Pioneer of

GENDER-SORTED SEMEN TECHNOLOGY
IN PAKISTAN

GREEN CORPORATE LIVESTOCK INITIATIVE

Livestock Sector of Pakistan

Livestock is the backbone of Pakistan's agriculture, contributing over **63.60%** to agriculture sector and **14.97% to the National GDP**. With more than 200 million animals, the sector supports over 8 million rural households, providing **milk**, **meat**, **draught power and livelihoods**. Pakistan ranks among the top producers of milk globally, yet per-animal productivity remains low due to outdated breeding practices, genetic limitations and poor herd management.

The sector holds immense potential for growth through the **adoption of modern technologies**, **improved genetics**, **and commercial farming models**. Strategic investments in breeding, nutrition, animal health and value-added processing can unlock significant economic, export and employment opportunities making livestock one of the Pakistan's most promising sectors for **food security**, **poverty alleviation and enhancing export potential**.

MESSAGE FROM THE CHAIRMAN

At Green Corporate Livestock Initiative (GCLI), we believe that the future of Pakistan's livestock sector lies in **innovation**, **technology**, and **sustainability**. With over 251 million heads of livestock, this sector holds immense potential to drive national growth. However, outdated practices and genetic limitations have long constrained its development. Our mission is to **transform national herd** through advanced technologies that enhance productivity and uplift farmers' livelihood. From the establishment of Pakistan's first Sexed Semen Laboratory and cutting-edge IVF labs to the development of superior exotic and indigenous breeds, GCLI is spearheading a new era of precision breeding and genetic advancement.

Our initiatives go beyond genetics. Through our **Grass Root Incentivized Dairy Development** (GRIDD) program, we are directly supporting small farmers with door-step extension services, guaranteed offtake and training - bringing real change to rural communities. In parallel, our **Corporate Livestock Farming** projects at Jugaitpeer, Rakh Ghulaman and Kallurkot demonstrate the scalability of modern livestock operations with genetic research, value addition and sustainability at their core.

Recognizing the importance of traceability and disease control, GCLI has launched National **Tag & Traceability** and **Disease Control Drives** to improve animal health through production of international standard vaccines and strengthen Pakistan's compliance with global export standards. We are also leading efforts to revitalize Pakistan's fisheries sector, promoting **cage fish farming**, **shrimp farming**, and responsible **marine harvesting** to unlock the potential of our blue economy.

At GCLI, we envision a livestock sector that contributes meaningfully to food security, rural development, women empowerment and economic resilience. Together, with the support of our partners in government, private sector and the farming community, we are building a thriving, technology-enabled future for Pakistan.

Let's collaborate and advance — from **potential to progress** and **innovations to impact**.

MAJ GEN
Muhammad Shuja Anwar
HI (M), RETD

Team GCLI

Striving Together for
SUSTAINABLE DEVELOPMENT OF LIVESTOCK SECTOR

Chairmain / CEO GCLI

MAJOR GENERAL MUHAMMAD SHUJA ANWAR HI (M), (RETD)

COO

BRIGADIER RAJA EHTASHAM YOUNIS SI (M), (RETD)

Company Secretary

COLONEL
M ASIM IMRAN
KHAN SI (M) (RETD)

Director Livestock

COLONEL
ABDUL REHMAN
QURESHI (RETD)

Director Farms

COLONEL
M IMRAN MASOOD KHAN TI
(M) (RETD)

AD Livestock

LIEUTENANT COLONEL
M TARIQ KHAN TI (M)
(RETD)

AD Livestock

LIEUTENANT COLONEL
SHAHNAWAZ
(RETD)

DAD Livestock

MAJOR DR
TARIQ MASOOD TI (M)
(RETD)

CFO

SARMAD ALI

Manager HR

ZAIN KHAN

Manager Media

HOOR UL AIN

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Landscape of Livestock Sector

Cattle & Buffalo Population

110.7 Mn

Annual Milk Production

74,689 Mn lits

Milk Production	Meat Production
74.69 Mn Tons	6.314 Mn Tons

3rd Largest Milk Producer in the World

Potential

Dairy Export Potential	Meat Export Potential
$ 14.5 Bn	$ 5 Bn

24 % **AGRICULTURE** Share in GDP

64 % **LIVESTOCK** Share in Agri Sector

14.97 % **LIVESTOCK** Share in GDP

Issues

- More than 90% Herd in **Small Holding**
- Lack of **Best Management Practices**
- Negligible **Value Addition**
- **Low Yielding** Herd
- **Animal Health**
- No **Traceability**
- Unreliable **National Data**

Revival of Livestock Sector

Necessitated for

Poverty **ALLEVIATION**

Food **SECURITY**

Import **SUBSTITUTION**

Reference: Economic Survey of Pakistan 2025 - 26, Livestock Census 2024 & FAO

Our Vision

To catalyze the **transformation** of Pakistan's livestock sector into a dynamic and sustainable industry, fostering **economic growth**, **food security** and **livelihood opportunities** for communities across the nation






From Field to Future

GCLI Driving Sustainable Livestock Solutions

Stakeholders

- Public Sector
- Private Sector
- Pakistan Army

GREEN CORPORATE LIVESTOCK INITIATIVE
PRIVATE LIMITED

Our Role

Synergize

Integrate

Facilitate

Coordinate

Synergizing for Sustainable Growth

Our Initiatives

Herd Transformation

Grass Root Incentivized Dairy Development

Livestock Farming

Tag & Traceability

Disease Control

Modern Cattle Markets

Fisheries

National Herd Transformation Drive

02

Revitaliszing Herd Potential

Through Modern Technology

Cattle & Buffalo Breeds

EXOTIC

MILCH BREEDS


Friesian


Jersey

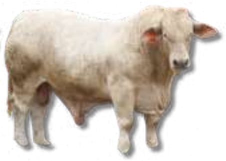

Brown Swiss


Gir

BEEF BREEDS


Brahman


Braford


Charbray


Nelore


Angus


Wagyu

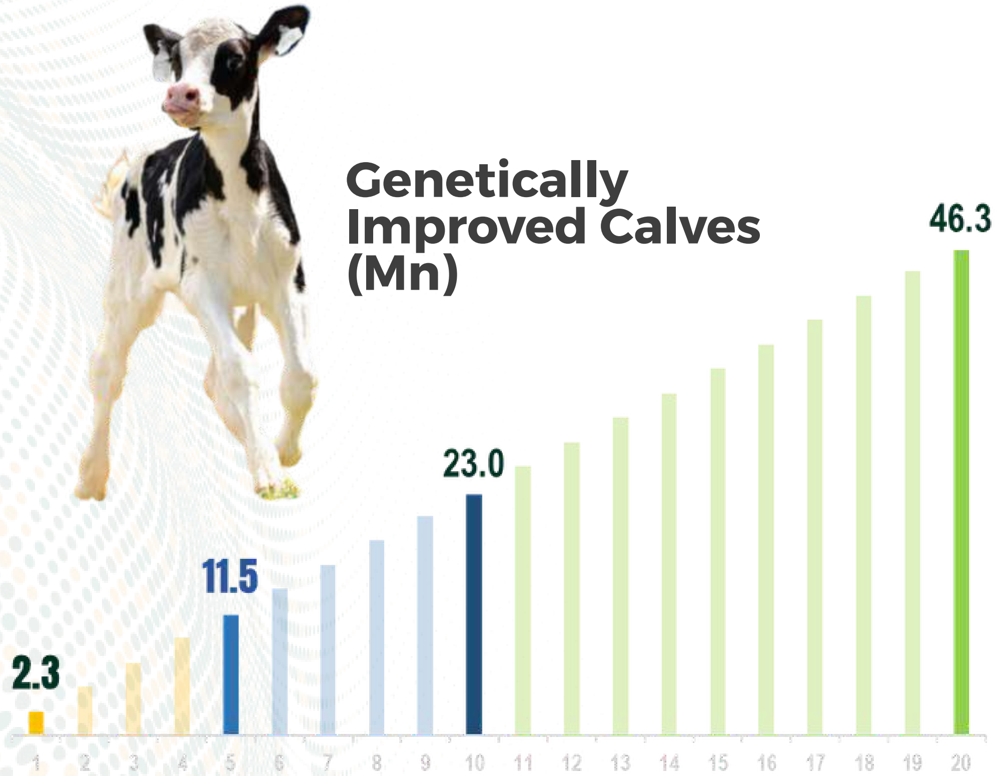
DOMESTIC

Herd Transformation Strategy

Seperate MILK & MEAT Breeds

- **Indigenous Breed Preservation**
- **Introduction of Exotic Breeds**
- **Upgradation of Non-Descript Herd** (about 90%)

Plan



	5th Year	10th Year	20th Year
Milk (Mn Ton)	+31	+89	+204
Meat (Mn Ton)	+1.3	+3	+6
Financial Effect	$24 Bn	$91 Bn	$363 Bn

Collaborative Approach

GCLI

RV&FC

Public Sector

Private Sector

Means of Proliferation

Conventional /
Sexed Semen Straws

In Vitro Fertilization
(Embryos)

Proliferation Through Technology

03

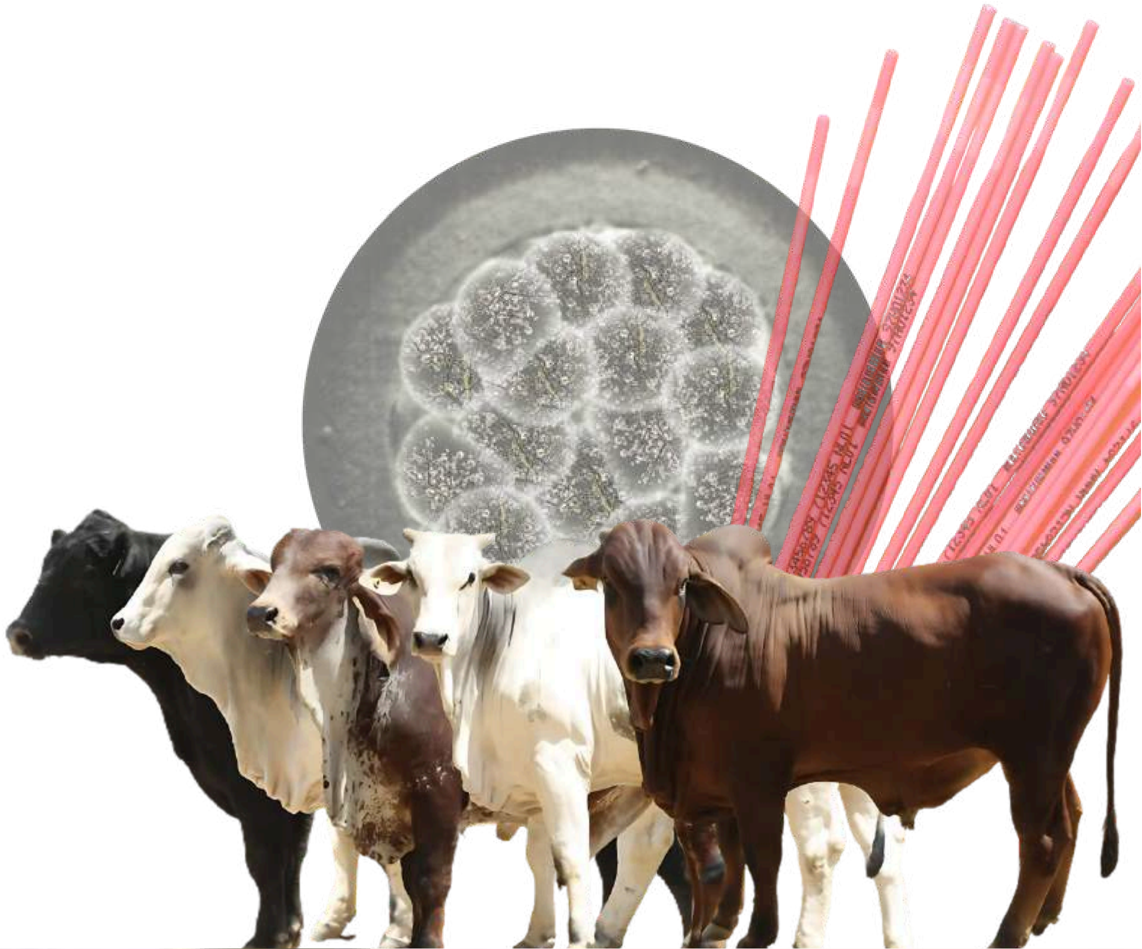
Sexed Semen Lab

In Vitro Fertilization Labs

Genomic Labs

Proliferation Through Technology

Combination of **In-Vitro Fertilization** with **Sexed Semen** and **Genomic Selection**



Improved Genetics

ENHANCED MILK OR MEAT OF LIVESTOCK

Outreach Approach

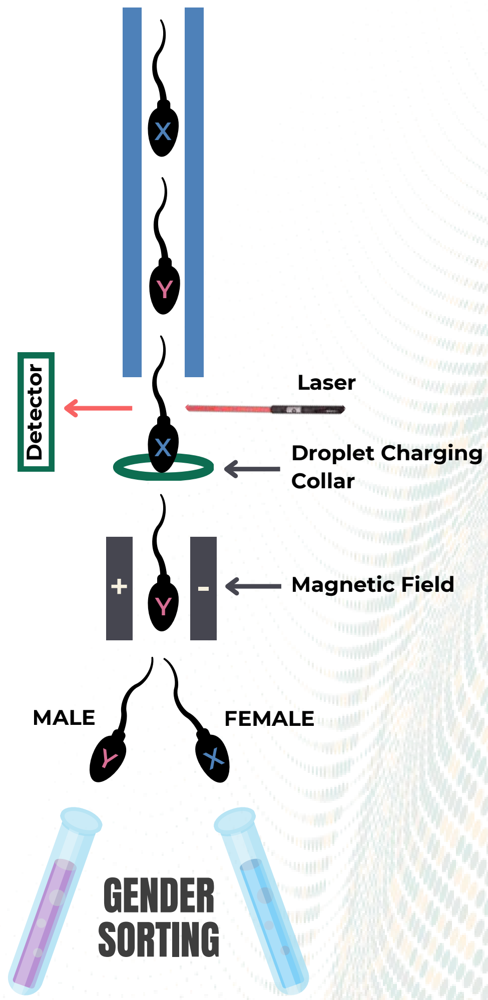
Mobile Veterinary Vans and Artificial Insemination Technicians

Fall-In Approach

Housing facility available for Livestock farmers to place their cattle at Lab Premises (Okara Farm) for 3 months. Confirmed pregnancy will be ensured

Sexed Semen Technology

Sexed semen technology is a groundbreaking reproductive innovation that enables farmers to choose the sex of their offspring before insemination, typically favoring **female calves** for dairy production and **male calves** for beef. GCLI has made history by establishing **Pakistan's first Sexed Semen Lab** at Okara - a significant milestone for livestock development. This technology offers numerous benefits, including targeted gender selection with up to 90% accuracy. In dairy farming, it facilitates the production of more female calves (heifers), thereby **boosting milk production**. In beef farming, sexed semen from high-yielding breeds increase the proportion of male calves, **optimizing meat production** and **enhancing overall efficiency**



Targeted
Gender Selection

Predetermine the Sex of Offspring

DAIRY FARMERS
Produce more female calves for enhanced milk yield

FEEDLOT FARMERS
In beef farming, where male animals are preferred for meat production, sexed semen of **high-yielding breeds** (more average weight gain per day) can be used to ensure a higher proportion of male calves, optimizing beef production

Sexed Semen **Technology**

1st Ever & the ONLY Sexed Semen Lab in Pakistan

Genetic Improvement and Breed Enhancement

- Selective Breeding
- Diversity of Breeds

Increased Productivity

- High Success Rate of Gender Selection
- Efficient Use of Superior Genetics
- Rapid Scaling of Herds
- Cross-breeding Opportunities

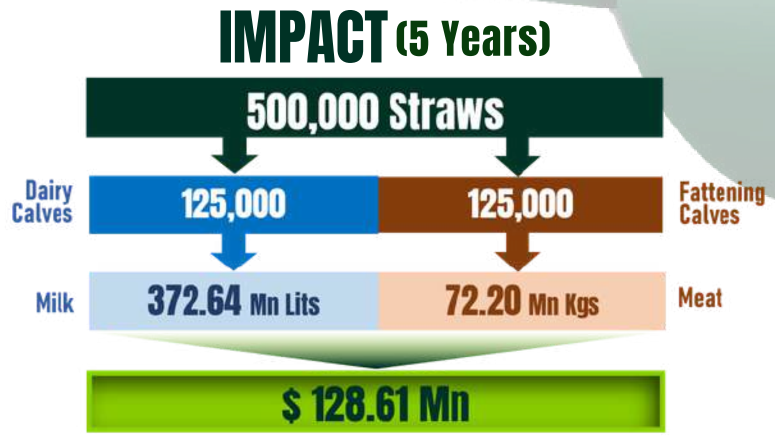
Sustainability and Efficiency

- Resource Optimization
- Reduced Disease Prevalence

Economic Benefits

- Higher Yield and Profitability
- Boosting National Economy

Empowering Farmers Access to Superior Genetics



Sexed Semen Lab

Established at
OKARA
Operational With Effect From
JULY 2025

ST Genetics Lab

Producing
500,000
Gender Sorted Straws Annually

In Vitro Fertilization Laboratory

GCLI IVF Lab Okara

4 x IVF Labs – Pvt Sector

GCLI has established an **advanced In Vitro Fertilization (IVF) lab at Okara**, to impact national herd transformation drive by **accelerating genetic improvement, increasing productivity and enhancing the overall quality of livestock**. 5,000 Embryos of superior genetics of high yielding cattle are being produced annually. IVF offers numerous benefits for livestock farmers, including the introduction of **high-yielding and disease-resistant breeds** to enhance genetic diversity and resilience. It enables faster herd growth by producing **more calves in less time** and allows elite bulls and cows to contribute to more offspring, maximizing genetic potential.

Through IVF, large-scale embryo production from superior animals accelerates herd transformation. The technology also supports **cross-breeding for desired traits**, improves resource efficiency, and reduces healthcare costs by selecting **disease-resistant genetics**. Farmers can boost productivity, profitability, and contribute to economic growth and gain access to our elite breeding program. IVF technology plays a critical role in leading to a more robust and high-performing livestock sector.

Impact
(5 Yrs)

Milk	Meat	Impact
35.3 Mn Lits	10.3 Mn Kg	$18.3 Mn

In Vitro Fertilization Laboratory

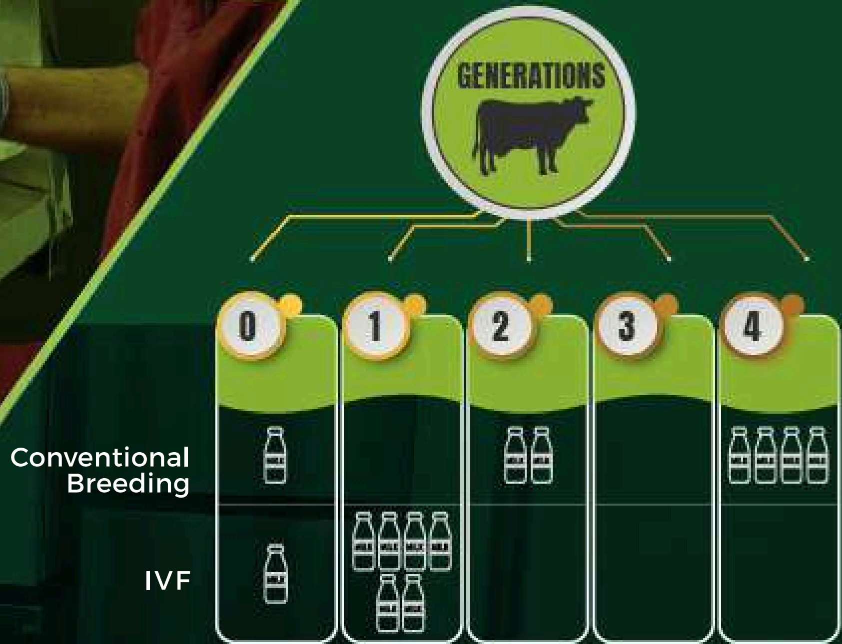
Exotic Calves
from Non Descript Surrogate Mothers

Friesian Calf

Brahman Calf

BOOST PREGNANCIES WITH ELITE EMBRYOS

ANNUAL PRODUCTION
5,000
EMBRYOS



Rapid Enhancement of Milk Potential

Superior Genetic Animals

The combination of Superior Genetic Cattle, IVF and Sexed Semen technology is transformative for Pakistan's national herd. Superior bulls bring the highest-quality genetics, IVF amplifies the speed and scale of genetic improvement and sexed semen ensures that the desired traits are passed on with precision. Together, they enhance productivity, sustainability and economic prosperity, while empowering farmers to contribute to the long-term transformation of the Livestock Sector

Resilient National Herd
Reduced Genetic Drift

DAIRY BREEDS

HOLSTEIN FRIESIAN

JERSEY

RED SINDHI

SAHIWAL

GIR

BUFFALO BULL

BEEF BREEDS

BRAHMAN

ANGUS

NELORE

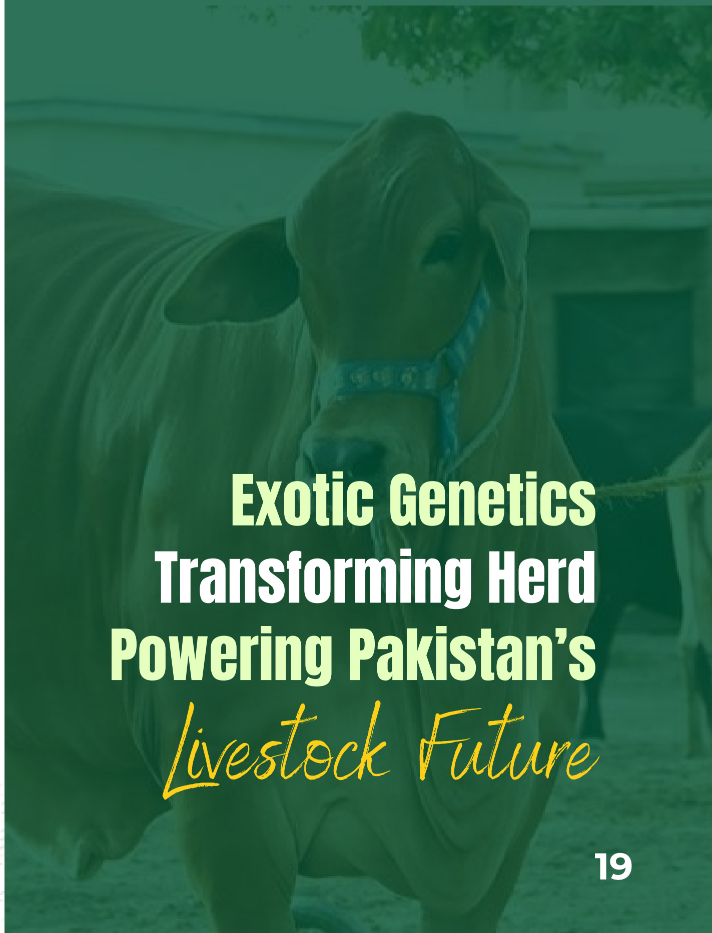
WAGYU

BRAFORD

CHARBRAY

Proliferation of Exotic Breeds

Superior bulls bring the highest-quality genetics, IVF amplifies the speed and scale of genetic improvement, and sexed semen ensures that the desired traits and gender are obtained



Exotic Genetics Transforming Herd Powering Pakistan's *Livestock Future*

Indigenous Breed Preservation

Preservation of indigenous livestock breeds is vital to ensure genetic diversity, climate resilience and long-term sustainability. Indigenous breeds of Pakistan cattle and buffalo are uniquely adapted to local conditions, with traits like heat tolerance, disease resistance and efficient feed conversion, making them strategic assets for Pakistan's livestock future. However, due to unregulated crossbreeding and neglect, many of these breeds face risk of genetic dilution or extinction. Preserving and promoting these breeds not only safeguards national biodiversity but also strengthens the foundation for a resilient, productive and self-reliant livestock sector

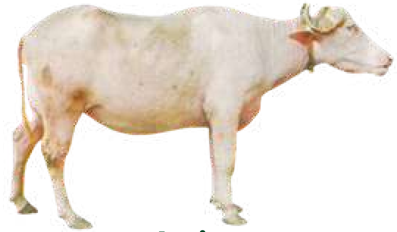
GENTIC DIVERSITY | CLIMATE RESILLIENCE | SUSTAINIBILITY

Indigenous Breeds Preserved

at GCLI Farms Okara

Khyber Pakhtunkhwa

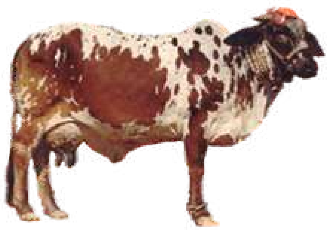
Azi Kheli



Achai

Punjab

Sahiwal



Cholistani

Nilli Ravi

Sindh

Thari

Red Sindhi

Kundi

Balochistan

Bhagnari

HEAT TOLERANT

DISEASE RESISTANT

EFFICIENT FEED CONVERSION

Grass Root Incentivized Dairy Development

04

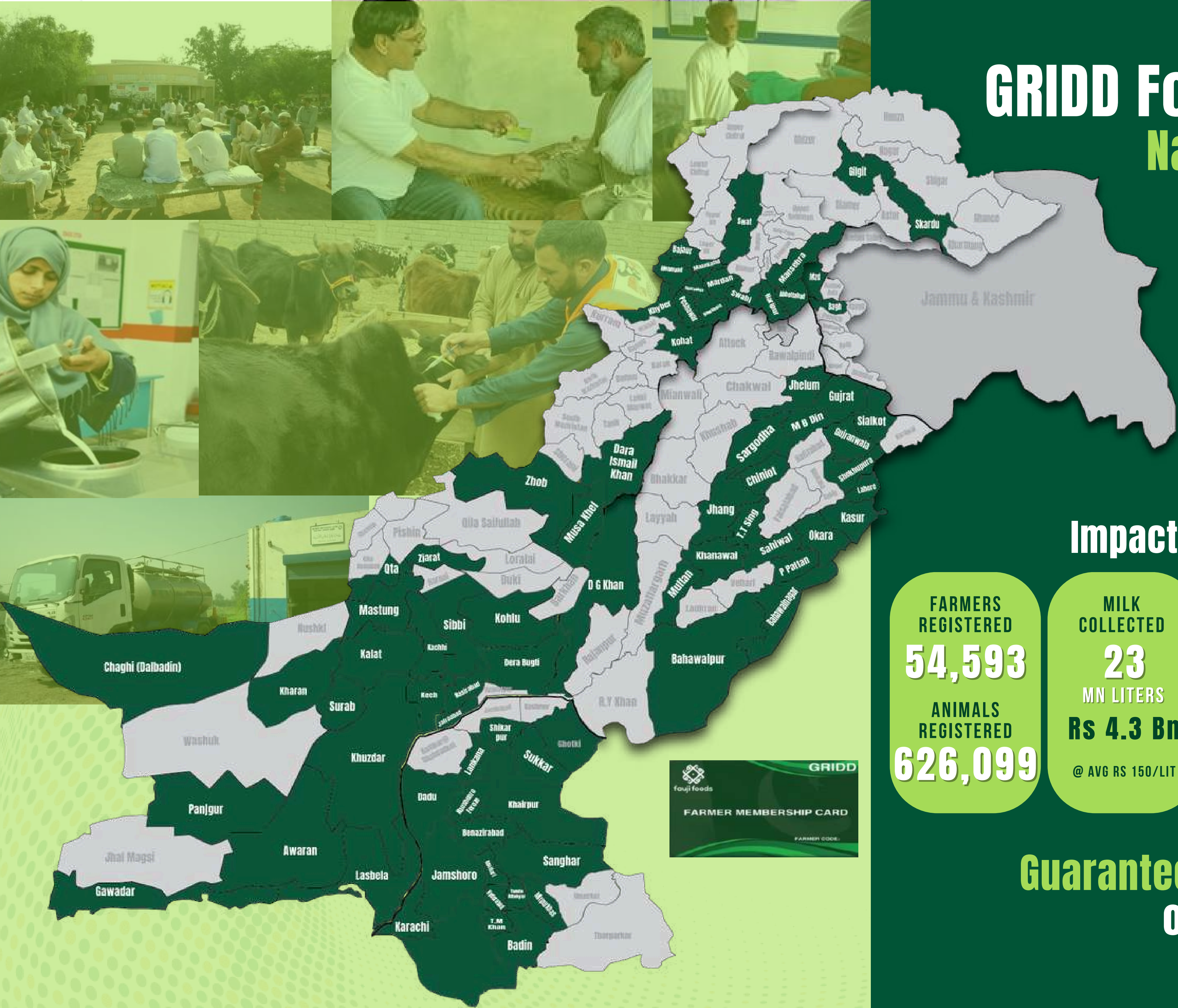
Enhancing dairy and meat production by harnessing small holdings with rural farmers through provision of doorstep free of cost / subsidized extension services; semen of elite bulls (dairy and meat), sexed semen, vaccination, animal treatment, awareness to modern animal management technology, provision of biogas facility and other social services etc thereby transforming their low yielding animals to high producing herd. In the process, contributing towards poverty alleviation and uplifting the living standards of local farmers

GRIDD Footprint
Nationwide

Launched in

84

Districts
&
Expanding



Impact (More than)

FARMERS REGISTERED	MILK COLLECTED	EXTENSION SERVICES PROVIDED
54,593	23 MN LITERS	Rs 819Mn
ANIMALS REGISTERED 626,099	Rs 4.3 Bn @ AVG RS 150/LIT	To Date

Guaranteed Offtake of Produce

Collaborating with

Pakistan Northern Cheese Society

Pakistan Northern Cheese Society (PNCS), is a registered **artisan organization,** inspired by the American Cheese Society. PNCS is the only institution in Pakistan focused on **value addition through traditional and modern cheese production** using milk from **goats, sheep, yaks, cows and buffaloes**

Mission

To revive, refine, and promote **traditional cheese-making practices** from all cattle types **across rural and mountainous northern regions** of Pakistan by integrating:

- Education & Training
- Innovation & Research
- Sustainability & Community
- Empowerment Collaboration with Institutions & Farmers

Reviving Pakistan's Cheese Heritage

Locally Crafted | Globally Recognized

As part of the **GRIDD Initiative**, GCLI has partnered with PNCS to **empower women** and **uplift the livelihoods of subsistence livestock farmers**, with core focus on:

Core Focus Areas

- Preserving endangered cheese-making heritage
- Establishing global recognition of Pakistan's traditional cheeses
- Providing complete production solutions - from kitchen-scale to industrial setups
- Delivering theoretical and hands-on training across diverse Northern region of Pakistan

Impact Highlights

- **First Artisan Cheese brand of Pakistan** having international recognition with inquiries from Mongolia, UAE, and Canada
- Empowering individuals through **training and sustainable livelihoods**
- Connecting **Pakistani cheese artisans with global networks** like American Cheese Society

Pakistan's first

Center of Excellence for Cheese Education

HERITAGE-BASED CHEESE

Empowering Local Community

Corporate Livestock Farming

Jugaitpeer
District Bahawalpur

Integrated farming
30,000 Animals

Rakh Ghulaman
District Bhakkar

Cattle Rearing
2800 Cattle

Kallurkot
District Bhakkar

Dairy farming
2400 Cattle

05

GCLI's Corporate Farming projects focus on sustainable, large-scale operations that harness advanced technologies to optimize herd productivity and profitability. Equipped with modern livestock machinery and management practices, these farms also serve as hubs for genetic advancement—featuring a Genetic Research Center at Jugaitpeer, an IVF Lab for elite embryo production at Rakh Ghulaman and a Value Addition facility at Kallurkot

PRODUCTIVITY | PROFITABILITY | MODERNIZATION

AFTER

SUPERIOR ANIMALS

IVF LAB

SEMEN PRODUCTION UNIT

CENTRAL PIVOTS

Jugaitpeer

Flagship Livestock Farm

Genetic Research Lab

Development of High-Yield indigenous breeds

One Stop - All Solution

Unique project in the region

SCOPE INTEGRATED FARMING 30,000 ANIMALS	**LAND** 4,200 ACRES
DEVELOPMENT PERIOD 3 YEARS	**INVESTMENT** RS 32 BN
IVF LAB	GENETIC RESEARCH LAB

SOCIO ECONOMIC IMPACT

247	Jobs
1.15 Mn	Genetically Improved Animals (5 Years)
Rs 336 Bn	Revenue (20 Years)

Rakh Ghulaman

Project will **enhance milk production (Rs 1.9 Bn)**

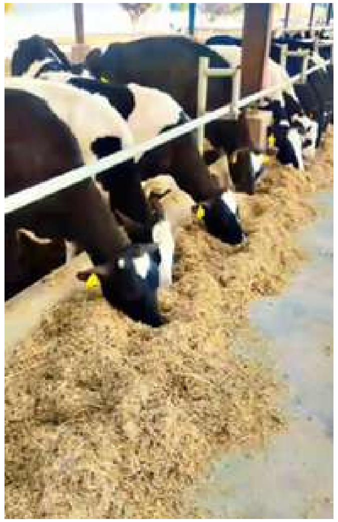
Complement **Herd Transformation Drive - IVF Lab**

SCOPE	LAND
CATTLE REARING 2800 CATTLE	1,000 ACRES
DEVELOPMENT PERIOD 2.5 YEARS	**INVESTMENT** RS 9.38 BN

IVF LAB

SOCIO ECONOMIC IMPACT

103	Jobs
0.55 Mn	Genetically Improved Animals (5 Years)
Rs 144 Bn	Revenue (20 Years)



Kallurkot

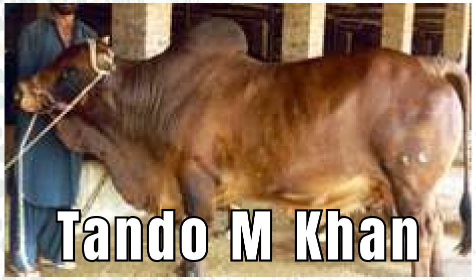
Project will **enhance production of processed milk products (Rs 1.64 Bn)** – **Value Addition Setup**

SCOPE	LAND
DAIRY FARMING 2400 CATTLE	741 ACRES
DEVELOPMENT PERIOD 2.5 YEARS	**INVESTMENT** RS 12.31 BN

VALUE ADDITION SETUP

SOCIO ECONOMIC IMPACT

Jobs	99
Revenue (20 Years)	Rs 130 Bn



Revival of Govt Livestock Farms

Redundant Govt Livestock Farms being revived through **Joint Venture** (JV) between **GCLI**, **Livestock Departments** and **Private Investors**

Investors to take over existing farm for 30 year lease period to develop along modern lines and will:

- **Perform all core functions**
- **Pay salaries to existing staff, rent and utility bills**
- **Establish Disease-Free Compartment**
- **CSR**

Yak Farming
Gilgit Baltistan

MODEL

- Land – Investor
- Investment – Investor
- Extension Services – Livestock Department
- Security – Livestock Department

Started From
3,000

Now At
3,490

Yak Calves Born
490

Alternate Asset Business Model

Feedlot Fattening Farm

Model

- CAPEX – Investor
- OPEX – HBL
- Profit Sharing – 40 / 60 %

2 x Pilot Projects under taken

Details	First Pilot Project	Second Pilot Project
Funds Allocated	Rs 100 Mn	Rs 1.5 Bn
Tenure	10 Months	11 Months
Farms	1 (Multan)	10
Total Herd	2,628	22,088

Key Achievements

- Documented banking transactions
- Job creation
- High quality inputs
- Established robust data-gathering system for animal weight, health & productivity
- Institutional partnerships with livestock consultants and rural experts
- Enhanced training and inclusion of women veterinarians

Tag & Traceability

Required For

HERD TRANSFORMATION
ADD VALUE TO PRODUCT
DISEASE SURVEILLANCE
CURB ILLEGAL SLAUGHTERING / SMUGGLING

06

Tag & Traceability

Tagging, Traceability, and Registration initiative aims at **identifying**, **monitoring** and **documenting** the nation's animal population with a **unique identification number**, ensuring accurate record-keeping and facilitating traceability throughout the animal's lifecycle. By implementing this initiative, **GCLI aims to enhance biosecurity**, **improve disease control and boost the overall health and productivity of the animal herds**, ensuring compliance with national and international standards. This program is pivotal in transforming Pakistan's Livestock industry, **fostering transparency** and **promoting sustainable livestock management practices**

Tag To *Thrive*

More than **569,746** Animals Registered

More than **116,168** Premises Registered

Disease Control

Disease Control

Local Production of International Standard Vaccines

天康制药

FMD Vaccine

• Required	300 Mn Doses
• Local Production	40 Mn Doses
• **Shortfall**	**260 Mn Doses**

PROGRESS

- MoU b/w **GCLI TECON Bio Pharma (China)** & **Technoman Kinetics (Pak)**
- Initial Capacity – **100 Mn Doses** (Expandable 200 Mn to 300 Mn)
- Setting up of FMD Plant at Education City Kci (25 Acres). Site NOC under process
- Lab tests / Fd Trials of vaccine to commence at NVL (MoNFS&R)

Modern Cattle Markets

PUNJAB CATTLE MARKET MANAGEMENT & DEVELOPMENT COMPANY

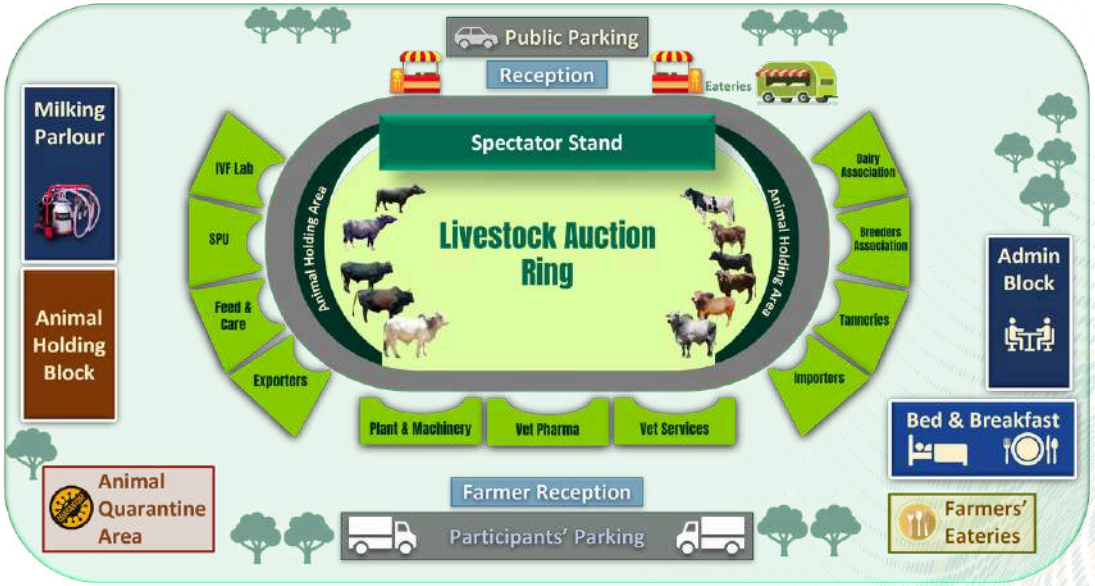
On GCLI recommendation, CEO PCMM&D visited Brazil (25 Oct - 8 Nov 24)

Designs finalized in collaboration with GCLI

Earth Breaking: Dec 2024

Inauguration of Cattle Market Shahpur Kanjran, Lahore May 2025

Livestock Arena *Layout*



Shahpur Kanjran

INAUGURATED BY CM PUNJAB - MAY 2025

Jhang

COMPLETION BY SEPTEMBER 2025

Livestock Census

- Last Livestock Census held in **year 2006**
- Fresh census carried out by **Pak Bureau of Statistics** in collaboration with **GCLI**
- **Training of Staff** – Completed on 31 Dec 24
- **Field Operations**: 3 Jan - 10 Feb 25 (digital data collection)

Report Published

Animal Population	**251.3 Million**
Livestock Population Growth Increase	**3.09 %**
Fodder Cultivation Area Increase	**10 %**

Significant rise in Sheep & Goat population

Every Animal Counts Towards Better Data

and a Stronger Herd

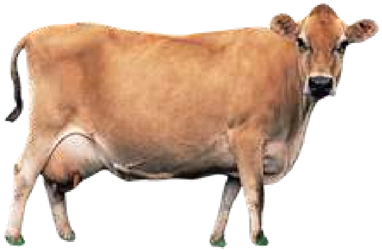
Pakistan
Halal Authority

- Authority raised in **year 2016**; placed under **Ministry of Science & Technology**
- **1st DG** appointed in **year 2020**
- Authority **remained Dormant** due to ownership issue
- Long awaited **Board of Directors meeting** held on **16 April 2025**

Global Confidence
Halal Assurance
Powered by
GCLI & PHA

- **PHA Logo approved**; Formal launching of PHA Logo planned
- **MoUs signed** with **Belarus, Turkiye, Malaysia, Bangladesh, Indonesia & Kirghizstan**
- MoUs Ready to be Signed - **UAE**
- MoUs in Process - **KSA, Iran, Iraq, Kuwait, Somalia, Azerbaijan, Tajikistan Morocco, Qatar, Jordan & Brunei**

Friesian



Jersey

Brahman

Brazilian Breeds

Wagyu **Charbray** **Braford**

Recent Surge in
Import of Exotic Breeds

Breeds	2023	2024	2025
Angus	-	19	-
Nilore	-	22	-
Wagyu	-	12	-
Guzera	-	13	-
Sindhi	-	22	-
Gir	-	61	-
Girolando	-	12	-
Holstein Friesian	-	2,748	3,369
Jersey	-	91	9
Brahman	-	288	63
Braford	-	-	43
Charbray	-	-	89
Total	-	3,288	3,573

Surge Depicts

- Transition to **high-yield, tech-driven** farming
- Growing reliance on **superior exotic genetics** for milk and meat
- Rising interest in **IVF and Sexed Semen** for herd transformation

Key Drivers

- GCLI's Corporate Livestock Farms leading the shift
- Increased private sector investment and global collaborations

Impact

- Enhances national productivity and food security
- Reduces import reliance through import substitution
- Positions Pakistan for Halal meat export growth

Livestock Future Endeavors

Animal Health Act

Approval of **Animal Breeding Policy**

Promotion of **Exotic Birds**

Establishment of **Poultry City**

Development of **Small Ruminants**

Breeding & Fattening **Farms**

Establishment of **Value Addition Setups**

Pursuance of **Herd Transformation**

Proliferation of Technology

Expansion of **GRIDD**

Continuation of **Tag & Traceability**

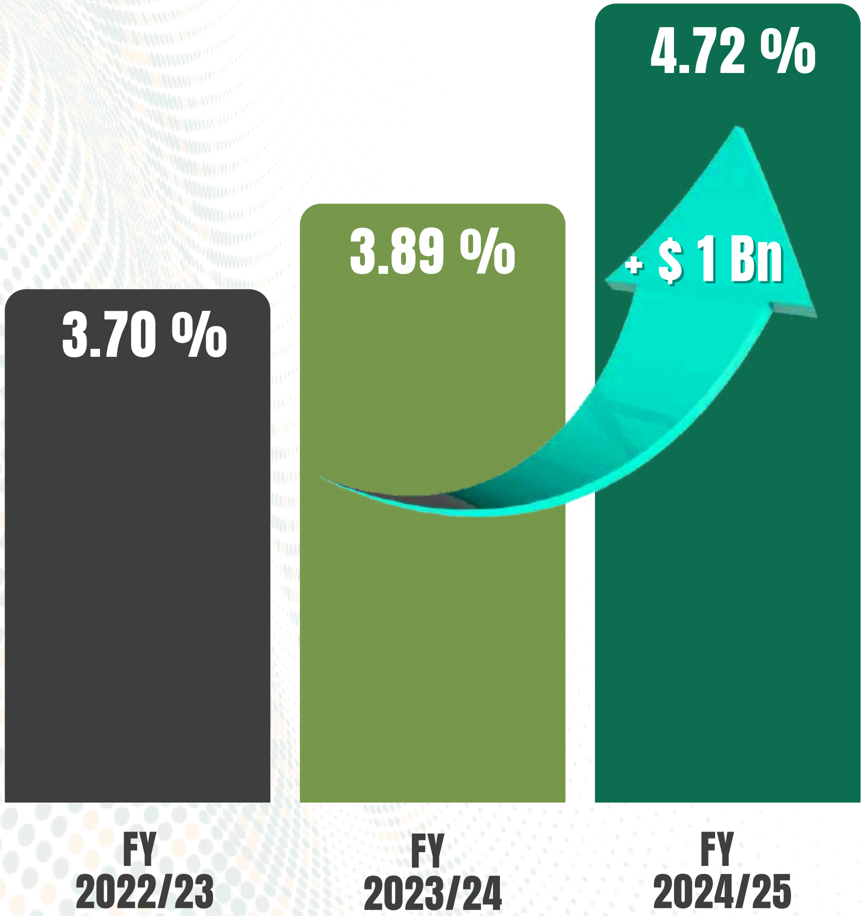
Establishment of **Disease Free Zones**

Vaccine Production

Growth in Livestock Sector

Collaborative Efforts - Reaping Results

Our collaborative efforts are beginning to yield tangible outcomes, reflecting the positive growth trajectory of Pakistan's livestock sector



Source: Federal Bureau of Statistics

Fisheries

07

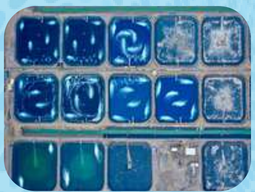
Landscape of Fisheries Sector

Inland Aquaculture

Existing Fish Farming

Area	181,752 Acres
Revenue	$ 415 Mn

Cage Fish Farming



Shrimp Farming

Hatchery

Marine Catch

Continental Shelf	350 NM
Fish Harbours	10
Processing Plants	65
Revenue	$ 426 Mn

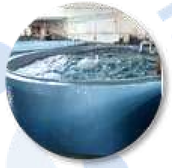
Exported - only 10% of Catch

Deep Sea Marine Fishing

GCLI Interventions

- Approval of Aquaculture Policy & NRCP

- Relief in Import Duties from 60% to 32%



- 1st ever Shrimp Nauplii Center established

- 1st ever Shrimp Feed Mill established

- Registration of 35 Pak Companies with EU, Russia, KSA & China

- Vessel Monitoring System

- Rehabilitation of Korangi Fish Harbour Authority (KoFHA)

Inland Shrimp Farming

Shrimp Nauplii Center

Shrimp PL-10 Import Price	Local Cost	Production Per Month	Saving
Rs 5 / PL	Rs 3 / PL	50 Mn	Rs 400 Mn per anum

Pilot Shrimp Project

Area	Production	Revenue
240 Acres	360 Tons	$ 1.8 Mn

Shrimp Feed Mill

Import Cost	Local Manufacture / Supply	Saving
Rs 425/Kg	Rs 325/Kg	Rs 100/Kg

SHRIMP NAUPLII CENTER

SHRIMP PILOT PROJECT

SHRIMP FEED MILL

Future Plan

Shrimp Farming Plan - Yr 2025	
Govt of Punjab	800 Acres
Pvt Investors (Punjab)	800 Acres
Pvt Investors (Sindh)	250 Acres
Total ($ 26 Mn)	1850 Acres

Full Scale Hatcheries

Gharo & Hawksbay

- **Gharo**: To be operational by **Jul 25**; Production by: **Dec 25**
- **Hawksbay**: To be operational by **Jul 25**; Production by: **Dec 25**
- Est Production: **Rs 1 Bn**
- Est Local Cost: **Rs 3 / PL**

Muzaffargarh

- GoPb offered establishment of **Shrimp Hatchery**
- Project Cost: **Rs 1.2 Bn**
- **Pre-Qualification Bidding** completed by Punjab Fisheries Department

Inland Cage Farming

Cages — 526 Nos

- Production : **631 Tons**
- Revenue : **Rs 505 Mn**

Establishment of New Hatcheries

- 3 x New Hatcheries
- Production : **5 Mn Seeds**
- Sale Price : **Rs 8 / Seed** (Imported @ **Rs 20/ Seed**)

GCLI reaching out to large scale Farmers / Entrepreneurs for establishment of Hatcheries of Pangasius and Tilapia

Trout Farming (KP, AJ&K, GB & Bln)

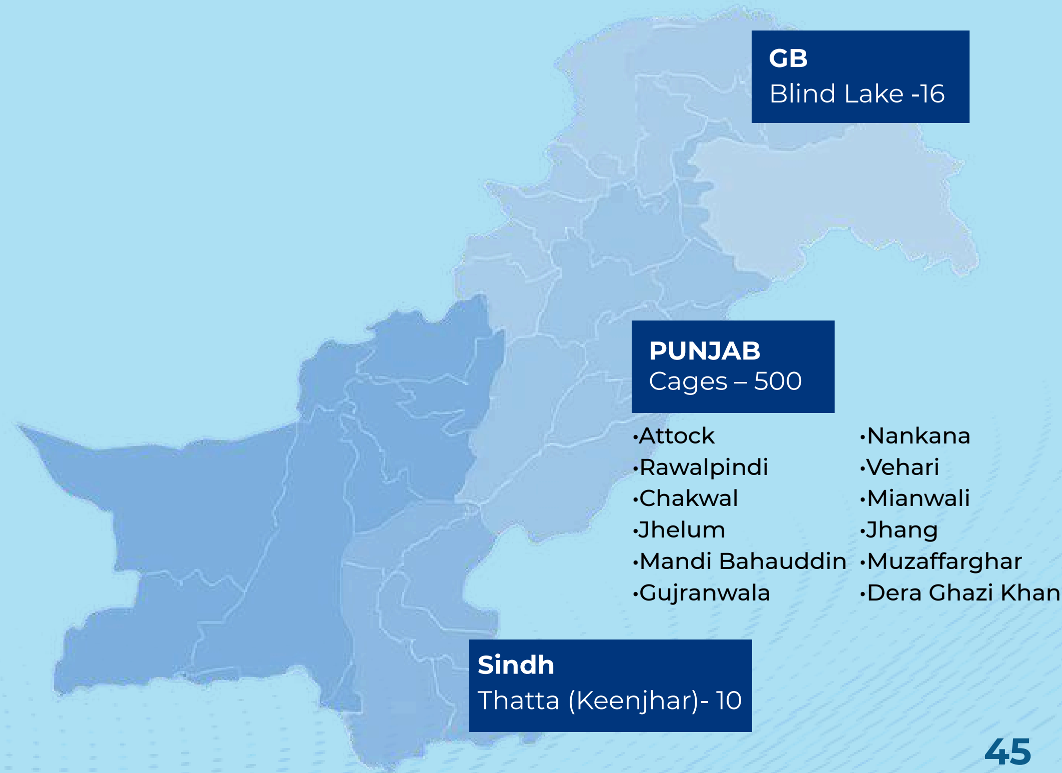
- Trout Hatcheries - **26**
- Trout Farms - **882**
- Annual Production - **1260 Tons**
- Revenue - **Rs 1.5 Bn**
- Trout Cage Farms - **16 (Blind lake GB)**
- **Trout Research Center** (Swat, KP) - Under const
- Introduction of **3 x New Species of Trout** in GB

CAGE FARMING

HATCHERY

TROUT FARMING

Cages	1500 (Bln, KP, AJ&K)
Est Production	1830 Tons
Est Revenue	Rs 1464 Mn
Timeline	3 Years



Marine

Vessel Monitoring Sys (VMS)

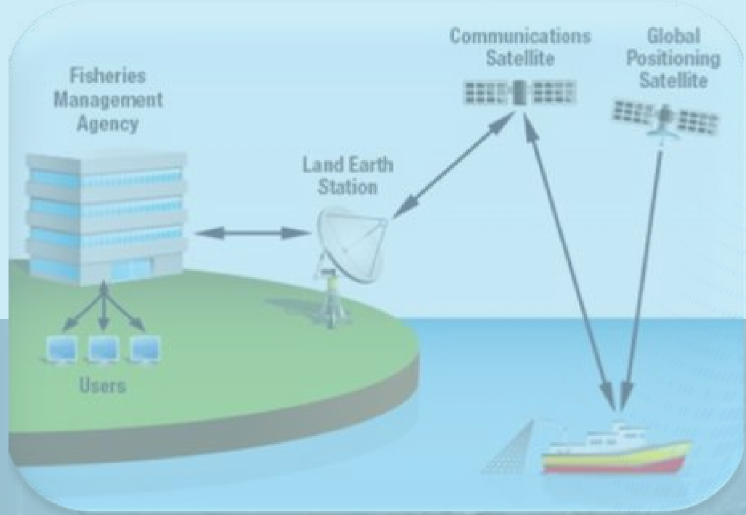
Objective	Monitor vessels, curb illegal fishing & secure EEZ
Project Cost	**Rs 1.2 Bn** (Fed Govt 600 Mn, Balochistan & Sindh 300 Mn each)
Phase-I	VMS planned for **7,000 boats**
Timeline	**2 Years**

Deep Sea Fishing Licenses

Background	**Over exploitation** of marine resources in territorial waters
Objective	Promotion of Deep Sea Fishing by easing **Licensing TORs**

Rehab of Korangi Fish Harbour

Objective	**Increase Fisheries exports** up to **$ 2 Bn**
Project Cost	**Rs 1.2 Bn** (Grant by Japan)



Sailing Toward Growth, Unlocking Pakistan's Marine Export Potential

Future Endeavors

Establishment of
SHRIMP HATCHERIES

Promotion of
DEEP SEA FISHING

Establishment of
FISH FEED MILLS

Revitalization of Fish
HARBOUR FACILITIES

Establishment of
VALUE ADDITION SETUPS

Formulation of
NATIONAL FISHERIES POLICY

Promotion of
CAGE FARMING

Introduction of
NEW FISH SPECIES

Investment Opportunities

08

Corporate Dairy Farm (1000 Acres)
5000 Cows

Project Details

- Land Allocation - **1,000 Acres**
- Cow Sheds at **500 Acres** for 5,000 cows (RFID-tracked), Fodder at **250 Acres** for Alfalfa/corn silage
- Milk Processing at **10 Acres** for UHT, yogurt, Cheese Production, Biogas Plant over **5 acres** for 2MW power
- Staff Housing at **20 Acres** for 100 workers
- **100,000 liters/day** (5,000 cows × 20L/day)
- Automated TMR Feeders

Unique Value Proposition

- Pakistan's First Tech-Integrated Dairy Farm
- Robotic Milking & RFID Tracking helps in 20% higher yield vs. traditional livestock farming
- Circular Economy Model by Biogas (2MW) + organic compost from manure
- Vertical Integration - 250 Acres fodder farm (30% feed cost reduction)
- On-site milk processing (UHT, yogurt, cheese)%)
- Export-Ready Halal Dairy for GCC & China
- Certifications by HALAL, HACCP, ISO 22000
- CPEC logistics advantage 30% lower export time to China

Investment

- Total investment is **USD 50 million**: Land Acquisition (1000 Acres) **USD 18 million**, Infrastructure & Shelters **USD 12 million**, Cattle Procurement **USD 15 million**, Feed & Veterinary Care **USD 0.8 million** and Working capital **USD 4.25 million**
- Major investments are land, infrastructure and purchase of dairy animals, that will produce approximately **100,000 liters of milk per day** for further processing and value addition

Market Dynamics

- High domestic demand fulfilling
- Urban premium dairy demand ↑ (e.g., Lahore/Karachi pay USD 0.60/liter vs. farmgate USD 0.40)
- Export Opportunity in GCC USD 1.2 billion imports with Halal certification premium
- China for USD 500 million imports with CPEC freight cost advantage. Comparative advantage for export to neighbouring countries
- Feed self-sufficiency cuts OPEX by USD 1.2 million/year
- Cheap / trained staff and labour

Project Risks and Mitigation

- Disease Outbreak has high risk, mitigated by Vaccination protocols and Isolation wards (5% capacity)
- Feed Price Volatility has medium risk, mitigated by 250 Acres fodder buffer and Pre-contracted suppliers
- Milk Price Fluctuation low risk, mitigated by 30% revenue from value-added products (cheese/yogurt)
- Power Outages mitigated by 2MW biogas backup and Solar hybrid option
- Export Regulation Shifts mitigated by Pre-certification (HALAL/HACCP)

Key Aspects

Dairy Farm - 1000 Acres
5000 Cows
100,000 Liters Milk Per Day

Value Addition Plant
Milk Processing, Butter, Cheese etc

110
Employees

Financial Aspects

Total Investment	**50 Mn USD**
IRR	**19 %**
Pay Back Period	**8 Years**

(Financials to be validated in bankable feasibility study)

Corporate Feedlot Farm (1000 Acres)
32,500 Animals Per Cycle

Project Details
- Land - 1,000 Acres
- Fattening Model is Zero-Grazing (Fully Confined)
- Production Cycles 3 Cycles per Year
- Annual Capacity would be 97,500 Cattle (32,500 per cycle) with feeding strategy 100% Purchased Feed

Unique Value Proposition
- Largest feedlot operation in Pakistan by annual capacity (97,500)
- TMR-based feeding + RFID for health tracking
- Revenue from 4MW biogas, composting, offal markets
- Halal, traceability, FMD-free zones, export-readiness
- Active buyer contracts from GCC and neighbouring countries

Investment
- Land Acquisition (1000 acres) USD 18 million
- Infrastructure USD 16.59 million
- Biogas (3MW) USD 0.53 million
- Feed/TMR/RFID Systems USD 0.18 million
- Borewells + Irrigation USD 0.12 million
- Working capital USD 14.7 million
- Total Investment **USD 50 million**

Market Dynamics
- Annual beef consumption increasing at 4.8% CAGR
- GCC halal meat = USD 4.2 billion market; China imported USD 1.7 billion in year 2023
- Pakistan has 30% lower cost of production vs. India/China
- CPEC road/railway corridor enabling reduced export lead time
- Cheap / trained staff and labour

Project Risks and Mitigation
- Feed Price Volatility mitigated by long-term contracts & local forage sourcing
- Disease Outbreaks (FMD) mitigated by vaccination, biosecurity and isolation protocols
- Regulatory shifts, Halal rejection and export disruption mitigated by certification compliance and government liaison
- Power disruptions mitigated by Biogas / diesel hybrid backups systems
- Environmental security mitigated by EPA approval, composting & effluent reuse of resources

Key Aspects

Feedlot Farm – 1,000 Acres

32,500 animal per cycle
97,500 animal per annum

Value Addition Plant

Slaughter House & Meat Processing Plant

133
Employees

Financial Aspects

Total Investment	**50 Mn USD**
IRR	**14 %**
Pay Back Period	**10 Years**

(Financials to be validated in bankable feasibility study)

Camel Farm
1000 Camels

Project Details
- Camel farming presents a high-value investment opportunity
- Land: **1000 Acres**
- This project aims to establish a 1000 Camels farm
- Farm focusing on milk production, meat processing, and breeding to cater to domestic and export markets

Unique Value Proposition
- High-value dairy product with medicinal properties
- Supplying halal-certified camel meat to local and international markets
- Enhancing camel breeds for higher productivity
- Sustainable camel farming with minimal environmental impact

Investment
- Total Investment: **USD 7.1 million**
- Land Acquisition (1000 acres): USD 1.33 million
- Infrastructure & Shelters: USD 1.00 million
- Camel Procurement (1000 camels): USD 3.00 million
- Feed & Veterinary Care: USD 0.60 million
- Processing & Packaging Units: USD 1.17 million

Market Dynamics
- Global market of Camel Milk is over USD 10 billion for diabetic/lactose-free consumers
- Camel Meat @ USD 8–12/kg in GCC (high demand for halal meat)
- Leather, wool (saddles, textiles) and tourism (camel safaris)

Project Risks and Mitigation
- Market Fluctuations: Diversify revenue streams (milk, meat, breeding)
- Disease Outbreaks: Implement strict biosecurity measures
- Regulatory Challenges: Ensure compliance with local and export standards
- Climate & Water Scarcity: Use efficient water management systems

Key Aspects

Camel Farm
1000 Camels

Slaughter House

Meat Processing Plant

110
Employees

Financial Aspects

Total Investment	7.1 Mn USD
IRR	21 %
Pay Back Period	7 Years

(Financials to be validated in bankable feasibility study)

Integrated Goat Breeding & Fattening Farm

10,000 Goats

Project Details

- A vertically integrated goat farming operation designed for maximum profitability
- Closed-cycle breeding (3,000 high-yield goats - Makhi Cheeni/Beetal/Kamori/Boer crosses)
- Commercial fattening units (7,500 market-ready goats annually)
- On-site feed production (50-acre fodder cultivation + feed mill)
- Dual revenue streams (premium meat exports + elite breeding stock sales)

Unique Value Proposition

- Complete Supply Chain Control from breeding to feed to export
- No dependency on external suppliers
- Proprietary cross-breeding program for fastest weight gain and High-value breeding stock
- 30-40% lower feed costs through On-site fodder production, Custom feed formulations and Manure-to-biogas energy cycle
- Export-Ready Compliance with GCC, KSA AND China protocols

Investment

- Total investment: **USD 3 million**
- Infrastructure, Land and roads USD 2.1 million
- Feed Mill & Equipment & Fodder Development USD 0.73 million
- Goat and buck procurement USD 0.47 million
- Working Capital USD 0.37 million

Market Dynamics

- GCC countries import $3.2B+ in live animals annually (Kuwait alone imports 1M+ goats/year)
- Chinese market paying premium prices for halal goat meat
- Live goat prices in GCC: **USD 4-6 /Kg (vs 3.5-5 /Kg domestic)**
- Breeding stock premiums: **USD 142-210 for certified Kamori/Boer crosses**

Project Risks and Mitigation

- Disease Outbreak: Closed herd system, weekly vet inspections, Vaccination SOPs
- Feed Price Volatility: 6 month silage buffer stock
- Contract farming with local growers
- Export Market Fluctuations: Pre-sale agreements with Gulf importers, Domestic premium meat brand backup
- Climate Variability: Drip irrigation systems, Drought-resistant fodder varieties

Key Aspects

Goat Integrated Breeding & Fattening Farm
10,000 Feedlot Animals

45
Employees

Financial Aspects

Total Investment	**3 Mn USD**
IRR	**32 %**
Pay Back Period	**5 Years**

(Financials to be validated in bankable feasibility study)

Sheep Farm (100 Acres)
20,000 Sheep

Project Details
- A large-scale rolling feedlot and export farm for sheep
- Maintains a perpetual inventory of 20,000 sheep, for exports
- Designed to meet PAFN regulations and live animal import standards
- Includes infrastructure for rearing, breeding, quarantine, veterinary care, and export preparation
- Positioned as a model for Pakistan's livestock export future, leveraging terrain and breed genetics

Unique Value Proposition
- Rolling entry-exit model ensures steady monthly exports and cash flow
- Direct access to international markets eliminating marketing risks
- Rear indigenous sheep, known for meat quality and adaptability
- Fully integrated facility with quarantine, vet care, and export staging zones
- Turnkey export-ready operations, a scalable livestock export model

Investment
Overall estimated investment is **USD 5.26 million** : Land Acquisition (100 acres): USD 0.36 million, Sheep Sheds (100,000 sq. ft.): USD 0.18 million, Fencing: USD 0.014 million, Water & Feed Storage Infrastructure: USD 0.018 million, Veterinary & Quarantine Block: USD 0.18 million, Export/Departure Holding Zone: USD 0.011 million, Admin & Staff Facilities: USD 0.018 million, Farm Equipment (feeders, tools, crates): USD 0.36 million, Contingency Reserve (10%): USD 0.113 million and Working Capital (20,000 sheep @ PKR 56,000 each): USD 4.00 million

Market Dynamics
- High demand for halal live animals in Arab countries
- Pakistan has genetic and climatic advantages, but underutilized in export
- Local sheep supply aligns with Gulf meat preferences
- Existing logistics channels via Karachi and other ports
- Market is import-dependent
- Export prices remain stable, providing consistent foreign exchange inflows

Project Risks and Mitigation
- Disease outbreak: Quarantine system, veterinary screening and rapid isolation protocol
- Food security: Secure long-term contracts, use local silage and seasonal stocking
- Regulatory compliance: Continuous coordination with DRAP, PAFN, and export authorities
- Manpower shortage: Local recruitment with livestock training programs
- Weather extremities: Covered sheds, emergency feed reserves and water storage systems

Key Aspects

Feedlot & Export Farm
20,000 Sheep
Rearing, Breeding, Feed, Quarantine, Veterinary Care & Export Holding

120
Employees

Financial Aspects

Total Investment	5.26 Mn USD
IRR	36 %
Pay Back Period	3 Years

(Financials to be validated in bankable feasibility study)

Poultry Business City

Integrated / All Solutions Poultry Farming

Project Details

- The Poultry Business City is envisioned as **Pakistan's first fully integrated poultry hub**
- Bringing together farms, processing units, feed mills, value-added product facilities
- Sustainable initiatives in one location
- The goal is to streamline operations, reduce production costs, and maximize profitability
- A self-sustaining poultry ecosystem that caters to both domestic and export markets

Unique Value Proposition

- From breeding and hatchery to meat processing and value-added poultry products, all in a single ecosystem
- Fully automated poultry farms, climate-controlled sheds, waste-to-energy solutions, and export-grade processing facilities
- Biogas plants, composting units and organic fertilizers to ensure zero-waste operations
- Access to local fast food giants, retail supermarkets, and international halal-certified markets
- Multiple Revenue Streams – Raw and processed meat, eggs, ready-to-cook products, poultry feed sales and organic fertilizers

Investment

Overall investment is **USD 36 million**, encompassing the entire value chain:

- Hatchery & Grandparent Farm: **USD 5 million**
- Broiler Farming (1 million birds per cycle): **USD 8 million**
- Layer Farming (500,000 hens): **USD 6 million**
- Slaughterhouse & Meat Processing: **USD 10 million**
- Biogas Plant (5MW): **USD 3 million**
- Feed Mill (100K tons/year): **USD 4 million**

Market Dynamics

- The ready-to-eat & frozen poultry segment is growing rapidly due to urbanization and changing food preferences
- Increasing demand for processed poultry
- Halal-certified processed chicken products have high demand in Middle East, Africa, and Malaysia
- Government incentives like tax breaks for rural-based farms, import subsidies for poultry equipment

Project Risks and Mitigation

- Focus on premium halal-certified processed poultry for competitive differentiation
- Secure bulk supply contracts with fast food chains & retailers to ensure consistent revenue
- Implement strict biosecurity measures (vaccinations, hygiene controls, isolated breeding zones)
- Deploy automated climate control & monitoring systems for early disease detection
- High Electricity & Feed Costs by Solar hybrid systems & energy-efficient solutions
- Invest in in-house feed mill production for cost control
- Logistics & Cold Chain Management
- Partner with regional distributors & supermarket chains for streamlined supply chains

key Aspects

Poultry City

Broiler, Layer & Breeder Farm
Processing Units
Feed Mills
Value Addition Setups
Halal Certified Chicken Products

300
Employees

Financial Aspects

Total Investment	**36 Mn USD**
IRR	**22 %**
Pay Back Period	**7 Years**

(Financials to be validated in bankable feasibility study)

Animal Vaccine Production Unit

100 Mn Doses / year

Project Details

- Setting up an animal vaccine production unit in Pakistan is a promising venture, given the demand for livestock health solutions
- Target diseases (e.g., Foot & Mouth Disease, Hemorrhagic Septicemia & PPR)

Unique Value Proposition

- The facility is designed to rapidly scale production in response to demand surges
- Optimized single-use bioreactors and automated purification systems reduce operational costs
- Advanced quality control measures ensure vaccine efficacy and safety
- Reducing dependency on imports by establishing local production

Investment

- Total investment is **USD 40 Million**
- Land & Facility Setup: USD 4 Million, Equipment & Machinery: USD 15 Million, Laboratory Setup: USD 8 Million, Raw Material & Initial Stock: USD 3 Million, Cold Chain & Storage: USD 2.5 Million, Regulatory & Compliance: USD 2 Million, Utilities & Support Systems: USD 3 Million, ERP & Automation: USD 1.5 Million and Working Capital / Contingency: USD 1 Million

Market Dynamics

- Global vaccine market is expected to grow significantly
- Increasing demand for vaccines due to their proven safety profile
- Government initiatives supporting local vaccine production
- Strategic partnerships with biotech firms and research institutions
- Competitive pricing compared, making them more accessible

Project Risks & Mitigation

- Regulatory Risks: Compliance with World Health Organization (WHO), U.S. Food and Drug Administration(FDA) and European Medicines Agency(EMA) standards
- Raw material shortages: Supply disruptions for critical inputs: Partner with global firms
- Disruption in critical raw materials: Secure multiple suppliers, stockpile essentials, forecast demand
- Partner with global vaccine manufacturers for distribution
- Continuous innovation by investing in R&D to improve production efficiency

Key Aspects

Vaccine Production Unit
100 Mn Doses Per Annum

300
Employees

Financial Aspects

Total Investment	**40 Mn USD**
IRR	**26 %**
Pay Back Period	**6 Years**

(Financials to be validated in bankable feasibility study)

Slaughterhouse

100 Large & 500 Small Animals

Project Details

- Pakistan's meat industry is expanding rapidly
- Demand increasing for hygienic, halal-certified meat for domestic consumption and exports
- This project aims to establish a modern slaughterhouse capable of processing 100 large animals (cattle, buffalo) and 500 small animals (goats, sheep) daily
- Ensuring compliance with international food safety standards

Unique Value Proposition

- Automated slaughtering, processing, and packaging
- Ensuring compliance with religious and international standards
- By-products (bones, hides, offal) processed for additional revenue
- Efficient storage and distribution for fresh and frozen meat

Investment

- Land Acquisition (10-20 acres) $1.75 million
- Infrastructure & Equipment $2.81 million
- Cold Storage & Logistics $1.05 million
- Labor & Operations $0.88 million
- Regulatory Compliance & Certification $0.35 million
- Total Investment **$6.84 million.**

Market Dynamics

- Pakistan's per capita meat consumption is growing, driven by urbanization and changing dietary preferences
- Halal meat exports to the Middle East, China, and Southeast Asia are increasing
- Incentives for meat processing and slaughterhouse modernization
- Compliance with Pakistan's food safety laws and international standards enhances market credibility

Project Risks and Mitigation

- Market Competition: Focus on premium quality and export markets
- Regulatory Challenges: Ensure compliance with food safety and halal standards
- Supply Chain Disruptions: Establish reliable livestock sourcing contracts
- Environmental Concerns: Implement waste management and eco-friendly practices

Key Aspects

Slaughterhouse
100 Large & 500 Small Animals

Value Addition Plant
Cold Chain & Logistics
Blast freezers, cold storage rooms

150
Employees

Financial Aspects

Total Investment	6.84 Mn USD
IRR	22 %
Pay Back Period	7 Years

(Financials to be validated in bankable feasibility study)

Automated Tannery
Capacity 2,000 Hides/Day

Project Details
- Location: Pakistan (Preferred: Kasur, Sialkot, or Karachi Industrial Zones)
- Production Capacity: 2,000 hides/day (expandable to 3,000 hides/day after 5 years)
- Technology: Fully automated Beamhouse, tanning, and finishing processes
- Workforce: Minimal manual labor (automation-focused)
- Products: Wet-blue, crust, and finished leather (for export & local markets)
- Key Markets: China, Europe, USA, and domestic footwear/garment industries

Unique Value Proposition
- Pakistan’s First Scalable, Zero-Waste Leather Tannery Combining Italian Automation with Halal Certification to Dominate the Global Luxury Supply Chain
- Ensuring consistent premium quality at 30% lower labor costs
- Halal + Eco-Certified for Premium Markets
- Cost-Leadership with Export-Ready Infrastructure
- Ensure hide supply at fixed rates, avoiding shortages that plague competitors

Investment
- Overall investment is **USD 21.83 Million**
- CAPEX is USD 14 Million, land and infrastructure USD 2.2 million, machinery USD 9.8 million, Boier and generator and water treatment USD 0.8 million, Pre op cost 0.30 and misc USD 1.2 million
- Working capital is USD 7.83 Million

Market Dynamics
- Pakistan’s leather exports enjoy zero-duty access to EU & China
- Cheap hides, low labor costs, and automation-driven productivity
- Tax breaks, export subsidies, and industrial zone benefits
- Ready scalability to 3,000 hides/day (50% growth)

Project Risks and Mitigation
- Energy Crisis: Need for backup generators
- Environmental Regulations: Strict EPA compliance
- Environmental constraints: Installation of efficient water treatment / recycling plants

Key Aspects

Automated Tannery in Pakistan
2,000 hides/day

100
Employees

Financial Aspects

Total Investment	**21.83 Mn USD**
IRR	**26 %**
Pay Back Period	**6 Years**

(Financials to be validated in bankable feasibility study)

Halal Gelatin Plant

100 Ton - Scalable & Export-Ready

Project Details

- Establishing Pakistan's first large-scale halal gelatin manufacturing plant with an initial capacity of 100 tons/year
- Expandable to **150 tons/year** in 5 years
- Plant will use 100% locally sourced raw materials to produce premium pharmaceutical, food, and cosmetic-grade gelatin
  - Location: Near Lahore/Karachi (proximity to livestock hubs & ports)
  - Investment: USD 3.5 million (land, machinery & certification)
  - Revenue Model: Domestic sales + exports (Middle East, Africa, Asia)

Unique Value Proposition

- First-Mover Advantage as No large-scale halal gelatin producer in Pakistan
- 100% Local Sourcing being no reliance on imports; cost-efficient & stable supply
- Scalable Design with Built-in expansion capability (+50 tons/year)

Investment

- Total investment is **USD 3.5 million**
- Land & Construction: USD 0.80
- Machinery & Equipment: USD 2 million
- Halal Certification: USD 0.05 million
- Working Capital (6 months): USD 0.65 million

Market Dynamics

- Pharma (60% demand): Gelatin capsules (local + export)
- Food (30%): Confectionery, dairy, desserts
- Cosmetics (10%): Collagen-based beauty products
- Import Gap: Pakistan spends $10M+/year on gelatin imports
- Export Potential: Middle East halal gelatin market = $500M+ annually

Project Risks and Mitigation

- Raw material shortage: Requires Long-term contracts with slaughterhouses & tanneries
- High energy costs: Shifting to Solar hybrid power solutions
- Export compliance hurdles: Pre-certification with PHA & intl. halal bodies
- Competition from imports: Competitive pricing & superior halal certification

Key Aspects

Halal Gelatin Plant
100 Tons scalable & Export Ready

60
Employees

Financial Aspects

Total Investment	3.5 Mn USD
IRR	19 %
Pay Back Period	8 Years

(Financials to be validated in bankable feasibility study)

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