

PAKISTAN POULTRY PRODUCTS



**TRADE DEVELOPMENT AUTHORITY
OF PAKISTAN**





TDAP INTRODUCTION

Trade Development Authority of Pakistan is the premier trade promotion organization mandated to develop and promote products and services of the country in international markets.

TDAP implements policies and directives of Federal Government and its Board of Directors for enhancing, promoting and facilitating trade.

TDAP supports and facilitates businesses through latest information and capacity building initiatives to enhance and improve their leverage in international trade.

To achieve its objectives, TDAP organizes as well as participates in local & international trade fairs, country specific exhibitions, trade delegations, conducts seminars and organizes contacts and information exchange events both physically as well on digital platforms.

This publication is part of the efforts of TDAP to share details and showcase Pakistan's products and services in international markets.

Pakistan's Poultry Value Chain Analysis

Major production system with their value chains are shown in Figure 2.2 Participants estimated that 97–98% of broiler commercial farming in Pakistan is within environmentally controlled houses characterized by automatically controlled temperature, humidity, feeding and water supply. Housing capacity is around 30,000–40,000 birds per house, with an average live weight of 1.5–2.0 kg per bird at the end of production cycle and a feed conversion ratio (FCR) of 1.2–1.6. Open-sided house broiler systems were reported to be used in <2–3% of all broiler production. In these systems birds are kept in open-sided houses (2,000–5,000 birds per house) with no control over the temperature of the house and manual provision of feed and water. Open-sided house farming was perceived to be decreasing rapidly due to the "increased risk of disease outbreaks," "poor management of birds under extreme weather conditions," "increased mortality rate," "poor feed conversion ratio," and the "reduced number of finished birds" produced in this system

Product Profile

The Agriculture sector of Pakistan is considered the backbone of Pakistani economy. This sector contributed 19.5 % to the GDP of Pakistan during last year 2016-17. Livestock is the main subsector of the Agriculture sector in Pakistan which contributed around 58.6% to the total Agricultural GDP during 2016-17. This Livestock subsector comprises of various industries including Poultry, Meat, Leather and Dairy industries etc.

The poultry industry of Pakistan has been performing extraordinarily well locally and internationally as compared to other Livestock businesses since last decade. It is the second largest industry of Pakistan which can be considered as the major contributor of Pakistan economy as it contributes around 1.3% to the Pakistani GDP. It has resulted in a mushroom growth of various poultry related businesses like broiler farming, layer farming, breeder and allied businesses. The irony of the situation is that besides the fact that poultry industry is contributing a lot socially and economically but it has been facing many problems in production, import and export. These problems are of multifarious nature and hindering in harnessing the full potential of this vibrant industry. In this policy paper all such problems which are faced by industrialists regarding production, import and export are separately explained. Finally, some prudent policy measures are given in the form of recommendation. It is claimed that if these policy recommendations will be implemented in the coming budget 2017-18, it can not only serve as a great of oxygen for this ailing industry but also reinvigorate it to its full potential.

3.0 HS Codes:

HS Codes: Pakistan Poultry

02 & 03	Live animals, Meat and edible meat offal.
'010599	Live domestic ducks, geese, turkeys and guinea fowls, weighing >185 g
'010511	Live fowls of the species Gallus domesticus, weighing <= 185 g (excluding turkeys and guinea fowls)
'010594	Live fowls of the species Gallus domesticus, weighing > 185
'020711	Fresh or chilled fowls of the species Gallus domesticus, not cut in pieces
'020712	Frozen fowls of the species Gallus domesticus, not cut in pieces
'020714	Frozen cuts and edible offal of fowls of the species Gallus domesticus
'020745	Frozen cuts and edible offal of domestic ducks
'020755	Frozen cuts and edible offal of domestic geese



The above table shows the HS Codes of the exports of live poultry and its products from Pakistan. The study will cover the above HS Codes and it doesn't cover the all HS Codes of poultry and its products.

Top Exporting Countries of Poultry

Importers	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018	Exported value in 2019
World	19,525,829	18,970,660	20,647,432	21,312,887	21,108,843
Brazil	6,291,900	6,011,258	6,497,560	5,962,534	6,414,256
United States of America	2,442,609	2,393,214	2,834,488	2,891,256	2,999,039
Netherlands	1,697,975	1,634,686	1,565,744	1,759,029	1,678,088
Poland	732,957	766,957	831,329	1,034,200	1,067,833
Thailand	430,523	509,375	609,416	689,592	804,138
Germany	849,658	859,423	871,891	938,756	791,814
France	940,914	714,320	715,819	782,301	682,101
Turkey	458,146	371,634	542,908	599,174	588,290
China	512,496	455,839	459,937	468,467	491,312
Belgium	378,952	387,936	442,831	481,753	422,308

Unit: US Dollar thousand

Sources: ITC calculations based on UN COMTRADE and ITC statistics

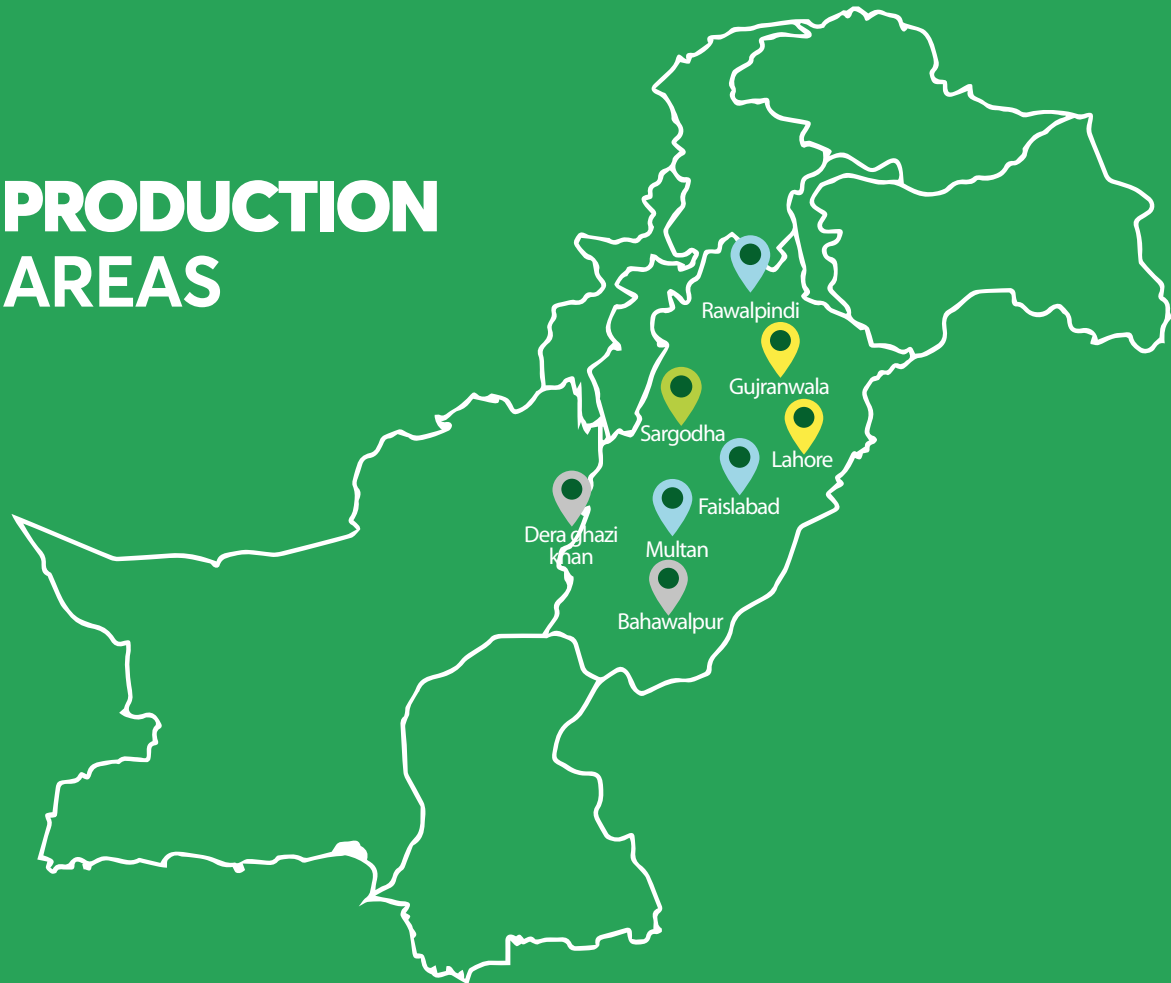
Top Importing Countries of Poultry

Importers	Imported value in 2015	Imported value in 2016	Imported value in 2017	Imported value in 2018	Imported value in 2019
World	19,217,090	18,458,836	19,543,336	20,578,916	20,817,130
China	920,698	1,258,481	1,046,067	1,163,768	2,013,190
Saudi Arabia	1,741,864	1,439,347	1,208,781	1,226,767	1,311,252
Japan	1,371,618	1,169,577	1,391,733	1,253,463	1,298,491
Hong Kong, China	1,231,528	1,302,705	1,371,282	1,295,279	1,157,159
Netherlands	1,015,249	1,048,648	1,112,216	1,212,962	1,088,711
Germany	863,143	898,750	950,506	1,086,032	950,794
United Arab Emirates	762,852	729,524	729,283	748,572	815,381
United Kingdom	739,791	717,691	686,274	812,858	713,036
Iraq	560,043	530,524	657,232	578,149	557,048
France	489,334	508,988	503,606	577,298	486,232

Unit: US Dollar '000

Sources: ITC calculations based on UN COMTRADE and ITC statistics

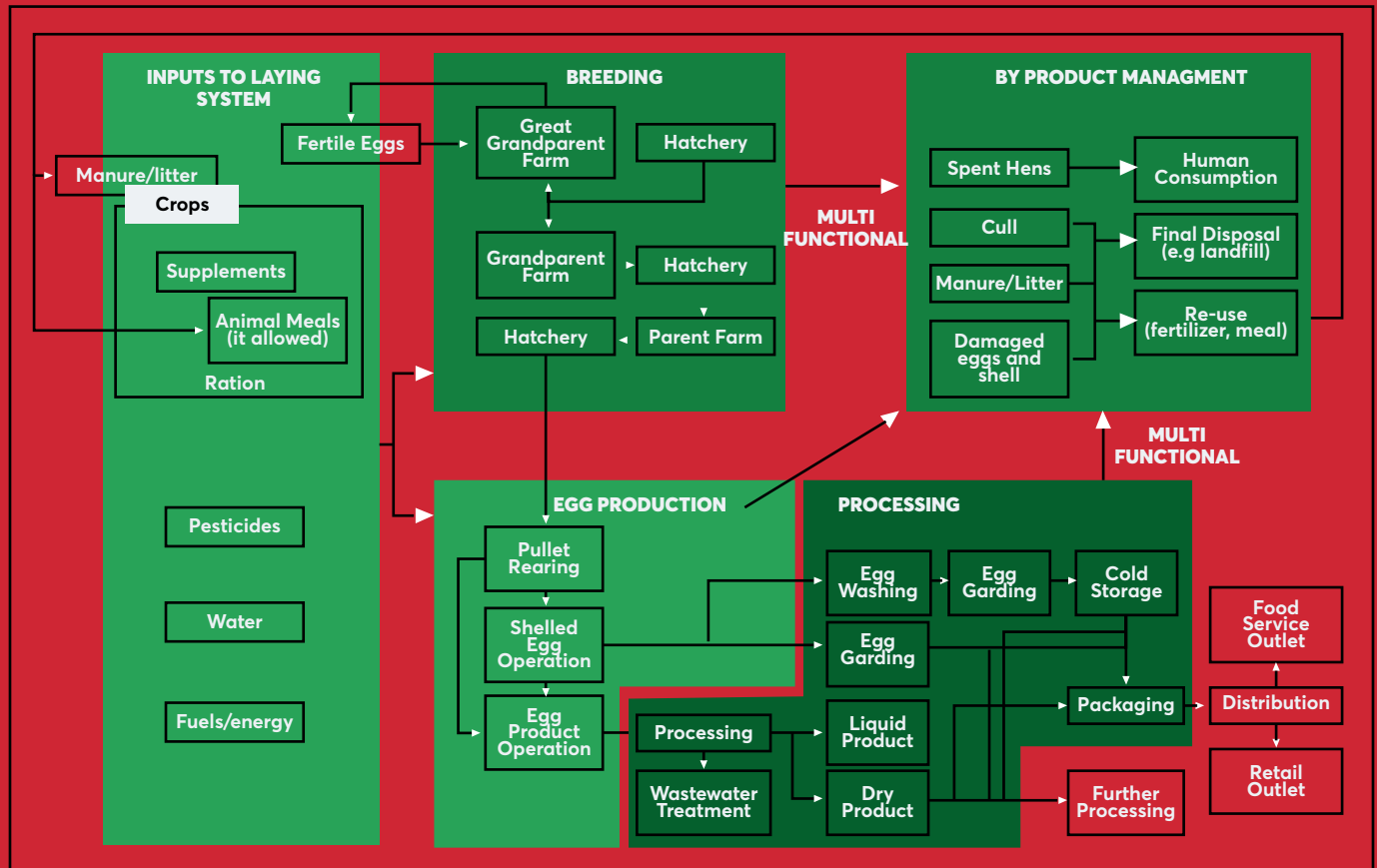
PRODUCTION AREAS



Major (colored) and minor (gray) commercial chicken producing areas of Punjab, Pakistan. Yellow: major broiler producing areas, green: major layer producing areas, blue: both broiler and layer producing areas.

Global Supply Chain Analysis

Figure 2.0 describes an example of the system boundary of the poultry supply chains covered in LEAP guidelines. These guidelines are transparent and comprehensive because different review processes were undertaken, from peer-review to public review. They provide transparent allocation rules between co-products and they address data collection and data quality assessment, inventory and interpretation and reporting of results supported by uncertainty and sensitivity analysis.



TOP EXPORTERS

Company: KAYS POULTRY FEED
Address: K&Ns Centre,160 banglore Town,Shara-e-Faisal, Karachi.

Company: SONA FEEDS
Phone: 0300-3020405
Address: Plot # P-6, SITE near Nara Jail, Hyderabad.

Company: MASHAALLAH POULTRY FARM
Phone: 0333-2122295
Address: A-163, Sector 14-B, Shadman Town, North Karachi.

Company: MARJAN FEEDS
Phone: 0333-2156575
Address: Plot # 45/4, Sector 12/D, North Karachi Industrial Area, Karachi.

Company: POULTRY INTERNATIONAL
Phone: 0333-2131562
Address: Centre S.19, 1st & 2nd Floor, Malir Cantt Bazar, Karachi.

Company: SNAM PHARMA
Phone: 0300-9480528
Address: 61-G, Phase-I, Commercial Market, D.H.A Lahore.

Company: CHERRY IMPEX INTERNATIONAL
Phone: 0300-8410247
Address: 14-E, Punjab Housing Society, Ghazi Road, Lahore Cantt.

Company: AL-MUSTAFA POULTRY BREEDING COMPANY
Phone: 0321-6949169
Address: Thana Bazar, Arifwala, Dist: Pak Pattan.

Company: ORIENT ANIMAL HEALTH (PVT) LTD
Phone: 0345-2010526
Address: Commercial VI, 1st Floor, Block-A, near Masjid-e-Hira, Kazimabad, Model Colony, Karachi.

Company: S.F FARMS
Phone: 0300-2004300
Address: H.No 64, Lane No: 23 off Khayaban-e-Badbaan, DHA, Phase-7, Karachi.

Company: GOLDEN HARVEST
Phone: 0321-8201043
Address: 49-C, 24th Commercial Street, Phase-II, Extension Defence Housing Authority, Karachi.

Company: PAKISTAN POULTRY FARMS
Phone: 0300-5012277
Address: Suit No. 206 ∓ 207, 2nd Floor, Dubai Plaza, 6th Road, Murree Road, Rawalpindi.

Company: SANNA LABORATORIES
Phone: 041-8586787
Address: 1019-B, P.S.I.E, Sargodha Road, Faisalabad.

Company: AVIAN PROTEIN FARMS
Phone: 0300-8476776
Address: 64, Ravi Block, Allama Iqbal Town, Lahore.

Company: R.S POULTRY
Phone: 0300-8559250
Address: Rafique House: 4-B/1, Satellite Town, Rawalpindi.

Company: A-ONE FEEDS
Phone: 0334-3008880
Address: Plot # G-5, SITE Hyderabad, Sindh.

Company: J.F HOMEOPHARMACY
Phone: 0300-6368777
Address: B-764, Block 13, FB Area, Karachi.

Company: BILAS POULTRY FARMS
Phone: 0345-8217550
Address: House No SDH-490, Street No: 21, PAF Falcon Complex (AFOHS) Faisal Cantt: Karachi.

Company: FORWARD SOLUTIONS
Phone: 0304-4444590
Address: 19-B, Abdul Sattar Edhi Road Kachi Koti Stop, Near Shahbaz Estate Lahore.

Company: MOTHER PHARMACEUTICALS Pakistan
Phone: 0300-6654645
Address: Office No.3, 4th Floor, Ibrahim Trade Center, Eid Gah Road, Faisalabad.

Company: R.B POULTRIES
Phone: 0300-8491798
Address: Opp Ravi Chemical Complex 25-Km, G.T Road Lahore.



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