

# Food & Allied

**Poultry**  
**Cooking Oil**  
**Packaged Food**  
**Bibliography**

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# Poultry & Eggs

# Poultry Industry



- Turnover of PKR ~750 billion in FY17.
- Contribution of 1.4% in GDP during FY17.
- Employment to over 1.5mln people.
- Growth rate of ~10% per annum.
- Consumes over 7mln metric tons of agro residues.
- Over 25,000 poultry farms.
- Poultry meat contributes 31% of the total meat production in the country

Type	Units	2014-15	2015-16	2016-17
Poultry Meet	"000" Tonnes	1,074	1,170	1,276

Type	Units	2014-15	2015-16	2016-17
Poultry Birds	Million Nos.	932	1,016	1,108
Day Old Chicks	Million Nos.	862	945	1,037

# Eggs Production

Type	Units	2014-15	2015-16	2016-17
Eggs	Million Nos.	15,346	16,188	17,083



- Eggs showed a growth of ~5.5% in 2016-17.
- Layer showed estimated growth of 7%.

# Cooking Oil

# Cooking Oil Industry

- Pakistan is the 4<sup>th</sup> largest market for cooking oil Consumption
- Pakistan is the 3<sup>rd</sup> largest global importer of cooking oil
- 2<sup>nd</sup> largest import after petroleum
- FY17: Import of 2.6 million tons of cooking oil (cost \$1.3 billion)
- Fulfills 75% of domestic demand
- Remaining 25% met by local extraction and refining from seeds & crude cooking oil (122 local extraction & manufactures units)
- FY17: Oil seed Import of 2.2 million tons
- Major imports are from Indonesia & Malaysia in form of Crude & Refined cooking oil
- Quality of cooking oil depends on
  - Presence of fatty acids
  - Melting point
  - Better nutritional value

# Solvent Extraction Plants

- In Pakistan there are 95 solvent extraction plants – 30 are in working state
  - Hyderabad (2)
  - Faisalabad (2)
  - Bhawalpur (8)
  - Multan (37)
  - Lahore (10)
  - Karachi (24)
  - Jamshoro (3)
  - Rawalpindi (2)
  - Islamabad (2)
  - Rajan Pur (2)
  - Jhang, Sukkar, Burewala & Muzafargarh (1 each)

# Packaged Food



# Confectionery Industry

Pakistan's total Confectionary industry is of PKR ~40bln i.e ~0.1% of total GDP

Confectionary industry mainly includes

- Chocolates
- Bubbles
- Candies & Lollypop
- Jellies
- Cakes

Major Players of confectionary industry are

- Mondelez International – Cadburry
- Ismail Industries - Candyland
- Hilal Confectionaries - Hilal
- Volka Foods - Gigly
- Asian Foods – Mayfair

Market shares

- Candyland is the market leader with 27% market share
- Hilal is second most famous brand with market share almost equivalent to Candyland

The logo for CandyLand, featuring the brand name in a blue, cursive font with a decorative underline.The logo for Hilal, consisting of the word "Hilal" in a white, cursive font on a red, triangular background.The logo for Cadbury, featuring the brand name in a white, cursive font inside a dark blue, oval shape.The logo for Gigly, featuring a yellow smiley face with a hand pointing to its cheek, above the brand name in a white, cursive font on a pink background.

# Biscuits

- Pakistan's total Biscuit industry is of PKR ~66bln i.e ~0.5% of total GDP
- Biscuit Industry includes Biscuits, Cookies and waffers
- Pakistan's major industry players which EBM, LU, Biscoffi, Cookania, Kolson, Whistles, Mayfair and others.
- English Biscuit Manufactures through its brand Peak Freans is the market leader of the industry.
- Sooper is the most selling biscuit brand of Pakistan with over 12bln sales.



**Biscoffi**



*The Legend Leads ..*



# Snacks

- Pakistan's total Snack industry is of PKR ~36bln
- Pakistan's Snack Industry is dominated by international brand – Fritolay by Pepsi Cola Inc.
- Famous Snacks of Pakistan include Potato Sticks & Slanty by Kolson. Lays and Wavy by Fritolay, Kurleez by Snackcity, Oye Hoye by United Snacks



# Bibliography

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