

Pre-feasibility Study Modern Slaughter House (Abattoir) For Cattle only



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Executive Summary

This Pre-feasibility study is conducted for establishment of Modern **Abattoir (Slaughter House)** in **Sindh**. All the calculations have been based on a setting up an Abattoir with a capacity to slaughter and process 200 heads of cattle (Buffalo) per day for only 10 months during a year.

Pakistan has not been able to exploit its large livestock population to become a major player in the international meat trade. The major reasons include; non-availability of indigenous meat breeds, lack of proper animal husbandry and absence of modern abattoirs and meat processing plants. The Government of Pakistan announced a policy in 2006 “Livestock Development Policy” which addresses legal framework and development strategies and action plans for farmers, using livestock as supplementary source of income. Pakistan suffers in the international markets as meat slaughtered in the traditional abattoirs fails to meet international standards. In order to overcome this handicap, it is proposed to have a modern abattoir plus meat processing plant. The plant will have the capacity to process 200 heads of beef per day. Recovery of usable by-products will form an important part of the process and it is expected that the quality of the by-products like skins, offal’s, blood, heart, kidneys will be superior to that obtained from the conventional slaughter houses.

1. The initial cost of the project is Rs. 149,026,000, including of an initial working capital of Rs. 7,531,000.
2. Net profit / (loss) for year 1, year 2, year 3, year 4 and year 5 is Rs. 17,194,187, Rs. 29,276,712, Rs. 44,026,046, Rs. 62,010,389 & Rs. 83,910,477, respectively.
3. Payback period of the project is approximately 2.55 years.
4. Average Return on Investment is 33.02%.
5. The IRR of the project is 47.45%.

1 PROJECT BRIEF

This pre-feasibility is about setting up a modern abattoir with a capacity to slaughter and process 200 heads of cattle (Buffalo) per day. All animals will be slaughtered under Islamic tradition. It is proposed that the live animals be bought from the market and fed for five days before being slaughtered. The animals that will be commonly slaughtered for food i.e. Meat are Cattle (Beef). This slaughter house will be set on modern standards with an aim to provide highly hygienic meat products for local sales as well as for export purpose. The slaughterhouse will be technically equipped for slaughtering calves; cows and buffaloes etc. and will also have the potential for further operations such as by-product processing/utilization, meat preservation, meat processing butchering and development of meat market.

1.1 OBJECTIVES

This Pre-feasibility study aims at both financial and socio economic viability with in-depth financial analysis and sustainable socio economic benefits to establish small scale Slaughter House. The objective of this feasibility is to provide a real time analysis of the market opportunity with factual data that will lead towards overall improvement in Livestock sector of economy.

2 Overview of the Livestock Sector

Livestock plays an important role in the economy of the country. More than 6.5 million families consisting of 30-35 million people are involved in livestock farming. Also in rural Pakistan, it complements agriculture income by converting crop residues, agriculture byproducts and wastes into milk, meat, wool, hair etc. Livestock sector contributed approximately 53.2 percent of the agriculture value added and 11.4 percent to national GDP during 2009 – 10. While other development sector experienced saturation and decline there has been an increase in livestock sector in 2009 – 10. Gross value addition of livestock at current factor cost has increased from Rs. 1304.6 billion (2008-09) to Rs. 1537.5 billion (2009-10) showing an increase of 17.8 percent as compared to previous year.

Species	Units	2007-08	2008-09	2009-10
Meat	000 Tons	2,728	2,843	2,965
Beef	000 Tons	1,549	1,601	1,655
Mutton	000 Tons	578	590	603
Poultry Meat	000 Tons	601	652	707

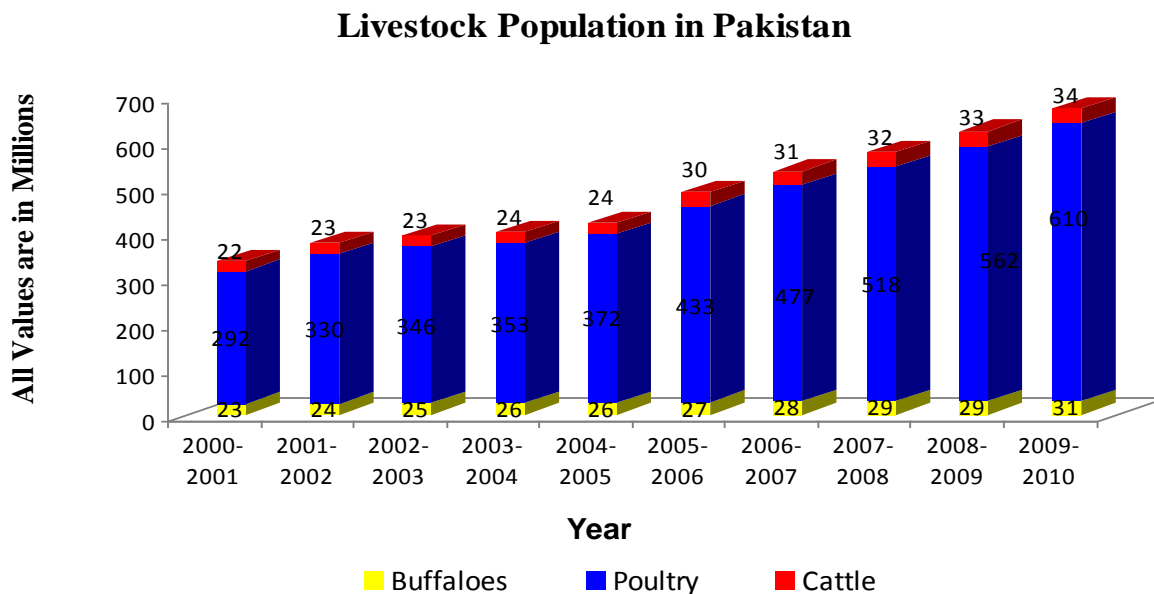
The livestock sector growth for the last seven years has been:

Livestock Growth	
Year	Livestock
2003-04	2.9%
2004-05	2.3%
2005-06	15.8%
2006-07	2.8%
2007-08	4.2%
2008-09	3.5%
2009-10	4.1%

Source: Federal Bureau of Statistics

Livestock population in Pakistan is mainly comprised of Cow, Buffalo, Sheep, Goat, Camel and Poultry. Around 47% of the rural households in Pakistan own livestock and 11% of their income come from livestock.”

According to Livestock Census 2006, 52% of total cattle population of Pakistan resides in Punjab, 19.7% in Sindh, 20% in NWFP and 8% in Baluchistan.¹ Detailed comparison of increase in Livestock population in Pakistan is given in graph below.



2.1 Opportunity Rationale

In spite of the big potential of the large livestock population, meat industry in Pakistan has not been able to make its mark in the international meat trade; the primary reason for this has been the lack of corporate cattle farming and the absence of modern state of the art abattoirs and meat processing plants. In addition, Pakistan has also not been able to enter the Halal Food Market which is estimated at US\$500 billion although it enjoys a unique position because of its strong Islamic character.

Analysts and livestock marketing experts agree that there are massive opportunities for Pakistan to tap into and network with international distributors to cater to the demand for 'Halal' meat and other Halal foodstuffs globally. Considering this potential, there is no doubt that there are ample opportunities for Pakistani entrepreneurs to involve in livestock production and marketing. While the demand for 'Halal' meat and other foodstuffs is growing internationally, the demand in the Gulf countries alone exceeded \$12 billion in 2005.

¹ M. Sajjad Khan, Zia-Ur Rehman, Muqarrab A. Khan and Sohail Ahmad, Genetic Resources and Diversity in Pakistani Cattle, Department of Animal Breeding and Genetics, University of Agriculture Faisalabad; Pakistan Vet. J., 2008, 28(2): 95-102.

There is, therefore, a huge market for international distributors and producers to create opportunities to build the essential relationships to do business in the region.

The opportunities available to a corporation able to supply Halal products are continuously growing. Muslims are starting to blend the best of Western attitudes with their generally Eastern cultures. Additionally, the large addition of Westerners to the faith of Islam is resulting in some changes in the behaviour of the Muslim community. Whereas in the past Muslims simply avoided foods that did not meet the dietary standard of Halal, today Muslims are making their presence felt socially and politically. Muslims are now requesting food products that meet their dietary needs. They are offering services and cooperating with producers with the foresight and wisdom to cater to the Muslim consumer. Some of the key Halal food/meat importing countries are:

- Algeria
- Iran
- Lebanon
- Qatar
- Turkey
- Bahrain
- Iraq
- Malaysia
- Saudi Arabia
- United Arab Emirates
- Egypt
- Jordan
- Morocco
- Syria
- Yemen
- Indonesia
- Kuwait
- Oman
- Tunisia
- UK

2.2 Market Analysis

Pakistan produced 1,655,000 tonnes of Beef, 603,000 tonnes of Mutton, 707,000 tonnes of Poultry Meat, 40,000 tonnes of Wool, 22,600 tonnes of Hair, 713,400 tonnes of Bones, 228,100 tonnes of Fat, 56,800 tonnes of Blood, 11,839,000,000 tonnes of Eggs and 47,400,000 tonnes of Skins in 2009-2010. Pakistan earned USD717 million from leather exports in CY09 and a meagre USD96 million from meat export. According to the FBS, meat exports during July-January 2009-2010 rose to 21,588 tonnes (worth \$56 million) as compared to 15,083 tonnes (worth \$41 million) in the corresponding period of the previous fiscal year. Similarly, meat exports during July-June 2008-09 surged to 26,794 tonnes (worth \$72 million) as compared to 17,816 tonnes (worth \$49 million) during the corresponding period of 2007-08.

BUFFALO AND CATTLE

There are 31.4 million buffaloes in the country. Nili-Ravi is predominantly raised in Punjab and Kundi in Sindh. Buffalo population has increased by nearly 5 million in the last five years. The buffalo is not only a draught animal; it is also a vital source of milk and meat. India with a similar climate is the largest exporter of buffalo meat in the world having exported a total of 625,000 metric tons of boneless buffalo meat in 2008; it is worth mentioning that the total buffalo population of India is estimated at 93 million. The average weight of the Nili-Ravi is 800 Kg for the male and 600 kg for the female, similarly the average weight of the Kundi is 600 Kg for the male and 375 Kg for the female. As the buffalo has been replaced as a draught animal because of the mechanization of agriculture, the population of the male buffalo has declined; most of the buffalo meat which is available consists of animals which have completed their useful life, and as such has a lower price.

Similarly there are 34.2 million cattle in the country with a positive population growth rate. Sahiwal, Red Sindhi and Cholistani are the distinguished dairy cattle breeds. The draught breeds besides Thari (also called as Tharparkar and partially dairy-cum-draught breed), include Kankaraj, Bhagnari (Sindh), Bhagnari, Lohani (Balochistan), Dajal, Dhanni and Rojhan of Punjab. Here again, like in the case of buffalo, the local breeds are predominantly draught in nature, however local cattle crossbred with Holstein and Jersey has resulted in a sizeable population of cross breeds which have better dairy and meat characteristics as compared to the indigenous breeds.

DOMESTIC DEMAND OF MEAT

Considering the present trend and increasing local demand, it is expected that in future, demand for livestock products will increase at higher rates induced by various factors. First the growth in population will bring direct increase in the demand of livestock products. Secondly the animal based product required for fulfilling the protein and calcium requirements of the population on health grounds. Thirdly in Pakistan rise in per capita income causes the increase in the demand of meat products. Fourth the modernization of cities of Pakistan other than metropolitan increases the number of hotels that causes the demand to pull upward.

Keeping in view the future requirements, it is very likely that the supply demand gap in animal based products will get widened with the passage of time as is evident from the table below:

Products	2003 (Million Tons)			2020 (Million Tons)		
	Supply	Demand	GAP	Supply	Demand	GAP
Milk	27.8	31.32	3.52	43.43	98.91	55.48
Beef	1.05	1.21	.16	1.43	3.74	2.31
Mutton	0.7	.80	.10	1.03	2.50	1.47

2.2.1 Per Capita Availability of Meat

Per capita availability of meat is 12 kg, most of which is from buffalo and cattle. It may, however, be mentioned that population statistics and statistics on the availability of products from various sources differ drastically. To meet the domestic demand of meat, the rate of growth must be at least 5-7 % per annum.

The demand of livestock food products is growing fast because Pakistan's human population is increasing at the rate of 2.9 per cent annually. If population pressure continues to grow and livestock production stays at the same level, then food deficit may become larger. According to one recent survey, in coming years, milk, red meat and poultry meat deficit will be 9.72, 0.17 and 0.14 million tons if the livestock production stays at the same level.

Therefore there is need of establishment of slaughterhouse facilities of a sufficiently high standard but still simple would improve the situation. Therefore, this prefeasibility study has been made of a medium size slaughterhouse equipped with medium level semi mechanized technology. By providing value added services, the slaughterhouse can utilize the abundant and unexplored resources of Pakistan.

2.2.2 Current Practice

In Pakistan local livestock markets have been established by municipal and local authorities. Meat sector in Pakistan is working on an informal basis from animal rising to meat selling. Animal traders purchase animals from the rural areas and sell them to the animal markets in the urban areas. Butchers purchase these animals from animal markets and slaughter them in the slaughterhouses. Butchers act as meat traders and dominate the meat market both in rural and urban areas. The animals sold in these markets are generally diseased and culled animals. Butchers/traders prefer to buy these cheap animals.

2.2.3 Status of Industrial Meat Processing in Pakistan

In the past a few interventions in public sector for provision of improved slaughtering and meat processing facilities were either provided or contemplated but did not yield any fruitful results for a number of reasons:

- Slaughterhouse, SIHALA
- Industrial Abattoir, KARACHI
- Semi-Manual Slaughterhouse, QUETTA

These slaughterhouses have insufficient capacity to fulfil the local and international demand for meat.

2.3 Government Incentives for the Livestock Sector

After the “green revolution” in agricultural production in the 1960’s and the ongoing “white revolution” in the form of increased production of milk in the dairy sector, the Government of Pakistan is trying to promote the next “pink revolution” which aims at increasing domestic production of meat. A number of measures have been undertaken by the government, these include:

- A new “Livestock Development Policy” which addresses legal framework and development strategies and has an action plan for farmers using livestock as supplementary source of income. The Policy aims at the development of small and medium enterprise (SME) and large businesses in the livestock sector.
- The policy aims to bring about a radical change in the current livestock production system and will help in exploitation of potentials of the livestock sector.
- Two private sector led companies namely “Livestock and Dairy Development Board” and “Pakistan Dairy Development Company” have been established to increase the pace of development in the livestock sector.
- Import of dairy and livestock machinery/equipment not manufactured locally, is allowed duty free.
- To provide access to credit to small holders, micro credit schemes have been initiated through commercial banks.
- Establishment of slaughterhouses and temporary quarantine stations is encouraged in private sector.

2.4 Export of Meat

The export of meat from Pakistan is relatively a new segment of country’s trade, as the real commercial level export started in not before that. Thus, the export of meat and meat preparation is not so high; but the export growth rate is quite encouraging.

Pakistan owns a large inventory of livestock, which determines a large size of meat exports in future. So, meat export is bound to be a good contributor to Pakistan's foreign exchange in the years ahead. In year 2000-01, the export of beef was 715 metric tons (value 1.1 Million US \$) whereas 3303 metric tons of mutton (value 5.8 million US \$). During July-May 2010, the country exported meat of all kinds for around \$81 million and this figure shows an increase of 56 percent as compared to export in the same period last year. According to the Federal Bureau of Statistics (FBS), export of meat and meat preparations swelled to \$72 million (27,347 tons) in July-March 2009-10 as compared to \$52 million (19,175 tons) in the same period of last fiscal.

Despite an increase in meat production, the prices have moved upward abnormally. The recent increase in meat prices is attributed to the export of live animals or meat to the Middle East and Afghanistan. The country, though rich in livestock, rarely got a chance to export meat or meat products to earn foreign exchange. It was offered an opportunity when various Middle East states stopped importing meat from European countries due to the incidence of the mad cow disease. Meat export from Lahore started in the beginning of the year 2000 when carcasses of goats and large animals were airlifted. The meat was processed under a special arrangement between the exporters and the Metropolitan Corporation of Lahore, which runs four abattoirs in the city.

The exports of livestock such as cow, buffalo, sheep and goat are finding their way to the Gulf States, Iran and Afghanistan where there is a shortage of good quality meat, hence fetches a high price.

3 Pre-Feasibility Study for Abattoir (Slaughter House) in Sindh

3.1 Comparison of traditional Slaughterhouse and an Abattoir

Livestock are slaughtered in recognized /unrecognized slaughterhouses and on private premise. Lack of suitable slaughtering facility and unsatisfactory slaughtering techniques cause considerable loses in meat as well as valuable by products like blood skin hides and offal's animals are slaughtered in place which are frequently polluted with blood and other hazardous elements.

In traditional slaughterhouses, the animals are slaughtered by Halal method without making the animal unconscious. The entire operation of slaughtering, bleeding and dressing is carried out on the floor. The units are cleaned with water only at the day's operation. The carcasses are washed with limited quantity of water at the end of operation.

On the other hand, abattoir consists of a lairage, a slaughter hall, an overhead rail arrangement, by-product rooms, a chilling room, a cutting and packing room, a storeroom, an office and a laboratory. There are separate lines for sheep and large animals. The abattoir has a slaughter capacity of 50 – 200 or even more buffaloes per day, depending on the size of the machinery.

According to a study conducted, the meat cuts obtained from hygienically processed carcass has a shelf-life of six days as against three days for those obtained from traditional slaughter unit. The minced meat from hygienically prepared carcass has a shelf-life of four days as against one day for those obtained from local slaughter unit. The study indicated that by adopting proper hygienic and sanitary practices during processing of buffalo meat would yield meat with acceptable microbiological quality with extended shelf-life. This method increases the exporting potential of the meat as well.

3.2 Abattoir Procedures

Origin of animals: In principal, the cattle (bachia) originate from all parts of the Sindh province.

Accommodation of the animals: On arrival at the abattoir, the cows are marked with the date and time and placed in their respective sheds. The reason for marking date is to know when to slaughter the animal (as the slaughter time is 5-6 days after arrival at the abattoir). The animals are fed and their fodder is placed within their sheds.

Output / Operational efficiency: The number of animals slaughtered per day ranges between 100 – 110 animals. The animals will be slaughtered for 10 months in a year approximately with 2,200 animals every month. A description of purchase and slaughter of animals per day is given in **Annex B**.

3.3 Abattoir Design & Setup

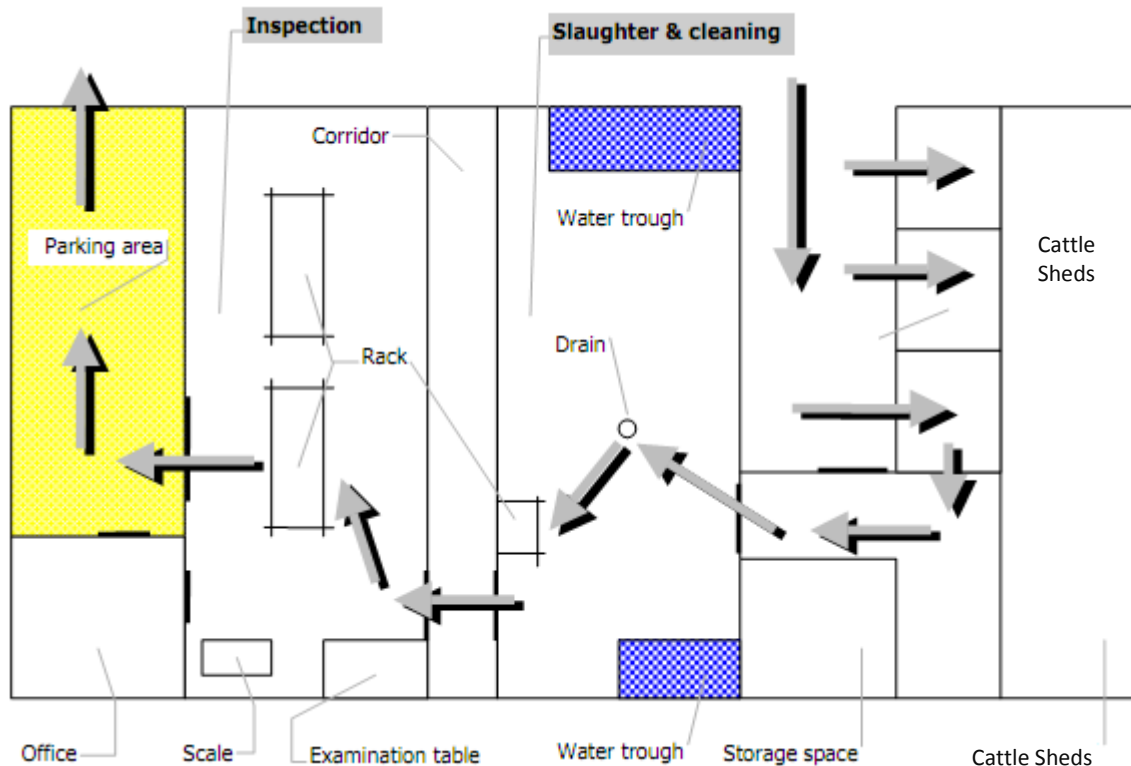
Lairage: The lairage area is covered providing protection against adverse weather conditions for cattle waiting for slaughtering. It is constructed of suitable impervious material so as to facilitate easy and thorough cleaning. Facilities have also been provided for the ante-mortem inspection to take place and detention facilities of animals that requires further inspection and evaluation. The floors and passage ways are impervious and properly sloped to ensure the satisfactory drainage. The floor has been surfaced to ensure that the animals have a safe foothold. Furthermore the lairage also contains feed trough (only when the Cattles are kept twenty four hours at slaughterhouse before slaughtering) and water troughs in each pen or stall. There is a facility for washing and disinfecting for all types of cattle transport vehicles. These facilities and equipment are maintained in good working order.

Production: The plant will have the state of art slaughtering and storage facility. The plant will be able to slaughter 200 cows per day and will be operated for a 5 days a week for 10 months in a year.

Laboratory and Quality Assurance: In order to prevent contamination the plant will comprise of laboratory, where experts will perform several testifying a meat as a healthy for human consumption.

Chillers and Cold Storage: Due to perishable nature of the product and to increase the shelf life chillers, freezers and cold storage rooms will be developed. The total freezing capacity will be 40-60 tons at a time.

Transportation: The facility of transporting will be done through pickup van.



The arrows represent the route the cattle take from arrival at the abattoir till offloading of the carcasses. The thickened lines represent the doorways.

Procedure of Slaughtering and cleaning of carcasses: A team of about five experienced men perform this job. Slaughtering starts at six o'clock in the morning, and lasts until the number of animals for that particular day are slaughtered. The animals are slaughtered in a central area by cutting the jugular veins and the throat. The blood runs off into a central drain in the floor, or is collected in a bucket at the specific request of the owner. The floor is concrete and the walls are tiled; the state of repair is poor, and floor and wall tiles are chipped. There floor are cleaned with buckets of water from water troughs and running water available. Instruments are also washed with this water. The general state of hygiene is moderate.

The carcasses are then skinned on the modern Abattoir; care is taken to avoid contact between the carcass and the floor surface. The distal parts of the legs are removed. After skinning, the carcasses are hung from hooks behind the Achilles tendons on a rack. The digestive tract and the genitalia are removed from the hung carcasses, whereby care is taken not to contaminate the carcass with ruminal or gut contents.

3.4 Operational Procedures

Lairage: The animal should be given rest for at least 12-18 hours before slaughtering and only water should be given to it in this process.

Slaughtering: Slaughters are done manually. The animal being cast down is laid on its back, while the neck vessels and passages (esophagus and trachea) are severed by a single slash of a sharp knife. Bleeding proceeds to completion.

Bleeding: Slaughtered animals must be positioned first for bleeding. A vertical or hanging position is achieved by shackling below the hock of one hind leg and hoisting the animal (head down) to a convenient height. Alternatively, the animal can be placed horizontally on a concrete slab or a sturdy plastic pallet for bleeding. Hoist bleeding is more hygienic and is recommended. It also facilitates collection of blood for further use.

Skinning: It is removing the skin of animals. Skinning will be done in hanging position with facilities/equipment of railing, the individual carcasses one after another.

Eviscerating: The next step is to cut open the animal body to dislodge the contents and produce the carcass. It is important that the carcass remains or is placed in the hanging position on railing.

Post-mortem Inspection: Inspection will be carried out by professional veterinarians and public health inspectors are to be employed, as it is required by the MCL. (Provision of their salaries has been provided in the financial analysis). Their duty is to examine the slaughter products for evidence of disease and abnormality and reject/eliminate them from the public meat supply.

Rigor Mortis process: Before chilling, for at least 2-4 hours, air is provided by fans to carcasses in a separate room.

3.5 Quality Control

In order to prevent contamination the plant also comprises of laboratory where food technician perform and evaluate several tests for potential microbiological and bacterial growth that may harm the meat. Appropriate proactive measures are taken to prevent any potential contamination.

The veterinary doctors perform ante-mortem and post-mortem inspection of animals and meat in order to ensure that the animal that is to be slaughtered is in good health and free from diseases and the animals' meat that is eventually obtained is fit and healthy for human consumption.

HACCP is used to assess and ensure food safety. Its modus operandi is to assess hazards and establish controls, and it is totally based on scientific principles to preserve food's quality, aroma, appearance and its texture. Ensuring of these factors also guarantees protection of nutritional value of food and food ingredients.

4 The Project

4.1 Project Brief

This project aims to establish state-of-the-art **Abattoir (Slaughter House)** in **Sindh** on 3 acres of leased land. All the calculations have been based on a setting up an Abattoir with a capacity to slaughter and process 200 heads of cattle per day. The plant will have the state of art slaughtering and storage facility. The plant will be able to slaughter 200 cows per day and will be operated for a 5 days a week for 10 months in a year. Animal will be bought from the market and fed for 5 days before slaughtering. On the sixth day the animal will be checked for any infection or diseases and then slaughtered.

The proposed slaughterhouse will identify and develop such services and products that will help to cater the unfulfilled market for quality meats and by-products in an effective and efficient manner on the following grounds:

- The slaughterhouse must follow the Islamic method for animal slaughter
- The slaughterhouse duly equipped with modern facility and hygienic standard

4.2 Pricing

In the Karachi market despite increase in local production of meat and livestock population, meat merchants are persistently jacking up the prices by attributing the same to smuggling live animals and surging meat export. In absence of any price control authority the beef price varies in different areas of city from 300 Rs. Per kg to 400 Rs per kg with difference in quality also experienced. The proposed project should generate revenues from sale of meat, skin and other items of the animal after they have been raised for 5 days. Assumptions used for the product mix are as follows:

Product	Average Weight	Price
Meat (Cattle) with bones	140 Kg	Rs. 250/Kg
Skin and other items ²		3,000

² 'Hide, skin prices rise by 100pc': <http://dawnnews.tv/wps/wcm/connect/dawn-content-library/dawn/the-newspaper/business/hide,-skin-prices-rise-by-100pc-900>

4.3 Product Assumptions

Number of Animals per year	22,000
Average Weight of a Live Animal	300 Kg
Feeding Period at Farm	5 Days
Boned Meat	45% of Live Weight
Total Meat Production	140 Kg/animal
Shed Space Required per animal (Sq.ft)	50
Sale price per Kg	Rs. 250/Kg
Skin, Head, Brain and other edible items	Rs. 3,000 per animal
Sale price growth rate per annum	10%
Average Cost of Feed per animal/day	Rs. 100/day

4.4 Manpower Requirement

Skilled and Semi skilled workers are needed to manage the operation of the Abattoir. These workers will look after the managing, vaccination, feeding, technical and cleaning operations at the Abattoir. The personal needed for the Abattoir is as under:

Description	Required Personal	Salary Per Month	Salary for the Year
General Manager	1	50,000	600,000
Doctor	2	40,000	480,000
Accountant	2	30,000	360,000
Driver	1	8,000	96,000
Admin Officer	1	15,000	180,000
Peon	2	14,000	168,000
Guard	3	24,000	288,000
Skilled labour	5	50,000	600,000
Helper	5	35,000	420,000
Lab (Food Technician)	1	15,000	180,000
Slaughterers	5	100,000	1,200,000
Total	28	381,000	4,572,000

4.5 Abattoir Equipment

In order to make sure the animals are slaughtered and fed properly and the meat is checked and preserved in an efficient manner the following abattoir equipments and technology have been identified.

Description	Amount PKR
Abattoir*	35,000,000
Refrigerator System with Chillers, Freezers & Coolers	8,000,000
Air Condition System	1,400,000
Two Diesel Generators³	1,600,000
Other Plant & Machinery**	1,000,000
Installation Charges	850,000
Total	47,850,000

***Abattoir:** An Abattoir will actually include hooks, cutting tools, knives, Slaughtering kit & equipments etc. The cost of this abattoir is obtained from a Chinese company Nanjing Changxun Machinery Co., Ltd. based in China.

****Other Plant and Machinery:** Weighing Scales, Hooks, Trolleys, Lab testing equipments, Exhaust fans, saver lights, bulbs, wires, coils, switches, switch boards, table fans, plumbing material and stuff, pipes etc.

4.6 Plant/Abattoir Capacity Utilisation

The capacity of the proposed slaughterhouse is 200 cattle. They will be fed for 5-6 days before slaughtering under complete Islamic Conditions. The initial capacity of the plant would be 55% and will be gradually increased to 90% at the end of 5th year. Therefore, if the plant capacity is to slaughter 200 cattle heads per day than according to 55% of plant utilisation the total number of slaughtered animals in one day would be 110. The total capacity of the plant varies from the 1st year to the 5th year of the project:

Year	Percentage
Year 1	55%
Year 2	65%
Year 3	75%

³ Perkins Diesel Generators

Year 4	85%
Year 5	90%

4.7 Land & Building

The Slaughtering facility will be located in the agricultural area near Bhambore, Thatta. The plant, build on 3 acres of land, comprises of an abattoir, Cold Storage units, Lairage, Management Office and Canteen for staff.

Water and Drainage

The slaughterhouse must have a dependable source of clean water, preferably pipe borne, to maintain hygienic and sanitary services in the plant. The water must be well distributed in terms of point-location inside the premises and must be hot, if possible, for hygienic washing of products and facilities.

It would be useful, to install a reservoir or tank on the premises as a security against shortages and breakdown of pumps.

Drainage of water is one of the main considerations in any slaughterhouse. All washings or wet cleaning must course over the slaughter floor into a collecting drainage and empty eventually outside the building. The floor should be designed to slope toward the main collecting drain, the latter in turn to slope toward exterior connecting pipes. The walls must have a hard smooth surface to prevent staining with blood and fat and hence facilitate cleaning; on the other hand, the floor must be rough or grooved to forestall slipping.

Lighting and Ventilation

Lighting is another important requirement of the slaughterhouse. Electricity connection will be obtained from WAPDA, but a diesel generator is provided for emergency supply of electricity. Transparent insets can also be made in the roofing at vantage points to provide natural lighting or sky lighting. Wide lintel windows (e.g. aluminium frame), covered with gauze to exclude insects, also serve the same purpose, as well as provide ventilation.

Description	Area (sq.ft.)	Cost (Rs. / Sq.ft.)	Total
Land	3 Acres	100,000/Acre	300,000
Shed Space (50 x 1000)	50,000	800	40,000,000
Factory/Plant	20,000	1,000	20,000,000
Admin Block	15,000	1,200	18,000,000
Store Room	500	1,100	550,000
Water Tanks Over ground and Underground			400,000
Covered Area	85,500		
Uncovered Area	45,180	250	11,295,000
Total	130,680		90,245,000

4.7.1 Mode for Acquiring Land

The land available will be on a lease (on a subsidised rate).

4.7.2 Preferred Locations – Sindh

The proposition is to establish small scale commercial Slaughterhouse (Abattoir) on 3 acres of land. The proposed location of the project is in Sindh, which consist of state-of-the-art infrastructure.

4.8 Working Capital

Description	Rate in Rs.	Total Amount
Cash		Rs. 500,000
Animals (200 – 1 year old)	30,000 per animal	Rs. 6,000,000
Feeding (For 10 Days)	Rs. 100 per animal	Rs. 200,000
Salary for 1 month		Rs. 381,000
Utilities		Rs. 450,000
Total		Rs. 7,531,000

5 The Financial Analysis

5.1 Project Economics

Capital Investment	Amount in PKR
Land	300,000
Building/Infrastructure	90,245,000
Machinery & Equipment	47,850,000
Furniture, fixtures & Office equipments	900,000
Vehicles	2,200,000
Total Capital Costs	141,495,000

Working Capital	Amount in PKR
Raw material inventory**	200,000
Cash in Hand*	7,331,000
Total Working Capital	7,531,000

**Raw Material Inventory includes Feed Inventory

*Cash in Hand include cash of Rs. 500,000 utilities, Animal Inventory and salary for one month

Total Investment	PKR 149,026,000
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5.2 Financing Option

Looking at the current market trends for such project lending of up to 70% could be available on these projects. A list of financial institutions willing to facilitate such projects is given in **Annex A**.

Initial Financing		Amount in PKR
Debt	70%	104,318,200
Equity	30%	44,707,800

5.2.1 Debt Assumptions

Debt Tenure	5 Years
Interest Rate on Long Term Debt	20%
Debt Payments	Monthly

5.3 Project Income Statement

Statement Summaries Abattoir - SBI Projected Income Statement						
	Details	Year 1	Year 2	Year 3	Year 4	Year 5
Sales		836,000,000	1,011,560,000	1,223,987,600	1,480,923,840	1,791,472,760
Less Cost of Goods Sold	L-1	682,400,000	824,306,000	995,892,620	1,203,300,446	1,453,844,431
Gross Profit		153,600,000	187,254,000	228,094,980	277,623,394	337,628,329
Less Operating Costs						
Administrative Expense	L-2	23,856,500	24,325,200	24,840,770	25,407,897	26,031,737
Marketing Expense		83,600,000	101,156,000	122,398,760	148,092,384	179,147,276
Less Amortization Cost		-				
Amortization		-	-	-		-
		107,456,500	125,481,200	147,239,530	173,500,281	205,179,013
Operating Profit		46,143,500	61,772,800	80,855,450	104,123,113	132,449,316
Less Financial Charges		19,690,905	16,731,704	13,123,072	8,722,515	3,356,274
Net Profit Before Tax		26,452,595	45,041,096	67,732,378	95,400,598	129,093,042
Provision For Income Tax		9,258,408	15,764,384	23,706,332	33,390,209	45,182,565
Net Profit/Loss After Taxes		17,194,187	29,276,712	44,026,046	62,010,389	83,910,477

5.4 Project Cash Flow Statement

Calculations Abattoir - SBI						
Cash Flow Statement						
	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Operating activities						
Net profit	-	17,194,187	29,276,712	44,026,046	62,010,389	83,910,477
Add: Depreciation expense	-	19,169,500	19,169,500	19,169,500	19,169,500	19,169,500
Amortization expense	-	-	-	-	-	-
Raw material inventory	(200,000)	(350,000)	(115,500)	(139,755)	(169,037)	(204,309)
Cash provided by operations	(200,000)	36,013,687	48,330,712	63,055,791	81,010,852	102,875,669
Financing activities						
Change in long term debt	104,318,200	(13,494,626)	(16,455,227)	(20,065,357)	(24,467,517)	(29,835,473)
Change in short term debt						
Issuance of shares	44,707,800	-	-	-	-	-
Cash provided by / (used for) financing activities	149,026,000	(13,494,626)	(16,455,227)	(20,065,357)	(24,467,517)	(29,835,473)
Investing activities						
Capital expenditure	(141,495,000)					
Cash (used for) / provided by investing activities	(141,495,000)					
Net Cash	7,331,000	22,519,061	31,875,485	42,990,434	56,543,334	73,040,196
Cash balance brought forward	7,331,000	7,331,000	29,850,061	61,725,546	104,715,980	161,259,314
Cash available for appropriation		29,850,061	61,725,546	104,715,980	161,259,314	234,299,510
Dividend	0	0	0	0	0	0
Cash carried forward	7,331,000	29,850,061	61,725,546	104,715,980	161,259,314	234,299,510

5.5 Balance Statement

Projected Balance Sheet						
	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Current Asset						
Cash	7,331,000	29,850,061	61,725,546	104,715,980	161,259,314	234,299,510
Fodder	200,000	550,000	665,500	805,255	974,292	1,178,601
Total Current Assets	7,531,000	30,400,061	62,391,046	105,521,235	162,233,606	235,478,111
Fixed Asset						
Land	300,000	300,000	300,000	300,000	300,000	300,000
Furniture	900,000	765,000	630,000	495,000	360,000	225,000
Building/Infrastructure	90,245,000	81,220,500	72,196,000	63,171,500	54,147,000	45,122,500
Machinery & Equipment	47,850,000	38,280,000	28,710,000	19,140,000	9,570,000	-
Vehicle	2,200,000	1,760,000	1,320,000	880,000	440,000	-
Total Fixed Assets	141,495,000	122,325,500	103,156,000	83,986,500	64,817,000	45,647,500
Total Assets	149,026,000	152,725,561	165,547,046	189,507,735	227,050,606	281,125,611
Liabilities & Shareholders' Equity						
Current liabilities	-	13,494,626	16,455,227	20,065,357	24,467,517	29,835,473
Accounts payable	-	-	-	-	-	-
Total Current Liabilities	-	13,494,626	16,455,227	20,065,357	24,467,517	29,835,473
Long Term Debt	104,318,200	90,823,574	74,368,347	54,302,990	29,835,473	(0)
Shareholders' Equity						
Paid-up capital	44,707,800	44,707,800	61,901,987	91,178,699	135,204,745	197,215,133
Retained Earnings		17,194,187	29,276,712	44,026,046	62,010,389	83,910,477
Total Equity	44,707,800	61,901,987	91,178,699	135,204,745	197,215,133	281,125,611
TOTAL CAPITAL AND LIABILITIES	149,026,000	152,725,561	165,547,046	189,507,735	227,050,606	281,125,611

Details of Calculations

L – 1

Item	Year 1	Year 2	Year 3	Year 4	Year 5
Fodder	11,000,000	13,310,000	16,105,100	19,485,840	23,572,010
Utilities	3,600,000	3,852,000	4,121,640	4,410,155	4,718,866
Petrol	1,200,000	1,284,000	1,373,880	1,470,052	1,572,955
Vaccination Cost	6,600,000	7,260,000	7,986,000	8,784,000	9,660,000
Animal Cost	660,000,000	798,600,000	966,306,000	1,169,150,400	1,414,320,600
Professional Fees	50,000	55,000	60,500	66,550	73,205
Maintenance Cost	100,000	110,000	121,000	133,100	146,410
Misc Expense	600,000	660,000	726,000	798,600	878,460
Total Cost	682,400,000	824,306,000	995,892,620	1,203,300,446	1,453,844,431

L – 2

Administrative Expense						
Description	Rate	Year 1	Year 2	Year 3	Year 4	Year 5
Administrative labour	10%	4,572,000	5,029,200	5,532,120	6,085,332	6,693,865
Office Expenses	10%	65,000	71,500	78,650	86,515	95,167
Professional Fees	10%	50,000	55,000	60,500	66,550	73,205
Depreciation Expense		19,169,500	19,169,500	19,169,500	19,169,500	19,169,500
Total		23,856,500	24,325,200	24,840,770	25,407,897	26,031,737

Annex A

Name of Financial Institutions	
ZTBL	Khushali Bank Ltd
Habib Bank Limited	Rozgar Microfinance Bank Ltd
Bank Al-Falah Limited	Tameer Microfinance bank Ltd
Askari Bank Limited	Kashf Bank Limited
United Bank Limited	Muslim Commercial Bank

Annex B

Date	Day	Animal Purchased	Slaughtered	Total
01-Jan-10	Saturday	500		500
02-Jan-10	Sunday			500
03-Jan-10	Monday			500
04-Jan-10	Tuesday			500
05-Jan-10	Wednesday			500
06-Jan-10	Thursday			500
07-Jan-10	Friday		100	400
08-Jan-10	Saturday	500	100	800
09-Jan-10	Sunday		100	700
10-Jan-10	Monday		100	600
11-Jan-10	Tuesday		100	500
12-Jan-10	Wednesday			500
13-Jan-10	Thursday			500
14-Jan-10	Friday			500
15-Jan-10	Saturday	500	100	900
16-Jan-10	Sunday		100	800
17-Jan-10	Monday		100	700
18-Jan-10	Tuesday		100	600
19-Jan-10	Wednesday		100	500
20-Jan-10	Thursday			500
21-Jan-10	Friday			500
22-Jan-10	Saturday	500	100	900
23-Jan-10	Sunday		100	800
24-Jan-10	Monday		100	700
25-Jan-10	Tuesday		100	600
26-Jan-10	Wednesday			600
27-Jan-10	Thursday			600
28-Jan-10	Friday		100	500
29-Jan-10	Saturday	500	100	900
30-Jan-10	Sunday		100	800
31-Jan-10	Monday		100	700
01-Feb-10	Tuesday		100	600
02-Feb-10	Wednesday			600
03-Feb-10	Thursday			600
04-Feb-10	Friday		100	500
05-Feb-10	Saturday	500	100	900
06-Feb-10	Sunday		100	800
07-Feb-10	Monday		100	700

08-Feb-10	Tuesday		100	600
09-Feb-10	Wednesday			600
10-Feb-10	Thursday			600
11-Feb-10	Friday		100	500
12-Feb-10	Saturday	500	100	900
13-Feb-10	Sunday		100	800
14-Feb-10	Monday		100	700
15-Feb-10	Tuesday		100	600
16-Feb-10	Wednesday			600
17-Feb-10	Thursday			600
18-Feb-10	Friday		100	500
19-Feb-10	Saturday	500	100	900
20-Feb-10	Sunday		100	800
21-Feb-10	Monday		100	700
22-Feb-10	Tuesday		100	600
23-Feb-10	Wednesday			600
24-Feb-10	Thursday			600
25-Feb-10	Friday		100	500
26-Feb-10	Saturday	500	100	900
27-Feb-10	Sunday		100	800
28-Feb-10	Monday		100	700
01-Mar-10	Tuesday		100	600
02-Mar-10	Wednesday			600
03-Mar-10	Thursday			600
04-Mar-10	Friday		100	500
05-Mar-10	Saturday	500	100	900
06-Mar-10	Sunday		100	800
07-Mar-10	Monday		100	700
08-Mar-10	Tuesday		100	600
09-Mar-10	Wednesday			600
10-Mar-10	Thursday			600
11-Mar-10	Friday		100	500
12-Mar-10	Saturday	500	100	900
13-Mar-10	Sunday		100	800
14-Mar-10	Monday		100	700
15-Mar-10	Tuesday		100	600
16-Mar-10	Wednesday			600
17-Mar-10	Thursday			600
18-Mar-10	Friday		100	500
19-Mar-10	Saturday	500	100	900
20-Mar-10	Sunday		100	800
21-Mar-10	Monday		100	700
22-Mar-10	Tuesday		100	600
23-Mar-10	Wednesday			600

24-Mar-10	Thursday			600
25-Mar-10	Friday		100	500
26-Mar-10	Saturday	500	100	900
27-Mar-10	Sunday		100	800
28-Mar-10	Monday		100	700
29-Mar-10	Tuesday		100	600
30-Mar-10	Wednesday			600
31-Mar-10	Thursday			600
01-Apr-10	Friday		100	500
02-Apr-10	Saturday	500	100	900
03-Apr-10	Sunday		100	800
04-Apr-10	Monday		100	700
05-Apr-10	Tuesday		100	600
06-Apr-10	Wednesday			600
07-Apr-10	Thursday			600
08-Apr-10	Friday		100	500
09-Apr-10	Saturday	500	100	900
10-Apr-10	Sunday		100	800
11-Apr-10	Monday		100	700
12-Apr-10	Tuesday		100	600
13-Apr-10	Wednesday			600
14-Apr-10	Thursday			600
15-Apr-10	Friday		100	500
16-Apr-10	Saturday	500	100	900
17-Apr-10	Sunday		100	800
18-Apr-10	Monday		100	700
19-Apr-10	Tuesday		100	600
20-Apr-10	Wednesday			600
21-Apr-10	Thursday			600
22-Apr-10	Friday		100	500
23-Apr-10	Saturday	500	100	900
24-Apr-10	Sunday		100	800
25-Apr-10	Monday		100	700
26-Apr-10	Tuesday		100	600
27-Apr-10	Wednesday			600
28-Apr-10	Thursday			600
29-Apr-10	Friday		100	500
30-Apr-10	Saturday	500	100	900
01-May-10	Sunday		100	800
02-May-10	Monday		100	700
03-May-10	Tuesday		100	600
04-May-10	Wednesday			600
05-May-10	Thursday			600
06-May-10	Friday		100	500

07-May-10	Saturday	500	100	900
08-May-10	Sunday		100	800
09-May-10	Monday		100	700
10-May-10	Tuesday		100	600
11-May-10	Wednesday			600
12-May-10	Thursday			600
13-May-10	Friday		100	500
14-May-10	Saturday	500	100	900
15-May-10	Sunday		100	800
16-May-10	Monday		100	700
17-May-10	Tuesday		100	600
18-May-10	Wednesday			600
19-May-10	Thursday			600
20-May-10	Friday		100	500
21-May-10	Saturday	500	100	900
22-May-10	Sunday		100	800
23-May-10	Monday		100	700
24-May-10	Tuesday		100	600
25-May-10	Wednesday			600
26-May-10	Thursday			600
27-May-10	Friday		100	500
28-May-10	Saturday	500	100	900
29-May-10	Sunday		100	800
30-May-10	Monday		100	700
31-May-10	Tuesday		100	600
01-Jun-10	Wednesday			600
02-Jun-10	Thursday			600
03-Jun-10	Friday		100	500
04-Jun-10	Saturday	500	100	900
05-Jun-10	Sunday		100	800
06-Jun-10	Monday		100	700
07-Jun-10	Tuesday		100	600
08-Jun-10	Wednesday			600
09-Jun-10	Thursday			600
10-Jun-10	Friday		100	500
11-Jun-10	Saturday	500	110	890
12-Jun-10	Sunday		110	780
13-Jun-10	Monday		110	670
14-Jun-10	Tuesday		110	560
15-Jun-10	Wednesday			560
16-Jun-10	Thursday			560
17-Jun-10	Friday		100	460
18-Jun-10	Saturday	500	100	860
19-Jun-10	Sunday		100	760

20-Jun-10	Monday		100	660
21-Jun-10	Tuesday		100	560
22-Jun-10	Wednesday			560
23-Jun-10	Thursday			560
24-Jun-10	Friday		100	460
25-Jun-10	Saturday	500	100	860
26-Jun-10	Sunday		100	760
27-Jun-10	Monday		100	660
28-Jun-10	Tuesday		100	560
29-Jun-10	Wednesday			560
30-Jun-10	Thursday			560
01-Jul-10	Friday		100	460
02-Jul-10	Saturday	500	100	860
03-Jul-10	Sunday		100	760
04-Jul-10	Monday		100	660
05-Jul-10	Tuesday		100	560
06-Jul-10	Wednesday			560
07-Jul-10	Thursday			560
08-Jul-10	Friday		100	460
09-Jul-10	Saturday	500	100	860
10-Jul-10	Sunday		100	760
11-Jul-10	Monday		100	660
12-Jul-10	Tuesday		100	560
13-Jul-10	Wednesday			560
14-Jul-10	Thursday			560
15-Jul-10	Friday		100	460
16-Jul-10	Saturday	500	100	860
17-Jul-10	Sunday		100	760
18-Jul-10	Monday		100	660
19-Jul-10	Tuesday		100	560
20-Jul-10	Wednesday			560
21-Jul-10	Thursday			560
22-Jul-10	Friday		100	460
23-Jul-10	Saturday	500	100	860
24-Jul-10	Sunday		100	760
25-Jul-10	Monday		100	660
26-Jul-10	Tuesday		100	560
27-Jul-10	Wednesday			560
28-Jul-10	Thursday			560
29-Jul-10	Friday		100	460
30-Jul-10	Saturday	500	100	860
31-Jul-10	Sunday		100	760
01-Aug-10	Monday		100	660
02-Aug-10	Tuesday		100	560

03-Aug-10	Wednesday			560
04-Aug-10	Thursday			560
05-Aug-10	Friday		100	460
06-Aug-10	Saturday	500	100	860
07-Aug-10	Sunday		100	760
08-Aug-10	Monday		100	660
09-Aug-10	Tuesday		100	560
10-Aug-10	Wednesday			560
11-Aug-10	Thursday			560
12-Aug-10	Friday		100	460
13-Aug-10	Saturday	500	100	860
14-Aug-10	Sunday		100	760
15-Aug-10	Monday		100	660
16-Aug-10	Tuesday		100	560
17-Aug-10	Wednesday			560
18-Aug-10	Thursday			560
19-Aug-10	Friday		100	460
20-Aug-10	Saturday	500	100	860
21-Aug-10	Sunday		100	760
22-Aug-10	Monday		100	660
23-Aug-10	Tuesday		100	560
24-Aug-10	Wednesday			560
25-Aug-10	Thursday			560
26-Aug-10	Friday		100	460
27-Aug-10	Saturday	500	100	860
28-Aug-10	Sunday		100	760
29-Aug-10	Monday		100	660
30-Aug-10	Tuesday		100	560
31-Aug-10	Wednesday			560
01-Sep-10	Thursday			560
02-Sep-10	Friday		100	460
03-Sep-10	Saturday	500	100	860
04-Sep-10	Sunday		100	760
05-Sep-10	Monday		100	660
06-Sep-10	Tuesday		100	560
07-Sep-10	Wednesday			560
08-Sep-10	Thursday			560
09-Sep-10	Friday		100	460
10-Sep-10	Saturday	500	100	860
11-Sep-10	Sunday		100	760
12-Sep-10	Monday		100	660
13-Sep-10	Tuesday		100	560
14-Sep-10	Wednesday			560
15-Sep-10	Thursday			560

16-Sep-10	Friday		100	460
17-Sep-10	Saturday	500	100	860
18-Sep-10	Sunday		100	760
19-Sep-10	Monday		100	660
20-Sep-10	Tuesday		100	560
21-Sep-10	Wednesday			560
22-Sep-10	Thursday			560
23-Sep-10	Friday		100	460
24-Sep-10	Saturday	500	100	860
25-Sep-10	Sunday		100	760
26-Sep-10	Monday		100	660
27-Sep-10	Tuesday		100	560
28-Sep-10	Wednesday			560
29-Sep-10	Thursday			560
30-Sep-10	Friday		100	460
01-Oct-10	Saturday	500	100	860
02-Oct-10	Sunday		100	760
03-Oct-10	Monday		100	660
04-Oct-10	Tuesday		100	560
05-Oct-10	Wednesday			560
06-Oct-10	Thursday			560
07-Oct-10	Friday		100	460
08-Oct-10	Saturday	500	100	860
09-Oct-10	Sunday		100	760
10-Oct-10	Monday		100	660
11-Oct-10	Tuesday		100	560
12-Oct-10	Wednesday			560
13-Oct-10	Thursday			560
14-Oct-10	Friday		100	460
15-Oct-10	Saturday	500	100	860
16-Oct-10	Sunday		100	760
17-Oct-10	Monday		100	660
18-Oct-10	Tuesday		100	560
19-Oct-10	Wednesday			560
20-Oct-10	Thursday			560
21-Oct-10	Friday		100	460
22-Oct-10	Saturday	500	100	860
23-Oct-10	Sunday		100	760
24-Oct-10	Monday		100	660
25-Oct-10	Tuesday			660
26-Oct-10	Wednesday			660
27-Oct-10	Thursday			660
28-Oct-10	Friday		100	560
29-Oct-10	Saturday	500	100	960

30-Oct-10	Sunday		100	860
31-Oct-10	Monday		100	760
01-Nov-10	Tuesday		100	660
02-Nov-10	Wednesday		100	560
03-Nov-10	Thursday		100	460
04-Nov-10	Friday		100	360
05-Nov-10	Saturday		100	260
06-Nov-10	Sunday		100	160
07-Nov-10	Monday		100	60
08-Nov-10	Tuesday		60	0
Total		22000	22000	

IMPORTANT CONTACTS

<p>SINDH BOARD OF INVESTMENT Government of Sindh Block B, 1st Floor, FTC Building Shahra-e-Faisal Karachi, Pakistan Tel: 021 – 99207512 – 4 Fax: 021 - 99207515 Email: info@sbi.gos.pk Website: http://www.sbi.gos.pk</p>	<p>MINISTRY OF FOOD, AGRICULTURE & LIVESTOCK B Block, Pak Secretariat, Islamabad , Pakistan Tel: +92-51-9203307, 9210351 Fax: +92-51-9210616</p>
<p>TRADE DEVELOPMENT AUTHORITY OF PAKISTAN (TDAP) 5th Floor, Block "A", Finance & Trade Centre, Shahra-e-Faisal, Karachi - Pakistan Tel: (92-21) 9206462 Fax: (92-21) 9206461</p>	<p>SMEDA 5 TH Floor, Bahria Complex II, M.T. Khan Road, Karachi - Pakistan Tel: (021) 111-111-456 Fax: (021) 5610572 Email: helpdesk.sindh@smeda.org.pk</p>
<p>LIVESTOCK & FISHERIES DEPARTMENT - SINDH Barrack Number 90, Sindh Sectt. No. 48, Opp. Sindh Assembly Building Karachi – Pakistan Tel: 021 – 99203291</p>	<p>Zarai Taraqiat Bank Limited 1 Faisal Avenue P.O. Box No. 1400. Islamabad, Pakistan Phone: 0092-51-9252805 Email: contactus@ztbl.com.pk</p>
<p>PK Livestock Moosa Razakabad Office National Highway, Dist: Malir Karachi Tel: 021 – 34100033</p>	<p>Al Shaheer Corporation. Suite # G/5/5, 3rd Floor, Mansoor Tower, Block 8, Sharah-e-Roomi, Clifton Block 8. Karachi Phone: 0092-21-35810051 Fax: 0092 21 35877017</p>
<p>THE MEAT SHOP 5-C, 1st Commercial Street, Zamzama Phase 5, D.H.A. Karachi, Pakistan. Tel: (92-21) 3-582-4844, 3-583-7374</p>	<p>MEAT ONE Main Khayaban-e-Shamsheer (Opposite Malaysian Consulate) Phase 5, D.H.A. Karachi, Pakistan. UAN: (0092-21) 111163281</p>
<p>Livestock and Dairy Development Board (LDDDB) 76- W, Umer Plaza , 1st Floor, Jinnah Avenue , Blue Area, Islamabad Tel: 051-2605711 - 4 Fax: 051-2605713</p>	<p>ISO-Xpert Management & IT Consultants D-32, Block-7, Gulshan-e-Iqbal Karachi—75300, Pakistan. Tel: 021-34973151 — 34815995</p>
<p>AG FA TECH C-10,Ground Flr., Ruqaiya SquareBlock-14, Federal "B" Area Karachi Tel: 021 - 36322602, 36333069</p>	<p>MEHRAN FEED INDUSTRIES (PVT) LTD. 805, Progressive Square, Block-6PECHS., Main Shahrah-e-Faisal Karachi Tel: 021 – 34540377</p>