

2023

## Trade Analysis Series

### Meat (Meat & Edible Meat Offal) Sector



*Turn Potential into Profit*

**Small & Medium Enterprises Development Authority (SMEDA)**

Ministry of Industries & Production  
Government of Pakistan

[www.smeda.org.pk](http://www.smeda.org.pk)

UAN: 111 111 456

## 1. Product Description

Pakistan is known for its production of various types of meat, including beef, mutton, and poultry. The country exports meat products to several countries, with the Middle East, Southeast Asia, and the Gulf region being primary export markets. Key factors influencing Pakistan's meat trade include efforts to meet international food safety and quality standards, tariff and non-tariff trade barriers, and fluctuations in global meat prices. Pakistan's meat industry also faces challenges related to infrastructure development, supply chain efficiency, and environmental sustainability. However, with continued investments and adherence to international standards, Pakistan aims to further tap into the global meat market, boosting its exports and contributing to its economic growth.

The Harmonized Commodity Description and Coding System (referred as HS Codes) designated for trade of Meat and Edible Meat Offal is 02. The brief description of sub categories falling with-in product category of HS 02 is provided in the following table:

**Table 1: Meat HS Code Details**

HS Code	Product Description
<b>0201</b>	Meat of bovine animals, fresh or chilled
<b>0202</b>	Meat of bovine animals, frozen
<b>0203</b>	Meat of swine, fresh, chilled or frozen
<b>0204</b>	Meat of sheep or goats, fresh, chilled or frozen
<b>0205</b>	Meat of horses, asses, mules or hinnies, fresh, chilled or fresh
<b>0206</b>	Edible offal of bovine animals, swine, sheep, goats, horses, asses, mules or hinnies
<b>0207</b>	Meat and edible offal of fowls of the species Gallus domestics, ducks, geese, turkeys
<b>0208</b>	Meat and edible offal of rabbits, hares, pigeons and others animals, fresh, chilled or frozen
<b>0209</b>	Pig fat, fee of lean meat, and poultry fat, not rendered or otherwise extracted, fresh
<b>0210</b>	Meat and edible offal, salted, in brine, dried or smoked

Source: Trade Map

## 2. Global Trade of Meat

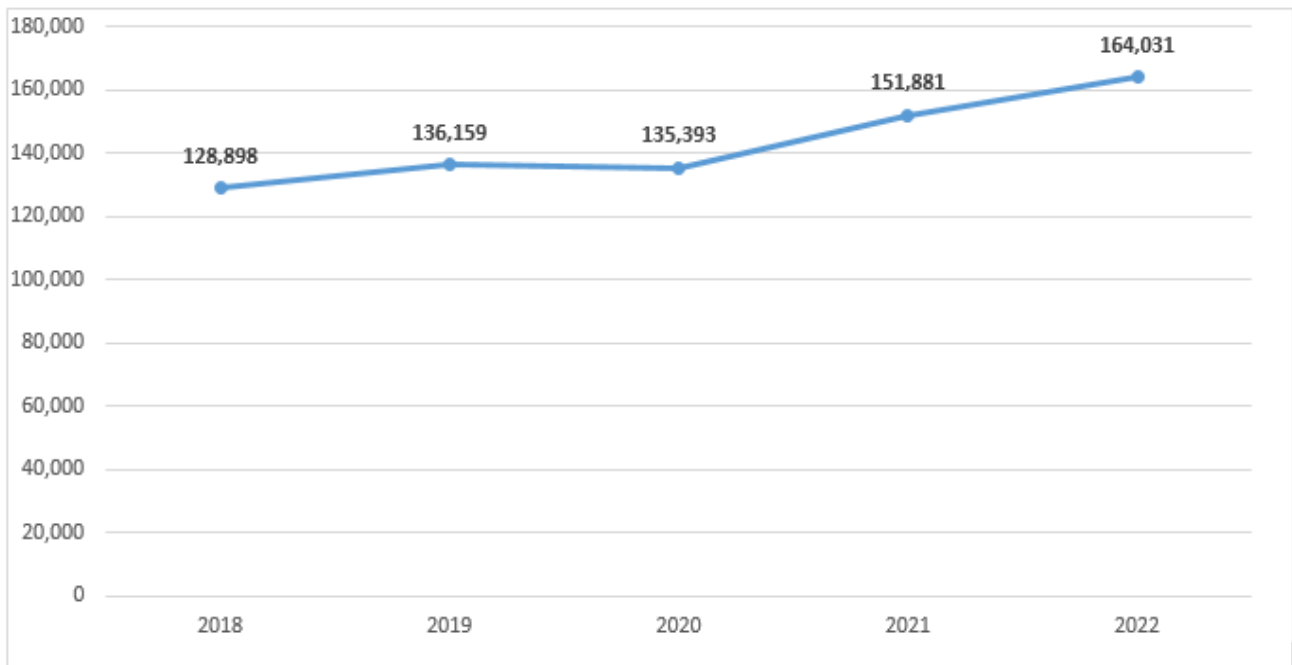
Exports of Meat were valued at US \$164,031 million in 2022. The Meat trade exhibited consistent growth from 2018 to 2019, experienced a decline in 2020, and then rebounded with steady growth in 2021 and 2022.

**Table 2: Global Exports of Meat HS 02 - Last 5 Years (US \$ million)**

Description	2018	2019	2020	2021	2022
<b>World Exports (Value is US \$ Million)</b>	128,898	136,159	135,393	151,881	164,031
<b>Growth (%age)</b>	Base Year	5.63%	-0.56%	12.18%	8.00%

Source: Trade Map

**Figure 1: Growth Trend in World Exports of Meat HS 02 (Value US \$ Millions)**



Source: Trade Map

## Major Exporters (HS Code: 02)

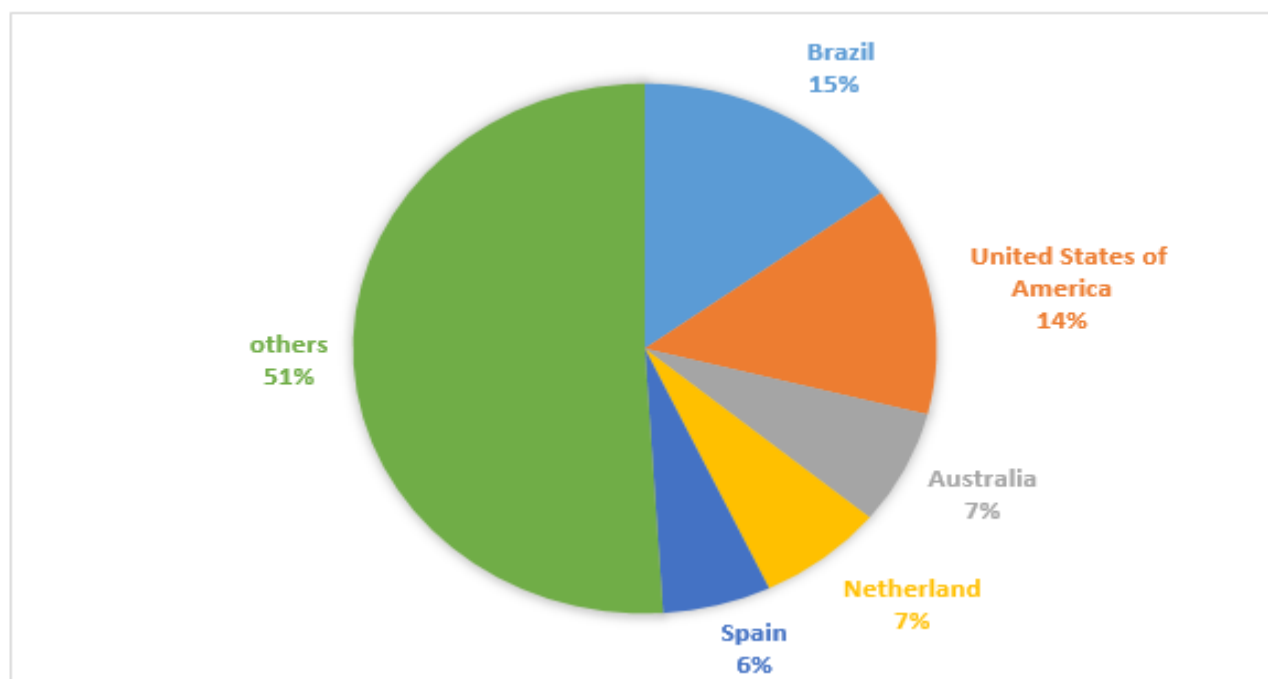
During the last 5 years, the global exports of Meat have been dominated by Brazil followed by United States of America. The export value and market share of the five biggest exporting countries in 2022 are provided in the table and figure below.

**Table 3: Major Meat HS 02 Exporting Countries in 2022**

Sr. No.	Country	Exports (Value in US \$ Million)	Growth in value between 2018 – 22 (%)
1	Brazil	23,974.70	15
2	United States of America	23,344.38	09
3	Australia	12,012.21	03
4	Netherlands	11,539.96	05
5	Spain	9,910.88	11

Source: Trade Map

**Figure 2: Market Share of Major World Meat HS 02 Exporters in 2022**



Source: Trade Map

## Major Importers (HS Code: 02)

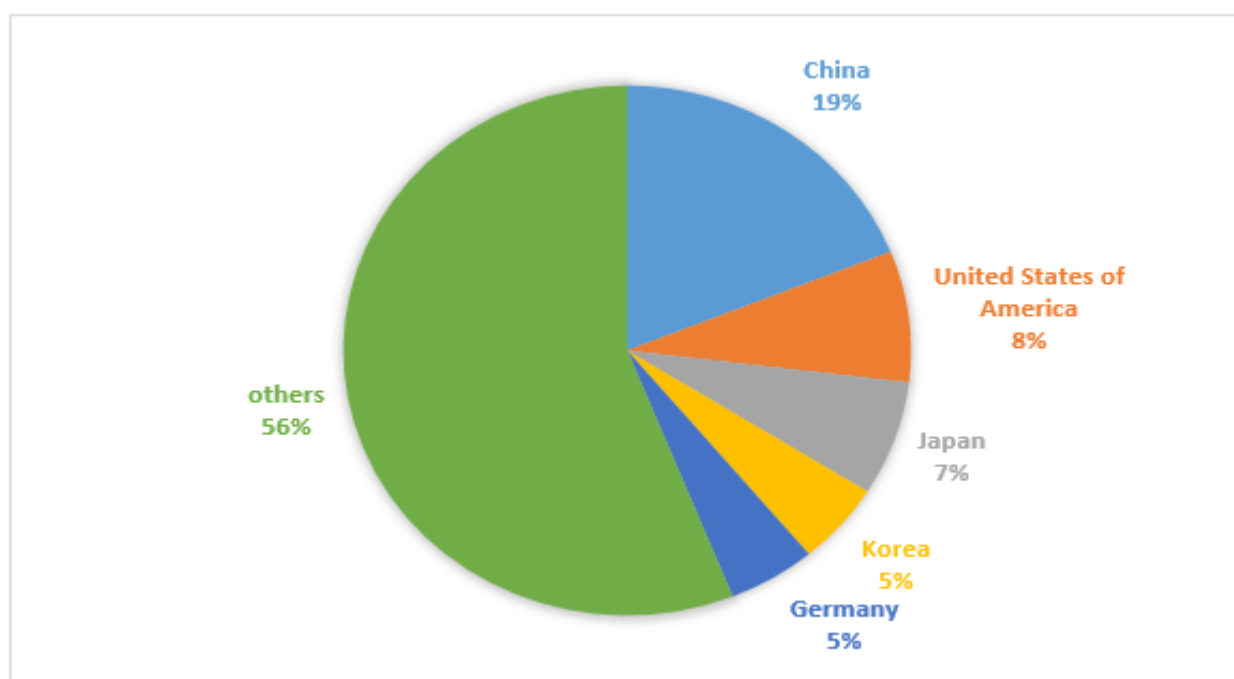
During the year 2022 - the largest importer of Meat was China with 19% share in world imports, followed by United States of America and Japan with 8% and 7% share respectively. The import value and growth in imported value of meat from 2018 – 2022 of the five major importing countries are provided in the table and figure below.

**Table 4: Major Meat HS 02 Importing Countries in 2022**

Sr. No.	Country	Imports (Value in US \$ Million)	Growth in value between 2018 – 22 (%P.a.)
1	China	30,879.44	29
2	United States of America	12,966.44	12
3	Japan	11,323.49	02
4	Korea	7,356.99	09
5	Germany	7,276.19	00

Source: Trade Map

**Figure 3: Market Share of Major Meat HS 02 Importing Countries in 2022**



Source: Trade Map

### 3. Pakistan's Export of Meat

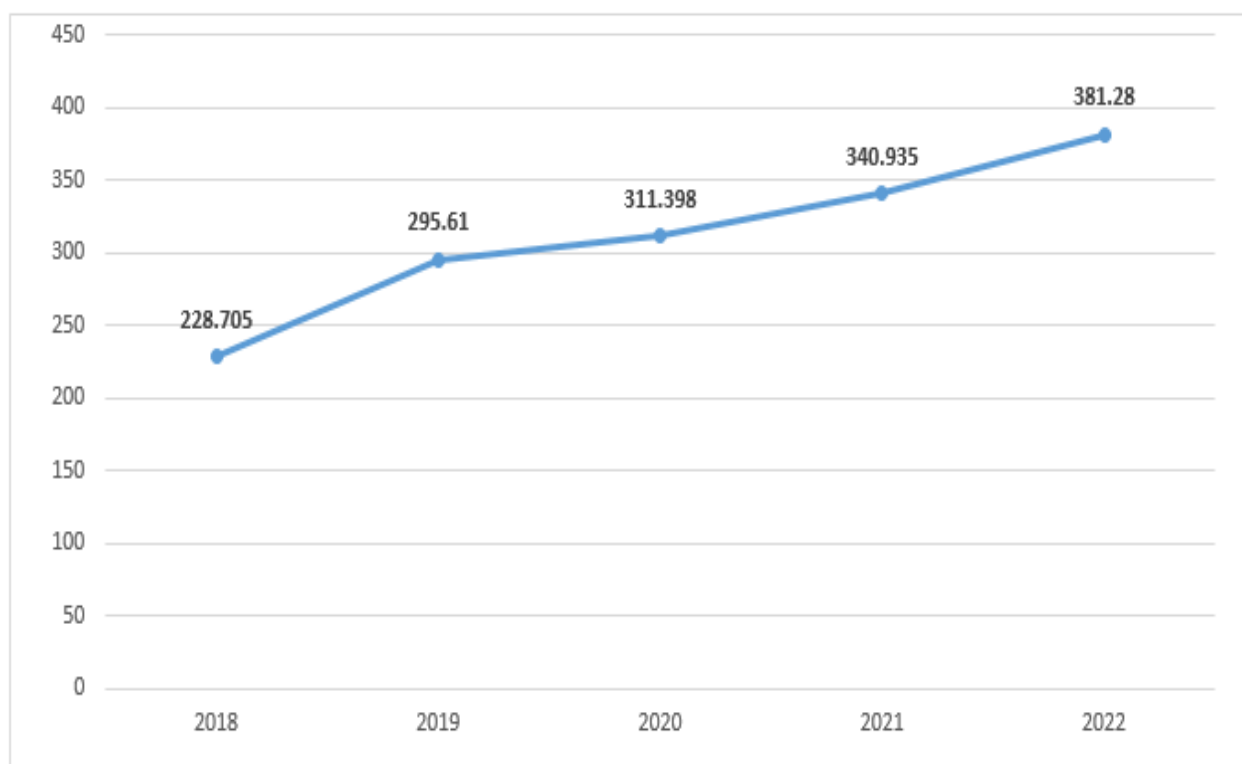
Pakistan is the 33<sup>rd</sup> largest exporter of Meat in 2022 with export value of US \$ 381.2 million. Pakistan's overall export of Meat during the last five years i.e. from 2018 to 2022 is given in table below.

**Table 5: Pakistan Meat HS 02 Export – Last 5 Years (Value in US \$ Millions)**

Description	2018	2019	2020	2021	2022
<b>Pakistan's Exports (Value is US \$ Millions)</b>	228.70	295.61	311.39	340.93	381.28
<b>Growth (%age)</b>	Base Year	29.25%	05.34%	09.48%	11.83%

Source: Trade Map

**Figure 4: Growth Trend of Pakistan's Meat HS 02 Export – Last 5 Years (Value in US \$ Millions)**



Source: Trade Map

## Pakistan's Export Destinations and Market Share

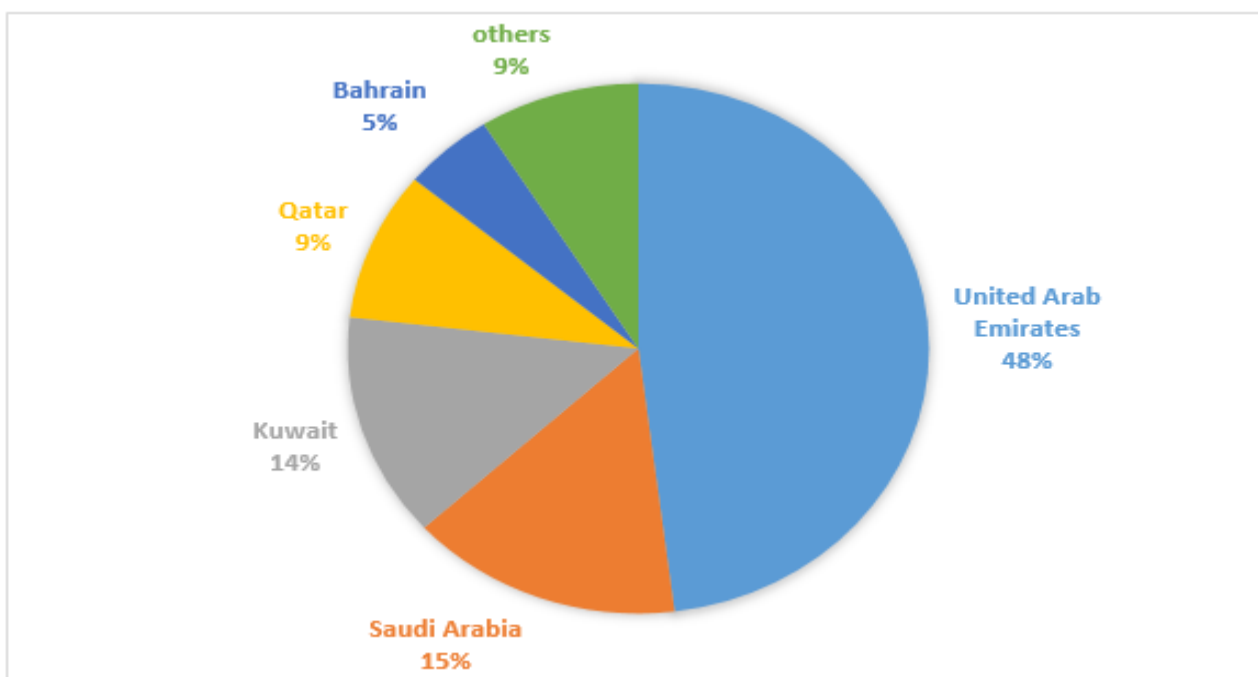
The chart below provides the market share of Pakistan's largest export destinations. United Arab Emirates is solely contributing 48% of Pakistan's total export value which is followed by Saudi Arabia and Kuwait with 15% and 14% share respectively. The export value in (US \$ Millions) and growth in value between 2018 – 2022 in %age per annum of the five biggest export designations in 2022 are provided in the table and figure below.

**Table 6: Major Meat HS 02 Export Designations for Pakistan in 2022**

Sr. No.	Country	Exports (Value in US \$ Million)	Growth in value between 2018 – 22 (%.p.a)
1	United Arab Emirates	184.35	19
2	Saudi Arabia	58.46	07
3	Kuwait	52.79	10
4	Qatar	35.24	50
5	Bahrain	19.50	07

Source: Trade Map

**Figure 5: Market Share of Major Meat HS 02 Importing Countries from Pakistan in 2022**

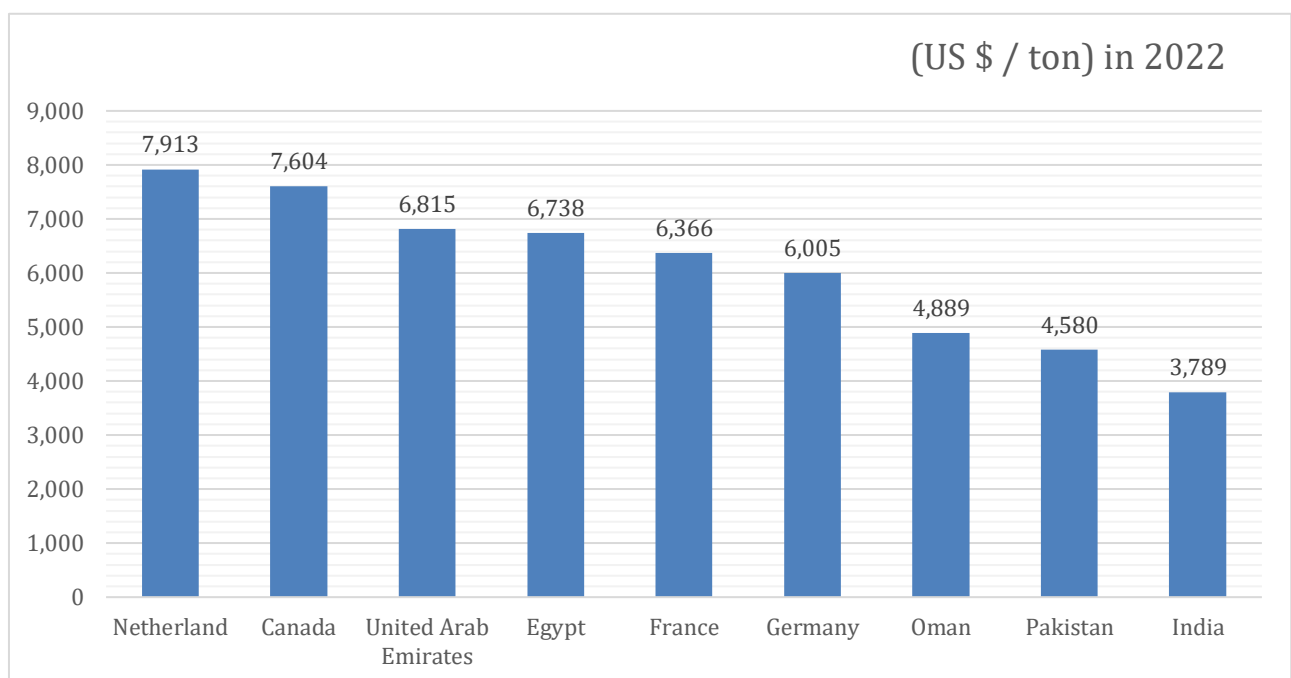


Source: Trade Map

## Price Competitiveness of Pakistan's Meat Export

In the realm of regional meat exports, it is essential to examine Pakistan's position in terms of price competitiveness. Pakistan's meat exports have been on the rise, driven by factors like competitive pricing, rigorous quality standards, and strict adherence to international regulations. The country's meat industry has strategically positioned itself as a dependable Source, providing high-quality products at prices that give it a competitive advantage. The provided chart outlines the specifics of countries with the highest prices for meat exports in 2022. The data indicates that Pakistan's meat export prices are slightly higher than those of its regional competitor, India.

**Figure 6: Price Comparison for HS Code 0201 “Meat (Fresh & Chilled)” in 2022**



Source: Trade Map

## 4. Pakistan's Import of Meat

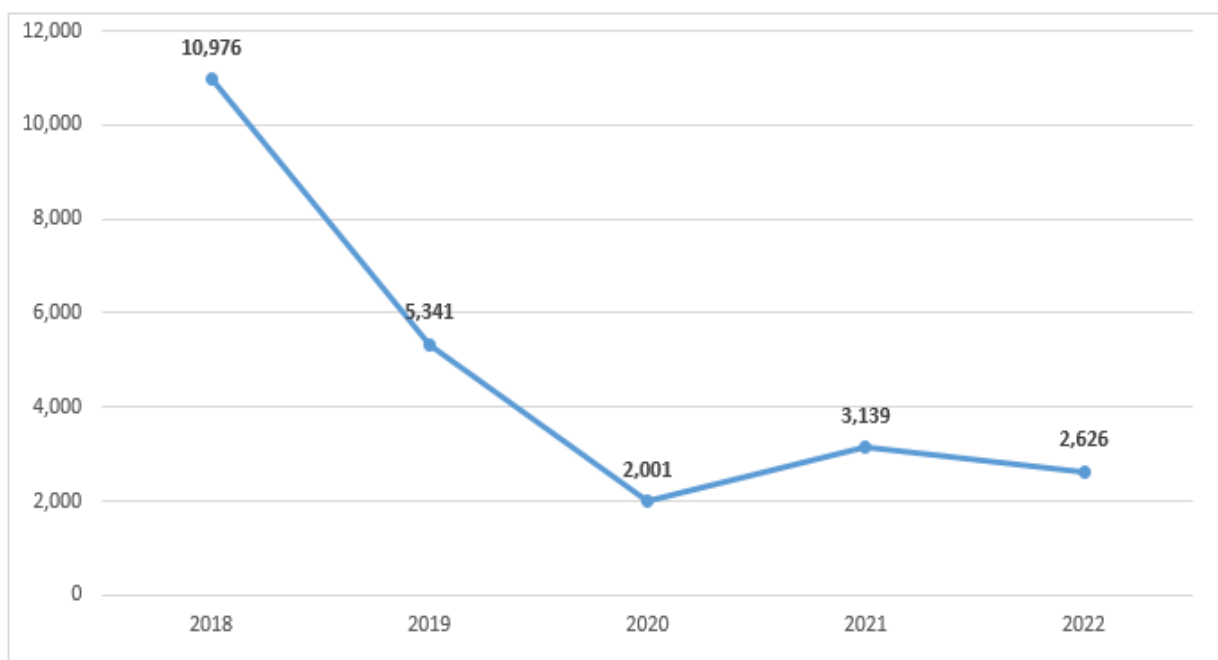
Pakistan's total value of Meat imports in 2022 was US \$ 2,626 thousands. In last five years, highest import of Meat is during 2018 which was US \$ 10,976 thousands. The import data of Meat is provided in the table and graph below.

**Table 7: Pakistan Meat HS 02 Imports – Last 5 Years (Value in US \$ Thousands)**

Description	2018	2019	2020	2021	2022
<b>Pakistan's Imports (Value is US \$ Thousands)</b>	10,976	5,341	2,001	3,139	2,626
<b>Growth (%age)</b>	Base Year	-51.34%	-62.54%	56.87%	-16.34%

Source: Trade Map

**Figure 7: Growth Trend of Pakistan's Meat HS 02 Imports – Last 5 Years (Value in US \$ Thousands)**



Source: Trade Map

## Pakistan's Import Partners and Market Share

United Arab Emirates was the largest exporter of Meat products to Pakistan in 2022 with 82 % share.

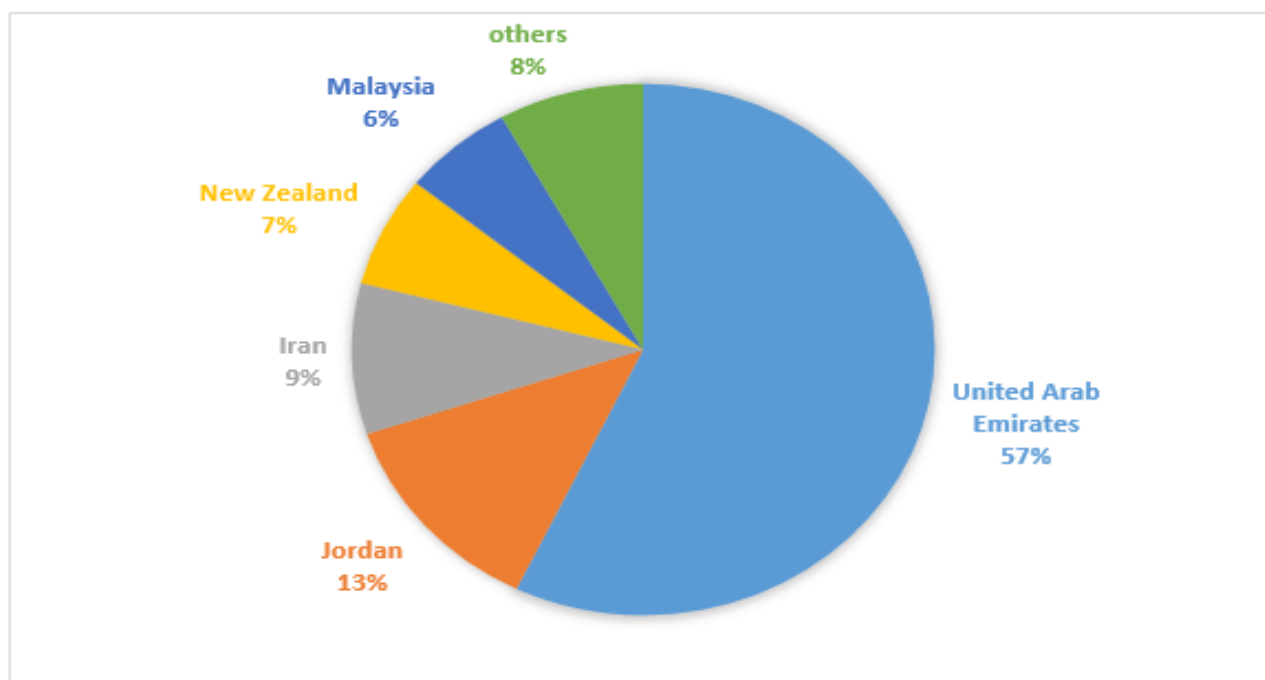
Furthermore, Pakistan also imported Meat from Jordan and Iran as depicted in the figure below.

**Table 8: Major Meat HS 02 Import Partners of Pakistan in 2022**

Sr. No.	Country	Imports (Value in US \$ Thousands)	Growth in Value between 2018 – 22 (%.p.a)
1	United Arab Emirates	1,490	25
2	Jordan	330	-
3	Iran	240	121
4	New Zealand	177	63
5	Malaysia	160	05

Source: Trade Map

**Figure 8: Market Share of Major Meat HS 02 Import Partners of Pakistan in 2022**



Source: Trade Map

## 5. Pakistan's Export Trade and Tariff

### Customs Tariffs/Duties

Knowing customs duties (or tariffs) are important to take decision of choosing a product or service for import or export economically feasible or not. In the same manner to claim refund or rebate again knowing custom duty is essential. Whole circle of import and export depends upon knowing and using the custom tariffs/duties or exemptions. Determining which customs duty is applicable to a product is a complex exercise and expert advice may be sought. Customs Act, 1969, Customs Rules 2001 are the relevant law and Pakistan Customs under FBR is the only authority to deal with custom tariffs and rules. Government often changes duty structure and rules due to which these are not stagnant. Following is the link to check the customs tariffs/duties applicable in which Pakistan Customs is the final authority to the extent of Pakistan.

<https://www.fbr.gov.pk/categ/customs-tariff/51149/70853/131188>

## 6. Prominent International Trade Fairs

Name of Trade Shows	Location	Frequency	Web links
<b>ACTIMEAT</b>	France, city MANOSQUE	Annual	<a href="http://www.actimeat.com">http://www.actimeat.com</a>
<b>AGROFOOD</b>	Belgium, City Lokeren	Annual	<a href="http://www.agrofood.be">http://www.agrofood.be</a>
<b>AGRO-INVEST Ltd</b>	Ukraine, City Chervonohrad	Annual	<a href="http://agroinvest-ukraine.com.ua">http://agroinvest-ukraine.com.ua</a>
<b>Ahmed Al Ali Trading Company LLC</b>	United Arab Emirates, City Dubai	Annual	<a href="http://www.ahmedalalitradng.com">http://www.ahmedalalitradng.com</a>
<b>Al Nafees Group of Companies</b>	India, City New Delhi	Annual	<a href="http://www.alnafeesgroup.in">http://www.alnafeesgroup.in</a>
<b>AGROPRODSEVIC E PubJSC</b>	Ukraine, City Ternopilskyi Dist.	Annual	<a href="http://www.agroprodservice.com.ua">http://www.agroprodservice.com.ua</a>
<b>ANIMEX Foods Sp. z o.o. sp. k.</b>	Poland, City Warszawa	Annual	<a href="http://www.animex.com.pl">http://www.animex.com.pl</a>