



# HALAL MEAT SECTOR

Time to make the most of the Edge

## INFONALYSIS

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Research & Development Cell

Karachi Chamber of Commerce & Industry

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## **TABLE OF CONTENTS**

<b>Global Halal Industry: A Booming Sector...</b>	<b>1</b>
<b>Presence of Trillion Dollar Halal Food Market</b>	<b>2</b>
International Halal Food Brands	2
<b>Halal Meat: A Growing Niche</b>	<b>3</b>
Global Meat Industry	3
Global Halal Meat Suppliers	4
<b>Halal Certification</b>	<b>4</b>
<b>Domestic Meat Industry: Pakistan’s Case</b>	<b>5</b>
Halal Meat Export Destinations of Pakistan	7
Industry Players	8
Competitive Advantage in setting up Meat Facility	9
<b>Pakistan among Top Halal Food players in OIC Ranking</b>	<b>9</b>
<b>Issues faced by Halal Meat Industry in Pakistan</b>	<b>10</b>
Absence of Local Halal Accreditation body in Pakistan	10
Privation of Technical Expertise	11
Lack of Policies and Incentives for Halal Meat Industry	11
Establishment of Halal Processing Zones	11
<b>Recommendations</b>	<b>11</b>

## HALAL MEAT SECTOR - Time to make the most of the Edge

As Pakistan's trade is limited to only few products, the country can capitalize on Halal food and meat industry for diversifying its export sector.

According to the estimates of OIC, during 2014; the global spending over all the halal sectors remained at about \$ 3.15 trillion representing 2.6% of market share in the world.

In the halal industry, halal food has grabbed the largest share of 36%, reflecting its higher demand among all other halal products in the world.

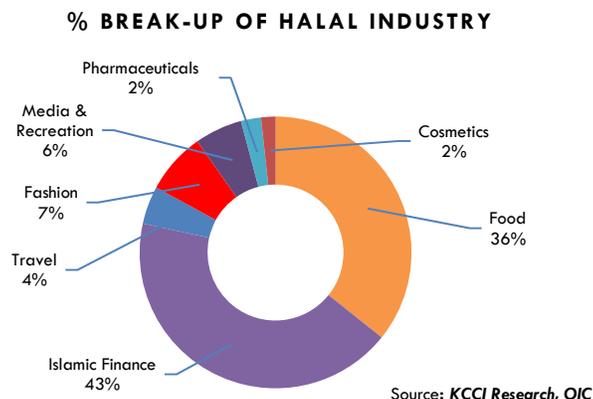
Confronted with the economic quagmire of energy and water crisis, critical law and order situation and infrastructural weaknesses, Pakistan's export has been stagnant for the past many years; which has made the country's economy remain stuck in the slow growth trap. In this crucial time, diversification of exports is a key for the country to steer itself out of this situation.

Located at a strategic position of Southeast Asia, Pakistan, an Islamic state, is endowed with high quality livestock; producing plenty of meat varieties. Possessing competitive advantage with respect to halal meat; Pakistan can diversify its export by capitalizing on halal meat sector as many non - Muslim countries like United States, United Kingdom, and New Zealand are utilizing their livestock for generating revenue through exporting halal meat items. Thus, Pakistan can enter into halal food industry to earn greater revenues.

To highlight the growing prospects of global halal food particularly the meat industry, the report presents a strong case of this sector in Pakistan by underlining its global growth and demand prospects, current state of local industry, problems faced by the industry in Pakistan and incentives available to the existing and new businessmen operating in this sector.

### Global Halal Industry: A Booming Sector...

The global halal ("permissible" or "lawful") industry has lately emerged as one of the fastest emergent consumer segments in the world markets. Muslims population, which makes about 24% (1.8 billion) of the world, have shown strong impetus in driving the demand for halal products due to upsurge in their income and awareness levels.



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Muslims' spending on halal Food & Beverages (F&B), during 2014, remained at about \$ 1.13Tn out of global spending of \$ 6.75 trillion; representing current market share of 16.9%.

It is projected that Muslims' spending on halal F&B would increase to about \$ 1.59 trillion by 2020.

Various halal food brands are globally operating in the halal food industry and are involved in supplying, processing, retailing and branding of halal food items.

According to the Organization of Islamic Countries (OIC), the overall spending on halal sector in the world remained at about \$ 3.15 trillion in 2014<sup>1</sup> (as per latest available figures) representing 2.6% market share of total spending in the world. The industry is largely dominated by consumer items ranging from processed foods and beverages, to the pharmaceuticals, fashion and cosmetics.

Among halal goods, halal food has grabbed the largest market share of about 36% in the overall halal industry, reflecting its upward trend in the world. Similarly, demand for halal services is also on rise; consisting of financial, travel, media and recreation services. The upswing in Islamic banking industry is an example of burgeoning halal financial services which has reached about more than \$ 1 trillion. The halal travel is a service which functions under the halal industry; offering tourism services with complete privacy for Muslim families and couples to enjoy their leisure time. Another rising segment "Halal Fashion" is related to the modest clothing (head scarves & abayas) among Muslims and has shown increasing response of young girls in this niche.

### Presence of Trillion Dollar Halal Food Market

Being the largest segment in halal industry; the increasing demand for halal food is evident with total spending of \$ 1.13 trillion on halal Food and Beverages (f&b) out of global spending of \$ 6.75 trillion on the Food and Beverages during 2014; representing its market share of 16.7%.

The Muslims are expected to make around 26% of world's population by 2020, thus their spending on halal F&B is projected to be at \$ 1.59 trillion occupying 16.9% of the market share. The augmented demand for halal food has made it a lucrative business activity to invest and earn profits.

### International Halal Food Brands

The industry is being operated at all levels from processing, supplying to retailing and branding of halal food. Various renowned halal food brands are globally running their businesses where processing of halal food is being done by IFFCO (UAE), ARMAN (China) and Brahim's

<sup>1</sup> <http://www.sesrtcic.org/imgs/news/file/1347-Presentation.pdf>

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The global meat production stood at 319 million Tons in the year 2015 as against 315 million Tons during 2014 with meat consumption being recorded at 43.4kgs per person.

Main demand for halal meat is driven by the Muslim countries in Middle East region including U.A.E and Egypt.

Major suppliers of meat are mostly non – Muslim countries including Australia, Brazil, Canada, the United States and New Zealand.

Holdings (Malaysia). The major suppliers of halal food include BRF Brasil Food Company, Cargill, and Euro Foods Group (UK). The famous retailers of halal food are LuLu Hypermarket (UAE), Carrefour, Tesco, BIM (Turkey) and Marrybrown (Malaysia). The famous brands of halal food are The Halal Guys (U.S.), Honest Chops (U.S.), ieat (U.K.), Chicken Cottage (UK), Mumtaz (U.K.), Al-Islami (U.A.E), Kawan Food, Nestle, Prima Agri products, QL foods, Saffron Road and Tahira etc.

A giant FMCG company, Nestle is considered to be one of the largest halal food manufacturers and processors in the world, possessing halal sales of more than \$ 5 billion with 75 out of 481 factories producing halal food worldwide.

### Halal Meat: A Growing Niche

Within halal food, halal meat is a prominent item which makes up a whole industry in itself. This niche is not limited to the processed meat only but its byproduct also makes up around 26 various other industries operating under it; including bone crushing, casings, sausages, leather, gelatin and other associated industries.

### Global Meat Industry

The global meat production stood at 315 million Tons during 2014 with meat consumption being recorded at 43.4kgs per person.

Under Islamic laws, halal meat items should not include alcohol, pork and it's by products, carnivores and animal's blood and that animal to be used for halal food items must be slaughtered in a way that its blood should be allowed to drain. Owing to this fact, rise in demand of halal meat is not only associated with the increase in Muslim consumers but many non-Muslim communities also have preferences for such items due to their ethical and safety procedures adopted while processing them.

The main demand for halal meat is driven by the Muslim countries like Middle East region including U.A.E and Egypt. The global fresh meat volume sales has recorded growth of 19% in African and Middle Eastern regions alone during 2014 as against average sales volume of 13% recorded in the same year. Within Asian Pacific region; during

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2009-2014, Pakistan, Indonesia and Malaysia recorded growth of 54%, 16% and 15% respectively<sup>2</sup>.

India has recently emerged as one of the most competitive players in halal meat industry.

### Global Halal Meat Suppliers

The countries which are the major suppliers are mostly non – Muslim like Australia, Brazil, Canada, the United States and New Zealand. France and Brazil are considered to be the largest halal chicken exporters in the world whereas United States and Australia are the largest halal beef exporters in the world. It is interesting to note that in recent years, India has emerged as one of the most competitive players in halal meat industry; only by specializing various aspects of its industry. According to the an independent research firm<sup>3</sup>, Indian exports of meat have grown by 318% in just five years from \$ 1.1 billion in 2009 to \$ 4.6 billion in 2014. Other Asian countries; Malaysia, Turkey and Thailand have also come on the forefront in meat exports.

Halal certification plays an important role for Non – Muslim meat suppliers to satisfy their Muslim consumers.

### Halal Certification

The Middle Eastern countries are one of the largest halal meat importers in the world which fulfil their demand by importing it mainly from Non – Muslim countries. However, a recent surge in demand for halal meat has been observed in Non - Muslim countries as well which includes Germany, United Kingdom and France where Muslims are considered to be an important minority. To satisfy their native Muslim consumers along with meeting strict halal import regulations from Muslim countries; halal certification plays an important role. According to the estimates, there are currently 122 certification bodies actively working in the halal markets of the world containing local government departments that regulate halal certification in their countries like Philippines, Thailand, Malaysia, Singapore and Indonesia. The certification is being provided for slaughterhouses and food including both processed and raw. These companies use halal logos on their items marketed in the stores which greatly help them in satisfying their Muslim consumers.

There are currently 122 certification bodies actively working in the international halal industry including local government departments of the countries.

<sup>2</sup> <http://halalfocus.net/euromonitor-promises-a-26-rise-of-halal-meat-market/>

<sup>3</sup> <http://www.brecorder.com/br-research/44:miscellaneous/5287:capitalising-on-halal-meat-market%E2%80%99s-potential/>

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There are various types of certification being availed on the basis of purpose and time duration:

Renowned halal certifications from various countries include JAKIM (Malaysia), MUI (Indonesia), SMIC (OIC), GSO (GCC), ESMA (UAE), IFANCA (USA), HFA (UK) and SGS

1. Certificate for Registering site; where a production facility, slaughterhouse, abattoir, a plant, food establishment or any other establishment where food is being handled. The place is being inspected and permitted for processing, channelizing and marketing the halal food. However it does not register product to be halal and implies that only the facility is halal.
2. Certificate for registering a halal product for a specific time duration.
3. Yearly certification; where food products are certified and certification is renewed automatically after the annual inspection; fulfilling compliance and fee payment.

The meat industry of Pakistan entered the world markets long time ago where its red meat is in great demand.

The certifications that are renowned for halal food from various countries include JAKIM (Malaysia), MUI (Indonesia), SMIC (OIC), GSO (GCC), ESMA (UAE), IFANCA (USA), HFA (UK) and SGS PAKISTAN.

### Domestic Meat Industry: Pakistan's Case

The meat industry of Pakistan entered the world markets long time ago where its red meat is in great demand in the international world particularly in Middle Eastern and Southeast Asian countries.

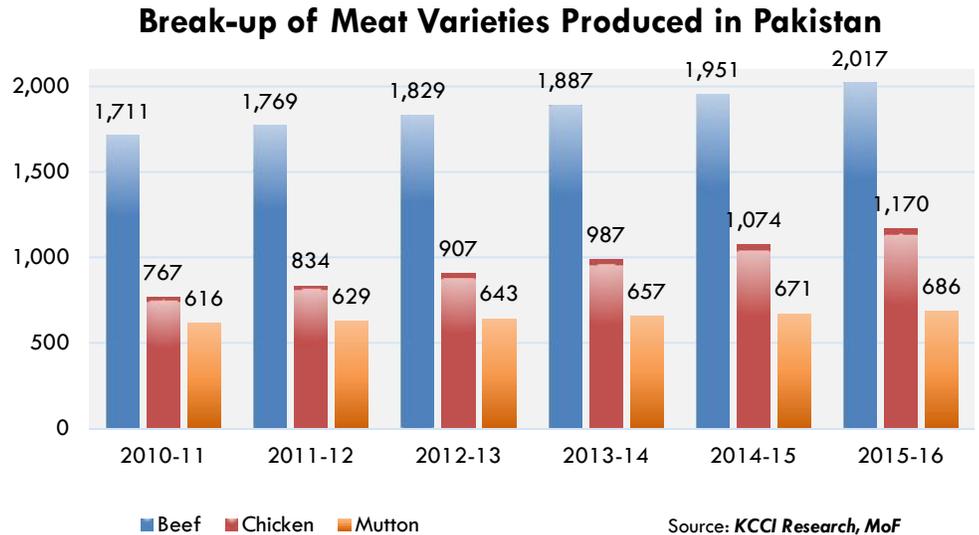
The production of quality meat is directly linked with livestock, being produced in Pakistan.

The production of quality meat is directly linked with livestock, being produced in Pakistan. With agriculture as its backbone, Pakistan is said to be the fifth largest livestock producer in the world. According to the Ministry of Finance, during Fiscal Year 2016, livestock sector posed a growth of 3.63% along with contributing 58.55% in agriculture sector of the country.

The production of livestock has been steadily increasing in Pakistan where the most widely produced livestock is Goat; producing around 68.4 million heads annually.

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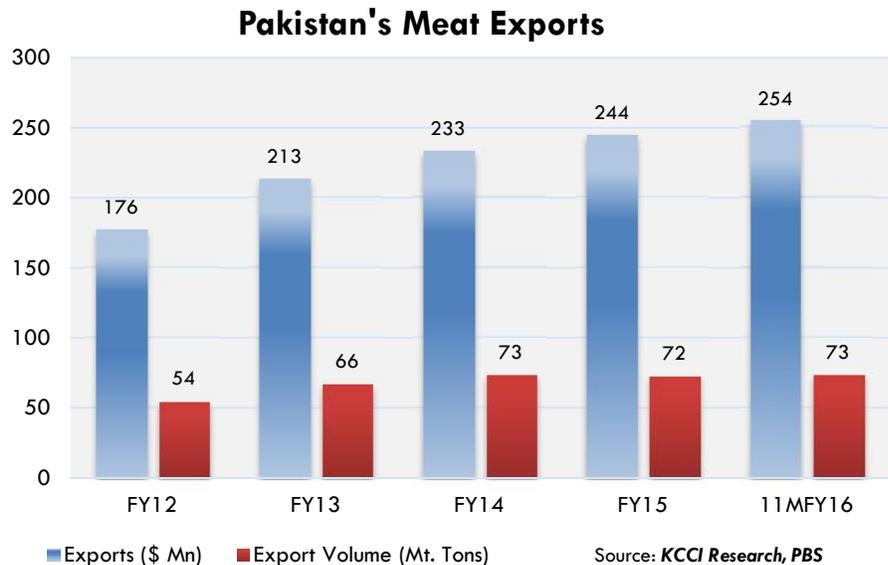
The most widely produced livestock is Goat; producing around 68.4 million heads annually.



Pakistan is said to be the fifth largest livestock producer and 19th largest meat exporter in the world.

With livestock's production increasing, generation of quality meat is also surging. Pakistan produces different kinds of meat mainly; beef, mutton and poultry. The annual production of meat varieties stood at 3,696 tons during Fiscal Year 2014 - 2015 as against 3,531 tons in the previous year showing 4.6% growth year-on-year.

Since 2003, Pakistan's meat industry has grown at a compound annualized rate of 27%.



Pakistan is the 19th largest meat exporter in the world where beef is its most traded export item. Since 2003, Pakistan's meat industry has grown at an annualized rate of 27% from \$ 14 million in Fiscal Year 2003 to \$ 244 million in Fiscal Year 2015 where 708,968 metric tons of meat was exported. Furthermore, during Jul-May.'16, Pakistan has

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exported meat of \$ 254.36 million. The upsurge in Pakistan's meat export shows the likeness for the country's quality livestock.

There are many companies successfully processing halal meat items on modern lines in Pakistan.

However new regions like South Africa, Russia, Indonesia and China are also being pursued to enhance its halal food exports in the coming years. Although, meat exports of Pakistan has been on the increase; they have remained low when compared with other competing countries.

### Halal Meat Export Destinations of Pakistan

Pakistan produces top quality meat and beef in particular. The key export destinations of Pakistan's halal meat industry for beef and chicken are United Arab Emirates, Saudi Arabia, Bahrain, Oman, Qatar and Kuwait.

Among them; PK Livestock is considered to be the oldest meat exporting company in Pakistan having mechanized abattoir facility.

#### Pakistan's Beef Export - Country Wise (\$ Mn)

	2013-14	% change	2012-13	% change	2011-12
<b>Total Exports</b>	<b>133.52</b>	<b>20%</b>	<b>111.22</b>	<b>40%</b>	<b>79.32</b>
<b>U.A.E.</b>	41.58	-5%	43.62	24%	35.10
<b>Saudi Arabia</b>	28.16	55%	18.14	35%	13.46
<b>Kuwait</b>	18.50	18%	15.71	52%	10.35
<b>Bahrain</b>	11.53	-13%	13.23	94%	6.82
<b>Oman</b>	9.98	-5%	10.50	25%	8.43
<b>Vietnam</b>	8.52	406%	1.68	3723%	0.04
<b>Iran</b>	6.95	65%	4.21	35%	3.12
<b>Qatar</b>	4.00	52%	2.62	98%	1.32
<b>Thailand</b>	1.69	966%	0.16	-	-
<b>Germany</b>	1.30	-	-	-	-
<b>Other Countries</b>	0.47	9320%	0.01	400%	0.00
<b>Afghanistan</b>	0.39	-54%	0.85	75%	0.49
<b>Hong Kong</b>	0.28	0%	0.28	-	-
<b>Malaysia</b>	0.06	-63%	0.16	100%	0.08
<b>Turkey</b>	0.06	-	-	-	-
<b>Yemen</b>	0.04	-14%	0.04	-58%	0.10
<b>Japan</b>	0.02	-	-	-	-
<b>United Kingdom</b>	0.01	0%	0.01	-	-
<b>Australia</b>	-	-	0.00	-	-

\*= After FY14, TDAP clubbed Beef exports in Meat & Meat preparations **Source: KCCI Research, TDAP**

The export destinations of Pakistan's halal meat industry are U.A.E, Saudi Arabia, Bahrain, Oman, Kuwait and Qatar.

India is the largest beef exporter in the world mainly due to the fact that it offers lower price in comparison to its competitors like Brazil. Furthermore, its proximity to China also helped in enhancing its export volume. However, as India exports "Carabeef" which is actually a buffalo meat, Pakistan can beat the competition by exporting high quality cow meat which is better in taste and is in great demand.

OIC in its “State of the Global Islamic Economy Report 2015/16”, has given second position to Pakistan in “Halal Food Indicator” (HFI). Having of best developed economy, needs for halal food are rising in the world. Pakistan, as against 3,531 tons in the previous year showing 4.6% growth year-on-year.

## Pakistan's Mutton Export - Country Wise (\$ Mn)

	2013-14	% change	2012-13	% change	2011-12
<b>Total Exports</b>	<b>58.92</b>	<b>-26%</b>	<b>79.40</b>	<b>13%</b>	<b>70.23</b>
<b>Saudi Arabia</b>	30.81	-4%	32.26	24%	25.92
<b>Bahrain</b>	10.17	-21%	12.88	137%	5.44
<b>U.A.E.</b>	7.67	-24%	10.16	6%	9.54
<b>Oman</b>	3.17	-16%	3.80	35%	2.80
<b>Kuwait</b>	2.48	-10%	2.77	60%	1.74
<b>Qatar</b>	1.73	-8%	1.88	15%	1.64
<b>Afghanistan</b>	1.14	8007%	0.01	-	-
<b>Vietnam</b>	0.54	391%	0.11	-	-
<b>Germany</b>	0.43	-	-	-	-
<b>Iran</b>	0.40	-97%	15.45	-33%	23.09
<b>Malaysia</b>	0.26	-	-	-	-
<b>Other Countries</b>	0.08	-	-	-	0.01
<b>Thailand</b>	0.03	-	-	-	0.02
<b>India</b>	0.01	-	-	-	-
<b>United Kingdom</b>	-	-	0.02	-	-
<b>Singapore</b>	-	-	0.05	-	-
<b>Spain</b>	-	-	-	-	0.04

\*= After FY14, TDAP clubbed Meef exports in Meat & Meat preparations **Source: KCCI Research, TDAP**

Pakistan's leading meat industry players include P.K. Food, MeatOne, Fauji Meat Limited, Mon o Salwa, and Organic Meat Company.

The quantity of mutton exports rose to 0.67 million tons during Fiscal Year 2015 from 0.66 million tons in the same period of last year. Similarly, the quantity of beef exports also rose to 1.28 million tons during Fiscal Year 2015 from 1.23 million tons in Fiscal Year 2014 which was exported from 29 private sector slaughterhouses of Pakistan.

## Industry Players

There are around 14 Pakistani companies successfully exporting halal meat items in the international markets. Among them, the leading industry players are PK Livestock Company (established in 1996), Quick Food Industries Ltd. (1997), Anis Associates Pvt. Ltd. (2002), Al – Shaheer Corporation Ltd (2008) and The Organic Meat Company (2010), Lahore Meat Company (2010), and Everfresh Meat (Shafi Group).

National Assembly of Pakistan approved bill for setting up Pakistan Halal Authority (PHA) in July 2015.

PK Livestock is considered to be one of the leading meat exporting company in Pakistan having mechanized abattoir facility in rural area of Karachi, Pakistan. It exports frozen and chilled meat in the international markets. The company further started its meat processing company “PK Foods” which offers various processed meat items of chicken, meat and beef in the local market of the country.

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Similarly, Organic Meat Company Ltd. possess large slaughtering facility of 50 heads per hour for buffalo/bull/cow and 120 heads per hour for sheep/goat. Similarly, Fauji meat Ltd. has a production capacity of 100 tons/day of meat including 85 tons/day for beef and 15 tons/day for mutton.

In an event, most of the above companies have established their retail brands as well which are operating in the local meat industry where MeatOne and Khaas (subsidiary of Al-Shaheer Corporation), MōnSalwa (Quick Food Industries Ltd.), P.K. Food (a subsidiary of PK Livestock), K&Ns and Organic Meat Company are the key players. The companies have set up state of the art meat processing facilities; designed to process all kinds of meat; cattle, buffalo, sheep and goat.

“Meat One” and “Khaas”; by Al – Shaheer Corporation Ltd, comparatively a new entrant, are considered to be the premium retail brands in the local meat industry. The company went for public listing last year in 2015 to mobilise funds.

Number of private Halal certifying bodies and govt. organizations have made it difficult for Pakistani meat exporters to comply with the halal standards of all the importing countries at once.

Similarly, Fauji Meat Limited by Fauji Fertilizer Bin Qasim Ltd (FFBL), is going to be another major market player in the industry when it becomes operational and will be in tough competition with the halal meat players operating at local retail and international markets of Pakistan.

### Competitive Advantage in setting up Meat Facility

The presence of quality livestock and low start - up cost are considered to be the major factors of competitive advantage for developing halal meat industry in Pakistan. According a study; an investment of around PKR 2 billion is needed to setup halal meat facility which will be comprising of slaughterhouse and a lairage area (land kept for receiving and calming livestock before slaughtering). Furthermore, the ban imposed by the federal government on export of live animals along with waiver given on import duty of meat industry tools and equipment; are steps toward incentivizing this sector.

Within “Halal Industry”, Pakistan is mainly operating in the raw meat industry where its share is insignificant.

### Pakistan among Top Halal Food players in OIC Ranking

The Organization of Islamic Countries (OIC) in its “State of the Global Islamic Economy Report 2015/16”, has placed Pakistan only after

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The meat industry is working on an informal basis in Pakistan and is being operated without any documentation.

Malaysia in a category of “Halal Food Indicator” (HFI); for having best developed economy needed for halal food operations in the world. Furthermore, in overall “Global Islamic Economy Indicator” (GIEI) ranking, Pakistan has also grabbed fifth position which shows that the country possess well organized halal sectors in categories of Finance, Pharmaceuticals and Cosmetics.

The ranking of OIC shows that halal industry in Pakistan can grow drastically in the coming years owing to the competitive advantage; the country possesses.

### Issues faced by Halal Meat Industry in Pakistan

Despite having competitive advantage and various incentives for halal meat industry in Pakistan, several issues are still faced by the businessmen operating in this lucrative sector; hindering the growth of halal meat industry in the country.

Pakistani meat exporters tend to struggle in obtaining halal certifications of each market making it difficult to operate in international markets.

#### Informal Practice prevails in Meat Industry

The meat industry is working on an informal basis in Pakistan where whole supply chain; from animal nurturing to meat selling, is being operated without any documentation. The animal purchasing is mostly being made from the rural areas from where traders buy the animals and sell them in city markets. The butchers then get these animals on cheaper rates without testing them for diseases/disabilities and slaughter them. As the slaughtering is not being done in a hygienic manner; it creates problem in meat supply on both national and international levels.

Pakistani meat exporters tend to struggle in obtaining halal certifications of each market making it difficult to operate in international markets.

#### Absence of Local Halal Accreditation body in Pakistan

The foremost challenge faced by the halal meat industry is that of halal standards which create confusion as number of private halal certifying bodies and government organizations exist in the global market. Pakistani market players tend to struggle in obtaining these halal certifications of each market making it difficult to operate in international markets. Thus absence of a unified local halal accrediting body has remained a major obstacle for the country’s halal meat exporters.

In this regard, the National Assembly of Pakistan has approved bill for setting up Pakistan Halal Authority (PHA) in July 2015, with the objective of accrediting halal products in the country. The authority

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Privation of technical expertise and incapability to meet the stringent safety codes are major hurdles; faced by meat industry.

The establishment of halal industrial zone is a healthy step toward developing this sector.

Presence of quality livestock, availability of processing facilities, and low start-up cost are considered to be competitive advantages existing in Pakistan for meat industry.

would accredit products under the standards prescribed by the Organization of the Islamic Cooperation (OIC). However, PHA is yet to get operational and the local halal meat exporters continue to get their products accredited by the respective destination country for exports.

### Privation of Technical Expertise

The privation of technical expertise is another major hurdle; restricting the growth of this lucrative sector in Pakistan. These include incapability with regard to meeting the stringent safety codes adopted by the meat importing countries due to weak infrastructure facilities, lack of technical know-how and low capability in terms of handling, storage, logistics, marketing, certification, and slaughtering process of meat.

### Lack of Policies and Incentives for Halal Meat Industry

Though the government authorities, in its budget for Fiscal Year 2016, announced income tax exemption of four years for the businesses that would set up production units for processing halal meat and obtain halal meat certification before December 2016, however industry needs more policies and incentives to attract the investors and businessmen in this sector.

### Establishment of Halal Processing Zones

Halal processing zone has also been established in Faisalabad which would offer investors tax holiday of 10 years and tariffs relaxation on importing plant, machinery and equipment. A similar processing zone needs to be set up in other areas also; particularly in Karachi, which has an added advantage of exporting halal food items being the port city of Pakistan.

### Recommendations

Despite having immense potential and possessing strong competitive advantage, Pakistan's halal meat industry is still in its nascent stage where its share in the global halal food market remains merely around 5%. The major problem lies in setting up appropriate halal standards which are acceptable in all the halal import markets particularly Saudi Arabia and Middle Eastern countries.

## HALAL MEAT SECTOR - Time to make the most of the Edge

Pakistan's halal meat industry is still in its nascent stage where its share in the global halal food market is merely around 5%.

Similarly, among global food trade, as halal meat is the fastest growing segment; Pakistan should effectively capitalize on the widespread global demand. The country should approach new markets for attaining high profit margins like Turkey as its meat consumption is expected to show strong demand in the near future due to the large influx of Syrian refugees. Similarly, Chinese markets can also be explored for attracting customers.

Moreover, under “Halal Products”, Pakistan is mainly operating in the raw meat industry and even in that segment; its share has remained insignificant. There are many other segments of halal food which offers lucrative returns like processed food products, value added meat products and beverages which can be taken into consideration for investment and diversification strategy.

Furthermore, the establishment of halal industrial zone is another healthy step towards developing this sector which would encourage further investment in the country. Since, positive aspects of the industry override the difficulties, many dynamic entrepreneurs are entering halal markets; finding new opportunities existing in overall supply chain i.e. processing, packaging, distribution and marketing of halal food items. The industry's success models can be taken as exemplars by the new entrepreneurs planning to invest in low cost business sectors.

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