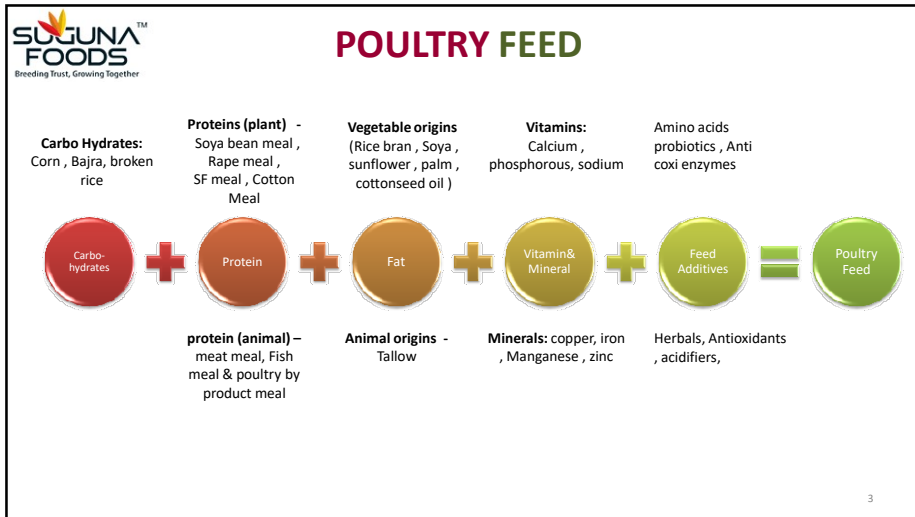


### Prospectus of Indian Feed Industry



### About Suguna

- India's Largest Poultry integrator
- 5<sup>th</sup> largest in Asia
- Turn over of INR 9000 Cr
- Working with 40000 farmers
- Capacity to process 50000 Mts/yr chicken meat
- 77 hatcheries with 15 million eggs set per week
- 62 feed mills and feed production of 2.5 mmts
- Largest broiler producer in India
- Largest soymeal consumer of India
- Selling one millions broiler birds per day



**SUGUNA FOODS**  
Breeding Trust, Growing Together

## WHERE WE STAND?

Description	Current Rank	FY 2019	FY 2010	FY 2010 Rank
Dairy Production	1 <sup>st</sup>	165.4 MMT	116 MMT	2 <sup>nd</sup>
Aqua Production	2 <sup>nd</sup>	10.76 MMT	8.1 MMT	4 <sup>th</sup>
Broiler Meat Production	4 <sup>th</sup>	5.51 MMT	2.65 MMT	6 <sup>th</sup>
Egg Production	3 <sup>rd</sup>	71 billion	54 Billion	7 <sup>th</sup>

- Broiler is growing @6-8% per annum.
- Layers is growing @ 4% per annum
- Aqua is growing @12% per annum

Sources: [nddb.coop](http://nddb.coop); [www.ijirset.com](http://www.ijirset.com); Director of Fisheries state Government; [www.internationalegg.com](http://www.internationalegg.com)

4

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## INDIAN LIVESTOCK

Broiler	Layer	Aqua	Cattle
<ul style="list-style-type: none"> <li>1 crore birds/day (Prod)</li> <li>4.85 MMT meat production/year</li> <li><b>@ 3.6 Kg Feed/Bird</b></li> <li>1,20,000 Crs Industry</li> <li><b>16 MMT of Broiler Feed Production/annum</b></li> <li>Industry growth at 6-8%</li> <li>4 TO 5 MMT of Soya meal consumed</li> </ul>	<ul style="list-style-type: none"> <li>20 cr eggs/day</li> <li>71 Billion table Egg Production/year</li> <li><b>@ 115 grams of layer feed/egg</b></li> <li><b>11 MMT of layer Feed Production/annum</b></li> <li>Industry Growth rate at a steady 4% CAGR</li> <li>1.1 MMT of Soya meal</li> </ul>	<ul style="list-style-type: none"> <li>10.76 MMT Production FY 16</li> <li>2<sup>nd</sup> largest Producer in the world</li> <li>1,00,000 Crs Industry</li> <li>6 lakh MT Shrimp Production FY 18</li> <li><b>3 MMT of Aqua Feed production/annum</b></li> <li>0.75 MMT Soya meal</li> <li>Growing with min 10-12% CAGR</li> </ul>	<ul style="list-style-type: none"> <li>420 million LPD production</li> <li>Largest producer and consumer of milk in the world</li> <li>5,75,000 Crs Industry</li> <li>Industry growth at 16% CAGR</li> <li>9 MMT feed production</li> <li><b>1 Lakh MT Soya Meal</b></li> </ul>

5

**SUJUNA FOODS**  
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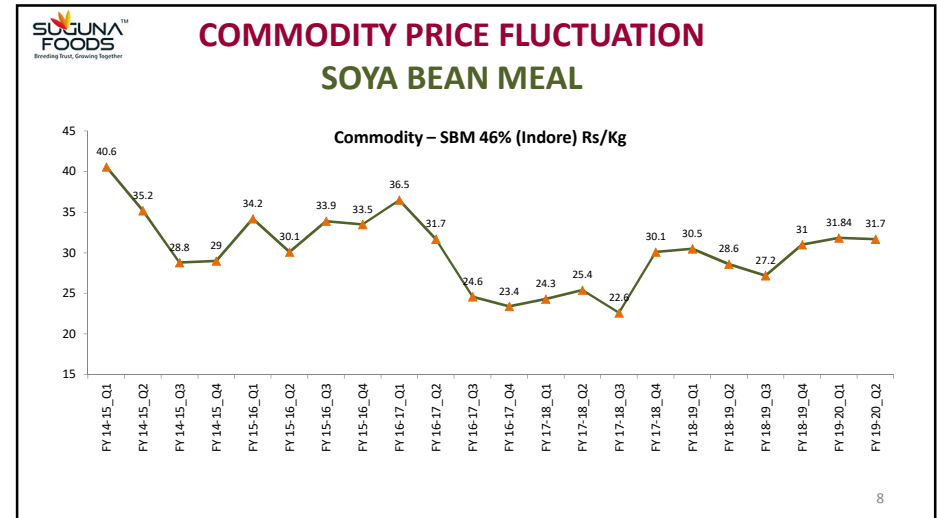
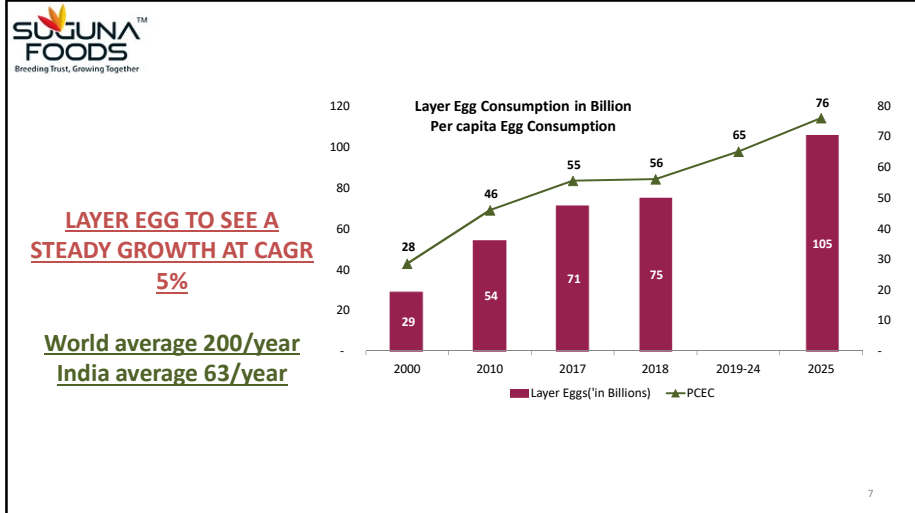
### POULTRY MEAT CONSUMPTION TO GROW AT A CONSTANT CAGR 7.5%

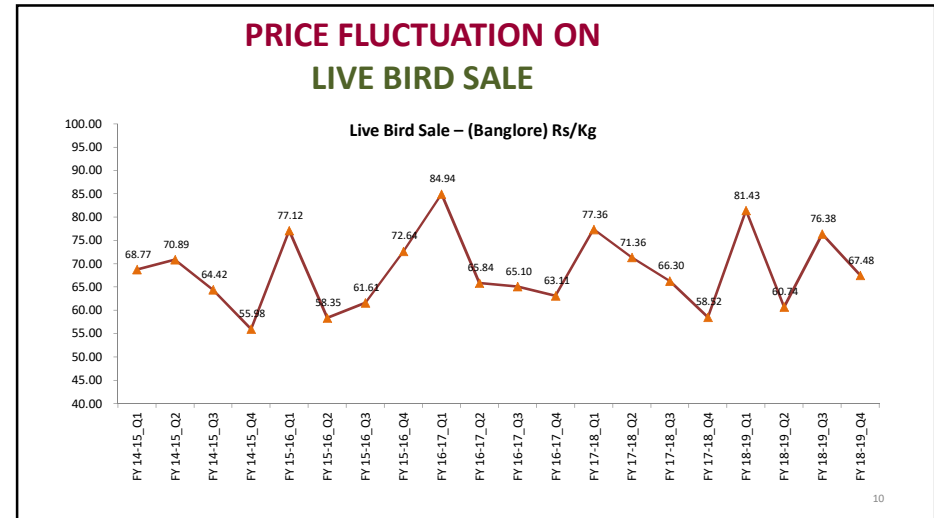
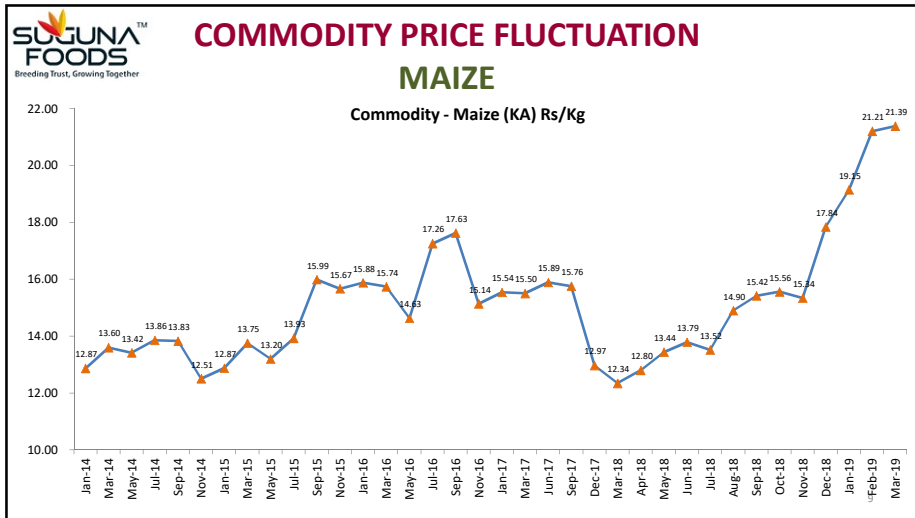
**World average -17 Kgs**  
**Highest -Israel 59 kgs**  
**Indian average -3.90 kgs**

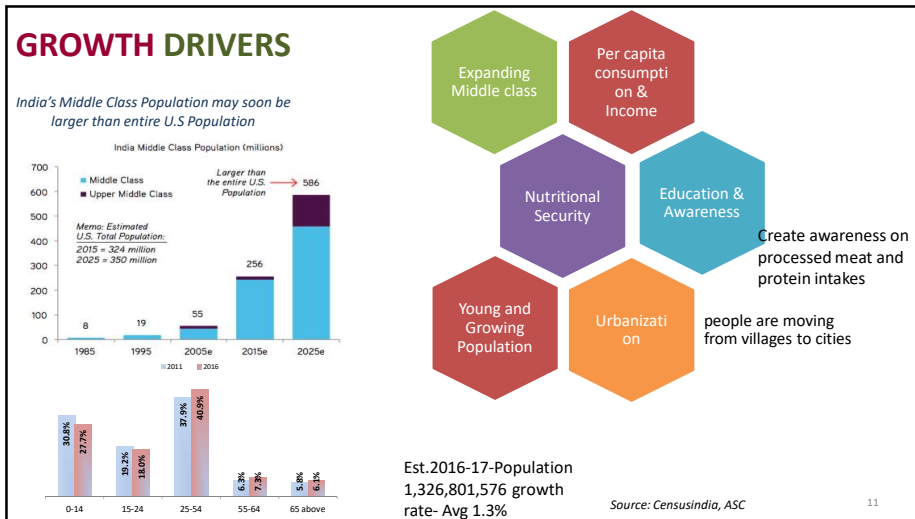
**Broiler Meat Gross Consumption ('Mn MT)**  
**Per Capita Consumption of meat ('Kgs)**

Year	Consumption ('Mn MT)	Per Capita Meat consumption ('Kgs)
2000	1.08	1.03
2010	2.65	2.15
2017	4.85	3.35
2018	5.21	3.89
2019-24	-	4.52
2025	8.65	5.98

6







### Feed Production & Soya Consumption

Description	Volume/Annum ('MMT)	% of Soya Composition		Soya Volume ('MMT)	
		Min	Max	Min	Max
Broiler	16	20%	25%	3.20	4.00
Layer	11	8%	10%	0.88	1.10
Aqua	3	20%	25%	0.60	0.75
Cattle	9	1 Lakh MT		0.1	0.1
<b>Total</b>	<b>39</b>			<b>4.78</b>	<b>5.95</b>

12

## Blue revolution

- Ministry of Agriculture and Farmers Welfare, Department of Animal Husbandry, Dairying & Fisheries has accordingly restructured the scheme by merging all the ongoing schemes under an umbrella of Blue Revolution
- To increase the overall fish production in a responsible and sustainable manner for economic prosperity
- Focuses mainly on increasing fisheries production and productivity from aquaculture and fisheries resources, both inland and marine.
- Central outlay of 3000 crore for five years



## Feed Production & projection

sector	Year 2019			Year 2025-30		
	production /year	Protein consumption	Soya consumed (MMT)	production /year	Protein consumption	Soya meal required ('MMT)
Broiler	16	20%	3	26	20%	5
Layer	11	10%	1	13	10%	1.3
Aqua	3	25%	0.75	15	25%	3.5
Cattle	9	One lac	0.1	15	2 lac	0.2
<b>Total</b>	<b>39</b>		<b>4.85</b>	<b>69</b>		<b>10</b>

## Kharif-19 soya.....??

Demand	Supply
<ul style="list-style-type: none"> <li>• Enough SBM for the domestic market</li> <li>• OND Export opportunity is over</li> <li>• Export Market?</li> <li>• forward trade ? reflects the confidence</li> <li>• Will EU buy Indian</li> <li>• Will Iran buy as they are stuck up with sanction</li> <li>• Trade war</li> <li>• % of SBM in feed – Soy needs to preserve its share</li> <li>• Organic Meal/Beans Exports – How sustainable this flow is</li> <li>• Poultry Growth – Will it consume SBM in same manner?</li> </ul>	<ul style="list-style-type: none"> <li>• Moisture of bean</li> <li>• Damage seeds percentage</li> <li>• Crush</li> <li>• Oil recovery</li> <li>• Quality of protein</li> <li>• Cost of meal</li> <li>• Ukrainian will be other source</li> <li>• Good crop of GN and RSM</li> <li>• Available alternatives – Cotton Seed Meal, SFM, RSM, CGM etc</li> </ul>