

STRATEGIC INVESTMENT OPPORTUNITY

Donkey Meat & By-Products Sector in Pakistan

Investment Pitch Book for Chinese Investors — 2025

"Developing a sustainable export industry within the framework of the China-Pakistan strategic partnership and deepening economic cooperation."



Why Invest: Strategic Partnership & Industry Transition

DONKEY MEAT & BY-PRODUCTS SECTOR OVERVIEW



Deepening Economic Cooperation Between Pakistan and China

The sector is undergoing a pivotal transformation from informal trade to an internationally regulated export industry. This shift aligns directly with the strategic partnership goals of both nations.

KEY GROWTH DRIVERS



Formal Protocols

Establishment of sanitary inspection and export protocols providing regulatory clarity and secure market access.



Infrastructure Investment

Foreign Direct Investment (FDI) driving the construction of modern, export-standard slaughterhouses and processing facilities.



Strategic Forums

Industry forums promoting sustainable cooperation, self-regulation, and alignment on quality standards.

Verified Donkey Population & Supply Advantage

LIVESTOCK BASE FOR EXPORT-ORIENTED PROCESSING

4.8 Million

DONKEY POPULATION

Verified by 7th Agriculture Census 2024

251.3 M

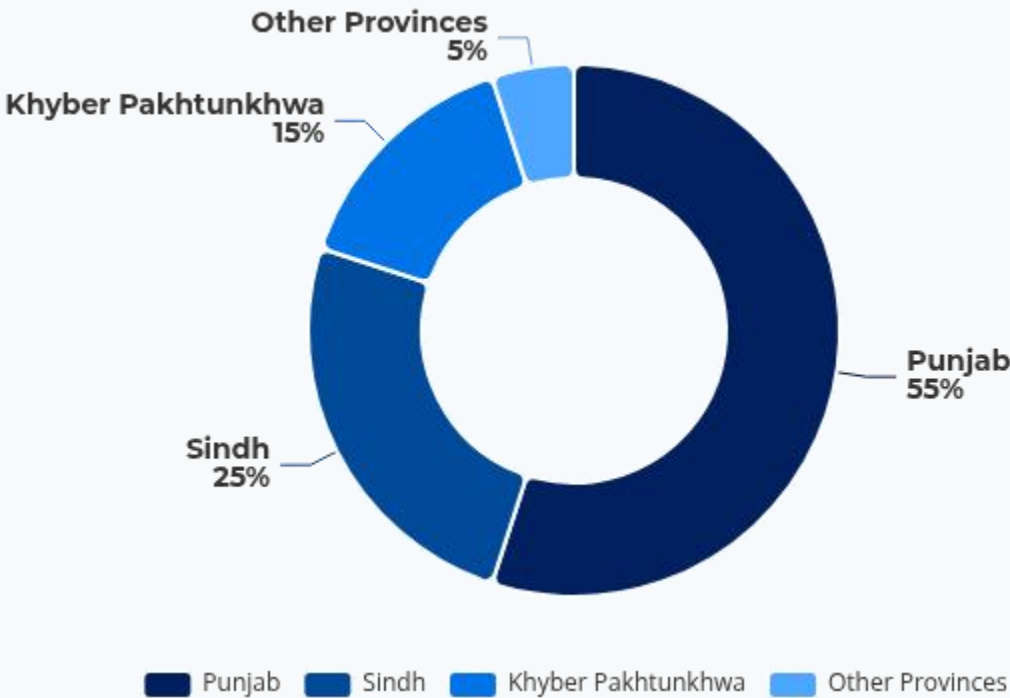
TOTAL LIVESTOCK

Total national livestock population across all species

✓ Strategic Implication

This substantial livestock base enables reliable supply planning for large-scale export operations, ensuring consistent throughput for processing facilities targeting the Chinese market.

Regional Distribution of Donkey Population



Source: 7th Agriculture Census 2024, Pakistan

China's Market Demand & Export Value

IMPORT STATISTICS & PRICING DYNAMICS (2023)

Global Market Leader

China remains the largest global market for donkey meat and by-products. The demand is structural and culturally driven, far exceeding domestic supply capabilities.

Specialized Applications

Beyond culinary meat consumption, donkey hides are processed into gelatin (Ejiao), a premium ingredient heavily used in traditional Chinese medicine, health supplements, and beauty products.

Lucrative Niche

The high per-unit market value creates a significant opportunity for compliant exporters to target premium specialty segments rather than just bulk commodities.

32.6 M_{kg}

2023 IMPORT VOLUME

Horse, Mule & Donkey Meat

\$62.61 M

2023 IMPORT VALUE

Total Trade Value

AVERAGE MARKET PRICE IN CHINA

Reflecting premium demand

\$20–25 /kg

Market Value Composition

Hides (Medicine/Ejiao)



High Demand

Meat (Food)



High Demand

Source: Global Trade Data 2023 & Industry Market Analysis

Export Protocols & Government Support

REGULATORY FRAMEWORK & COMPLIANCE STRUCTURE



Establishing a Controlled & Compliant Export Framework

The government has instituted clear regulatory mechanisms to transform the donkey meat sector into a formal export industry. Recent protocols ensure full compliance with international standards, providing security and predictability for investors.

KEY REGULATORY DEVELOPMENTS



2024 MILESTONE

Sanitary Inspection & Export Protocol

Signed between Pakistan's Ministry of National Food Security & Research (MNFSR) and China's General Administration of Customs (GACC), establishing the formal pathway for donkey meat exports.



Export Policy Order (EPO) Amendment

Economic Coordination Committee (ECC) approved amendments to lift the ban on donkey hide exports, creating a legal channel for high-value by-products previously restricted.



Zonal Restrictions & Compliance

Exports are strictly restricted to approved slaughterhouses in designated zones, such as the Gwadar Free Zone, ensuring centralized quality control and traceability.

Operational Infrastructure & Facilities

PROCESSING CAPACITY & COMPLIANCE STATUS

Strategic Hub: Gwadar North Free Zone



Gwadar Free Zone

Designated Export Processing Zone



Deep Sea Port



CPEC Route

DIRECT ACCESS

Facilities located within the Free Zone benefit from tax incentives, simplified customs procedures, and direct connectivity to Chinese logistics networks.



Modern Processing Plant A

OPERATIONAL

- ★ First modern donkey slaughterhouse meeting international standards.
- 🛡️ Fully compliant with GACC sanitary protocols.
- 💰 Supported by significant Foreign Direct Investment (FDI).



Hengeng Trade Enterprise

GACC INSPECTION PHASE

- ✂️ Large-scale processing facility currently in final validation.
- 📋 Undergoing final facility inspection by GACC officials.
- 📈 Poised to significantly expand national export capacity upon approval.

STANDARD ALIGNMENT:

 **GACC Protocols**

 **Export Quality Control**

 **Traceability**

2025 China–Pakistan Donkey Industry Forum

FOSTERING ETHICAL GROWTH & SUSTAINABLE COOPERATION

OCTOBER 2025

📍 Islamabad, Pakistan

CO-HOSTED BY

🏢 CCCPK (China Chamber)

🏢 Sangyang Industrial Group

SUPPORTED BY

🇨🇳 Chinese Embassy

🇵🇰 Mo NFS&R

Strategic Mandate

The forum convened high-level government officials and industry leaders to align on technical standards and collaborative innovation models for ethical industry scaling.



Donkey Industry Self-Regulation Declaration

Key commitments ratified by industry stakeholders



Legal Compliance

Strict adherence to all applicable laws, export protocols, and sanitary regulations.



Sustainable Practices

Adoption of breed management and environmental standards to ensure long-term viability.



Ethical Supply Chain

Ensuring animal welfare standards and protection of worker rights throughout the value chain.



Cultural Sensitivity

Respect for local cultural and religious sensitivities in all processing and trade operations.



Transparency & Traceability

Support for transparent, traceable production systems to build market trust and ensure safety.

Sector Strengths & Competitive Advantages

STRATEGIC ENABLERS FOR MARKET LEADERSHIP

Pakistan’s donkey meat sector offers a unique combination of raw material abundance, regulatory support, and logistical infrastructure that creates a formidable barrier to entry for competitors and a secure platform for investors.

COMPETITIVE ADVANTAGE	STRATEGIC IMPACT
 Verified Livestock Base (4.8 Million Donkeys)	 Provides a scalable supply foundation for export-oriented processing, ensuring consistent raw material availability for large-scale operations.
 Formal Export Protocol (Signed with GACC)	 Enables compliant export pathways, removing regulatory uncertainty and allowing direct access to the Chinese market without grey-channel risks.
 Operational Infrastructure (Gadar Free Zone)	 Connects directly to China via port infrastructure and CPEC logistics, reducing transit times and leveraging Free Zone fiscal incentives.
 High-Value By-Products (Hides & Gelatin)	 Generates expanded revenue streams beyond meat exports by tapping into China’s lucrative traditional medicine (Ejiao) and health markets.

Risks and Mitigations

PROACTIVE STRATEGIES FOR SUSTAINABLE GROWTH

While the sector presents significant opportunity, we have identified key risks and established robust mitigation frameworks to ensure long-term stability and compliance.

IDENTIFIED RISK AREA		STRATEGIC MITIGATION	
	Population Sustainability SUPPLY CHAIN RISK		Adoption of comprehensive breed-management practices and regulated sourcing policies to prevent depletion and ensure herd regeneration.
	Illegal Processing & Food Safety COMPLIANCE RISK		Strengthened enforcement and oversight by AQD and MNFS&R, alongside rigorous export inspection systems to eliminate grey-market activities.
	Market Perception REPUTATION RISK		Emphasis on transparency, full traceability, and Halal certification for export products to build trust with stakeholders and consumers.

Strategic Takeaways for Investors

SUMMARY OF INVESTMENT RATIONALE



Verified Supply Foundation

01

Pakistan’s verified donkey population of approximately **4.8** million head provides a robust, scalable raw material base that underpins long-term export supply potential.



Enabled Regulatory Framework

02

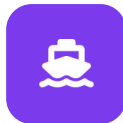
Formal export protocols and recent **EPO** amendments have lifted barriers, enabling controlled, compliant exports of meat and hides from designated approved facilities.



Ethical Industry Alignment

03

The **2025 Donkey Industry Forum Self-Regulation Declaration** unifies stakeholders behind ethical growth principles, ensuring sustainability and social license to operate.



Strategic Export Gateway

04

Operational and near-approved facilities in the **Gwadar Free Zone** serve as direct, efficient gateways to China’s high-demand market, leveraging **CPEC** infrastructure.

✓ Investment Conclusion: A high-potential, regulated niche ready for capitalization.





GOVERNMENT OF PAKISTAN

THANKS

MINISTRY OF NATIONAL FOOD SECURITY & RESEARCH

We look forward to partnering with you

www.mnfsr.gov.pk

Islamabad, Pakistan

STRATEGIC INVESTMENT OPPORTUNITY

Donkey Meat & By-Products Sector in Pakistan

For further information

“ABC

