厂

Private Dairy Processing Units



水牛 & 奶牛

主要奶源基础

Buffalo & Cow Dominant (Camel Emerging)

加工缺口与潜力 The Processing Gap

当前加工产量仅为 340-680 万吨/年，工业扩张空间巨大。



未加工/非正式 Unprocessed 已加工 Processed



巨大的增值潜力

目前 90-95% 的牛奶通过非正式渠道交易。投资正规加工设施可释放巨大的市场价值。



供应优势

供应优势



全年稳定供应

四季持续的原奶供应，保障生产连续性。



畜群持续增长

奶牛数量稳步上升，夯实产能基础。



规模化养殖扩张

商业化及城郊养殖场快速发展，提升集约化水平。



物流系统改善

基础设施升级，支持生鲜乳高效运输。

加工缺口与机遇

当前现状

未开发

90%+

原奶仍在非正规市场/散奶市场交易，加工率极低。

高潜力细分市场

UHT 灭菌奶

奶酪 (Cheese)

酸奶 (Yogurt)

奶粉 (Milk Powder)

黄油 (Butter)



进口替代与 出口机会

Import Substitution & Export Access

发掘国内市场潜力，同时利用战略伙伴关系
打通通往中国的出口门户。

Domestic opportunities and international
gateways



进口替代 IMPORT SUBSTITUTION

获取国内价值 (Capturing Domestic Value)

- 国内供应缺口：高附加值产品（如奶酪、黄油）存在显著的国内供应缺口。
- 依赖进口：尽管拥有强大的国内原奶供应，巴基斯坦目前仍大量进口奶粉。

💡 机会点

投资加工设施，将过剩原奶转化为替代进口的粉类产品。



中国市场准入 ACCESS TO CHINA

战略贸易伙伴关系 (Strategic Partnership)

- ✓ 2023 协议签署：签署了关键的乳制品出口协议，建立了长期稳定的贸易框架。
- ✓ GACC 注册企业：已有数家巴基斯坦领军企业完成中国海关总署注册：

Gourmet Foods

Fauji Foods

Engro

Haleeb

Millac

- ✓ SPS 体系协调：出口兽医卫生证书 (VHC) 已完成协调，涵盖产品：

奶粉、乳清粉、牛初乳粉、奶酪、奶油



需求、地理与 成本优势

Demand, Geography, and Cost Advantages

凭借不断增长的国内消费需求、直通关键市场的战略位置以及极具竞争力的生产成本，巴基斯坦乳制品行业具备独特的全球竞争优势。



消费增长

EXPANDING CONSUMPTION

对奶酪、酸奶和强化产品的需求不断上升；目前人均摄入量仍低于全球基准，增长空间巨大。



战略地理位置

STRATEGIC GEOGRAPHY

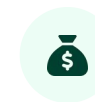
直通中国、中东和中亚等高需求市场，具有直接且具有成本效益的市场准入优势。



物流优势

LOGISTICS ADVANTAGE

极具竞争力的运输时间和运费成本，为时间敏感型乳制品出口创造了显著的竞争优势。



生产效率

PRODUCTION EFFICIENCY

丰富的饲料资源、低廉的原奶价格和劳动力成本，显著降低了整体生产和运营成本。

市场规模与战略机会

MARKET SIZE & STRATEGIC OPPORTUNITY



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USD 10-12 B

乳制品市场总规模 (TOTAL MARKET SIZE)

6-7%

年均复合增长率 (ANNUAL GROWTH RATE)



核心投资机会

- 加工与增值产品 Processing & Value Addition
- 冷链基础设施 Cold Chain Infrastructure
- 商业规模化养殖 Commercial Scale Farming

巴基斯坦与中国贸易数据对比 (2024)

Unit: Value (USD) / Volume (Tons)

产品类别 Product Category	巴基斯坦 Pakistan		中国 China	
	进口 Imports	出口 Exports	进口 Imports	出口 Exports
乳清粉 Whey Powder	15,987 k 9,515 tons	0 0 tons	780 Million 645,497 tons	149 k 71 tons
奶酪 Cheese	1,180 k 373 tons	146 k 29 tons	361,026 k 75,671 tons	29 k 5 tons
黄油 Butter	344 k 89 tons	1,512 k 346 tons	737,431 k 104,980 tons	12,174 k 3,576 tons

商业提案

BUSINESS PROPOSAL



CAMEL MILK PROJECT

ELC Biotechnology
Pvt Ltd

A strategic initiative leveraging Pakistan's unique dairy resources for global export markets.

CONTACT INFORMATION

✉ info@elcbiotech.com



全脂/脱脂骆驼奶粉供应

向 GCC 国家和中国供应 700-1,000 吨 骆驼奶粉。该项目作为 Sawani KSA (属于 PIF 2030 愿景计划) 的子公司运营，拥有强大的市场准入渠道。

🚩 Target Markets: China & GCC



极具竞争力的生产成本

巴基斯坦的生产成本显著低于 Sawani 目前的进口来源地。本地化生产不仅降低了运营支出，还提供了极具竞争力的出口定价优势。

📈 High Margin Potential



现代化生产设施规划

计划在骆驼主要栖息地附近建立最先进的乳粉生产工厂。园区规划还包括配套屠宰场，用于向 GCC 地区出口高价值骆驼肉产品。

🍴 Integrated Meat Export



巴基斯坦水牛奶出口潜力巨大，合资企业也前景广阔，但目前仅限于非正规部门。

可以联系成熟的乳制品公司和/或水牛养殖户协会，洽谈潜在的合资合作事宜。

巴基斯坦驻华使领馆联系方式

Mission/Office	Contact Information	Region of Coverage
Embassy of Pakistan, Beijing	Email: commercial@pakbj.org Telephone: +861085327930 Website: www.pakbj.org	Beijing, Hebei, Tianjin, Jilin, Shandong Province, Liaoning Province, Jiangxi Province, Ningxia Hui Autonomous Region, Tibet Autonomous Region, Xinjiang Uygur Autonomous Region, Shaanxi Province, Hubei Province, Helongjiang Province, Qinghai Province, Henan Province, Gansu Province, Shanxi Province, Inner Mongolia
Consulate General of Pakistan, Shanghai	Email: invest2.shanghai@gmail.com Telephone: +8618217022743 Website: www.pakbj.org	Shanghai Municipality, Zhejiang, Jiangsu, Anhui
Consulate General of Pakistan, Guangzhou	Email: tic.guangzhou@commerce.gov.pk Telephone: +862089819539 Website: www.pakbj.org	Guangdong, Fujian, Hainan, Guangxi Zhuang Autonomous Region, Hunan Province
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巴基斯坦政府

谢谢

国家粮食安全与研究部

我们期待与您合作。

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服务管辖区域

JURISDICTION / COVERAGE AREAS

✓ 广东省 Guangdong Province

✓ 福建省 Fujian Province

✓ 海南省 Hainan Province

✓ 广西壮族自治区
Guangxi Zhuang Autonomous Region

✓ 湖南省 Hunan Province

■ SUPPLEMENTARY MATERIALS

ANNEXURES

附录

Extended Market Analysis, Detailed Data Tables & Supplementary Information regarding the Pakistan Dairy Sector.

详细市场分析、数据表格及补充信息



Market Analysis

Global & Domestic Trends



Trade Data

Import & Export Volumes



Global Leaders

Top Players & Countries

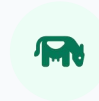
PAK-CHINA INVEST

Dairy Inputs & Processed Products

Advancing investment, technology transfer, and export growth across the dairy value chain. 推动乳制品价值链的投资、技术转让和出口增长。



Milk Processing 牛奶加工



Cattle Farms 养牛场



Cheese & Butter 奶酪和黄油

2026

JANUARY • EXECUTIVE BRIEFING

MARKET SCOPE

 Global

 China

 Pakistan

Executive Summary

Market Overview & Strategic Outlook (2025)



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GLOBAL MARKET

~\$1.0–1.24

T
965M tons production
CAGR 4.8–6.1%

GROWTH DRIVERS & CHALLENGES

↑ DRIVERS (驱动因素)

- Rising middle-class demand in Asia for protein-rich dairy.
- Shift towards UHT and value-added cheese/butter.

⚠ CHALLENGES (挑战)

- Cold chain infrastructure gaps in Pakistan (spillage).
- Global feed price volatility & stringent export standards.



CHINA MARKET

~\$182 B

2nd Largest Globally
41M tons production

↔ TRADE DYNAMICS

TOP EXPORTERS

New Zealand EU USA

TOP IMPORTERS

#1 China +13% Q1 2025

Followed by Russia & Saudi Arabia.

Pakistan Structure

Massive volume but low value-add; only 5% formally processed.
Heavily reliant on imported genetics/inputs.



PAKISTAN MARKET

~\$6.45 B

3rd/4th Largest Producer
97% Informal Supply Chain

🎯 SEGMENTS & STRATEGY

KEY SEGMENTS

Liquid Milk Powders (WMP/SMP)

Cheese Butter Cattle Farming

🤝 COLLABORATION OPPORTUNITIES

Please Write Here (Strategic Collaboration Points)

Global Market Overview

Production, Value & Trade Dynamics (2025 Estimates)



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SEGMENT / 细分市场	GLOBAL PRODUCTION & VALUE 全球产值	GLOBAL EXPORTS 全球出口	GROWTH 增长率
 Fluid Milk 液态奶	~\$630.0 Billion	\$32.5 Billion	<div style="width: 100%;"></div>
 Cheese 奶酪	~\$160.0 Billion	\$38.2 Billion	<div style="width: 100%;"></div>
 Butter & Fats 黄油与脂肪	~\$85.0 Billion	\$16.5 Billion	<div style="width: 100%;"></div>

KEY INSIGHT: PRODUCTION VALUE (产值洞察)

Milk production serves as the foundational raw material, with value addition significantly amplified in processed segments. The global market value is heavily weighted towards fluid milk due to massive volume, but profitability margins are higher in cheese and fats.

牛奶生产是基础，但加工环节（如奶酪和脂肪）的利润率显著更高，尽管液态奶因体量巨大占据主要市值。

KEY INSIGHT: TRADE INTENSITY (贸易强度)

While fluid milk is largely consumed domestically, cheese and butter are intensively traded commodities. The export markets are dominated by the EU, New Zealand, and USA, catering to rising demand in Asia and the Middle East.

液态奶主要在国内消费，而奶酪和黄油是高度贸易化的商品。欧盟、新西兰和美国主导出口市场，满足亚洲日益增长的需求。

China Market: Value and Trade

Domestic Scale vs. Strategic Import Reliance (2025 Estimates)



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DOMESTIC LANDSCAPE

国内市场格局

TOTAL MARKET VALUE (市场总值)

\$182.1 B ↑ 6.2%

ANNUAL MILK OUTPUT (年牛奶产量)

41.2 M Tons ↑ 2.0%

FARM CONSOLIDATION

Large-scale farms (>1k Head) dominance

68%

The "10,000-cow farm" model dominates. Smallholders have largely exited, improving quality but increasing feed import dependency.



TRADE DYNAMICS & STRATEGY

贸易动态与战略

TOTAL IMPORTS

+13%

Rebound in Q1 2025

EXPORTS STATUS

Flat / Low

Limited global footprint

MAJOR PARTNERS

New Zealand, EU, Australia

NET IMPORTER



STRATEGIC GAP (战略缺口)

Domestic production (41.2M tons) falls short of consumption (~58M tons), creating a structural deficit filled by imports.

CONSUMPTION SHIFTS & POLICY

> From Liquid to Solid

Demand shifting to high-value cheese, butter, and bakery fats.

🛡️ Food Security Policy

Govt targets ~70% self-sufficiency in liquid milk, accepting reliance on imported powders.

Pakistan Market: Value and Trade

Production Giant vs. Processing & Infrastructure Gaps (2025 Estimates)



GOVERNMENT OF
PAKISTAN



DOMESTIC LANDSCAPE

国内市场格局

TOTAL MARKET VALUE (市场总值)

\$6.45 B ↑ 6.3%

ANNUAL MILK OUTPUT (年牛奶产量)

65-72 M Tons ↑ 2.2%

INFORMAL DOMINANCE

Loose milk "galala" system

97%

Massive volume but only ~5% formally processed. High spoilage (~15-20%) occurs due to lack of chillers at farm gate.



TRADE DYNAMICS & STRATEGY

贸易动态与战略

INPUTS IMPORT

High Reliance

Value-added products

EXPORTS STATUS

Limited

Minimal regional trade

KEY DEFICITS

Cheese, Butter, High-yield Genetics

NET IMPORTER



INFRASTRUCTURE CHALLENGE (基础设施挑战)

Critical shortage of cold chain logistics. Investment is urgently needed in village chilling centers and refrigerated transport.

STRATEGIC OPPORTUNITIES



Export Potential

Significant potential to export to China & Middle East if SPS standards improve.



Yield Gap

Opportunity for genetic improvement (semen imports) & fodder management.

Top 5 Dairy Players by Market

Leading Companies: Global Giants, China Leaders, and Pakistan Processors



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GLOBAL GIANTS 全球巨头

- Lactalis**
France \$31.9B
- Nestlé**
Switzerland \$23.9B
- Dairy Farmers of America**
USA Co-op
- Danone**
France Fresh Dairy
- Yili Group**
China Asian Leader

CHINA LEADERS 中国领军企业

- Yili Group (伊利)**
Inner Mongolia Leader
- Mengniu Dairy (蒙牛)**
Inner Mongolia COFCO
- Bright Dairy (光明)**
Shanghai Fresh Milk
- Felhe International (飞鹤)**
Heilongjiang Infant Formula
- Junlebao Dairy (君乐宝)**
Hebei Yogurt

PAKISTAN PROCESSORS 巴基斯坦加工商

- Nestlé Pakistan**
Lahore Leader
- FrieslandCampina Engro**
Karachi Olper's
- Haleeb Foods**
Lahore Pioneer
- Fauji Foods**
Lahore Nurpur
- Shakarganj Food**
Lahore Good Milk

Top 5 Global Dairy Countries

Leading Nations in Production, Exports, and Imports (2024-2025 Estimates)



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PAKISTAN



TOP PRODUCERS

顶级生产国

1 India 印度
227M TONS (2.27亿吨)

2 European Union 欧盟
150M TONS (1.5亿吨)

3 United States 美国
102M TONS (1.02亿吨)

4 Pakistan 巴基斯坦
65M TONS (6500万吨)

5 China 中国
41M TONS (4100万吨)



TOP EXPORTERS

顶级出口国

1 New Zealand 新西兰
22% Global Share

2 European Union 欧盟
Value-Added

3 United States 美国
Cheese & Powders

4 Australia 澳大利亚
Asian Focus

5 Argentina 阿根廷
SA Hub



TOP IMPORTERS

顶级进口国

1 China 中国
WMP & Formula

2 Russia 俄罗斯
Cheese & Butter

3 Saudi Arabia 沙特阿拉伯
Ingredients

4 Algeria 阿尔及利亚
Milk Powders

5 Mexico 墨西哥
Cheese & SMP

Global Dairy Trade Flow Visualization

Major Dairy Commodity Routes: Exporters to Importers (2024-2025)



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GLOBAL EXPORT VALUE

\$65.0 Billion



CHINA IMPORT VALUE

\$13.8 Billion

TRADE FLOWS

- From New Zealand
- From EU
- From USA/Americas
- Major Importers

Sources: FAOSTAT (2024), USDA Foreign Agricultural Service, CLAL, Global Dairy Trade (GDT), World Bank WITS.

Trade Analysis by Product Category

Global Flow Dynamics: Key Exporters & Importers (2024-2025)



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Milk Powders (WMP/SMP)

奶粉 (全脂/脱脂)

TOP EXPORTERS (主要出口国)

New Zealand

👑#1

Dominant in WMP market globally.
全脂奶粉市场主导者。

European Union

Leading SMP supplier.
脱脂奶粉主要供应方。

United States

Growing SMP market share.
脱脂奶粉市场份额增长中。

MAJOR IMPORTERS (主要进口国)

China

#1 Buyer (WMP & SMP).
最大买家 (全脂及脱脂)。

Algeria

Strategic WMP/SMP imports.
战略性奶粉进口国。

Mexico

Major SMP destination.
脱脂奶粉主要目的地。



Cheese

奶酪

TOP EXPORTERS (主要出口国)

European Union

👑#1

Premium & Specialty varieties.
高端及特色品种。

United States

Cheddar & Industrial cheese.
切达及工业用奶酪。

New Zealand

Commodity Cheese.
大宗商品奶酪。

MAJOR IMPORTERS (主要进口国)

United Kingdom

Cross-channel trade.
跨海峡贸易。

Japan

High-value imports.
高价值产品进口。

China

Fastest growing segment.
增长最快的细分市场。



Butter / AMF

黄油 / 无水乳脂

TOP EXPORTERS (主要出口国)

New Zealand

👑#1

Global price setter.
全球价格制定者。

European Union

High domestic use, key exporter.
国内消费高, 主要出口方。

India

Top Producer (Low Export).
最大生产国 (出口少)。

MAJOR IMPORTERS (主要进口国)

China

Bakery sector demand.
烘焙行业需求。

Middle East

Saudi Arabia & UAE.
沙特与阿联酋。

South Asia

Supply gap filling.
填补供应缺口。

Market Insights & Strategic Outlook

Trends, Risks & Collaboration Opportunities (2025-2026)



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KEY TREND 01

Farm Consolidation

China's shift toward mega-farms (>1,000 heads) stabilizes quality; a model for Pakistan's modernization.

⚠️ RISKS & CHALLENGES

Price Volatility

Global WMP/SMP prices remain sensitive to energy costs and feed availability.

● Cold Chain Gaps

~20% milk wastage due to infrastructure deficits; chilling centers critical.

● Quality Compliance

Meeting China's rigorous SPS standards is the primary hurdle for exports.



KEY TREND 02

Formalization Push

Regulatory drive in Pakistan to shift from loose milk (97%) to packaged/processed milk ensures hygiene.

⚙️ TECH TRANSFER & PROCESSING

Strategic partnership leveraging Pakistan's volume and China's tech.

- Joint Ventures (JVs) for modern UHT and milk powder plants to utilize surplus milk.

- Investment in cold chain logistics and village-level chilling centers to reduce wastage.

💡 OPPORTUNITY

Turning 97% informal milk into export-grade powder through Chinese processing tech.



KEY TREND 03

Premiumization

Rising middle-class demand in Asia for cheese, butter, and functional dairy products drives value growth.

🧬 GENETICS & INPUTS

- Introduction of high-yield cattle breeds and embryo transfer technology from China.

- Development of high-nutrition fodder and feed mills to improve milk yield per animal.

"Improving yield per animal is the fastest route to export surplus."

Data Sources: Agriculture Service (2025), Rabobank Global Dairy Quarterly, Pakistan Economic Survey 2024, China Dairy Industry Association, Expert Interviews.