



FISHMEAL INDUSTRY OF PAKISTAN

By:
M.A.Proteins



INTRODUCTION

- It is almost 40 years old industry with around 10,000 people employed directly or indirectly.
- There are 3 fish landing ports where we get our raw material for fishmeal purpose.

1. FISHERY:

The left overs, waste fish and fish clippings from the edible fish industry. The raw material is mixed species of mostly Cat fish, Sardine, Mulletts and Red snapper etc. The fishing season starts in September for 9 months. Around 30% of the fishmeal made from the raw material from this port is export quality.

2. HYDERI:

On this port we get Anchovy and Sardines. Mostly fresh quality and 80% of the fishmeal from this port is suitable for export. The fishing is only for 15 days a month from September till April. By the grace of the Almighty 40% of the active boats at the Hyderi port are catching fish for only M.A.Proteins.



INTRODUCTION

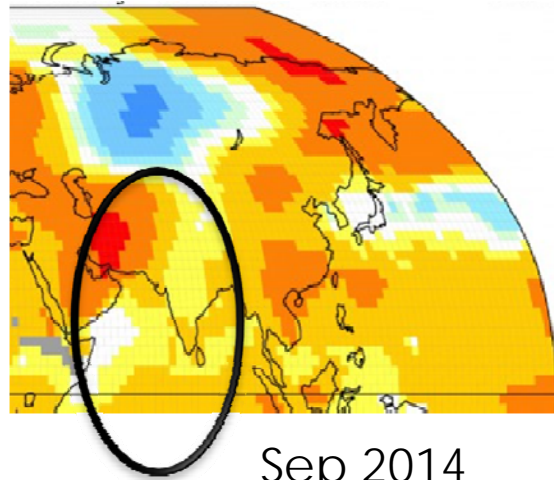
DAAM:

This port is near to the famous Gwadar Port where Pakistan and China economic corridor is under development. The fish from this port is fresh and fatty, mostly used for sun dried fishmeal.

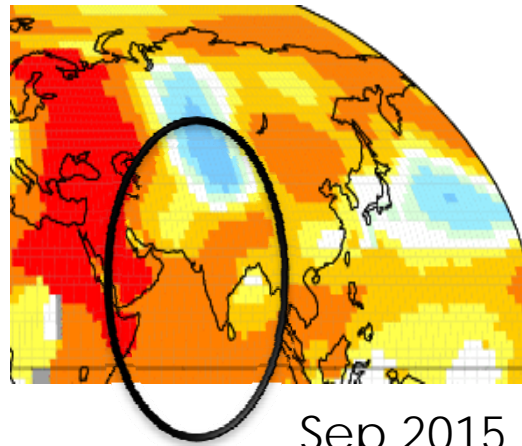
Due to El Nino effect the fishing was **90% less** during the last season. The new season starts in October and we hope for a better fish catch. The season period is between October till April.



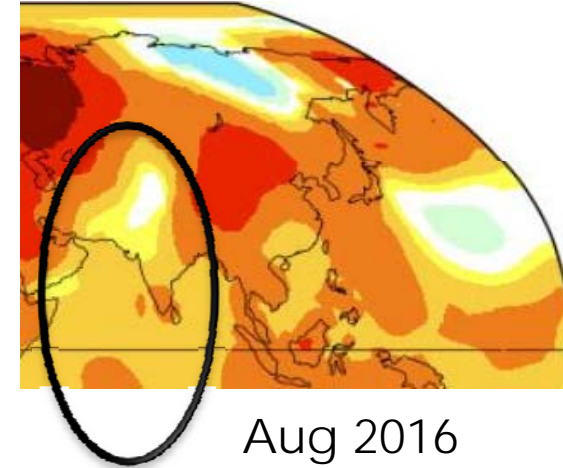
Weather & Fishing



Sep 2014



Sep 2015



Aug 2016

Images courtesy NASA website

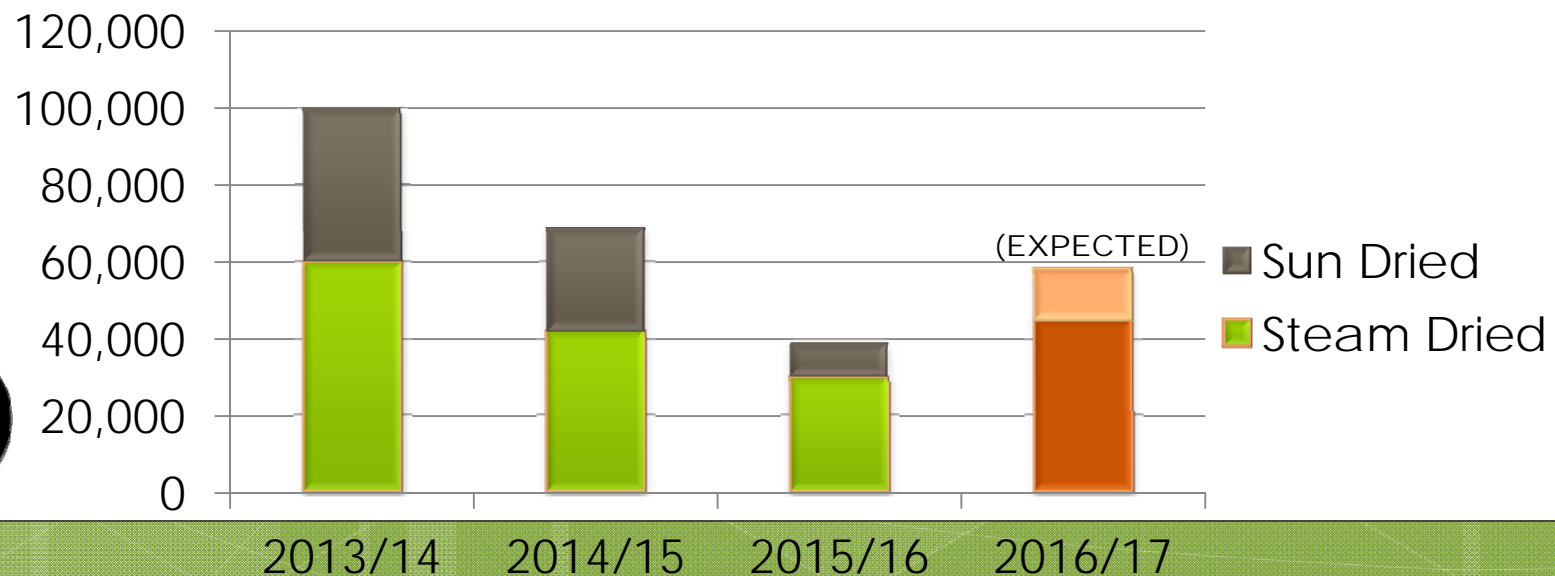
The **2015 El Nino** had the worst effect on Indian Ocean. During 2015 the temperature in fishing and harbor areas were recorded more than **45C** with very **strong winds**. The temperature in those areas are normally **35C**. The biomass was also noticeably small resulting in **historic low catch**. In 1997 and 2003 we experienced similar shortfall in fish catch which took sometime to recover, however, it was better in the following years.

Since June 2016 the temperatures are much cooler and back to normal. **God willing** we expect better fishing during 2016-2017.



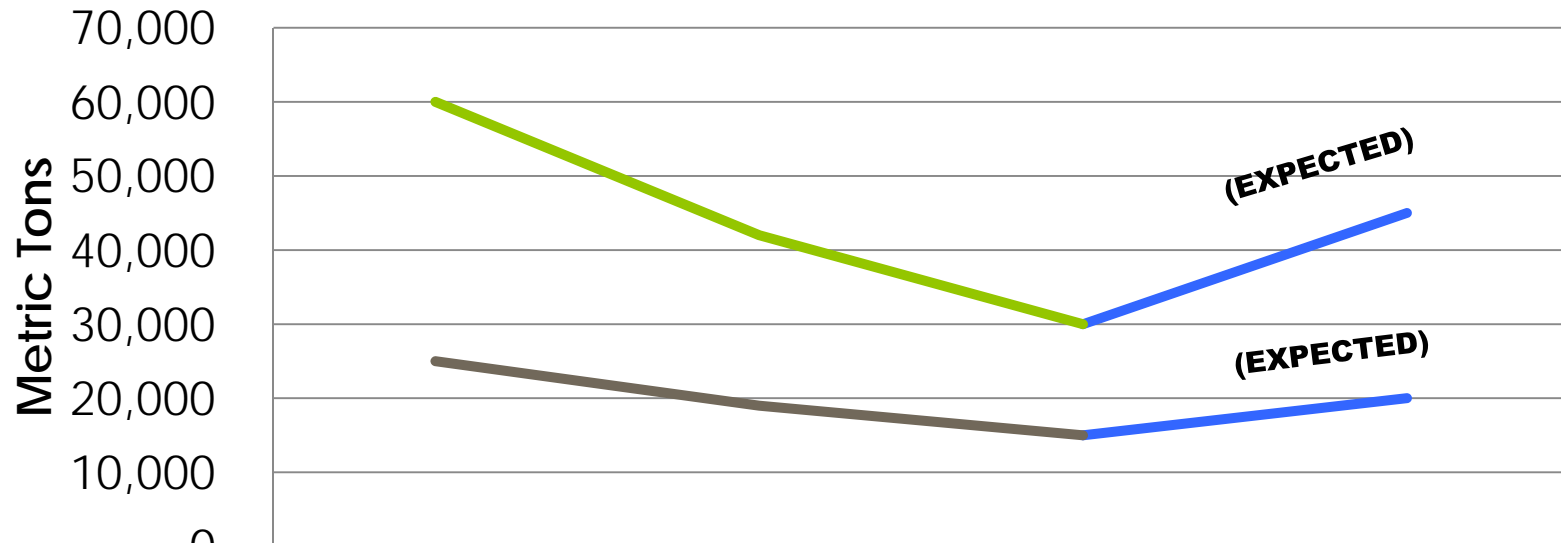
FISHMEAL INDUSTRY

- Pakistan has production of both steam dried and sun dried fishmeal.
- The 2013-2014 season for the fish landings was good and the total fishmeal produced was almost a 100,000mt.
- In 2014-2015 the biomass started to deplete. The total catch remained at 35% lower. Almost 65,000mt of fishmeal was produced in which 42,000mt was steam dried.
- Due to El Nino in 2015-2016 there was 60% less fishing than 2013-2014.



M.A. Proteins Industry Share

Steam Dried Fishmeal Production Flow



	2013/14	2014/15	2015/16	2016/17
— Total Production	60,000	42,000	30,000	45,000
— M.A. Protein	25,000	19,000	15,000	20,000



GOVERNMENT ROLE

- The government of Pakistan has now started taking interest in the Development and control of the fishing for the fishmeal industry. The usage of small size nets are being banned to protect the biomass and juvenile fish in our sea.
- We expect this will take another 2 years to fully implement. The size of Anchovy and Sardine biomass has seriously deteriorated because of juvenile fish catching in ban season and breeding spots. Furthermore, last year El Nino effect has crippled the industry, however, we see some sign of recovery this year.
- We hold regular meetings with government officials and work with them to identify juvenile fish catching.



Fishmeal Market

- Pakistani fishmeal prices are mostly influenced by domestic market.
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- Most of the production of sun dried and part of steam dried fishmeal is consumed by local feed producers.
- The local fishmeal price can go higher than export price depending on supply and demand and other protein meal prices like soymeal and rapeseed meal.
- There are no quota system in Pakistan only open market competition.
- Pakistani fishmeal has its own market value. We are now widely accepted by many aqua feed producers.
- In **2014-2015** the prices remained average **\$1180** cnf China for 60%min. Last year at CFO we estimated the price will average \$1050 for the running season and the actual price average was \$1040.
- For current season of **2016-2017** our estimate for **60%min** price is to average around **\$980**.



ITEMS	SPECIFICATION 1	SPECIFICATION 2	SPECIFICATION 3	SPECIFICATION 4
PROTEIN - MIN %	64%	62%	60%	58%
MOISTURE - MAX %	9%	10%	10%	10%
ASH - MAX %	20%	20%	21%	21%
FAT - MAX %	12%	13%	14%	14%
SAND - MAX %	2%	2%	2%	2%
SILICA - MAX %	2%	3%	3%	3%

Raw Material

English Name	Scientific Name
Commerson's Anchovy	Stolephorios Commersoni
Sindh saradine	Sardinella Sindenrus
John Croaker	Johnis Sp.
Thryssa	Thryssamystax
Threadfin Bream	Nempteris Japonius
Oil Sardine	Sardinella Longiceps
Mullet	Liza Sp.
Cat Fish	Arius
Rays	Stingrays



M.A. Proteins



WHEN YOU NEED TO BE SURE



- M.A. Proteins has spread its clientele to many international destinations including Turkey, Malaysia, Vietnam, Indonesia, Sri Lanka and China.
- M.A. Proteins has potential markets in Africa and Middle East.
- We are producing almost 25,000-30,000mt fishmeal annually and are capable of processing 600mt raw material daily by the grace of the Almighty.
- The new facility in Daam is a big step forward to source the best quality raw material for fishmeal. By the will of the Almighty, we expect better results this year.



M.A. Proteins is the only company in Pakistan that has ISO 9001-2008 and HACCP certification directly from SGS Switzerland.



THANK YOU
YZYZYZYZYZYZYZYZYZYZYZYZYZYZYZ

