

Sector Brief

MEAT



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**Sindh Board of
Investment**
Government of Sindh



INTRODUCTION

Livestock is the most important sub-sector of agriculture with national GDP contribution of 11%. The national herd consists of 24 million cattle, 26 million buffaloes, 25 million sheep, 57 million goats and 0.8 million camel. These animals produce 1.2 million tons of beef, 0.75 million tons of mutton, 0.5 million tons of poultry meat, 9 billion eggs, 40 thousand tons of wool, 22 thousand tons of hair and 52 million skins and hides. The distribution of livestock in Sindh province is at table 1. Buffaloes are the main dairy animal and are raised in Punjab and Sindh.

Livestock Population

(million numbers)

Table 1	Cattle	Buffalo	Sheep	Goat	Camel
Pakistan	33	30	27.5	58.3	1
Sindh	11	8	4.2	14	0.3

Source: Mistry of Livestock & Dairy Development

The role of livestock in rural economy may be assessed by the fact that 30 to 35 million of the total rural population are engaged in livestock farming. During year 2007-08, the total red meat production was 1.6 and 0.58 million tons for beef and mutton, respectively. The meat demand for Pakistan domestic market is growing at a very fast rate.

MARKET ANALYSIS

The meat demand for Pakistan domestic market is growing at a rate of 2.8 % for beef 2.9 % for mutton and 6.10 % for poultry. The domestic demand is growing due to population growth, human need for protein and calcium, migration of population from rural to urban areas and improving consumption patterns and due to rise in per capita incomes. The rising trend is estimated to reach the following demand in the year 2020:-

Products	2003			2020 (000 tons)		
	Supply	Demand	Gap	Supply	Demand	Gap
BEEF	1050	1210	160	1430	3740	2310
Mutton	700	800	100	1030	2500	1470

The gap between supply and demand of meat in 2020 is projected to be 3780 metric tons. To fill this future domestic demand and supply gap, the Government of Sindh is taking steps and has established Sindh Dairy & Milk Development Company with offices in Hyderabad and Sukkur. The major task of the company will be to raise the productivity, introduce better practices and facilitate cattle farmers.

In addition to the growing gap in the domestic demand, there is immense potential to export meat in foreign countries like USA, UK on the ground of Halal food and the big gap of demand and supply of meat i.e beef and mutton in middle east countries

Country	Production	Consumption	Gap
KSA	25630	75630	50000
Egypt	440000	533000	93000
Bahrain	1440	4600	3220
Oman	4148	18000	13852
UAE	9500	43185	33685

(000 tons)

INVESTMENT OPPORTUNITIES

The supply and demand gap of meat is increasing at a rate of 4.1% per annum in Pakistan. This increasing gap in the local and export market provide excellent opportunities for investment.

The conventional livestock sector of Sindh cannot meet the challenges of the future demands. The technological advancement and better farm management practices are making in-roads in this sector. Enterprising companies are making phenomenal profits by introducing technology and modern farming methods in the livestock sector of Sindh. The main investment areas with high profitability are:

- i. Raising of high producing breeds
- ii. Artificial insemination for improve breeding
- iii. Abattoir (Slaughter House) with international quality, compliance and sanitation
- iv. Halal – Meat exports
- v. Supplying to meet, local meat demand, specially for the religious rite of sacrifice (Eid-ul- Azha)



LIVESTOCK SPECIAL ECONOMIC ZONE

Sindh Board of Investment has taken initiatives to provide a workable model for modern and large size investments in the Meat sector. It has proposed to establish a Livestock Special Economic Zone near Bhambhore. The Livestock Department of the Government of Sindh has already earmarked funds for development of infrastructure and common facilities. The facilities will support several cattle farms established and managed with Australian collaboration. These fully developed farms will be provided to investors on easy installments of 3-5 years with coverage of expert farm management for 2-3 years.





Sindh Board of Investment

is the primary investment promotion agency of the Province positioning Sindh as an attractive destination for investment.

SBI strives to find new avenues for public private collaboration, develop investment opportunities for large, medium and small investors and facilitate investment projects.

IMPORTANT CONTACTS

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