Livestock and Dairy Sector: Opportunities for Investments

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Vice Chancellor

Webinar on 22 June 2020

Geo Strategic Position of Pakistan and Italy in Emerging Markets

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Area & Human Population & Consumption

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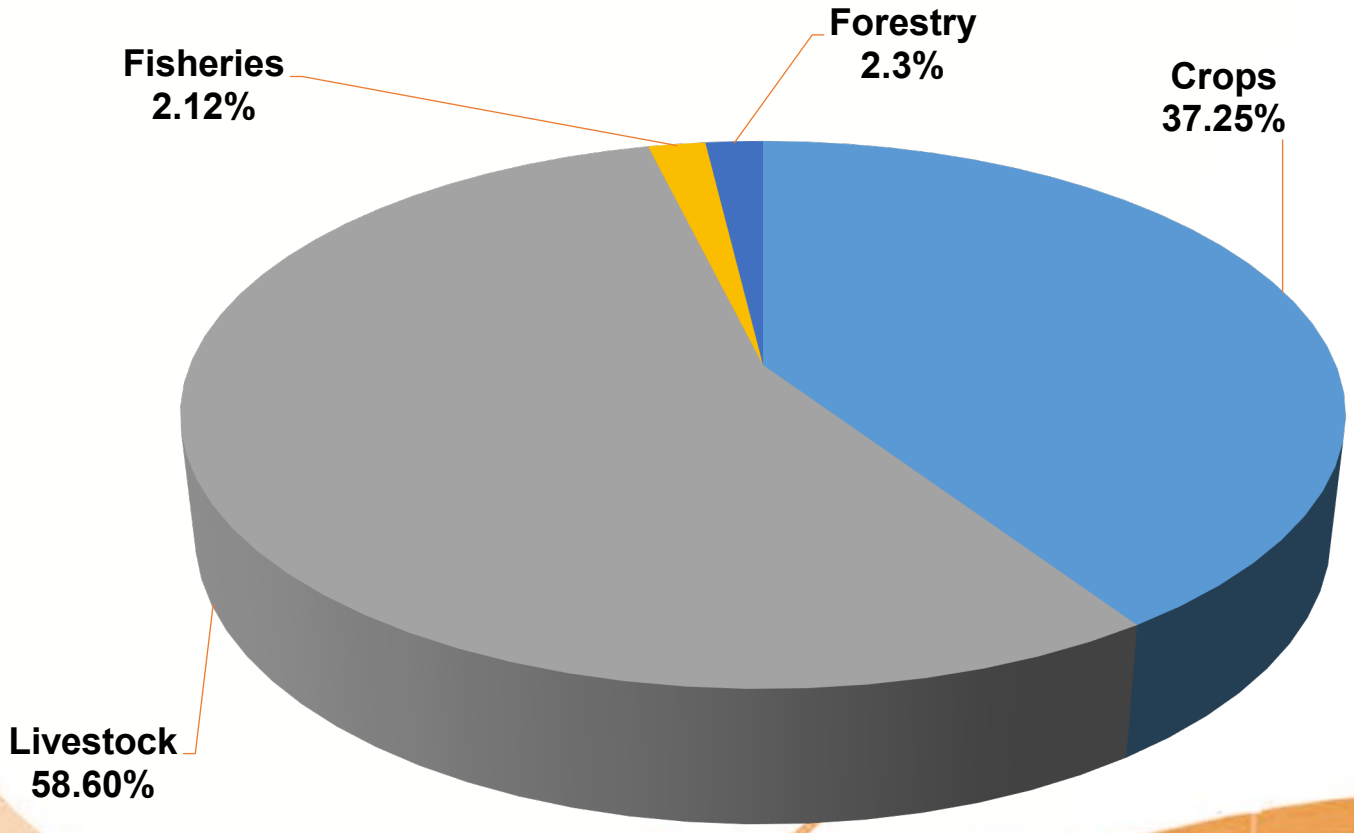
- Total Area — 79.61 M. Ha
- Cultivated Area — 22.00 M. Ha
- Irrigated — 80%
- Population (2019-20) — 220 Million
  - Rural population — 119 Million
  - Urban population — 101 Million
  - Population Growth / annum — 1.86%
- Milk and dairy products accounts for about 25 - 30 % of total food expenditure
- Per capita per annum average consumption :
  - Meat = 20 Kg
  - Milk = 196 liters
  - Eggs = 77 numbers

Pakistan Economic Survey, 2019-20

The Household Income and Expenditure Survey

Sectoral Share in Agri GDP 2019-20



Source: Economic Survey of Pakistan 2020

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Punjab Province: Leading

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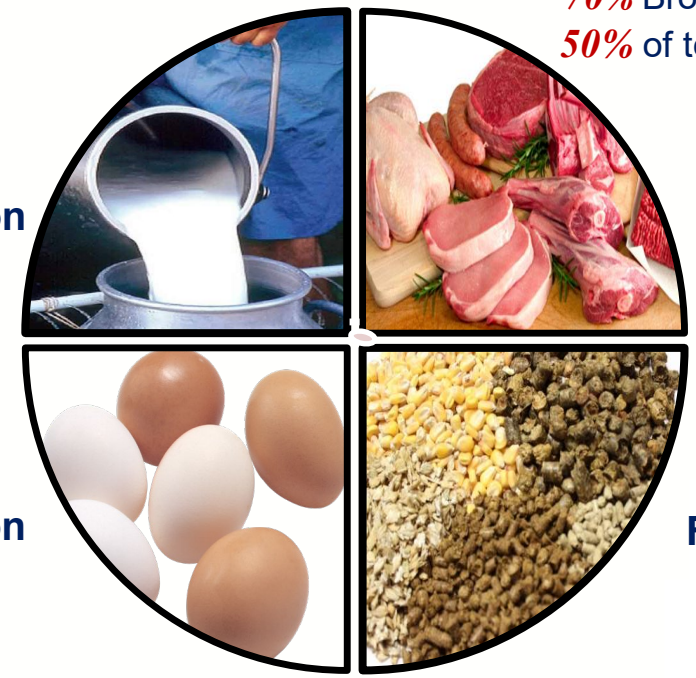
100% Broiler meat processing
70% Broiler meat production
50% of total meat production

61%
Milk Production



80%
Egg Production

85%
Feed Production

Punjab owns a major share of livestock products among provinces

(*Source: Livestock and Dairy Development Department, 2019 – 20*)

- Livestock production **2nd biggest economic activity**
- 67% rural population ~ **30-35 million engaged in livestock**
- **88 %** livestock raised by small and landless farmers
- 40% dependent on livestock for **income**

AVCCR

Commercial Dairy Farming: Emerging Industry

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Opportunities in Livestock Sector

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- ***Demand for livestock products is increasing:***
  - Population growth, urbanization and economic development
  - Gap between demand and growth rate
  - Education and awareness to enhanced nutrition
  - Increase per capita income
  - Export Avenue
- ***Technologies for increasing production and processing are available:***
  - Good national genetics is available
  - International genetics can be imported
  - Processing technologies are available
- ***Processed foods are in demand:***
  - Demand for processed livestock products is increasing
  - Processed milk is gaining market
  - Value added dairy products have fair say in market
  - Processed and ready to eat foods are gaining momentum in market

Opportunities in Livestock Sector (Favorable conditions!)

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- ***Cost of production and profitability favors the investment:***
  - **Cost of production** for livestock products is competitive in Pakistan
  - **Cost of labor** is low compared to all developed and many developing countries
  - **Prevailing prices** for the livestock and poultry clearly **depict profitability** of both milk, meat and egg production as well as processing
  - **Minimum Pasteurization Law** will encourage & **promote investment** in milk sector

Opportunities in Livestock Sector

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International subsidies are lowering:

- With WTO and globalization gaining momentum, many developed countries are being pursued to lower production and export subsidies
- Livestock industry in most of the developed world is highly subsidized
- With reduction of subsidies, Pakistan have better opportunities to compete

Niche markets:

- Mozzarella cheese from buffalo milk
- Goat Milk, goat cheese, camel milk and camel meat
- Mutton from Pakistan

Opportunities in Livestock Sector (Conducive Environment!)

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- Private sector-led companies for promotion and facilitation of livestock
- Private sector led livestock development policy
- Increasing public-sector investment to facilitate and promote the sector development
- Disease control programs for TAD's(FMD & PPR Diseases) (Rinderpest freedom since 2007)
- Multiple remissions on duty & taxes

Opportunities in Livestock Sector (Commercial Dairying on rise!)

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- Import of high yielding animals and their semen and embryos are allowed

  (6000 - 8000 exotic animals and 6-8 lac semen doses are imported annually)

- Import of Holstein-Friesian & Jersey breeds of dairy cattle are encouraged and allowed (Nucleus herd of approximately two hundred thousands exotic animals are available in corporate sector)

- Duty and tax rebates available on import of calf milk replacer & cattle feed premix

- Import of veterinary, dairy and livestock machinery / equipment are allowed at reduced rates of duty

Where to Invest

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- Setting up commercial dairy and fattening farms
- Salvage farming for dry animals of dairy colonies
- Semen production units & AI services
- Establishment of milk collection and chilling centers and refrigerated transport
- Value added dairy products development

Nili-Ravi

UVAS
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Sahiwal

Holstein Friesian

Milking Parlor

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Training Courses on Dairy Farming

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Dairy Farm Advisory Services

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Pakistani Delegation Visit Italy, June 2019

Cheese Training by David McGill (UK) in UVAS

Prof. Dr. Antonio Borghese in Local Cheese Industry, IBC 2019

Value Added Dairy Products (UVAS)

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Minister Livestock & Prof. Borghese in 'One on One Business Meeting, with Cheese Industry, IBC 2019

Ultrasound Training

- Hands on training on Ultrasound 5 days 5 Species
- National and International Vets, AIT's, Farm Manager
- Self Finance @ Registration Fee
- High Response

یونیورسٹی آف ویٹرنری اینڈ
اینیمل سائنسز، لاہور

جانوروں میں تولیدی معائنے کے لئے

الٹراساؤنڈ ٹریننگ کورس

ٹریننگ دورانیہ: (06-03-2017 to 10-03-2017)

یونیورسٹی آف ویٹرنری اینڈ اینیمل سائنسز، لاہور میں سوسائٹی فار اینیمل ریپروڈکشن پاکستان کے تعاون سے جانوروں میں تولیدی معائنے کے لئے الٹراساؤنڈ کے استعمال پر پانچ روزہ ٹریننگ کورس کا انعقاد کیا جا رہا ہے۔ جس میں الٹراساؤنڈ کے استعمال پر لائیو سٹاک فارمنگ سے متعلقہ افراد کو ٹریننگ دی جا رہی ہے۔

ترجیحی پروگرام برائے:

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☆ڈیری فارم منیجرز

☆لائیو سٹاک اسسٹنٹ/اے۔آئی ٹیکنیشن

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☆ جانوروں میں تشخیص حمل

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☆ جانوروں میں بیضہ دانی اور بچہ دانی کے نقائص

کوارڈینیٹر ٹرینر: پروفیسر ڈاکٹر نسیم احمد

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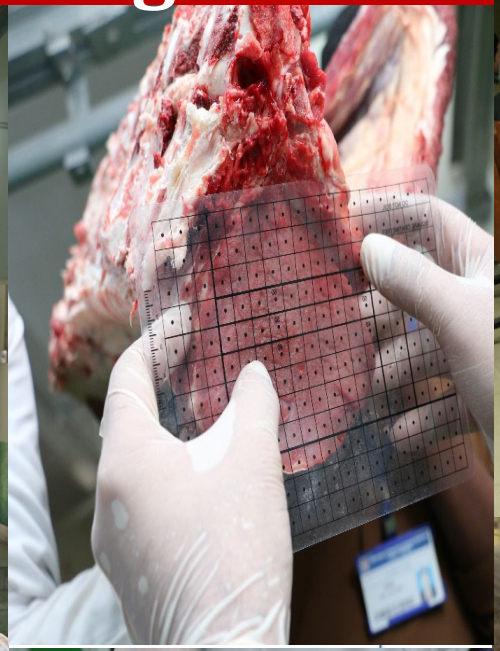
Meat Industry Training



Conclusion

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- ***Enabling Environment for Investments in Dairy and Livestock***
  - Public Sector very supportive @ regulatory, policy, FMD Free Zone
  - Private sector, gaining momentum in dairy and meat
- ***Comparative Advantages***
  - World's best buffalo Nili-Ravi buffalo (6-7 % Fat), semen, embryo
  - Equipment of Dairy and Meat processesing, , Cheese manufacturing
  - Veterinary pharmaceuticals

Thank You!