



ALL PAKISTAN MEAT EXPORTERS & PROCESSORS ASSOCIATION



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POLICY NOTE

Potential Negative Effects of Allowing Live Animal Exports from Pakistan

In the Context of Local Livestock Population, Meat Processing Units, Leather, Offal and Allied Value Chains

This document highlights the economic, industrial and food-security implications of a possible policy decision by the Government of Pakistan to allow the export of live animals. The core position is that Pakistan should prioritize value-added meat exports and allied by-products rather than exporting live animals, because value addition within Pakistan generates higher foreign exchange, employment, industrial utilization and long-term national benefit.

1. Background and Policy Question

Pakistan is an agrarian economy where livestock is not only a major pillar of rural livelihoods, employment and food security, but also the basic raw material for several industries including meat, milk, leather, offal, feed, transport, cold chain and export logistics. Therefore, any policy permitting the export of live animals should not be viewed merely as a short-term export opportunity; it should be assessed in the context of national herd sustainability, domestic meat prices, processing capacity and the broader value chain.

According to recent official economic survey data, livestock remains the largest component of Pakistan's agriculture sector, contributing a major share to agricultural value addition and national GDP. Total meat production and meat-and-meat-products exports have also shown growth, confirming that the value-added meat sector is already a significant and expandable export opportunity. This makes it even more important to retain animals for domestic slaughter, processing, certification and export as meat products rather than exporting the animal itself.



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2. Potential Negative Effects on the Local Livestock Population

Although overall livestock numbers may show periodic increases in headline data, the exportable and commercially viable pool of healthy, young, properly weighted and good-quality animals is limited. If live animal exports are allowed without strict controls, the same superior animals needed by local markets and processing plants may be diverted directly to foreign buyers.

- Availability of slaughter-ready animals in the domestic market may decline, increasing pressure on local meat prices.
- Better genetics and breeding-quality animals may leave the country, weakening future productivity of the national herd.
- Small farmers may receive a temporary price benefit, but long-term herd regeneration and supply chain stability may be weakened.
- If export-driven demand pushes animal prices sharply upward, local consumers, processors and meat exporters will all be affected.
- Unregulated procurement through middlemen can weaken disease traceability, animal health controls and formal livestock management.

3. Impact on Local Meat Prices and Food Security

Live animals are the primary raw material for meat. If the raw material itself is exported, domestic meat supply is reduced. This directly affects consumers, hotels, caterers, retail butchers, meat processors and export-oriented slaughterhouses. Pakistan is already sensitive to food inflation and affordability concerns; therefore, any reduction in local supply can further increase meat prices and reduce protein affordability for the public.

From a food-security perspective, every animal that can be slaughtered and processed in Pakistan should be seen as a source of domestic protein supply, employment and industrial value. Exporting it in live form transfers the value chain, jobs and by-products to another country.



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4. Impact on Meat Processing Units

Pakistan has invested heavily in export-oriented abattoirs, chilling facilities, blast freezing, deboning, vacuum packing, MAP packing, cold storage, laboratory testing, veterinary inspection and international audit compliance. These facilities require a stable supply of quality animals. If these animals are exported live, the processing sector will face a shortage of raw material and a loss of competitiveness.

- Capacity utilization of processing plants may fall, increasing fixed costs and reducing export competitiveness.
- Investments made in international approvals, audits, halal systems and food-safety certifications may become underutilized.
- Employment chains involving skilled slaughtermen, veterinarians, QA staff, cold-chain technicians, packing workers and logistics teams may be disrupted.
- Pakistan's positioning may shift from a value-added halal meat exporter to a low-value raw/live animal supplier.
- Animal prices for processors may rise, making Pakistan's processed meat exports less competitive against regional suppliers.

5. Impact on Leather, Offal and Allied Industries

The economic value of an animal is not limited to carcass meat. After slaughter and processing, hides, skins, fat, bones, blood, glands, casings, tripe, liver, heart, brain, trotters, tails and other by-products become raw material for several local industries. When an animal is exported live, the entire downstream value chain is also exported with it.

- Leather and tanning industries may face reduced availability of hides and skins.
- Offal exporters may lose access to liver, heart, brain, trotters, tails, tripe, casings and other high-demand by-products.
- Rendering, pet food, gelatin, pharmaceuticals, animal feed and other by-product industries may lose raw material.
- Cold-chain, packaging, carton, transport, documentation, inspection and freight-related service providers may lose business activity.
- **Pakistan will lose the opportunity to earn foreign exchange from multiple product streams from the same animal.**



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6. Live Animals vs. Value-Added Meat: Economic Comparison

Aspect	Live Animal Export	Processed / Value-Added Meat Export
Nature of export	Raw biological asset	Processed, inspected and certified food product
Value addition in Pakistan	Minimal	High: slaughtering, chilling, deboning, packing, certification, cold chain
Employment generation	Limited	Significant across processing, QA, packing, logistics and allied sectors
Foreign exchange potential	One-time animal value	Multiple revenue streams: meat, cuts, offal, hides/skins and by-products
Industrial benefit	Transferred to importing country	Retained within Pakistan
Brand positioning	Commodity supplier	Premium halal meat and protein supplier
Risk to local supply	High if unrestricted	Lower, because value is created domestically before export

7. Foreign Exchange: Where Is the Real Benefit?

Live animal export may create an immediate inflow of foreign exchange, but it represents the sale of a raw asset. In contrast, when the same animal is slaughtered, chilled, frozen, deboned, vacuum packed, cartonized and exported as a certified halal meat product, Pakistan captures value at multiple stages.

- Carcass meat, boneless cuts, vacuum packed meat, MAP packed meat and frozen products can command higher unit values.
- Offal, hides/skins, casings, trotters, tails and other by-products create separate export and local revenue streams.
- Processing, packaging material, cold chain, warehousing, air/sea freight, veterinary certification and documentation generate domestic economic activity.
- A structured meat export policy can position Pakistan as a premium halal protein supplier, whereas live exports risk reducing Pakistan to a low-value commodity supplier.

Recent economic survey data indicates that exports of meat and meat products continued to grow during July-March FY2025-26, reaching approximately Rs 113.07 billion. This trend demonstrates that meat exports are already a growing and scalable segment. Policy should therefore strengthen this sector rather than weaken its raw material base.



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8. Disease Control, Traceability and Reputation Risk

Processed meat exports operate through approved slaughterhouses, veterinary checks, ante-mortem and post-mortem inspection, cold-chain control, temperature monitoring, halal supervision and export documentation. Large-scale movement of live animals can create greater risk of disease spread, traceability gaps, animal mortality, welfare concerns and reputational damage in importing markets.

Even a single instance of a diseased animal being exported from Pakistan could severely damage the country's credibility in international markets. Such an incident could destroy Pakistan's reputation as a reliable halal meat supplier, jeopardize the entire meat export industry, and result in additional restrictions or bans on Pakistani meat exports, which are already limited by market access, regulatory approvals and international sanitary requirements.

For Pakistan to build a credible global halal meat brand, the country needs more traceability, regulated slaughter, quality assurance and certified processing, not uncontrolled live animal movement.

9. Policy Recommendations

- General export of live animals should not be permitted. Pakistan should prioritize the export of meat, offal, hides/skins and value-added meat products.
- The Government should ensure animal availability for export-oriented meat processing units through livestock procurement corridors, feedlot farming and contract farming schemes.
- Meat exporters should be supported through freight facilitation, airport cold-chain development, quarantine facilitation, international approvals, lab testing and certification support.
- To protect leather and offal industries, the value chain should be retained within Pakistan wherever possible so that hides, skins and by-products remain available to local industry.
- Pakistan should accelerate livestock census updates, animal identification, disease-free compartments, breed improvement and feedlot development.
- Pakistani meat should be marketed as a premium halal brand through trade missions, supermarket contracts, HORECA partnerships and government-to-government supply programs.

10. Proposed Government Position

The Government of Pakistan should evaluate live animal exports with extreme caution in light of the national livestock base, food security and industrial value chain. Pakistan's real opportunity is not to sell raw animals, but



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to slaughter, process, pack, certify and export high-value halal meat products from within Pakistan. This approach retains employment, captures by-products, supports allied industries and generates more sustainable foreign exchange.

“Animals should remain in Pakistan, value addition should take place in Pakistan, and the world should receive Pakistani halal meat, offal, leather and allied value-chain products.”

11. Summary

- Live animal export will create pressure on the local herd, increase meat prices and reduce raw material availability for processing units.
- Allied sectors such as leather, offal, by-products, cold chain, packaging and logistics will suffer if animals are exported before value addition.
- Value-added meat exports are more sustainable, more employment-generating and more foreign-exchange oriented for Pakistan.
- Any disease-related incident in live animal exports could trigger reputational damage and further restrictions on Pakistan’s already limited meat export access.
- In the national interest, Pakistan should promote processed meat, boneless cuts, offal and branded halal products instead of unrestricted live animal exports.

End

