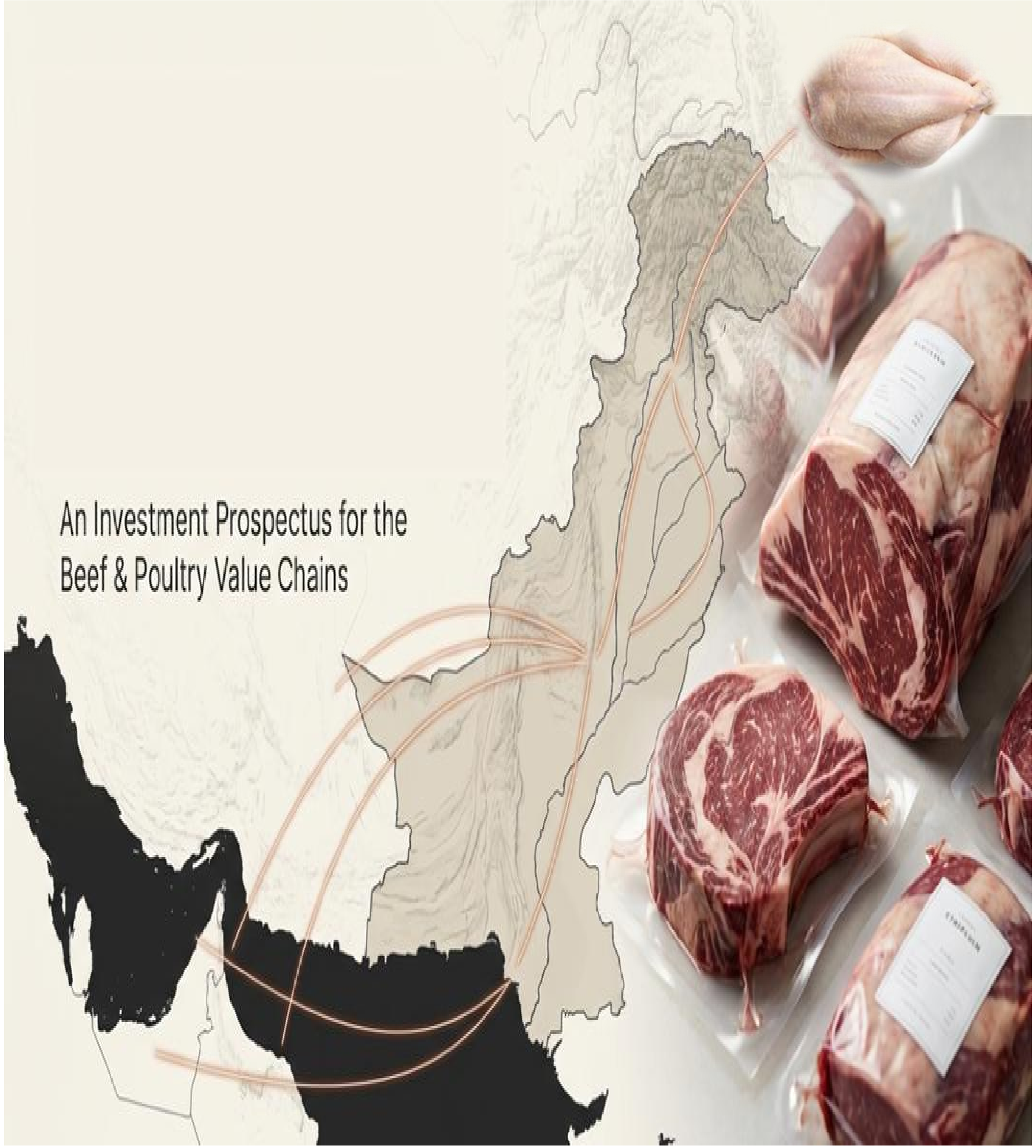
Poultry & Meat Sector

Strategic Investment Pitchbook

China-Pakistan Agricultural Investment Conference, 2026

JANUARY 2026



Poultry Sector- Overview

Poultry sector is one of the most organized branches of the agro based sector of Pakistan.

USD 3.06 B

Turnover of Pakistan Poultry Industry

(Pakistan Bureau of Statistics, 2023-24)

1.5 M

Employement

Massive labor pool

7-8% per annum

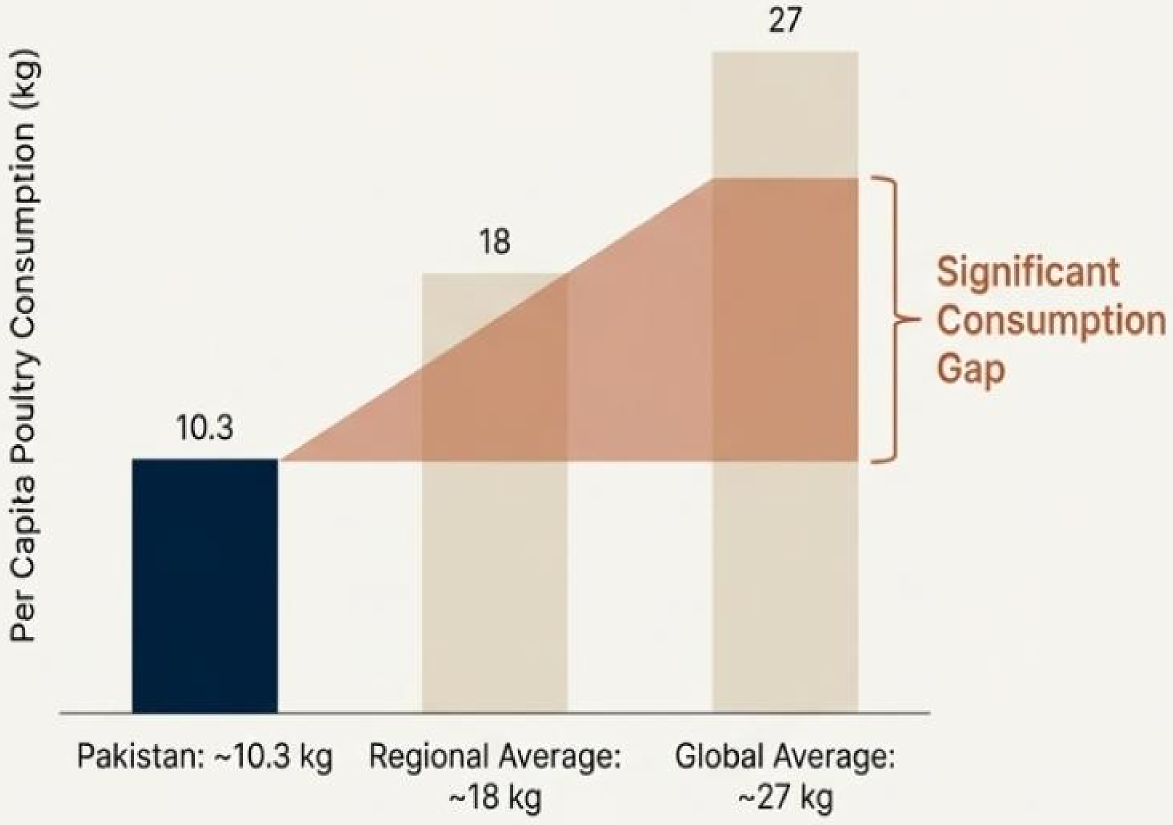
Growth Rate

(CAGR 2025-2030)

- Annual production of **2.5 million Tons** **of Chicken Meat**

(Pakistan Poultry association)

Low Per-Capita Intake Plus Strong Demand Drivers Signal Massive Room for Growth



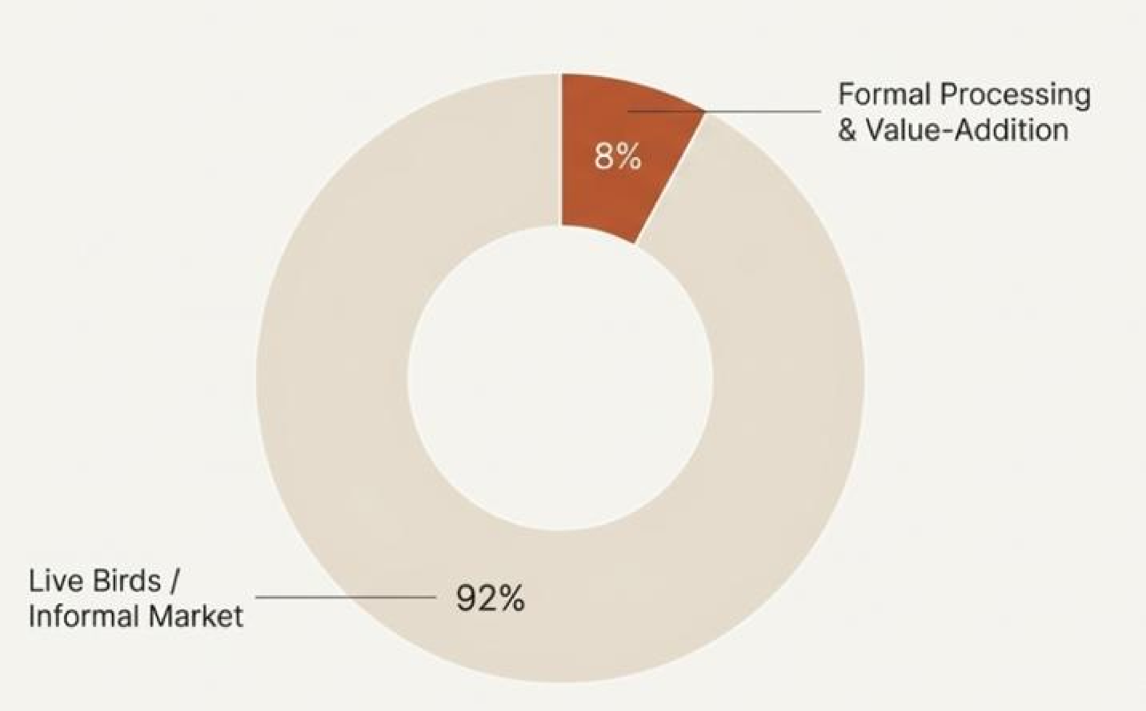
Key Growth Catalysts

- Rapid Urbanization and growth of middle class.
- Explosive expansion of the domestic fast-food sector.
- Rising consumer preference for hygienic, packaged protein over traditional wet markets.

Investment Opportunities

Pakistan’s poultry industry combines large-scale production, rising domestic consumption, and underdeveloped infrastructure, creating high-potential opportunities in processing

- **Processing Poultry Plants**
  Value addition
- **Cold chain Logistics**
  addressing infrastructure gaps
- **Feed Supplements**
  Fermentation Plants (Amino acids & Enzymes)



Annex-I Potential Partners Poultry

S. No.	Name of Company & Location	Contact Person
1	M/s. Islamabad Feed Pvt. Ltd. Rawal Pindi	Irfan Umer (Manager) 03027424455
2	Sabir's Group (Sabroso)	https://shopsabroso.pk/
3	M/S Sadiq Poultry Pvt. Ltd. Rawalpindi	Nasir (Manager) 03005384425
4	K&Ns Pakistan	K&N's | Safe and healthy chicken
5	Big Bird	https://bigbirdfoods.com.pk/

Sector Overview - Beef Sector

~2.55 MMT PER ANNUM

Cattle meat: 1.25 MM tons,
Buffalo meat: 1.25 MM tons,
Camel meat: 0.01 MM tons

(Economic Survey of Pakistan, 2024-25)

TOP 10

Global ranking

(FAO, 2023)

Halal Certified

Internationally recognized

Investment Opportunities

Pakistan's **Halal certification**, low production costs, and proximity to **Western China** and **GCC Halal markets** provide a competitive edge over Southeast Asia, Brazil, and Latin America.

Feedlot Fattening

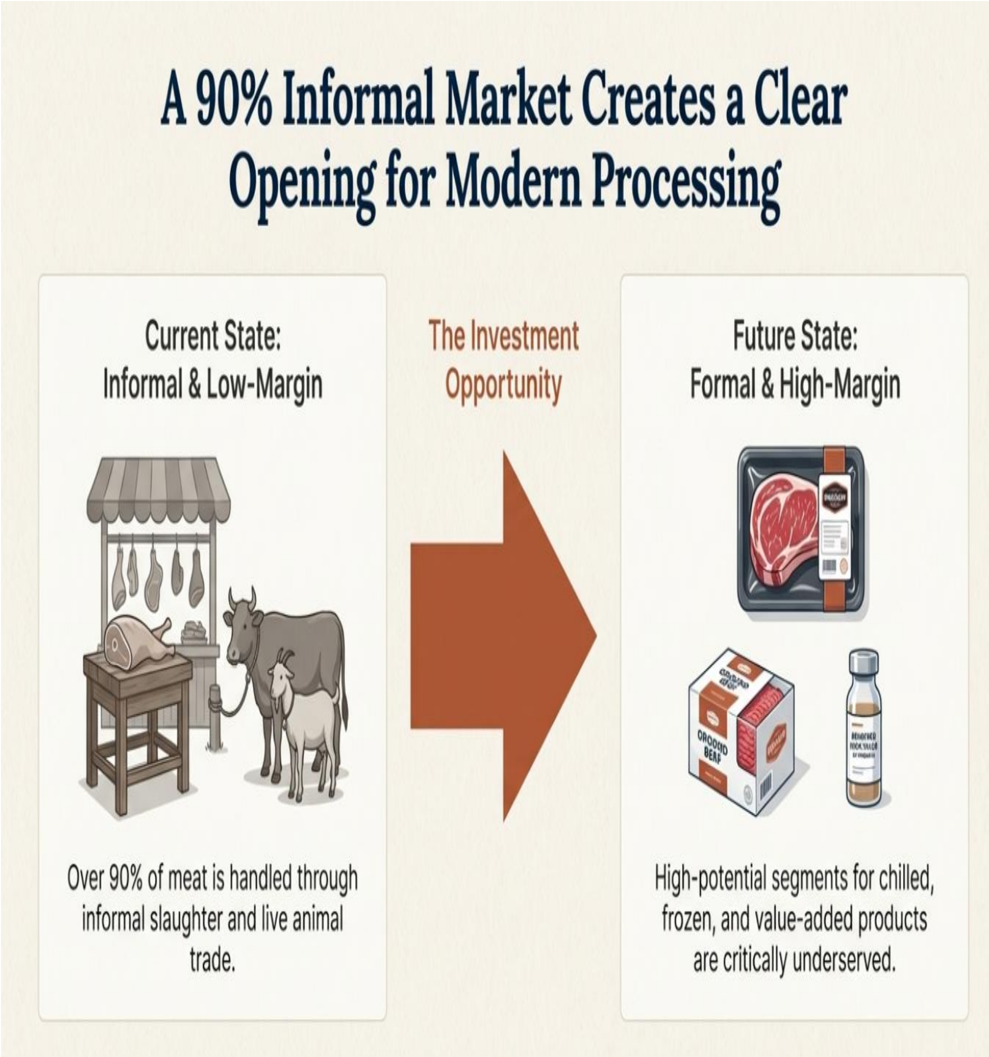
Integrated Industrial Scale

Disease Control

local production of FMD vaccine & FMD free compartment

Top Meat Companies

- Fauji Meat Limited – Karachi
- TATA Best Foods – Karachi
- Zenith Associates Abattoir & Livestock Farms – Lahore
- Abedin International (Pvt) Limited – Lahore
- The Organic Meat Company Limited – Karachi



The Twin Engine Side by Side View of two Contemporary Opportunities

Metrics	Beef Engine	Poultry Engine
Market Size	**USD 9+ Billion**	**USD 3+ Billion**
Projected CAGR (2025-2030)	**~8%**	**7-8%**
Primary Driver	Halal Export Demand	Domestic Consumption
Core Gap	Disease Control & informal animal production	Dominance of live bird sales vs. formal processing
Key Opportunity	Becoming a global Halal beef supplier	Capturing the shift to packaged, branded protein

Annex-II Potential Partners Beef

S. No.	Name of Company & Location	Contact Person
1	M/s. The Organic Meat Company, Karachi	Mr. Ali Hussain Chief Operating Officer 0300 8258248
2	M/s. Tata Best Foods, Karachi	Mr. Bilal Shahid Chief Executive Officer 0316 2226664
3	M/s. Fauji Meat Ltd, Karachi	Brig ® Adil Ashraf Naveed Chief Executive Officer 0324 8449899
4	M/s Abedin International Pvt, Ltd Lahore	Mr. Muhammad Nawaz Dogar 0333-4214108
5	M/s Zenith Associates (Pvt) Ltd Lahore	Mr. Arif Ghias 0300-8464607

Consulate General of Pakistan, Chengdu	Email: parepchengdu@mofa.gov.pk Telephone: 008685268316 Website: www.pakbj.org	Sichuan, Yunnan, Guizhou, Chongqing

Annexures

PAK-CHINA AGRI INVEST

PAK-CHINA AGRI INVESTMENT CONFERENCE

Meat and Poultry Industry

FEEDLOT FATTENING • VACCINES • SLAUGHTERHOUSES

Advancing agricultural investment, technology transfer, and export growth through strategic partnership.

Market Scope
Global • China • Pakistan

Key Objectives
Inv. Promotion • Tech Transfer

DECEMBER 2025 • EXECUTIVE BRIEFING

Executive Summary

Global Industry Scale

Production Volume: Total global meat production reached 365 Mt, with poultry accounting for 103.7 Mt.

Market Valuation: Poultry market valued at ~$305.9B. Adjacent markets include Vaccines ($13.5B) and Slaughter Equipment ($0.91B).

Growth Trajectory: Poultry remains the fastest-growing protein segment globally due to affordability and health trends.

Regional Positioning

China: A dominant player holding a ~15% share of global chicken meat production with rising domestic consumption.

Pakistan: Currently ranked as the 8th largest poultry producer worldwide, demonstrating significant scalability.

Infrastructure: Both nations are undergoing rapid modernization in feedlot management and processing capabilities.

Drivers & Technology

Efficiency: Shift towards automated slaughterhouses to improve yield and hygiene standards.

Health: Critical focus on vaccine localization to mitigate disease risks and ensure food security.

Feedlot: Modern fattening techniques are essential to optimize weight gain and export quality.

Strategic Implications: PAK-China Collaboration

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Global Market Overview

Meat Production, Vaccines & Processing Equipment (2024 Estimates)

Segment	Market Scale	Global Exports	Growth (CAGR)
Meat Production	Total: 365 Mt Poultry: $305.9B Beef: ~$350B	~$115 Billion	~1.5%
Animal Vaccines	$13.48 Billion	~$4.5 Billion	9.5%
Slaughterhouse Eq.	$910 Million	~$600 Million	5.1%

Key Insight: Production Drivers

Global meat production has reached 365 Million tonnes, with poultry (~104 Mt) leading growth due to efficiency and affordability. Beef market remains high-value ($350B+), while Mutton/Lamb (~$35B) is crucial for niche halal markets.

Key Insight: Tech Adoption

The vaccines segment is witnessing the highest growth (9.5% CAGR) as biosecurity becomes paramount. Processing modernization is driving steady demand for automated slaughterhouse equipment.

Note: Meat Production values represent commercial market estimates: Poultry ($305.9B), Beef/Buffalo ($350B+), Mutton/Lamb ($35B+). Vaccine growth forecast period: 2025-2030. Equipment growth to 2032.

Data Sources: OECD-FAO Agricultural Outlook 2024, Grand View Research (Vaccines), Statista, MarketDataForecast, Industry Reports 2024.

China Market: Meat & Poultry

Production Powerhouse & Strategic Import Hub (2024-2025 Outlook)

Production Scale

Segment	Volume / Share	Trend
Poultry	15.35M MT (15%)	▲ Steady
Beef	~7.5M MT	▲ Rising
Mutton/Lamb	~5.3M MT	▶ Stable

Insight: China holds ~15% of global chicken meat share. Consumer demand is pivoting to poultry and ruminant meats (beef/mutton) driven by health trends and culinary preferences (hotpot).

Trade & Market Dynamics

Category	Export Focus	Import Demand	Status
Poultry	Processed (Cooked)	Parts (Paws/Wings)	Specific Cuts
Beef	Minimal	High Volume	▼ Net Importer
Mutton/Lamb	Minimal	Premium Cuts	▼ Net Importer

KEY IMPORTS

Beef (Brazil/Aus), Mutton (NZ/Aus), Poultry by-products, Breeding Stock

CONSUMPTION SHIFT

Rising demand for pre-cooked/processed meats and premium beef/mutton cuts in tier-1 cities.

Biosecurity & Policy

Strict biosecurity regulations are driving rapid consolidation. Small farms are exiting, replaced by large-scale, automated integrators with strict zoning controls to prevent disease.

Tech Modernization

Urgent demand for automated slaughter, deboning, and portioning technology to improve yield, food safety, and labor efficiency in processing plants.

Investment Areas

High-potential zones: Local production of advanced animal vaccines (FMD/AI), feedlot finishing technology, and export-grade Halal processing capacity.

Pakistan Market: Meat & Poultry

High Domestic Demand, Import Reliance & Export Potential (FY24-25)

Market Scale & Value

Segment	Volume / Share	Trend
Poultry	2.40M MT (41%)	▲ High Growth
Beef/Mutton	~59% Share	▶ Organic
Value	~PKR 1.98 T	▲ Inflationary

Insight: Poultry is the 8th largest producer globally, serving as the backbone of meat consumption. However, the sector is heavily reliant on imported inputs (feed/vaccines).

Import Reliance & Gaps

Input Category	Import Reliance	Local Status	Impact
Feed (Soybean)	High Volume	Minimal Prod.	▼ Critical Deficit
Vaccines	90%+ Imported	Low Tech	▼ Tech Gap
Equipment	100% Imported	Service Only	▼ Modernization

KEY IMPORTS

Soybean Meal (Feed), Grandparent Stock, Veterinary Vaccines, Slaughter Machinery

MAJOR CONSTRAINTS

Skyrocketing energy costs, FX liquidity for L/Cs, and significant cold chain gaps.

Biosecure Feedlots

Strategic need for corporate feedlot fattening zones to improve beef yield and traceability, targeting high-value export markets in GCC/China.

Vaccine Localization

Critical opportunity to establish local fill-finish and R&D facilities for poultry and FMD vaccines to reduce import bill and ensure supply security.

Halal Processing

Upgrading slaughterhouses to HACCP and international Halal standards is essential to unlock export potential to China and the Middle East.

Sources: PACRA 2024, Economic Survey of Pakistan FY24, Pakistan Poultry Association (PPA).

Top 5 Global Players by Segment

Industry Leaders in Meat Processing, Health, and Equipment (2024)

Feedlot & Meat Processors

1. **JBS S.A.** — Brazil
2. **Tyson Foods** — USA
3. **Cargill Meat Solutions** — USA
4. **WH Group** — China / Hong Kong
5. **Marfrig Global Foods** — Brazil

Animal Vaccines

1. **Zoetis** — USA
2. **MSD Animal Health** — USA
3. **Boehringer Ingelheim** — Germany
4. **Ceva Santé Animale** — France
5. **Elanco Animal Health** — USA

Slaughterhouse Equipment

1. **Marel** — Iceland / Netherlands
2. **JBT / Meyn** — USA / Netherlands
3. **Baader** — Germany
4. **GEA Group** — Germany
5. **Jarvis Products Corp** — USA

Sources: Company Annual Reports (2024), WATTPoultry Top Companies, Animal Pharm, Mordor Intelligence Market Analysis.

Note: Rankings based on global revenue and production capacity estimates. Processing data includes both red meat and poultry segments.

Top 5 Global Exporters by Category

Leading Nations Dominating International Meat Trade Flows (2024 Estimates)

Beef Exporters

1. **Brazil** — South America
2. **Australia** — Oceania
3. **United States** — North America
4. **India** — Asia (Buffalo Meat)
5. **New Zealand** — Oceania

Poultry Exporters

1. **Brazil** — South America
2. **United States** — North America
3. **European Union** — Europe (Aggregated)
4. **Thailand** — Asia
5. **Turkey** — Europe / Asia

Mutton/Lamb Exporters

1. **Australia** — Oceania
2. **New Zealand** — Oceania
3. **United Kingdom** — Europe
4. **Ireland** — Europe
5. **Spain** — Europe

Sources: USDA Foreign Agricultural Service (FAS) 2024 Outlook, FAO Meat Market Review, Trade Data Monitor.

Note: Rankings based on metric tons (volume) of export. EU data aggregates intra-trade for some categories.

Global Meat Trade Flows

Major Export Routes: Beef and Poultry to Asian & MENA Markets (2024)

Top 5 Global Importers by Segment

Leading Nations Driving Global Demand (2024 Estimates)

Beef Importers

1. **China** — Asia
2. **United States** — North America
3. **Japan** — Asia
4. **South Korea** — Asia
5. **United Kingdom** — Europe

Poultry Importers

1. **Mexico** — North America
2. **China** — Asia
3. **Japan** — Asia
4. **Saudi Arabia** — Middle East
5. **South Africa** — Africa

Mutton/Lamb Importers

1. **China** — Asia
2. **UAE** — Middle East
3. **Saudi Arabia** — Middle East
4. **United States** — North America
5. **France** — Europe

Sources: USDA Foreign Agricultural Service (FAS) 2024 Trade Data, FAOSTAT, Rabobank Global Animal Protein Outlook 2025.

Note: Rankings reflect total import volumes (Metric Tons) including fresh, frozen, and processed meat products.

Strategic Outlook & Investment Pathways

2025-2026 Trends, PAK-China Collaboration, and Export Growth Priorities

Market Trends (2025-2026)

Poultry Expansion: Global output hitting new highs; Pakistan well-positioned to leverage low-cost labor for value-added processing.

Premium Beef Demand: Growing appetite for grain-fed, traceable beef in GCC & ASEAN markets offers a high-margin export window.

Price Normalization: Feed and input costs stabilizing post-2024, enabling better long-term planning for feedlot operations.

Tech Transfer & Trade

Technology Transfer: Adoption of Chinese automated evisceration lines and waste-to-energy biogas systems to improve efficiency.

Trade Facilitation: Mutual recognition of Halal & SPS standards to streamline customs for exports to China and GCC.

Biosecurity: Implementation of rigorous FMD-free zone protocols to unlock restricted export markets.

PAK-China Investment Priorities

Strategic joint ventures to modernize Pakistan's meat value chain for global export competitiveness.

1. FEEDLOT FATTENING HUBS

Establish corporate grain-finishing farms with end-to-end traceability.

Target: 100,000+ head capacity for high-quality beef export to GCC.

2. VACCINE LOCALIZATION

Joint Ventures for local fill-finish of FMD and poultry vaccines.

Reduce import reliance and ensure supply security for disease control.

3. INFRASTRUCTURE UPGRADE

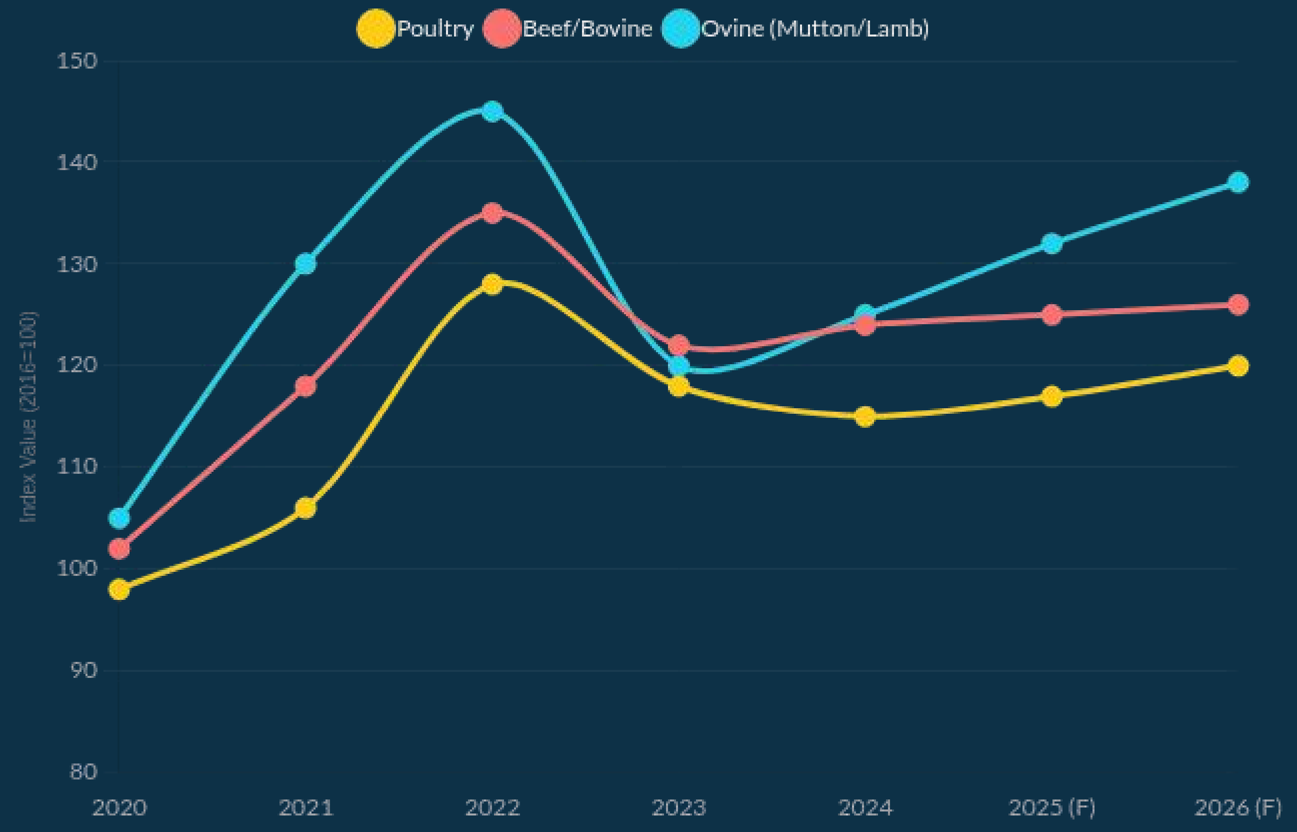
Deployment of Cold Chain logistics and Halal Slaughter Automation to meet international hygiene standards.

Sources: PAK-China Agricultural Cooperation Plan, OECD-FAO Agricultural Outlook 2024-2033, Pakistan Board of Investment (BOI), Rabobank Poultry Quarterly Q4 2024.

Global Price Trends & Market Dynamics

Historical Trends (2020-2024) and Future Outlook (2025-2026)

FAO Meat Price Index Trends (Baseline 2016=100)



Analysis: Prices peaked in 2022 driven by high feed costs and supply chain disruptions. 2023-2024 saw stabilization as corn/soy prices eased. Poultry shows resilience with fastest correction capability.

Key Cost Drivers (2025)

- Feed Costs: Stabilized ~15-20% below 2022 peaks, aiding poultry margins.
- Biosecurity: Rising OPEX for disease prevention (HPAI, FMD) essential for export access.
- Logistics: Freight rates normalized; cold chain energy costs remain a factor.

2025-2026 Price Outlook

Segment	Value Trend	Volume Outlook
Poultry	▲ +1-3%	Strong demand in Asia
Beef/Buffalo	▶ Stable	Supply growth (AU/BR)
Mutton/Lamb	▲ +4-7%	High GCC Demand

PAK-China Investment Strategy

Secure long-term feed positions to lock in margins. Invest in vaccine-driven biosecurity to access premium export markets. Target Mutton/Lamb segment for highest value growth in GCC trade.

Data Sources: FAO Meat Price Index, USDA Foreign Agricultural Service, World Bank Commodities Outlook 2024.

Halal Certification & GCC Market Deep Dive

Unlocking the $16-20B+ GCC Halal Meat Opportunity for PAK-China JVs

GCC Market Landscape

Market Size: The GCC Halal meat market (Beef, Poultry, Mutton) is valued at ~ $16-20 Billion (2025 est.) with heavy import dependence (>80%).

Top Importers: UAE, Saudi Arabia, and Qatar drive demand, prioritizing premium cuts and strict halal compliance.

Key Driver: Pakistan already controls nearly 45% of the bovine carcass export market to the GCC region.

Certification & Compliance

Regulatory Bodies: Compliance required with SFDA (Saudi Arabia), ESMA (UAE), and unified GSO Standards.

Process Specs: Mandatory manual slaughter by Muslim slaughtermen; strict prohibition of stunning for poultry in key markets.

Documentation: Full traceability required from farm-to-fork, including health certificates and accredited Halal body approval.

PAK-China Export Opportunity

Combining Pakistan's livestock resources with Chinese automation technology to capture the premium Halal market.

1. JOINT VENTURE SYNERGY

Pakistan: Provides livestock (Buffalo/Beef/Mutton), labor, and inherent Halal status.

China: Supplies automated processing lines, cold chain technology, and quality assurance systems.

2. STRATEGIC ADVANTAGE

Proximity to GCC markets reduces freight costs vs. Brazil/Australia.

Ability to supply "Fresh/Chilled" meat (48-72h shelf life) via air cargo.

Sources: State of the Global Islamic Economy Report 2024, SFDA Import Regulations, GCC Standardization Organization (GSO), TDAP (Trade Development Authority of Pakistan).