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Challenges & Potential of Pakistan's Meat Export Industry

AUTHORS
Shamaila Parveen MPhil, Shafique Ahmed MPhil, PhD
Office of Research, Innovation and Commercialization (ORIC)

EXECUTE SUMMARY

Pakistan's meat export industry operates through a fragmented supply chain, sourcing 90% of animals from independent producers. While large processing units handle significant volumes, the sector primarily focuses on bulk exports with limited value addition. Key challenges include dependency on third-party sourcing, high certification costs, and reliance on cold chains. Despite these barriers, strong demand from GCC countries offers a lucrative market. Strategic investments in backward integration, value-added products, certification support, and cold chain infrastructure can enhance quality, reduce wastage, and increase export earnings.

What We Learned (Key Findings)

- 90% of animals are sourced from independent farmers or traders, while only 10% come from company-owned farms, indicating a fragmented supply structure.
- Large units process up to 2,500 small animals and 1,000 large animals. Medium units handle around 250 large animals, and small units process approximately 100 large animals.
- Processing is limited to slaughter, basic butchery, and offal separation, with minimal focus on packaging, branding, or ready-to-cook products.
- Exporters must meet multiple international standards, including Quarantine, Halal, ISO 9001, and HACCP.
- The export process relies on chiller trucks to preserve meat quality within a 72-hour cycle from slaughter to shipment.
- Meat exported to Gulf countries earns PKR 4,000/kg, but products not meeting export standards are rejected, leading to potential wastage and financial loss.

KEYWORDS

Halal Meat Exports; Cold Chain Logistics; Value Addition in Meat Processing

What Needs to Change (Actionable Insights)

- Encourage processing units to establish feedlots or cooperative farming models to secure reliable and quality animal supply.
- Promote investment in premium cuts, marinated meat, and branded packaging to move up the value chain.
- Export Diversification: Develop access to new markets (e.g., East Africa, Central Asia) to reduce reliance on GCC countries.

SOURCE OF INFORMATION

Sector day discussion and input from the industry by

ORIC
Office of Research, Innovation & Commercialization

Opportunities for Social and Economic Impact

"Current Meet Export business model shows a high-volume, low-value structure: most units focus on bulk export rather than branded, high-margin products. The sector's heavy dependence on third-party animal sourcing and limited vertical integration make it vulnerable to price shocks and inconsistent supply."