IRAN ANIMAL FEED MARKET 4th EDITION, 2024

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Animal feed is the focus of sustainable development

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Iran Feed Industry Association

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Foreword

MAJID MOVAFEGH GHADIRLY
AUTHOR & IFIA
CHAIRMAN OF THE BOARD

Now, after 20 years of the third millennium, we are at the glorious beginning of the explosion of science and information in all areas of life. The light of knowledge is shining on all aspects of economic, political, etc. activities and it is not a dark house in the global village. On the other hand, parallel to the production of knowledge and various statistical numbers, the fields of technology are also expanding and developing wonderfully, and in this field of science and technology development, those who have the ability to exploit and use this treasury are the winners. The field of agriculture and animal husbandry has also reached new achievements due to the growth of the world population and the limitation of supply sources, among the vanguards of science and

technology advances every day, and in addition to increasing the productivity of inputs, they have achieved amazing numbers during the breeding and maintenance period and the amount of the product. In the field of global trade, thanks to the existence of transparent information and the facilitation of information circulation, the producing countries, due to their relative production and geopolitical advantages, have left the previous traditional shell and are thinking of importing and exporting products that can be easily supplied, distributed and sold in the global and domestic spheres. Iran Feed Industry Association has also published the third edition of “Iran Animal Feed market” in line with its mission and in continuation of the previous series of books that explained and described the domestic and global market and hopes that the publication of this book can help ,even a little, to make the production, distribution and sale of livestock, poultry and aquatic feed, more dynamic. Please share your comments and suggestions with us so that possible problems and errors can be fixed in the next issues.

Iran Feed Industry Association

Overview

With the formation of livestock and poultry feed mill institutions, organizations and associations in Iran, to receive opinions on the animal feed industry, be stakeholders and meet the needs of large- scale industries (entrepreneurs), as well as managers, the status of an institution was required and therefore, a number of public and private sector entrepreneurs and managers became involved in this issue.

IFIA as the Official Member of IFIF (International Feed Industry Federation) is Iran's largest organization devoted exclusively to making laws and legislations as well as defending the legal interests of the animal feed industry and the suppliers.

IFIA also is the recognized leader for international companies and provincial associations, and 650 members which include domestic parties, such as livestock feed and additive feed manufacturers, integrators, pharmaceutical companies, ingredient suppliers, equipment manufacturers and companies which supply other products, services and suppliers for feed manufacturers. The feed industry plays a significant role in providing feed safety, nutrition and the environment, as well as healthy, wholesome meat, milk, fish and eggs. More than 80% of the commercial feed in Iran is manufactured by IFIA members. Besides, setting the foundation to interact with domestic institutions, universities, colleges, there is also relations with international entities such as IFIF (International Feed Industry Federation), FAO, as well as some Chinese, Indian and European institutions.

History

Iran's feed Industry was established 60 years ago, simultaneously with the industrialization of animal husbandry. Nowadays, despite the high depreciation, 3 generations of technology have been integrated into feed mills.

In 2002, the number of animal feed mills was at 300 with the capacity of about 8 million tons production annually, while the number of mills reached 645 with a production capacity of 20 million tons after 15 years. Over time, a significant number of feed mills were established with a production capacity of over 30,000 tons, due to the high efficiency two working shifts become the norm. Moreover, unlike the old units, the new ones were active at higher or almost actual capacity.

Also, the technology utilized was completely up to date with GMP certifications and Iranian authority's new standards. Most animal farms prefer to purchase their feed requirements from the newly established mills.

Mission

- Organize livestock and poultry feed industries with faster coordination, consistency in the activities of the industry.
- Enhance bargaining power in the domestic and international markets.
- To improve product quality, with the aim of improving civil and guild management.
- To the pave way for further exploitation of investment for suitable production of the required merchandise.
- Apply and transfer stakeholder scientific and practical experience to update achievements of the legal and developmental goals.
- Organize all affairs relating to animal feed production.
- Receive data relating to supply and demand, prices and consumption markets, sent to members.
- Participate in decision-making and determine production of relevant goods and services.
- Forge relationships and communication with state banks and credit institutions as well as national and international monetary organizations, as per regulations, aimed at facilitating and expanding financial services according to IRI regulations.
- Create a database for areas related to the goals of the association to provide data via a network, in addition to publication of books, magazines, journals, special-interest and exchange of relevant information;

Goals & Plans

- Develop and strengthen the contribution of animal feed industry to the national economy.
- Strengthen the role of animal feed industry in terms of employment and national income.
- Efforts to promote social knowledge, regarding the role of animal feed industry on inclusive development.
- Attempts to promote leadership and management knowledge and skills for industrial and semi-industrial feed mills.
- Attempts to optimize use of resources and environmental protection.
- Participate with government agencies to create a favorable environment, unity and solidarity among activists in the field of development.

- Increase bargaining power in the domestic and international markets.
- Apply and transfer stakeholders scientific and practical experience to update the achievement of the legal developmental goals.

Beliefs & Core Values

Core values are basic beliefs, traits and behavioral norms that would motivate criteria decision making of the organizational culture and all members and stakeholders are expected to commit the implementations and executives and signify the necessary commitment in practice. The beliefs include:

- Accountability
- Commitment
- Cooperation and empathy
- Independence in providing comments
- Respect other's opinions and attempts to reach
- consensus
- Respect the national and social interests

Vision

- Transform the association into an information resource and the decision-makers in the field of animal feed industry, so that the relevant industrial policies would not be applied except the participation and presence of the Association.
- The vision will be realized by focusing on the following strategic issues:
- Turn to a stable organization having an optimal financing system
- Establishing and maintaining relationships, collaboration and effective partnerships at home and abroad
- Creation of a think-tank and expert industrial /economical professionals
- Lead in creating and developing standards of corporate governance, social responsibility and business ethics Extend recruitment and increasing members circle.

IFIA Members of the Board of Directors

Majid Movafegh Ghadirly
Chairman
Director Manager of Iran Feed, Drug and Additive Joint-Stock Company

Reza Savari
Vice chairman
Director Manager of Keyvan Morgh Partalai Mahabad Company

Ahmad Salahshoor
Member and Treasurer
Director Manager of Gohar Daneh Shargh Company

Seyyed Ali Kheirie
Member
Director Manager of Setare Kian Birjand Company

Foroud Yadollahi
Member and Secretary
Director Manager of Fara Daneh Company

Iran Feed, Drug & Additive Joint-Stock Company

Overview

In 1998, a group of highly reputed and renowned pioneers established Iran Feed, Drug & Additive Joint-stock company to create one of the most comprehensive companies in the field of animal feed industry. The organization under the Ministry of Agriculture-Jahad support and a number of highly reputed entrepreneurs and industry owners and with more than half a century experience, managed to plan and implement strategies in order to improve the Feed industry in Iran. Iran Feed, Drug and Additive Joint-Stock Company (IFDAC) was established with the aim to be one of the most comprehensive and consolidated commercial-trade organizations to improve feed production in a high quality and quantity. Having more than 164 affiliated feed mills as the members, now the company supplies about two third of the total feed production in Iran. Appropriate geographical distribution of members, warehousing high capacity, well-equipped laboratories, remarkable technological capabilities, considerable turnover and active education and research department, enable the company to cope with its duties perfectly.

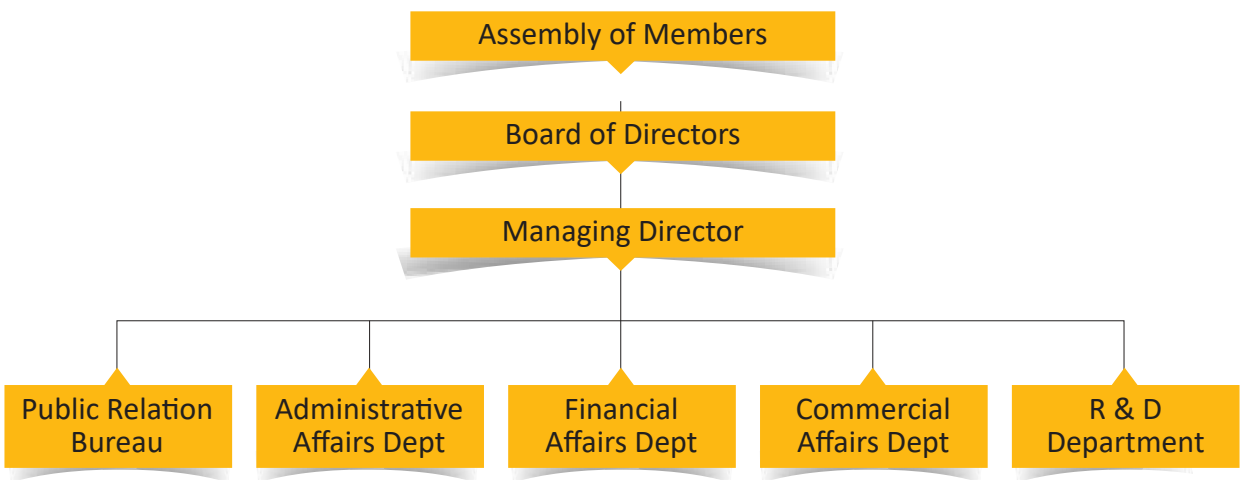
The organization chart is illustrated below:

Mission

Participation in economic development by strengthening the promotion and expansion of animal feed, and provide an environment with effective and constructive role in the recovery and improvement of business environment and individuals' quality of life for the industrial companies, scientific centers, organizations and professional companies in the city centers of provinces.

Vision

- Transforming the company into a database in the field of animal feed industry, so that the relevant industrial policies are not implemented without the participation and presence of the Joint-stock company.
- The vision would be more touchable by focusing on the following strategic issues:
- Becoming a stable organization having optimal financial system.
- Establishing and remaining in the relationships, with collaborations and effective partnerships nationally and internationally.
- Creation of a think-tank and expert industrial / economical



professionals.

- Becoming a leader in creating and developing standards of corporate governance, social responsibility and business ethics.
- Very broad recruitment and increasing the circle members.

Strategy

At the moment, with support and assistance of the private sector and valuable strategies of Ministry of Agriculture-Jahad, the organization has the possibility to become a member of related professional and specific associations. The management tries to expedite and facilitate the industry's activities by following up important issues with the authorities. Some of the activities implemented by the organization include possibilities of offering low interest loans, lowering custom tariffs, facilitating export, and controlling strategies of quality.

Already, the R&D center of the organization tries to increase the quality and lower the production cost of animal feed by accessing or importing new raw material technology.

In the other words, a high amount of investment has been made to cooperate with R&D sections, and organizations in Europe, Asia and India, which the Pro-biotic animal feed production is one of the major implemented strategies.

Main Duties

- Dealing with the trade affairs through contact with the relevant state organizations.
- Providing the members with the raw material and feedstuff.
- Marketing and exporting members' products.
- Supplying the members with technical services in order to improve the sufficiency and profitability.
- Conducting some projects to enhance quality assurance of products and productivity.
- Holding seminars, workshops and short-term training courses for expert and staff members.
- Offering technical consultation on nutrition and feed to the members as well as animal farmers.
- In fact, the company makes efforts to facilitate the activities in feed industry through making suggestions to official organization, taking the relevant steps such as offering bank credits with low interest rate, lowering tariffs rate, providing export credits, lowering taxation rate, ensuring the products for quality assurance, promoting the distribution system of feedstuff.

Significant Enterprises

- Member of specialized committees in Ministry of Agriculture-Jahad.
- Member of livestock, poultry and aquatic Feed Codex Committee in Iran.
- Member of Feed Committee of Iranian Institute of Standard and Industrial Research

Cooperation with some domestic and international educational institutions by singing up MOUS.

- Holding some domestic, regional and international workshop, short-term training courses in feed technology.

Attendance in some regional and international, exhibition to present Iranian capability of feed industry. Having cooperation with domestic and international research institutions to apply the outcome of the researches in the plants.

Offering technical services and consultation to the members as well as livestock, poultry and aquatic farmers.

Suppling proposals to officials and policy makers concerning feed manufacture to improve the situation in the industry.

Establishing a Wide Area Network (WAN) in the specialized field to join the members.

IFDAC Members of the Board of Directors

Reza Savari
Chairman
Managing Director of
Keyvan Morgh Partalai
Mahabad Company

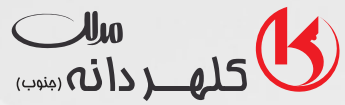
Majid Movafegh Ghadirly
Managing
Director

Seyyed Ali Kheirie
Vice- Chairman
Agent of Khorak
Gostarandame
Company

Gholam Reza Nosrt
Member
Managing Director of
Hashtgerd Supplement
Company

Mohammad Reza Hesamian
Member
Managing Director of
Kabileh Shahreza

Sponsers



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1

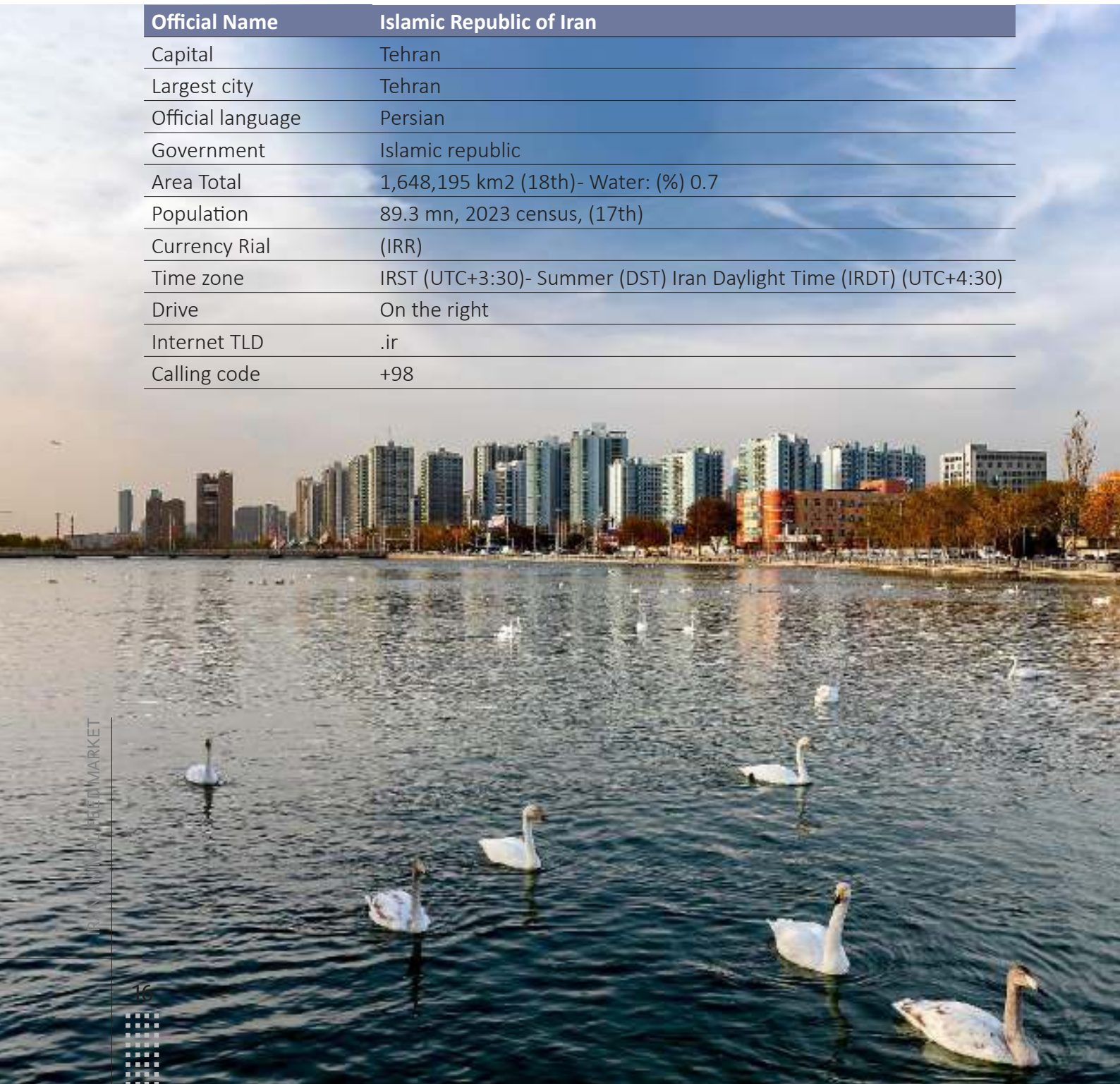
IRAN ECONOMY

Overview

The Islamic Republic of Iran is a country in the Middle East (West Asia), which has borders with Armenia, Azerbaijan, and Turkmenistan in North, Afghanistan and Pakistan in East, Iraq in West and Turkey in Northwest, and in the South bordered by the Persian Gulf and Oman Sea.
Iran is divided into five regions with 31 provinces (Ostān); the provinces are divided into counties (Shahrestān) and subdivided into districts (Bakhsh) and villages (Dehestān), each governed by an appointed governor-general (Ostāndār).

***Table1,1:* General Information**

Official Name	Islamic Republic of Iran
Capital	Tehran
Largest city	Tehran
Official language	Persian
Government	Islamic republic
Area Total	1,648,195 km2 (18th)- Water: (%) 0.7
Population	89.3 mn, 2023 census, (17th)
Currency Rial	(IRR)
Time zone	IRST (UTC+3:30)- Summer (DST) Iran Daylight Time (IRDT) (UTC+4:30)
Drive	On the right
Internet TLD	.ir
Calling code	+98



Population

According to the latest census, Iran's total population was 89.3 million, of which 51 and 49 million were male and female. Also 74% and 26% were urban and rural, respectively, in the year ended October 2023. The population growth had a downward trend, reaching from 2.46% during the 1986 - 1991 period, to 1.1% in the year ended Oct. 2023.

Figure 1-1: ***Gender Ratio in the Yr. ended Mar. 2023- %***

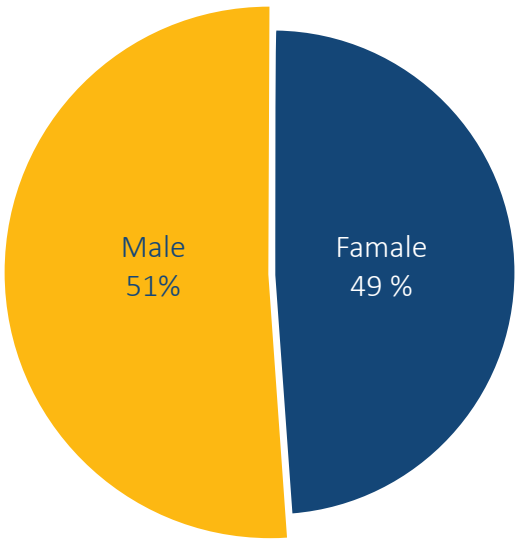
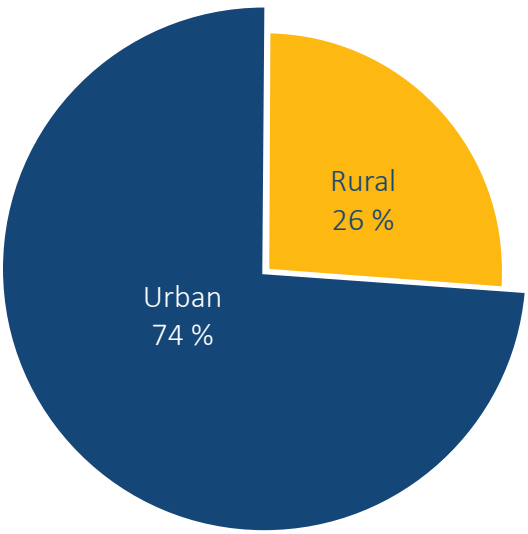


Figure 1-2: ***Residence Status in the Yr. ended Mar. 2023 - %***



Source: Statistical Center of Iran

GDP & Economic Growth

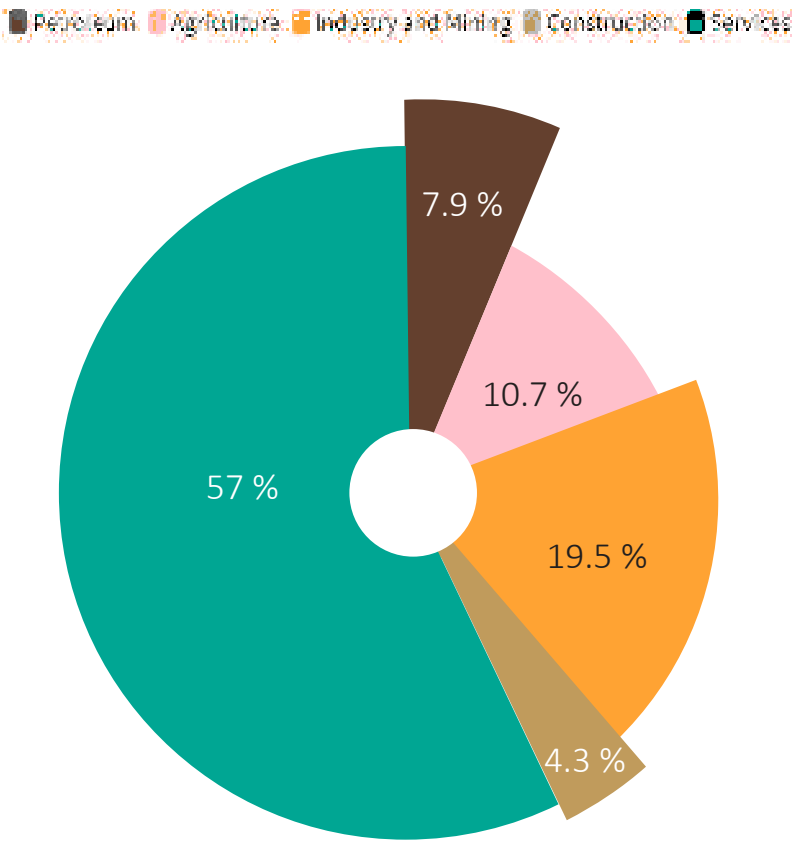
According to the IR Central Bank, the GDP amounted to 413.5 bn dollars in 2022 with growth rate of 3.8%.

***Table 1-1:* GDP & Economic Growth 2017-2022**

	2017	2018	2019	2020	2021	2022
GDP; Current Price (bn USD)	486.6	329.6	283.65	239.7	359.1	413.5
Economic Growth (%)	2.8	-1.8	-3.1	3.3	4.7	3.8

Source: World Bank

***Figure 1-3:* GDP Composition 2022 - %**



Source: Central Bank of Iran

Inflation

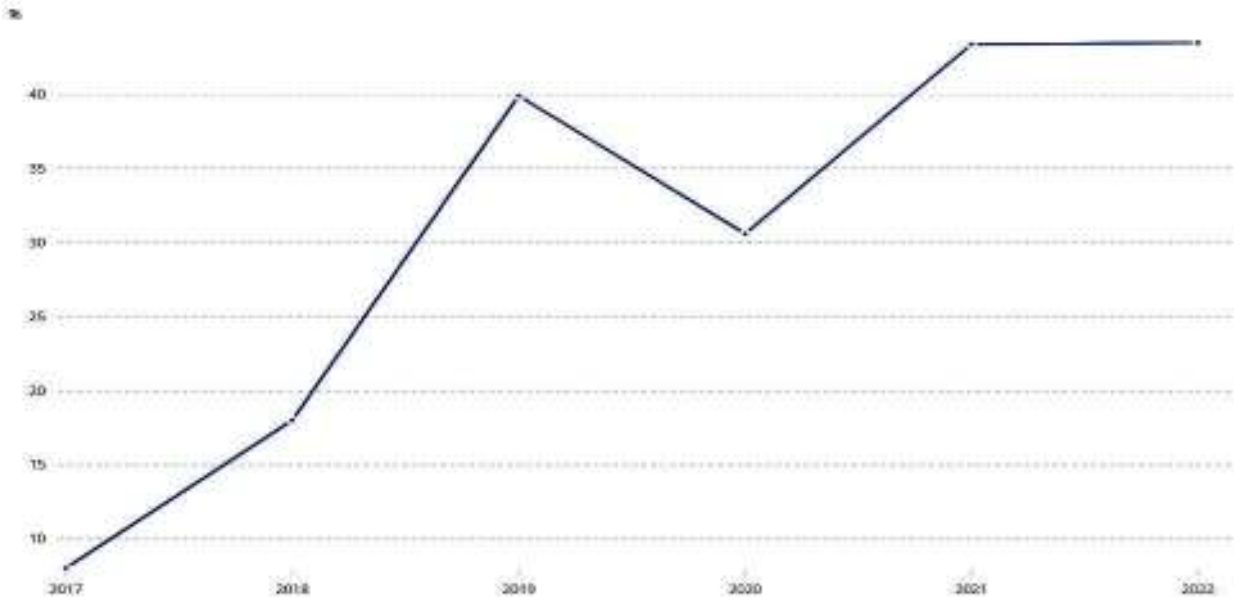
Currently, production cost are increasing and aggregate demand is among the main determinants of inflation. The average inflation rate reached 9.6% the year ended March 2018. According to the International Monetary Fund, Iran inflation rate was 39.3% in the year ended March 2020.

Table 1-2: ***Inflation - %***

YR. ENDED MAR. 2017	YR. ENDED MAR. 2018	YR. ENDED MAR. 2019	YR. ENDED MAR. 2020	YR. ENDED- MAR. 2021	YR. ENDED MAR. 2022
8	18	39.9	30.6	43.4	43.5

Source: World Bank

Figure 1-4: ***Inflation rate, 2017-22***



Source: World Bank

Employment & Unemployment

In the year ended March 2022, Iran's working population was approximately 24.35 million, of which the employed and unemployed accounted for 24.7 and 3.26 million, respectively. The unemployment rate was 11.1% in the year ended March 2019.

***Table 1-3:* Comparison between Employment & Unemployment -Person (2020-22)**

	YR. ENDED MAR. 2020	YR. ENDED MAR.2021	YR. ENDED MAR.2022	CHANGES	
				AMOUNT	%
WORKING POPULATION (M)	25.8	26.2	26.8	0.6	2.2
EMPLOYED POPULATION (M)	23.5	24	24.7	0.7	3
UNEMPLOYED POPULATION (M)	2.3	2.1	2	- 0.1	- 4.8
UNEMPLOYMENT RATE (%)	8.9	8.2	7.6	- 0.6	- 8
ECONOMIC PARTICIPATION RATE (%)	40.9	41	41.5	0.5	1.2

Source: Statistical Center of Iran

Gini Index

The income distribution indicates the Gini coefficient decreased in urban and rural households to 0.003 in the year ended March 2022, from 2021. The status of the class distinction has been improving more than the previous years.

***Table 1-4:* Gini Index**

	Yr. ended Mar. 2018	Yr. ended Mar. 2019	Yr. ended Mar. 2020	Yr. ended Mar. 2021	Yr. ended Mar. 2022
Total Gini	0.4	0.39	0.4	0.39	0.387
Urban Gini Coefficient	0.39	0.38	0.38	0.37	0.369
Rural Gini Coefficient	0.35	0.35	0.35	0.36	0.364

Source: Statistical Center of Iran

Foreign Trade

The non-oil export amounted to 122 milion tons, 53 bn USD in the year ended March 2022 which grew by 0.15% and 9.7% in volume and value. The import volume reached 37 milion tons and 59.6 bn USD, which grew by 10.8% and 12.5% in volume and value, compared to the same period in the previous year.

***Table 1-5:* Non-Oil Export & Import - Mln tons/ bn USD**

	Yr. ended Mar. 2020		Yr. ended Mar. 2021		Yr. ended Mar. 2022	
	Value	Volume	Value	Volume	Value	Volume
Export	46,931	132,300	48	122	53.1	122
Import	54,302	38,736	42	52	59.6	37.2
Trade Balance	-7.3 bn USD		-6 bn USD		- 6.5 bn USD	

Source: Statistical Center of Iran

Exchange Rate

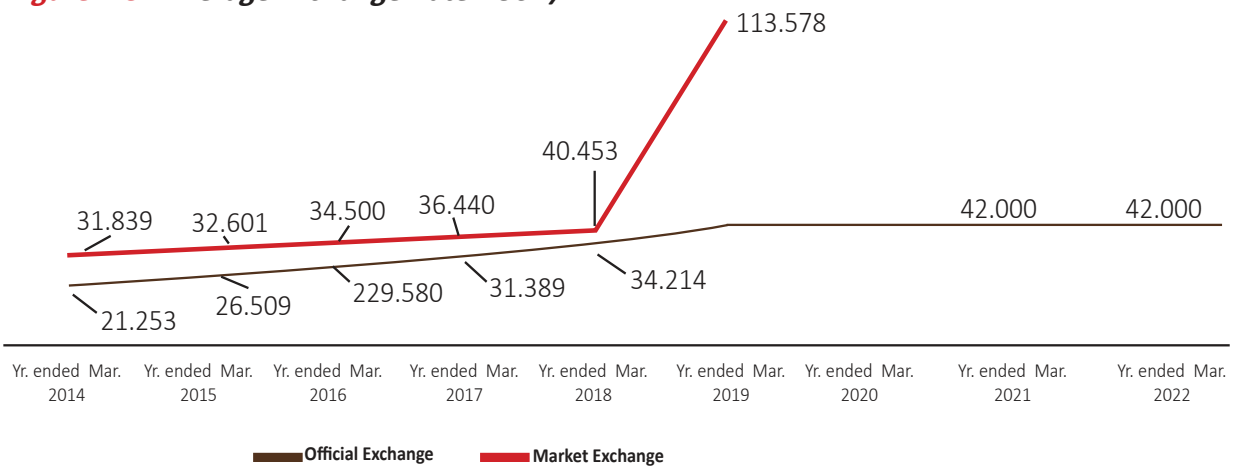
The official rate of the Central Bank and the market rose by 22.76% and 180.76%, while the exchange rate gap was 71,578 IRR, in the year ended March 2019.

Table 1-6: ***Average Exchange Rate - USD/IRR***

	Yr. ended Mar. 2018	Yr. ended Mar. 2019	Yr. ended Mar. 2020	Yr. ended Mar. 2021	Yr. ended Mar. 2022
Official CBI Rate	34,214	42,000	42,000	42,000	42,000
Market Rate	40,453	113,578	-	-	-

Source: CBI

Figure 1-5: ***Average Exchange Rate - USD/IRR***



Source: CBI

Stock Exchange Index

Table 1-7: ***Iran TEDPIX Stock Market Index - USD/IRR***

	Yr. ended Mar. 2017	Yr. ended Mar. 2018	Yr. ended Mar. 2019	Yr. ended Mar. 2020	Yr. ended Mar. 2021
TEDPIX	77,230	96,290	178,659	130,000	129,000
Industry Index	66,100	86,082	161,031	-	-
Top 50 Index	3,035	4,036	7,668	-	-

2

FOREIGN INVESTMENT INCENTIVES

Incentives Features & Advantages of Foreign Investment Promotion & Protection Act (FIPPA)

- Unrestricted volume and percentage on foreign investment participation of Iranian company registration possibility with 100% foreign capital.
- Transfer of capital, dividend and the profits gained in the form of currency or goods.
- Equal behavior with both foreign and domestic investors.
- Investment possibility for foreign natural and legal persons and Iranians residing abroad.
- Investment possibility in all areas permitted for the private sector.
- Providing protection for all foreign investment plans.
- Approving foreign capital in a short and fast process.
- Issuance of a 3-year residence visa for investors, managers, foreign experts and their firstdegree relatives.

Risks Covered by FIPPA

- Expropriation and nationalization.
- Unlimited transfer of principal and dividend.
- Guarantee of purchasing goods and services produced in foreign investment projects with BOT method via monopsony

Customs Incentives

- Exemption of Customs duties production line machineries and equipment provided that being new and not being made domestically.
- Raw material used for export commodities production.
- All production line machineries and raw materials in free zones.
- Components imported by manufacturing units for producing domestic goods are exempted from 20% customs duties, provided that they have not been made in Iran and recognized by Ministry of Industries, Mine and Trade.
- Knowledge-based companies and institutions are exempted from commercial taxes, customs and export duties.

Tax Incentives

- Taxable incomes of knowledge-based institutions resulted from the contracts, research and development activities, commercialization and knowledge-based services are exempted from taxes for 20-year.
- Companies with more than 50 employees: in case of increasing the employment volume up to 50% in comparison to the last year, will enjoy one added year exemption.
- If foreign companies with the capacity of domestic production units start business with authentic brands and export at least 20% of total production, can benefit 50% of tax exemption.

***Table 2-1:* Fixed Corporation Income Tax at a Flat Rate of 25%**

Activity	Level	Duration
Industry & Mine	80%	4 Years
Industry & Mine in Less Developed Areas	100%	20 Years
Agriculture	100%	Perpetual
Tourism	50%	Perpetual
Export of Services & Non-oil Goods	100%	During 6th development
Salary in Less Developed Area	50%	Perpetual
Profit used to Development of Existing Unites or Setting up New Units	50%	Perpetual

Source: Ministry of Industry, Mine & Trade

***Table 2-2:* Income Tax with rate of 0%**

Duration	Economic Sector
5 Years	Industry, mine & services (Hospital & Hotels)
7 Years	Industry, mine & services (Hospital & Hotels) years in industrial parks and economic especial zones
10 Years	Industry, mine & services (Hospital & Hotels) years in less developed areas
13 Years	Industry, mining & services (Hospital & Hotels) in less developed areas located at industrial parks and economic especial zones

Source: Ministry of Industry, Mine & Trade

Other Tax

Total taxable income <= registered capital 50% of income is tax free

Less Developed Areas

Total taxable income capital <= double of registered capital 100% of income is tax free.
In case of each 5% foreign investment, 10% will be added to the 2 incentives, maximum up to 50%.

Regional Incentives

Investment Incentive in Special Economic Zones

- Import from economic zone for domestic consumption would be subordinate to export and import regulations, while export from the areas will be carried out without any formalities.
- Import from abroad, free zones, or industrial areas would be carried out with minimal customs formalities and domestic transit are performed in accordance with the relevant Regulations.
- Goods imported from abroad, industrial areas or other commercial zones could be exported with no formalities.
- Management of the region is allowed to assign the region to qualified natural or legal persons after classification and valuation.
- Owners of goods imported to the region could send all or part of their goods for temporary entry in to the country after doing customs clearance regulations.
- If the processing of imported goods were to some extent that changes the goods tariff, the commercial benefit rate of the goods would be calculated equal the commercial benefit of raw material and spare parts.
- Importers of goods are allowed to hand over to others part or all of their products against warehouse receipt to be issued by the district administration, in this case the breakdown warehouse receipt holder would be the owner.
- The management of each district is authorized to issue certificated of origin for goods per applicant out of the area with the approval of the customs.
- All the goods imported to the region for the required production or services are exempted from the general import-export laws. Import of goods to other parts of Iran will be subordinated to export and import regulations.
- Percentage of goods produced in the zone, based on paragraph (d) of article (25) in the law of the second economic, social and cultural development plan of the Islamic republic of Iran imported to the country, the proportion of total value added and domestic parts and material used in the total price of the commodity production is allowed without any limitation and in addition to not having to order and open letter of credit.
- Goods manufactured in special economic zones, as well as raw material and imported CKD parts into the country is not subject to price regulation due to unutilized resources and allocated currency.

Incentive & Advantages for Investment in TradeIndustrial Free Zones

The list of the special economic zones of the Islamic Republic of Iran are as follows:

- Salafchegan special economic zone
- Shiraz special economic zone
- Assaluye special economic zone
- Arge Jadid special economic zone
- Payam Airport special economic zone
- Persian Gulf special economic zone
- Lorestan special economic zone
- Amirabad port special economic zone
- Bushehr Port special economic zone
- Shahid Rajaee Port special economic zone
- Sarakhs special economic zone
- Sirjan special economic zone
- Yazd special economic zone
- Bushehr special economic zone
- Tax exemption for 20 years from the date of operation for all economic activities.
- Foreign investment and nearly a hundred percent of the amount invested.
- Exemption of entry and exit of capital and profits.
- Protection and guarantees for foreign investments.
- Abolition of entry visas and easily issue of residence permits for foreigners.
- Facilitated regulation on labor relations, employment and social security.
- Transfer of part manufactured goods to the mainland without paying customs duties.
- Elimination of pay customs duties on import from outside to the region and vice versa.
- Employed trained and skilled work force in all different skill levels and professions.
- Utilization of raw materials, oil and gas as feedstock and fuel for all industrial activities.

Other Incentives

The list of the Trade-Industrial Free Zones of the Islamic Republic of Iran are as follows:

- Qeshm Trade-Industrial Free Zone
- Chabahar Trade-Industrial Free Zone
- Aras Trade-Industrial Free Zone
- Anzali Trade-Industrial Free Zone
- Arvand Trade-Industrial Free Zone
- Kish Trade-Industrial Free Zone
- Maku Trade-Industrial Free Zone
- Take advantage from local currency facilities of the National Development Fund.
- The partnership possibility of development organizations (Iran Industrial Development and Renovation Organization, Iranian Mines and Mining Industries Development and Renovation Organization) in implementation of investment projects in less developed regions.
- The possibility of establishing new industries in estates industries areas with restrictions of the establishment of industries (120 kilometers distance from Tehran and 50 km and 30 km distance from the centers of some provinces).
- Government's guarantee for foreign investment while political risks emerges.
- Foreign investments have benefited from all rights, protections and similar facilities to local investors.
- Guarantee importation and exportation of original interest and installment of investors' financial facilities.
- Exemption of export commodities produced by financial corporation with participation of foreign investors.
- Possibility of temporary importation without customs duties payment for export commodity processing.
- Awards and export subsidies (participating costs in fairs and marketing).
- Export commodities exemption from paying all type of duties.
- Possibility of foreign investment for private sector activity in all permitted areas in Iran. No restrictions in investment volume and the percentage of partnership.
- Free import of machinery and raw material from free industrial trade zones and special economic zones (except passenger cars and recreational boats).

3 AGRICULTURE

Overview

Developing and strengthening the agricultural sector is crucial to fostering economic foundations in developing countries. Stability and continuous growth in the agricultural sector are essential to social stability and economic growth since the mentioned sector is important to supply food and raw materials for industries, employment, and income. The agricultural sector is significant in terms of providing skills in the rural societies, because of the important role played at providing job opportunities, income and local & national security. The growth of the agricultural sector facilitates the development process through sustainability, transitions and resources of the other economic sectors. Moreover, the economic growth of agricultural sector plays an important role in decreasing poverty. Hence, regarding the promotion of utilization and efficiency levels, agricultural development is critical to achieve economic growth.

Agriculture is the 2nd largest economic sector after Services in Iran. Almost one-third of land is arable and fundamental from the aspects of economy, food security, production, employment, export, protection, utilization of natural sources, research and technology development as well as public participation. Agricultural growth directly affects economic growth which holds about 11% of GDP(2022), 14.4% of non-oil exports, 17.7% of total employment and over 80% of the domestic supplied food.The cultivated area of crops is 12.6 million hectares and hold first to tenth place in world ranking by cultivation of 20 horticultural products and 7 crops which provides food for the Persian Gulf neighboring countries besides the local food supply and has 47% of arable lands and 10% of the total area of Iran. Horticultural and cultivated lands cover about 2.85 million hectares and 11 million hectares from the total arable lands, respectively, 52% and 48% of which belongs to irrigation and dry land farming. The average growth rate of value added of the agricultural sector was 3.7% during the year 2022.

Crops

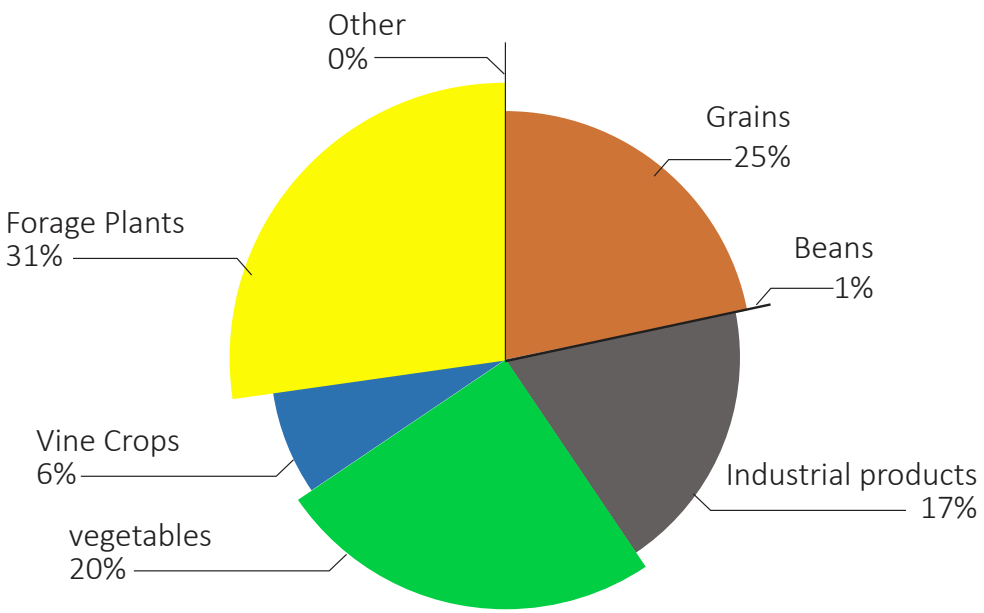
The cultivated land is about 11.4 million hectares including grain, beans, industrial products, vegetables, cucurbits and forage plants. About 60% and 40% of the total land area is allocated to agricultural irrigation and dry land farming, respectively. In addition, crops forming the total cultivated land include about 7.65 million hectares grain (69.5%), 799,000 hectares bean (7.27%), 552,000 hectares industrial products (5.02%), 517,000 hectares vegetables (4.71%), 1.04 million hectares forage plants (9.4%), 296,000 hectares cucurbits (2.7%), and 144,000 hectares crops (1.31%). Grain, forage plants, and bean have the largest share of 86.2% in terms of total crops.

***Table 3-1:** The level of harvest and the amount of production of crops by product group (2021)*

	Area (hectares)	Volume (tons)
Grains	9,556,340	21,260,415
Beans	613,109	515,376
Industrial products	607,539	14,401,507
Vegetables	449,236	16,789,449
Forage Plants	196,711	5,424,552
Vine Crops	1,040,758	26,159,714
Other	112,531	220,875

Source: Ministry of Agriculture-Jahad

***Figure 3-1:** Under Cultivated Land -% (2022)*



Source: Ministry of Agriculture-Jahad

Overview *Major Agriculture Products*

2015 - Census

16.5 Mha Arable Land

46.2% Irrigated Arable Land

53.8% Rainfed Arable Land

7,759 ha Green House Cultivation Area

2,759 Number of Medium & Big Food Processors

2023

23,648 Number of Modern Cattle Farms

17,768 Number of Modern Chicken Farms

17,610 Number of Aquacultural Holdings

96,327 Number of Apicultural Holdings

18,120 Number of Sericultural Holdings

2023

45 M Sheep & Lamb

15.4 M Goat & Kids

5.4 M Cattle & Calves

196 Thousand Camel

223 Thousand Buffalo

0.9 MT Production of Red Meat

2.8 MT Production of Chicken Meat

12.3 MT Production of Milk

1.3 MT Production of Eggs

1.25 MT Catches & Production of Aquatics

0.12 MT Honey

Iran's World Ranking (2022)

Exports & Imports

Exports

Iran exports of agricultural products topped $6.2 billion in 2023, showing a $1 billion rise compared to a year earlier.

The value of imports in the agricultural sector fell by $1 billion in the previous year compared to a year before, the trade balance of the agricultural sector has improved by $2 billion.

Iraq with a purchase of $1.405 billion, UAE with $531 million, Russia with $376 million, Pakistan with $330 million dollars and Afghanistan with $280 million were the top five destinations of Iran's food and agricultural products. Iran's exports of food and agricultural products were 68% of exports to these five countries in 2023.

China with the purchase of $215 million, India with $160 million, Turkey with $156.5 million, Turkmenistan with $82.5 million, Azerbaijan with $73.5 million, Germany with $68 million, Qatar with $57 million, Kazakhstan $55.5 million, Oman $52 million, Uzbekistan $47 million, Kuwait $39 million, Spain $37 million, Kyrgyzstan $35 million, Armenia $33.1 million and Syria $33 million, were the sixth to twentieth destinations for Iran's crops and food products from the beginning of the year to the end of the month of Azar (December 21, 2023).

Table 3-2. ***Exports by Agriculture Sector***

	Yr. ended Mar. 2022	Yr. ended Mar. 2021	Yr. ended Mar. 2020	Yr. ended Mar. 2019	Yr. ended Mar. 2018
Value (bn USD)	5.2	5.3	7.1	6.2	5.7

Source: Ministry of Agriculture-Jahad

Table 3-3. ***Comparative statistics of export of main livestock products in 2021&2022***

		2022		2021		Change (%)	
		Volume 000 MT	Value Million USD	Volume 000 MT	Value Million USD	Volume	Value
Livestock	Live Animals	16	47	2	8	636	514
	Processed	671	920	625	641	7	44
	Non-processed	57	62	11	20	402	205
Total		**744**	**1029**	**638**	**669**	**17**	**54**
Veterinary	Vaccine	0.003395	0.204193	0.00004	0.014645	8388	1294
	Medicine	1	8	1	11	-26	-25
	Live objects	0	0	0.00041	0.002055	-100	-100
Total		**1**	**8**	**1**	**11**	**-26**	**-23**
Aquatic	Live	2	4	2	2	25	96
	Processed	139	328	120	219	16	50
Total		**141**	**332**	**121**	**221**	**16**	**50**

Source: Information and Communication Technology Center-Ministry of Agriculture-Jahad

Table 3-4. ***Comparative statistics of export of main agricultural products in 2021&2022***

		2022		2021		Change (%)	
		Volume 000 MT	Value Million USD	Volume 000 MT	Value Million USD	Volume	Value
Wheat		19	12	32	15	-41	-16
Barley		0.295483	0.239545	0.400206	0.324375	-26	-26
Corn		9	2	19	5	-56	-54
Oil Seeds	Soy	0.038708	0.024739	0.204179	0.184285	-81	-87
	Other	2	6	1	2	37	146
Red Meat	Red Meat	0.002	0.01	0.002	0.0037	0	170
	Entrails	1	1	2	2	-69	-49
	Total	**1**	**1**	**2**	**2**	**-69**	**-48**
Poultry Meat	Poultry Meat	6	7	0.028	0.0098	21,688	67,394
	Entrails	17	6	25	8	-33	-26
	Total	**23**	**13**	**25**	**8**	**-9**	**53**
Eggs	Table Eggs	52	48	8	5	550	810
	Fertile Eggs	2	4	0.072251	0.226805	2,567	1,515
	Total	**54**	**52**	**8**	**6**	**567**	**839**
Meal	Soybean meal	0.0138	0.008142	0.00006	0.00006	22,900	13,470

Source: Information and Communication Technology Center-Ministry of Agriculture-Jahad

Import

Iran imported $9.3 billion worth of agricultural products in the year ended Mar. 2020, $8 billion of which were related to the import of oilseeds and corns while $1.3 billion belonged to import of livestock vaccines and poultry drugs.. In the same period, some $14 billion was spent on importing basic goods and commodities.

Table 3-5. Imports by Agriculture Sector

	Yr. ended Mar. 2022	Yr. ended Mar. 2021	Yr. ended Mar. 2020	Yr. ended Mar. 2019	Yr. ended Mar. 2018
Value (bn USD)	18.3	17.1	9.3	10.7	10.5

Source: Ministry of Agriculture-Jahad

Table 3-6. Comparative statistics of import of main livestock products in 2021&2022

		2022		2021		Change	
		Volume 000 MT	Value Million USD	Volume 000 MT	Value Million USD	Volume 000 MT	Value Million USD
Livestock	Live Animals	7	27	4	24	64	13
	Processed	162	515	193	533	-16	-3
	Non-processed	3	29	20	98	-87	-71
Total		**172**	**571**	**217**	**655**	**-21**	**-13**
Veterinary	Vaccine	0.433008	50	0.486982	58	-11	-13
	Medicine	12	345	5	342	128	1
	Live objects	0.011234	1	0.028118	1	-60	-32
Total		**12**	**396**	**6**	**401**	**115**	**-1**
Aquatic	Live	0.063027	9	0.097433	5	-35	88
	Processed	11	27	11	27	-2	1
Total		**11**	**36**	**11**	**32**	**-3**	**14**

Source: Information and Communication Technology Center-Ministry of Agriculture-Jahad

Table 3-7. ***Comparative statistics of Import of main agricultural products in 2021&2022***

		2022		2021		Change (%)	
		Volume 000 MT	Value Million USD	Volume 000 MT	Value Million USD	Volume	Value
Wheat		4,456	2,013	7,075	2,487	-37	-19
Barley		2,380	992	3,338	1,006	-29	-1
Corn		8,119	3,304	9,784	3,407	-17	-3
Rice		1,779	2,137	850	731	109	192
Oil Seeds	Soy	2,541	1,975	2,204	1,452	15	36
	Canola	0.00668	1	7	7	-100	-81
	Other	194	282	153	220	27	28
	Total						
Red Meat	Red Meat	48	214	31	142	54	51
Poultry Meat	Poultry Meat	56	99	125	238	-55	-58
Eggs	Table Eggs	1	2	13	20	-90	-91
	Fertile Eggs	0.114651	2	6	48	-98	-96
	Total	**1**	**4**	**19**	**68**	**-93**	**-94**
Meal	Soybean meal	1,343	855	2,338	1,274	-43	-33

Source: Information and Communication Technology Center-Ministry of Agriculture-Jahad

Table 3-8. ***Comparison of trade balance of agriculture and food sector in 2021&2022***

	Food and Agriculture Sector				Change	
	2022		2021			
	Volume 000 MT	Value Million USD	Volume 000 MT	Value Million USD	Volume	Value
Export	7,771	5,212	8,532	5,334	-9	-2
Import	25,212	18,390	30,550	17,116	-17	7
Trade Balance	-17,441	-13,179	-22,017	-11,782		

Source: Information and Communication Technology Center-Ministry of Agriculture-Jahad

Development & Renovationof Agricultural Mechanization

Machines play an important role in decreasing costs and waste in the process of agricultural production. In the past 5 years, about 500,000 tractors, over 1,500 combines, over 45,000 seed planters and over 44,000 pestiside sprayers were utilized in the agricultural sector.
The combined volume increased from 64 machines to 17,334 in the 1977-2018 period. The number of tractors increased from 68,451 machines to 555,133 in the same period.
Although the lack of rice trans planters and combine machines were clearly felt in 1977, the chain of agricultural mechanization came to full circle with 7,220 and 7,878 vehicles, respectively. In addition, 18,000 soil mixing machines and 44,895 tractor, and pestiside sprayers were added to the chain, recently.

Complementary & Processing Industry

Using modern technologies has helped the complementary and processing industry to develop swiftly in the past 4 decades. The industry's capacity increased from 3.3 million tons of raw material absorption to over 47 million tons, in the agriculture sector, in the 1977-2018 period.
Moreover, Agro-processing companies grew to 20,000 in the year ended March 2019. Cold storage and refrigerators reached 1,830 units with 4,500,000 tons of growth in capacity.
Industrial slaughterhouses experienced remarkable growth from 4 to 75 units and industrial poultry slaughterhouses reached from 3 to 273 units between the years 1977 and 2018.

Crops Insurance

After the Islamic Revolution (1979), the government established a Relief Fund for suffering Agricultural Units with the approval of the IRR insurance law (1984) and Agricultural Insurance Fund (AIF), to manage farmer risks and to supplement their income. At present, agricultural insurance guarantees 3.5 million hectares of arable land and 419,000 hectares of horticultural land. Besides, about 3,619,000 livestock, over 693 million poultry and over 3,143 hectares of aqua-farm have been under insurance coverage since March 2018. In the year ended March 2017, 12,570 billion IRR was paid to agricultural producers for over 875,000 compensation cases.

Investment Advantages & Incentives

Iran has high rankings in many agricultural products which can be a significant factor for asset owners creating job opportunities and raising the IRI to the 1st to 9th ranks for the 35 agricultural products in the world. Iran is the 1st producer of pistachio, saffron and caviar 2nd in cucurbits and 3rd in dates at present.

- The proceeds of all activities at agriculture, animal husbandry, livestock breeding, fish farming and honey beekeeping and poultry raising, fishing, sericulture, reviving pasture and forest, garden, or any kind of land are exempted from taxation, and all natural and legal persons (Iranian and non-Iranians) could benefit from the exemption from the beginning of the activity.

- Export of agricultural products, including crops, horticulture, livestock and poultry, fisheries, forest and rangelands, and conversion and complementary industries are 100% exempt from taxes.

- Agriculture and animal husbandry provide the best opportunity to invest in Iran, because about 120 million tons of crops and livestock exist by volume, in addition to quality, and unique diversity in the conversion and complementary industries. Tax and customs exemptions for the re-export of processed agricultural and animal products have provided incentives to attract investors.

- Iran has a four seasons variety, meaning the best agricultural and livestock products.

- The proximity to the countries of Iraq and Afghanistan, and Persian Gulf regional states which lack agricultural potential, the existence of land and air transit infrastructures in Iran has enabled foreign investors to export products after processing and receiving investment profits in foreign currencies.

- Agricultural export in non-oil sector have been important during the recent years, as raw and unprocessed products constitute the major part.

- The Complementary and processing industry has a great influence on the agricultural sector. Considering the lack of significant development of complementary and processing industries in the agricultural sector and the policy of the Ministry of Agriculture-Jahad toward processed of agricultural products, complementary and processing industries can be considered as one of the significant investment opportunities.

- Iran is known as a unique and unrivaled producer of saffron in the world markets, and significant capacities are available, but unfortunately, these products are traditionally exported with the least value-added. Thanks to modern technologies, Spain cultivates the product at 6.5 kilograms per hectare, while this figure in Iran is 3.8 kilograms per hectare meaning less valueadded than the rivals, due to the sale of raw materials. Therefore, applying modern technologies and packaging as well as processing technologies could be good opportunities for foreigners.

Investment Opportunities

Crops

- Production of hybrid maize
- Cultivation of oily seeds
- Vegetable processing and packaging
- Choline chloride Plant (Poultry Feed Supplement) from corn grain
- Project of glucose and starch from corn
- Hybrid maize seeds production
- Construction of maize seeds hybrids processing plant
- Construction of cotton gin advanced equipment production plant
- Organic production

Horticulture

- Cultivation of medicinal plants and related industries
- Production of edible mushrooms and processing industry
- Horticultural mechanization machinery
- Pre-cooling device for grapes and strawberries
- Pistachio automatic sorting machine and pasteurization equipment

Livestock

- Furnishing and optimization of dairy centers
- Optimization of dairy cattle breeding equipment
- Production of milking machinery and equipment
- Laboratory analysis of milk equipment projects
- Sperm production center projects (AI)
- Ranch Farming equipment (broilers and layers)
- Incubator equipment
- Broilers slaughtering equipment
- Livestock and poultry feed equipment
- Dairy cattle nourishment
- Animal husbandry centers
- Production of veterinary drugs

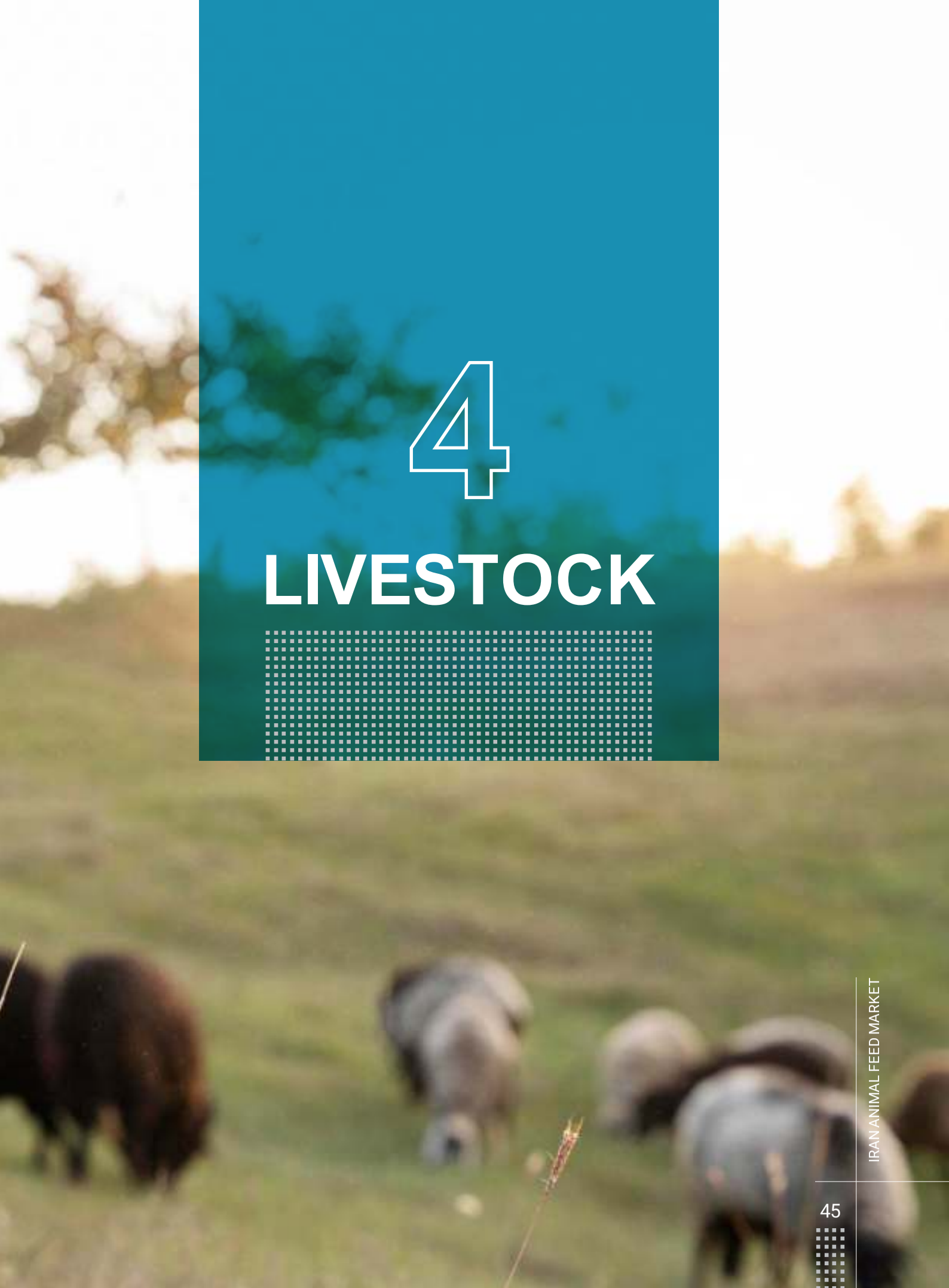
Complementary & Processing Industries

- Rating, drying, packaging, processing, freezing, fruits dry powder
- Pistachio, nuts and raisin processing pasteurization and sterilization projects
- Dairy products equipment includes sterilized milk, ice cream, milk powder and cheese

- The equipment project of industrial poultry and livestock slaughterhouse (Advanced)
- The equipment project of aquatic canned with modern processing and packaging, e.g. sardines, shrimp etc.
- New technology industry of fish oil and powder projects
- Modern industry of aqua feed processing projects
- Olive-oil projects
- Leather production
- Dairy
- Pharmaceuticals process of fish oil
- Essence and aromatic substances production by using effective medicinal plants
- Production of extraction from medicinal plants
- Sorting, grading and packaging of saffron
- Two-circuit cooling

Aquaculture

- Aquaculture nourishing
- Construction and equipping caviar centers to produce meat and caviar
- The construction and equipping marine fishery
- Aqua feed and its raw materials projects
- The construction of fishing ships and equipment



4

LIVESTOCK

Overview

Livestock farms are important in the agricultural sector, producing milk, dairy products, meat, fertilizer, etc. Livestock are among the major products in the agricultural sector and play an important role in the human food chain and growth of population and demand in further production.

Livestock Population

The population of calf and cattle was 7,049,000 and categorized into 1,620,000 head purebred, 4,302,000 head crossbred, 1,127,000 head native in the year ended March 2023.
Provinces including Isfahan with 345,000 head of purebred, Mazandaran with 360,000 head of crossbred and 135,000 head of native cattle holding the first rank in calf and cattle livestock.
The population of sheep and lamb was estimated at 51,161,000 while the population of goat and kid was 17,301,000. Provinces, including Razavi Khorasan, had a volume of 6,722,000 of sheep and lamb and Fars 2,410,000 of goat and kid ranked 1st in sheep farming.

***Figure 4-1:* Population of Livestock by Type & Province (2022) - 000 head**

Source: Agricultural Production Report

Table 4-1. ***Population of Livestock Classified by Type & Province-2022 - 000 head***

	Sheep & Lamb	Goat & Kid	Calf & Cattle			
			Crossbred	Purebred	Native	Total
East Azerbaijan	3,385	506	268	41	91	400
West Azerbaijan	3,990	370	237	17	82	336
Ardabil	1,928	298	124	24	73	221
Isfahan	1,568	472	334	345	10	689
Alborz	362	41	70	106	0	176
Ilam	1,394	482	20	3	13	36
Bushehr	437	569	23	1	9	33
Tehran	989	118	199	304	4	507
Chaharmahal & Bakhtiari	1,320	373	112	56	13	181
South Khorasan	938	896	55	14	5	74
Razavi Khorasan	6,722	822	313	118	12	443
North Khorasan	1,909	296	55	7	3	65
Khuzestan	2,573	1,068	173	10	73	256
Zanjan	962	176	45	14	45	104
Semnan	1,476	336	53	33	1	87
Sistan & Baluchestan	1,112	1,717	17	2	47	66
Fars	3,644	2,410	226	117	42	385
Qazvin	916	113	166	133	53	352
Qom	297	60	47	24	13	84
Kurdistan	1,331	294	47	8	91	146
Kerman	1,375	1,221	74	27	9	110
Kermanshah	1,651	278	119	23	41	183
Kohgiluyeh & Boyer-Ahmad	634	868	32	5	14	51
Golestan	1,577	179	261	22	15	298
Gilan	794	93	92	6	126	224
Lorestan	2,046	762	170	10	27	207
Mazandaran	1,514	103	360	16	135	511
Markazi	1,520	212	205	50	9	264
Hormozgan	191	899	5	0	9	14
Hamedan	1,420	103	290	27	26	343
Yazd	446	380	83	57	9	149
South of Kerman	740	786	27	0	27	54
Total	51,161	17,301	4,302	1,620	1,127	7,049

Source: Agricultural Production Report

Livestock operators

- 1 million and 487 thousand operators including:
- 1 million 340 thousand livestock operators
- 767886 operators only lightweight livestock
- 320099 operators only heavyweight livestock
- 252157 light and heavyweight livestock operators

* One operator is considered for each industrial unit.

Livestock Production

Livestock production is categorized into red meat and milk. The total of red meat production reached 859,000 tons with a 3.6% growth, evaluated by distribution of mutton at 273,73 tons, purebred cattle at 86,980 tons, crossbred cattle at 287,760 tons, and native cattle with 109,880 tons, in the year ended March 2020.
Total milk production reached 11,002 tons with a 3.9% growth which is evaluated by distribution of milk production' categorized into sheep 235,000 tons, goat 287,000 tons, purebred cattle 4,578,000 tons, crossbred cattle 5,184,000 tons, and native cattle 561,000 tons.

Table 4-2. ***Red Meat & Milk Production by Livestock (2022) - 000 tons***

	Red meat	Milk
Sheep	320	248
Goat	86	213
Purebred Cattle	140	6,038
Crossbred Cattle	276	4,701
Native Cattle	62	275
Others	16	174
Total	900	11,649

Source: Agricultural Production Report

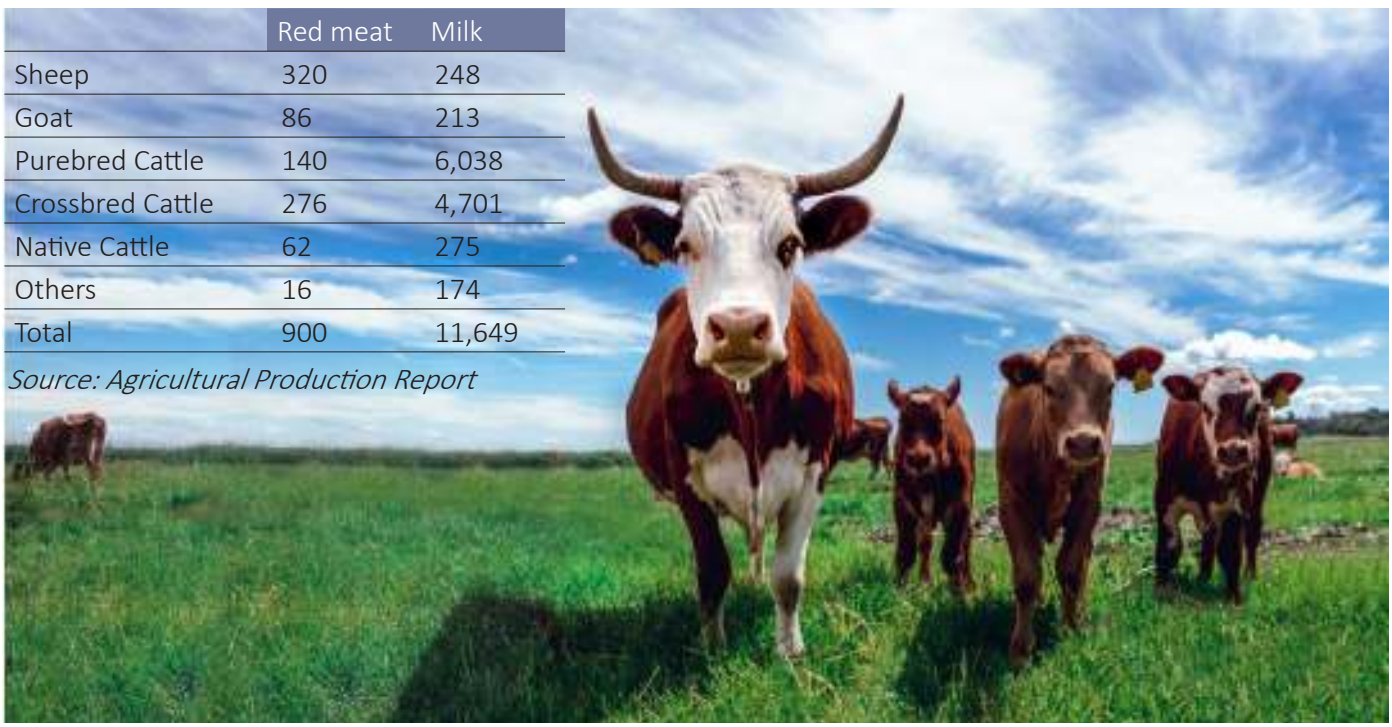
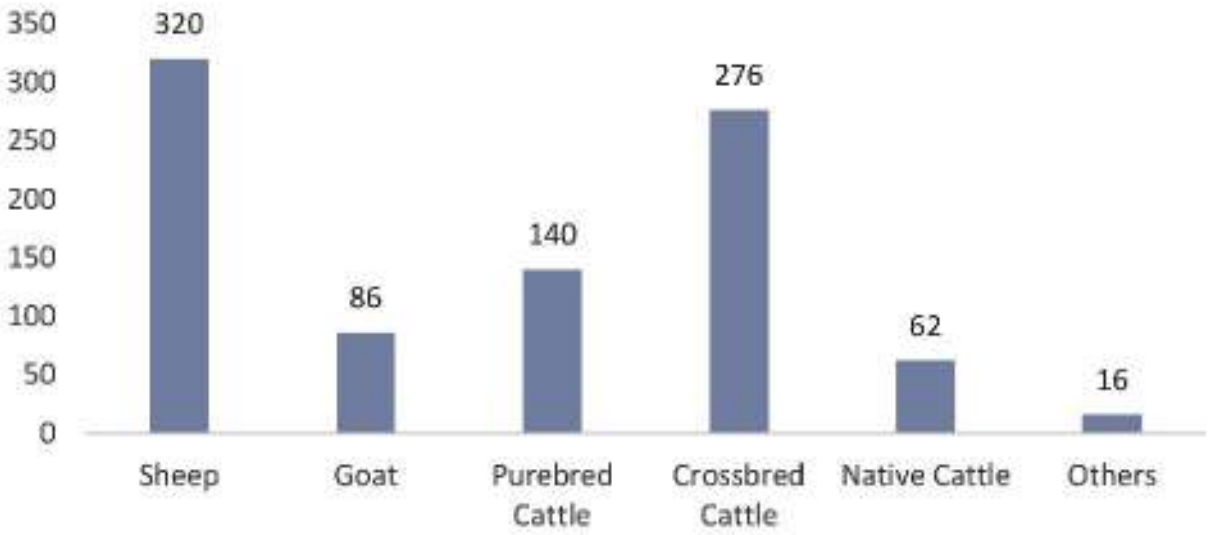
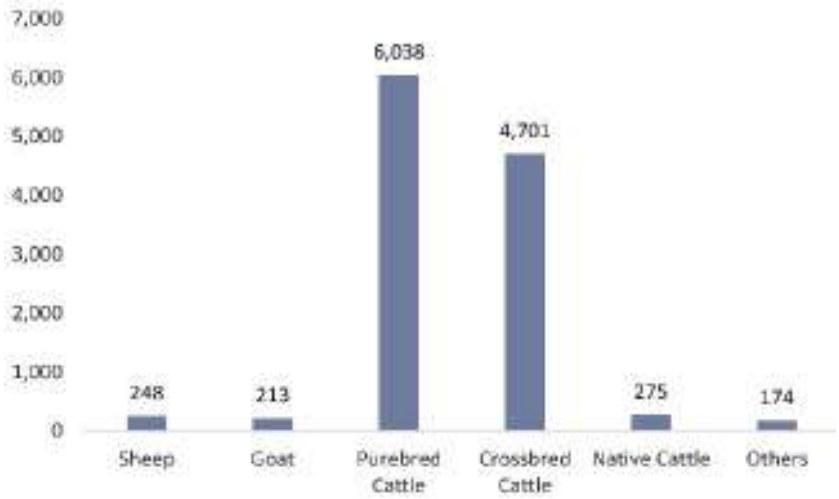


Figure 4-2. ***Red Meat &Milk Production by Livestock (2022) - 000 tons***



Source: Agricultural Production Report

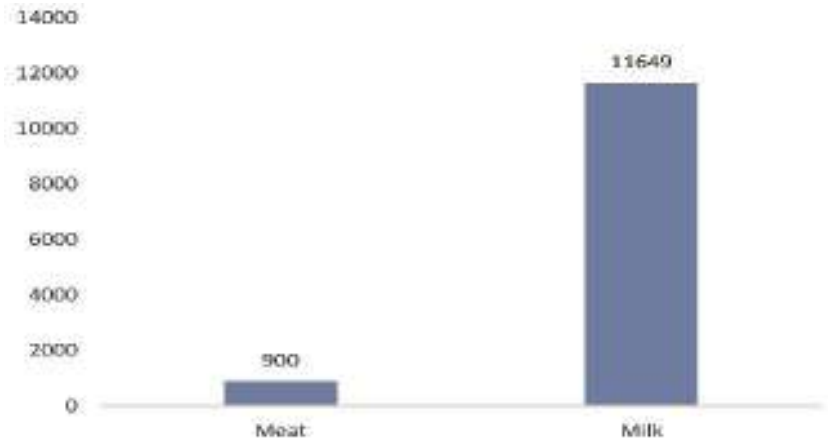
Figure 4-3. ***Milk Production by Livestock (2022) - 000 tons***



Source: Agricultural Production Report

Razavi Khorasan and Isfahan took the first ranks of protein products with 86,000 tons of red meat and 1,929,000 tons of milk, respectively.

Figure 4-3. ***Red Meat & Milk Production by Livestock (2022) - 000 tons***



Source: Agricultural Production Report

* The red meat encompasses lamb, goat, beef, buffalo, and camel.

***Table 4-3:** Iran's position in the production of animal products in the world in 2023*

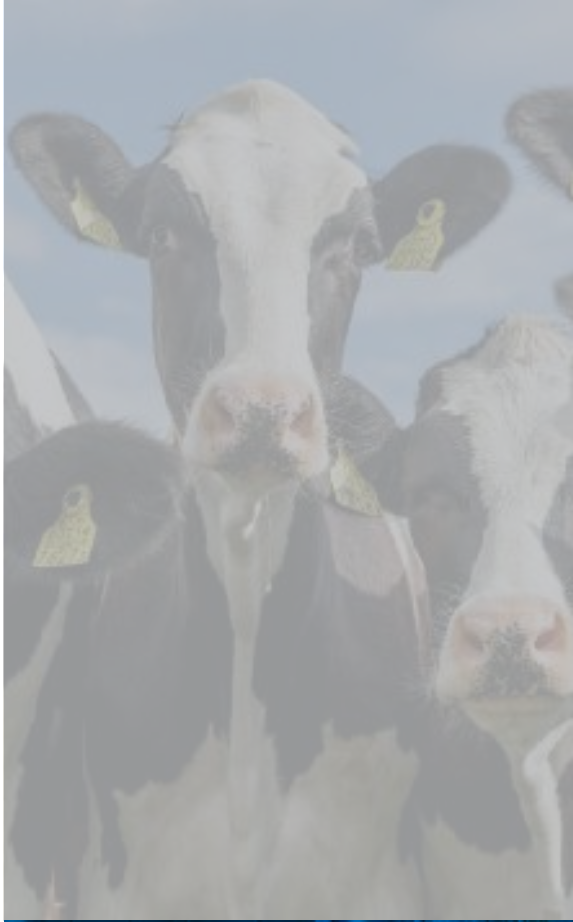
Product type	Iran's rank globally	Production Volume
Red meat*	18	900 Thousand MT
Chicken meat	8	2.8 Million MT
Milk	22	12 Milion MT
Table Egg	10	1.3 Milion MT
Honey	3	136 Thousand MT

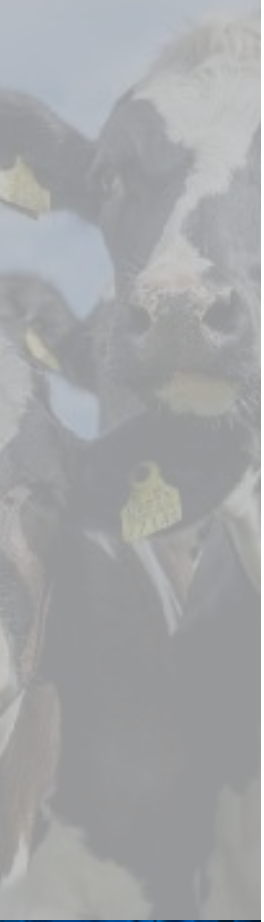
Source: Deputy Minister of Livestock Production

Table 4-4. ***Milk and Red meat Products by Province -2022- 000 tons***

	Milk	Red meat
East Azerbaijan	526	50
West Azerbaijan	366	54
Ardabil	245	28
Isfahan	1,929	72
Alborz	506	17
Ilam	45	14
Bushehr	33	8
Tehran	1,531	36
Chaharmahal & Bakhtiari	317	22
South Khorasan	117	17
Razavi Khorasan	957	86
North Khorasan	89	19
Khuzestan	292	32
Zanjan	126	15
Semnan	182	17
Sistan & Baluchestan	54	19
Fars	697	62
Qazvin	773	32
Qom	116	25
Kurdistan	98	19
Kerman	184	21
Kermanshah	218	21
Kohgiluyeh & Boyer-Ahmad	63	10
Golestan	339	31
Gilan	149	17
Lorestan	224	28
Mazandaran	434	34
Markazi	347	30
Hormozgan	19	5
Hamedan	373	30
Yazd	258	19
South of Kerman	42	11
Total	**11,649**	**901**

Source: Agricultural Production Report





In the year ended March 2022, Iran held the world 23nd, 27th and 25th ranks in meat, red meat and milk production, respectively

Table 4-5. Ranking in Agricultural Products - (2022)

	Rank
Poultry Meat	8
Red Meat	18
Milk	22

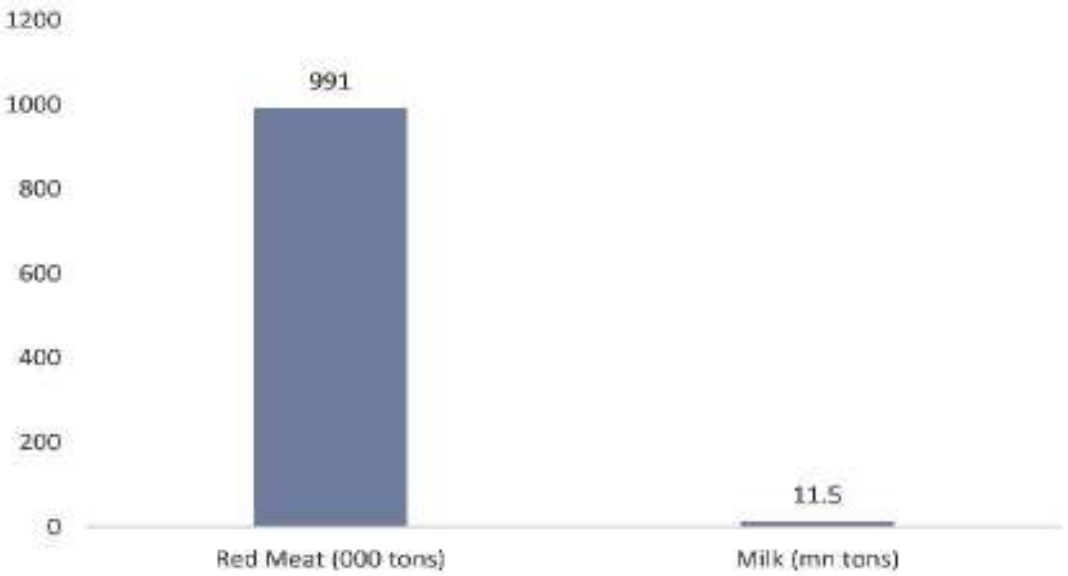
Source: FAO

Table4-6. Livestock Production in the Vision of Sixth Development Plan (2021)

	Production
Red Meat (000 tons)	991
Milk (mn tons)	11.5

Source: Agricultural Production Report

Figure 4-4. Livestock Production in the Vision of Sixth Development Plan



Source: Agricultural Production Report

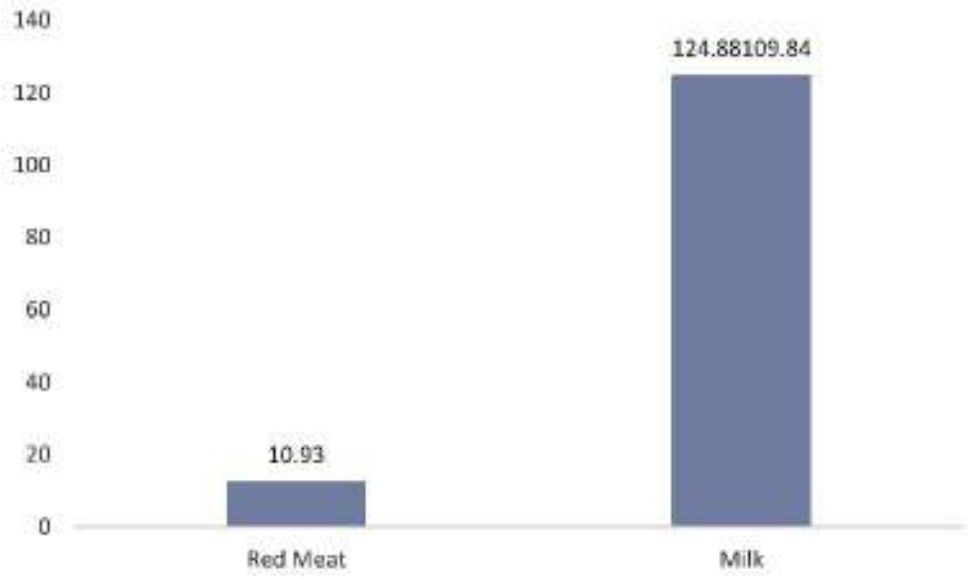
Products Consumption Per Capita

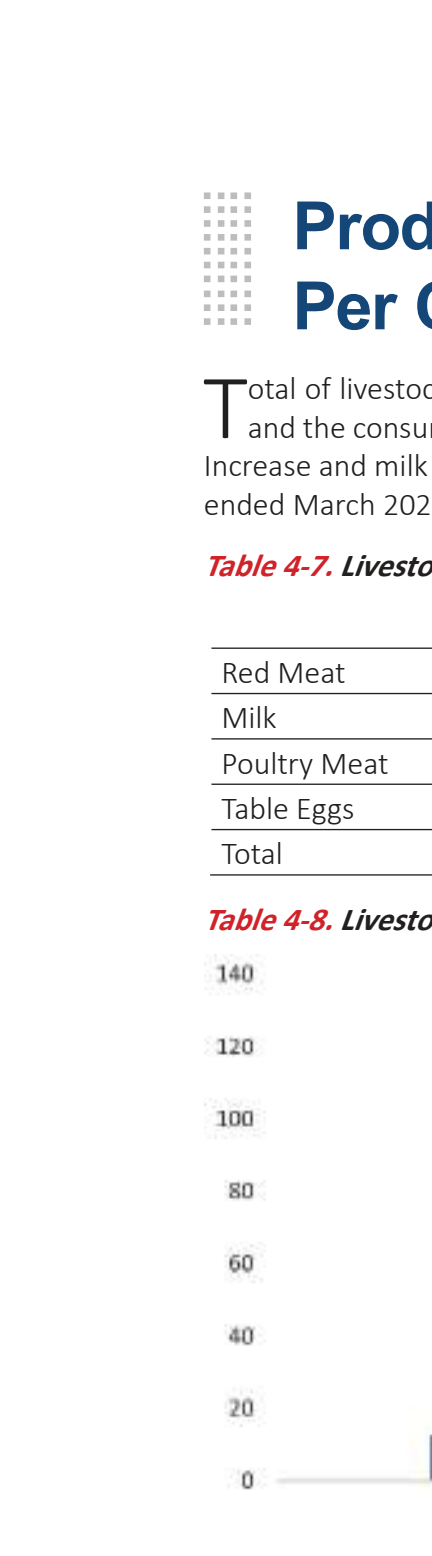
Total of livestock product consumption per capita was 179.18 Kilograms and the consumptionof red meat reduced to 11.13 Kilograms with 1.8% Increase and milk was 109.84 Kilograms with a increase of 7.6% in the year ended March 2023.

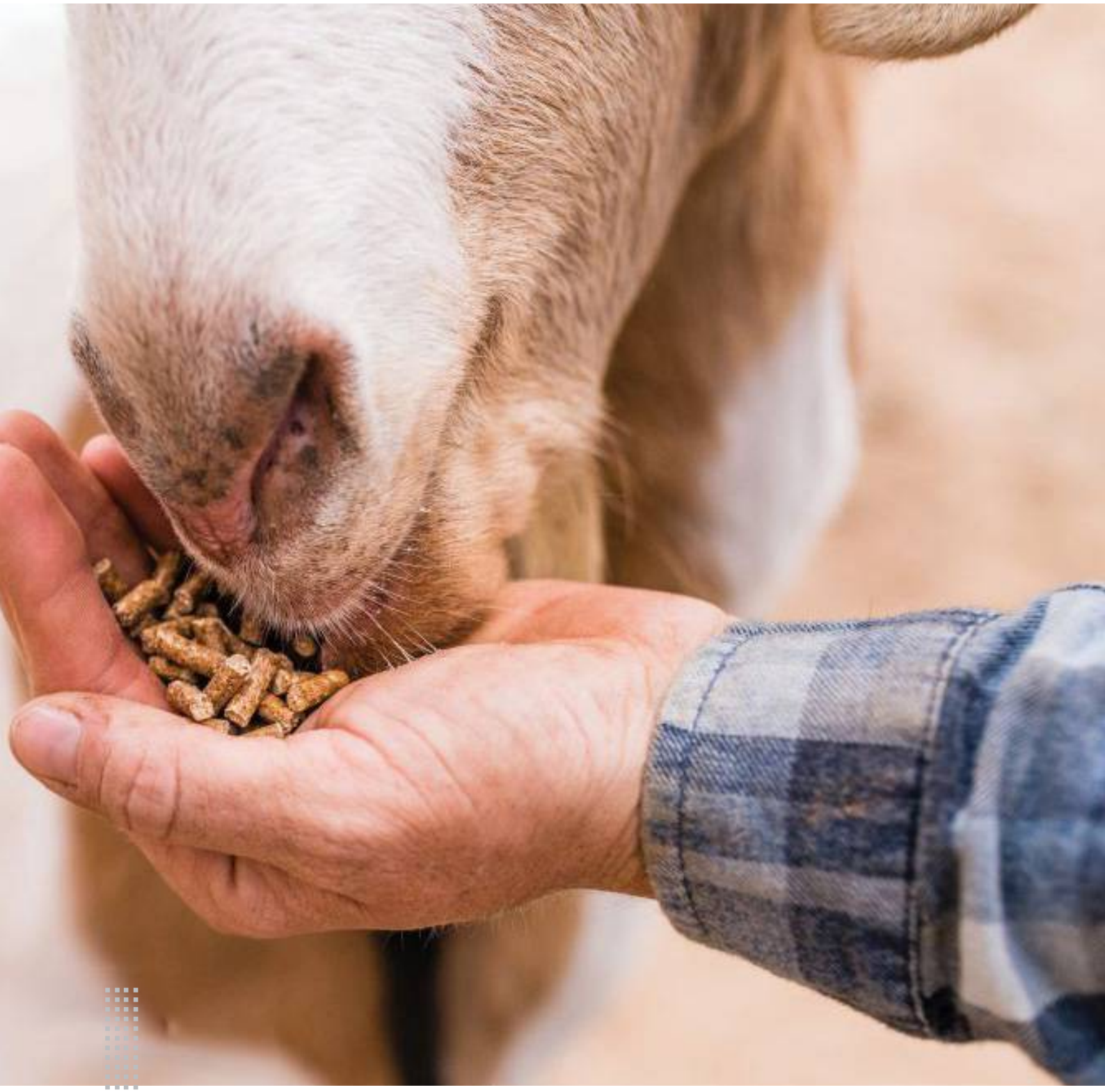
Table 4-7. ***Livestock Consumption 2023 –Kg***

	Consumption
Red Meat	11.13
Milk	118.88
Poultry Meat	33.93
Table Eggs	15.24
Total	179.18

Table 4-8. ***Livestock Consumption –Kg***







Livestock Production in the Vision of the Sixth Development Plan

Livestock production in the vision of the sixth development plan (2021) is anticipated at 991,000 tons and 12,500 tons of red meat and milk, respectively.

5

POULTRY

Overview

Industrial poultry breeding has 140 years of history and many efforts have been made to develop poultry industrial production in terms of genetic improvement, genetic selection, treatment and veterinary.

Iran poultry industry has experienced considerable growth in terms of quality and quantity in the past 60 years ranking 7th and 9th globally in chicken and egg production, respectively.
Per capita consumption of chicken and egg was 32.74 Kilograms and 13.91 Kilograms with 4.7% and 18.69% growth, respectively showing the industry's importance and rankings in the Iranian food supply chain

Poultry Farming Capacity

The capacity of 17,811 broiler farms is 421,883,000 chickens, 1,512 farms of which are active in Khorasan Razavi with the capacity of 30,912,000 chickens. In Iran, a total of 1,701 layer chicken farms are active with the capacity of 111,208,000 chickens, of which 252 farms belong to Khorasan Razavi Province with capacity of 12,465,040 chickens. A total of 810 broiler breeder farms are active with the capacity of 27,993,000 chickens, of which 215 farms belong to Mazandaran Province with capacity of 6,495,000. A Total of 24 layer breeder farms are active with capacity of 1,281,000 chickens, of which 10 farms belong to East Azerbaijan and Khorasan Razavi Provinces with capacities of 230,620 and 187,800 chickens. Also, 5 farms belong to Qazvin Province with capacity of 420,500 chickens.

Layer pullet farms are divided in to two categories of independent and dependent pullets, a total of 515 independent pullet farms are active with capacity of 36,859,970 chickens, of which 10 farms belong to Isfahan Province with the capacity of 6,131,470 chickens and total of 50 dependent pullet farms are active with capacity of 3,307,220 pullets, of which 8 farms belong to Qazvin Province with the capacity of 932,640 pullets.

Figure 5-1. ***Capacity of Poultry Farming- 000 chickens***

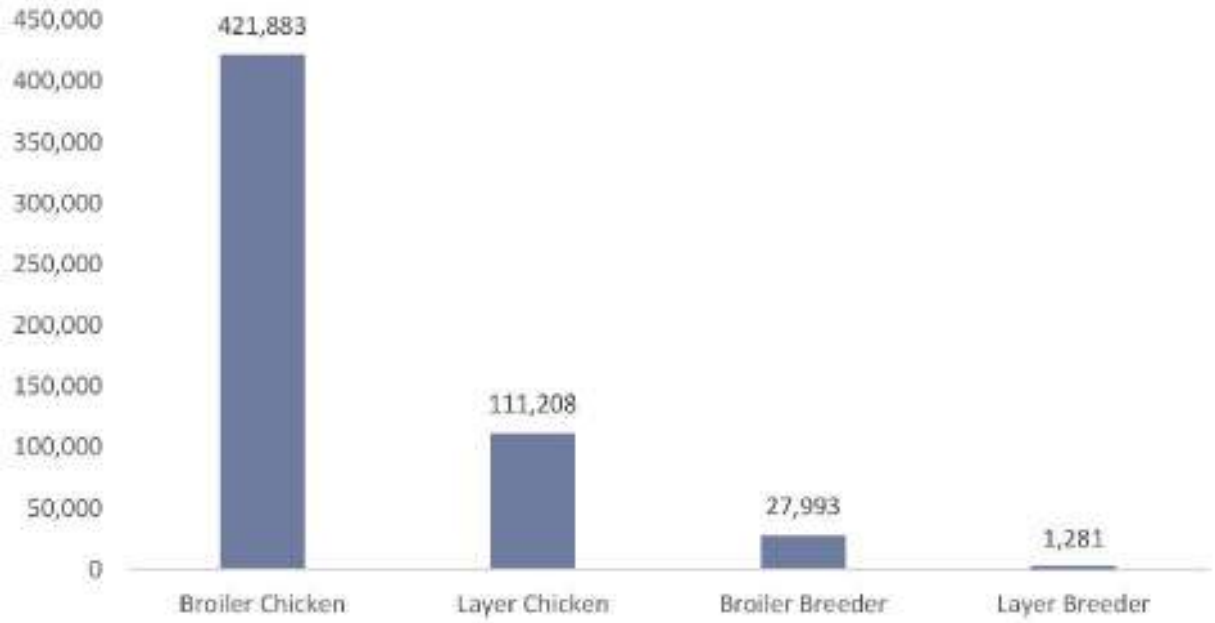


Table 5-1. ***Capacity of Poultry Farming - 000 chickens***

	Layer Breeder	Broiler Breeder	Layer	Broiler
East Azerbaijan	230	1,665	10,389	13,745
West Azerbaijan	0	1,968	1,144	16,213
Ardabil	0	1,793	69	7,954
Isfahan	29	640	13,500	33,521
Alborz	96	311	7,241	2,562
Ilam	0	0	230	7,468
Bushehr	0	18	40	6,570
Tehran	0	875	12,206	5,908
Chaharmahal & Bakhtiari	0	177	409	5,270
South Khorasan	50	260	2,683	10,690
Razavi Khorasan	188	713	12,465	30,912
North Khorasan	0	20	130	3,004
Khuzestan	0	248	980	19,650
Zanjan	80	1,400	1,119	7,312
Semnan	0	236	2,894	9,707
Sistan & Baluchestan	0	92	599	6,328
Fars	0	381	5,397	27,994
Qazvin	420	1,018	9,154	9,588
Qom	54	143	9,957	4,697
Kurdistan	0	537	455	15,007
Kerman	0	339	2,142	10,788
Kermanshah	0	308	817	9,647
Kohgiluyeh & Boyer-Ahmad	0	0	540	2,255
Golestan	0	2,528	5,525	34,711
Gilan	99	4,094	36	26,623
Lorestan	0	255	825	14,644
Mazandaran	0	6,495	766	39,132
Markazi	0	745	4,671	11,542
Hormozgan	0	65	10	7,218
Hamedan	35	456	1,766	10,573
Yazd	0	213	2,949	10,371
South of Kerman	0	0	100	279
Total	1,281	27,993	111,208	421,883

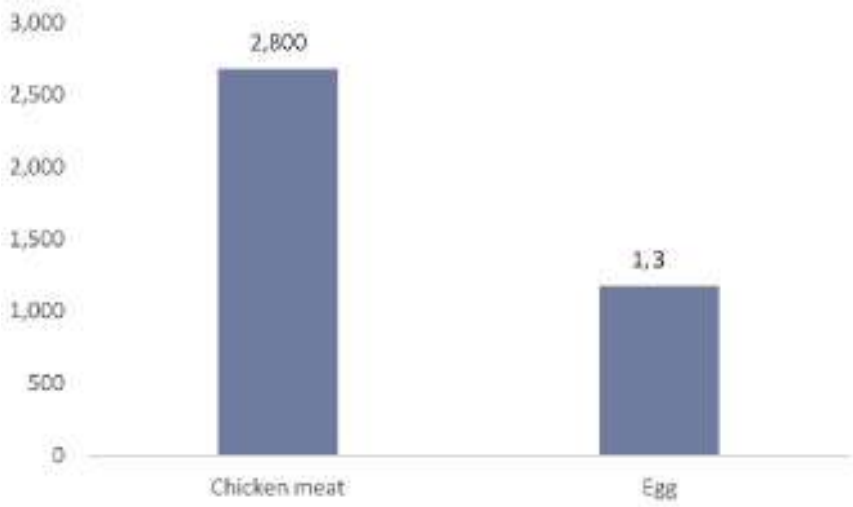
Chicken & Egg Production

The poultry production industry is divided into two categories of chicken and egg. The total of chicken meat production reached 2,800,000 tons with 4.5 % increase in the year ended March 2023. In addition, the total egg production reached 1,300,000 tons with 9.5% increase.

Table 5-2. ***Chicken Meat & Egg Production-000 tons***

Protein Type	Production
Chicken meat	2,800
Egg	1,3

Figure 5-1. ***Chicken Meat & Egg Production-2023-000 tons***



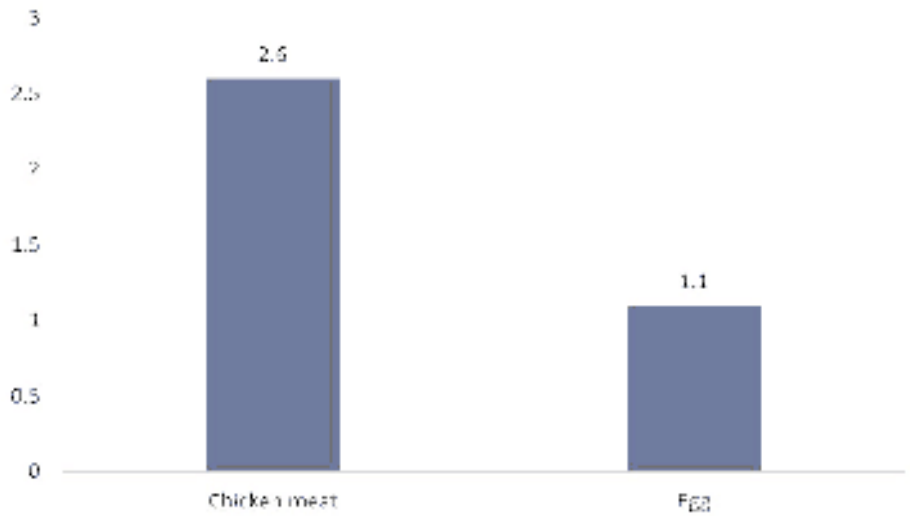
Chicken & Egg Production in the Vision of the Sixth Development Plan

The volume of chicken and egg production, in the vision of sixth development plan, is predicted at 2.6 million tons and 1.1 million tons respectively.

Table 5-3. ***Chicken & Egg Production in Vision of Sixth Development Plan-mn tons***

	Production
Chicken meat	2,6
Egg	1.1

Figure 5-2. ***Chicken & Egg Production in Vision of Sixth Development Plan-mn tons***



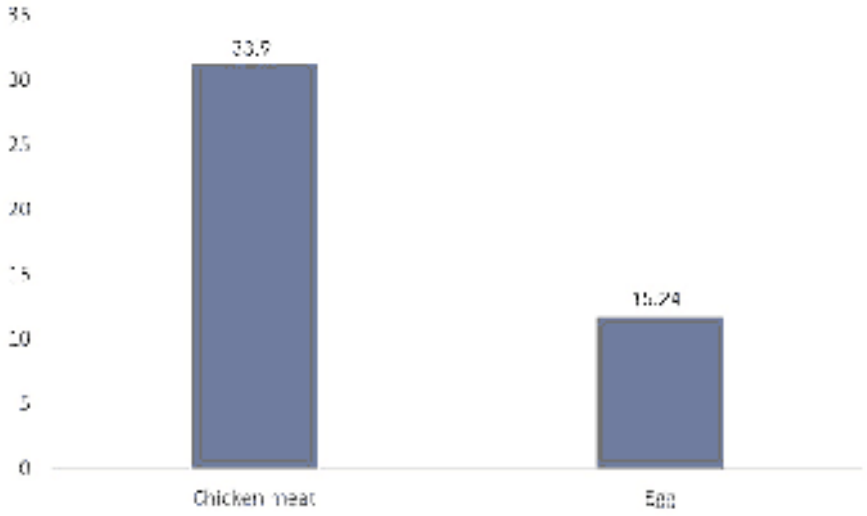
Products Consumption Per Capita

The total chicken and egg consumption per capita reached 33.1 kilograms with an 8.3% rise and egg consumption per capita reached 14 kilograms with a 15.32 % rise in the year ended March 2022

Table 5-4. ***Chicken Meat & Egg Consumption Per Capita-kg***

	Consumption
Chicken meat	33.9
Egg	15.24
Total	49.14

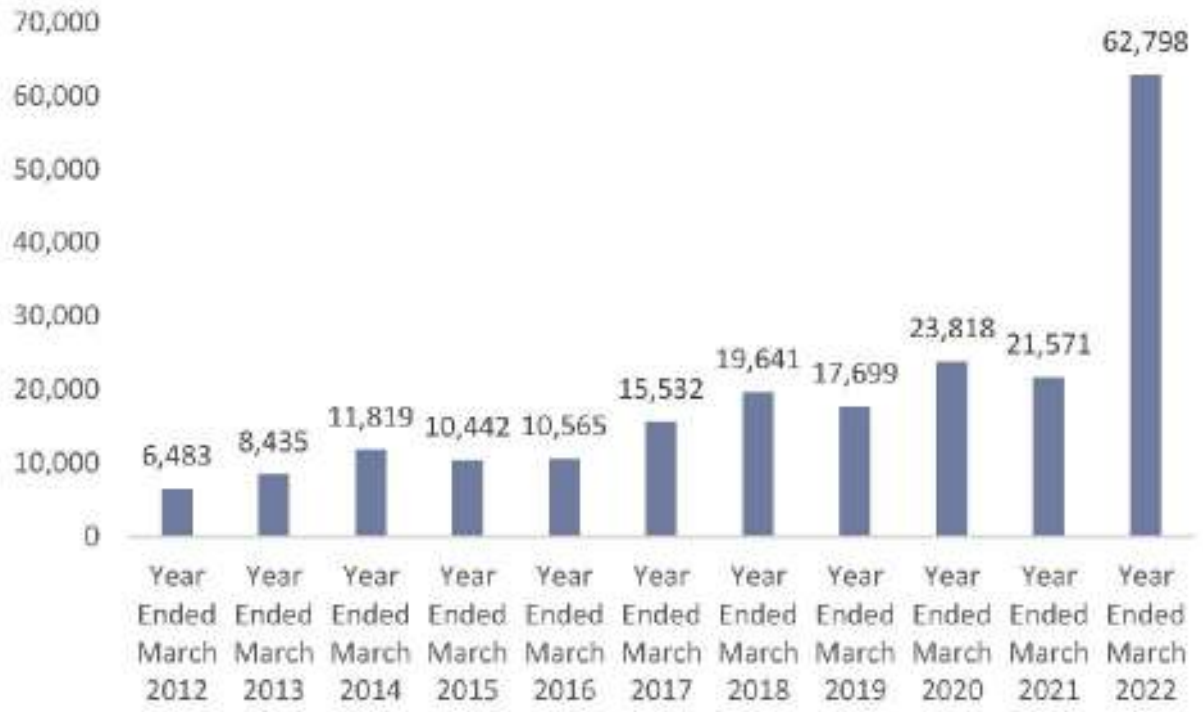
Figure 5-3. ***Chicken Meat & Egg Consumption Per Capita-kg***



Day-Old Chick

In the year ended March 2023, price of a day-old chick had an 29% growth in comparison to the previous year and experienced an annual average decrease of 1.4% in the period ended March 2013-2023.

Figure 5-4. ***Day-old Chick Average Cost- IRR***



Brooding at Broiler Breeder Farms

The Unsteady and unstable trend of brooding at broiler breeder farms entered a period of restrictions and rationing from the year ended March 2015, after which in recent years the trend became more stable, with a 2% annual increase in productivity. Brooding on Broiler Breeder Farms has been one of the most significant statistics of the industry and has direct and specific effect on the production of chicken and day-old chicks

Figure 5-5. ***Brooding at Broiler Breeder Farms - Day-old chick***

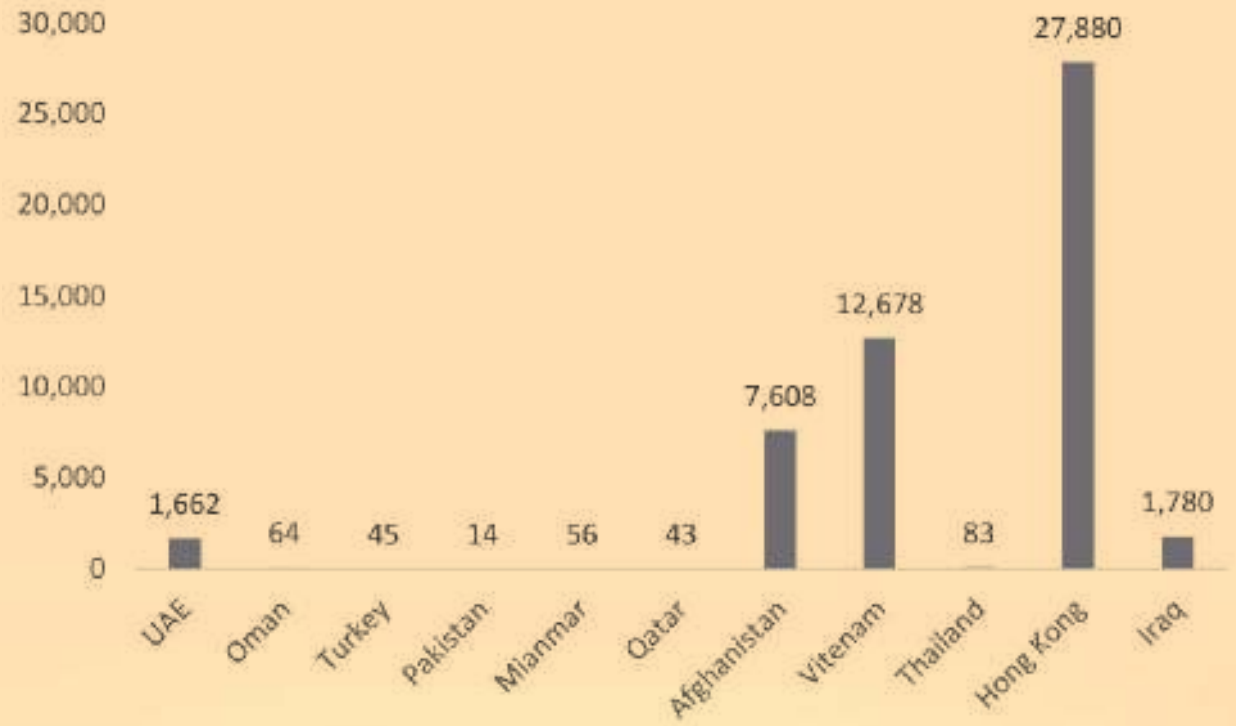
Export

In the year ended March 2023, the export volume of chiken meat were 136 thousand tons.

Brooding

Iran has 40 grandparents chicken breeding units with a capacity of one million pieces per year and 827 broiler parent chicken breeding units with a capacity of 30 million pieces per year.

Figure 5-6. ***Export by Destination-tons***

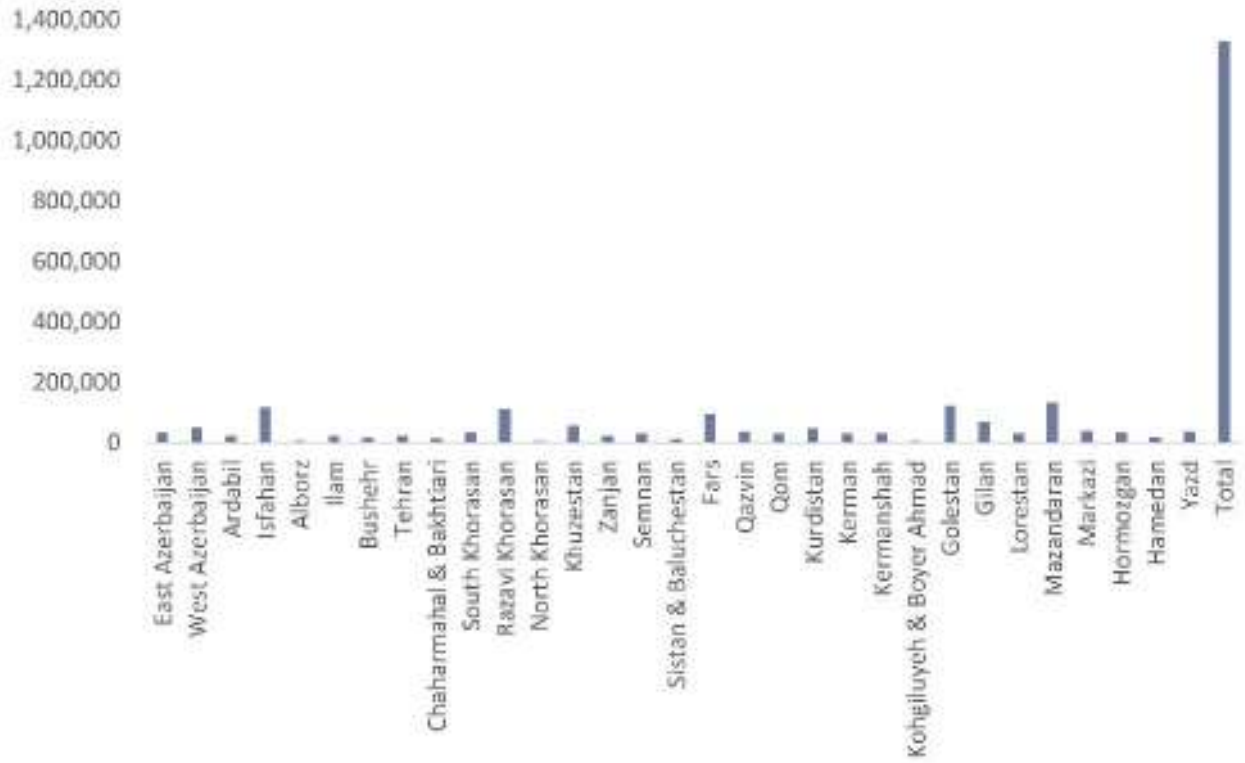


In the year ended March 2023, a total of 2.6 milion MT of chicken meat were Slaughtered and Mazandaran province gained the top rank in breeding with 304 Thounsand MT and Golestan, Gilan and Razavi Khorasan followed it.

Table 5-5. Brooding by Province- Yr. ended Mar. 2022

Province	000 Chicks
East Azerbaijan	34,240
West Azerbaijan	50,540
Ardabil	21280
Isfahan	117040
Alborz	7980
Ilam	22610
Bushehr	17290
Tehran	22610
Chaharmahal & Bakhtiari	15960
South Khorasan	33250
Razavi Khorasan	109060
North Khorasan	5320
Khuzestan	55860
Zanjan	22610
Semnan	29260
Sistan & Baluchestan	10640
Fars	95760
Qazvin	35910
Qom	29260
Kurdistan	45560
Kerman	29260
Kermanshah	30590
Kohgiluyeh & Boyer Ahmad	6650
Golestan	122360
Gilan	70490
Lorestan	30590
Mazandaran	133000
Markazi	37240
Hormozgan	33250
Hamedan	18620
Yazd	35910
Total	1330000

Figure 5-7. ***Brooding by Province- Yr. ended Mar. 2022***



Export of Day-Old Chick

On January 2019, 23,418,000 day old chicks at 983,556 kilograms weight and 6,196,403 USD value were exported to Armenia, Afghanistan, Turkmenistan, Iraq, Azerbaijan. Azerbaijan, Armenia, Afghanistan, and Turkmenistan had the highest export value at 1,332,818 USD. Afghanistan had the highest export value of day-old chicks among the export destinations. Currently, the export of day-old chickens is prohibited.

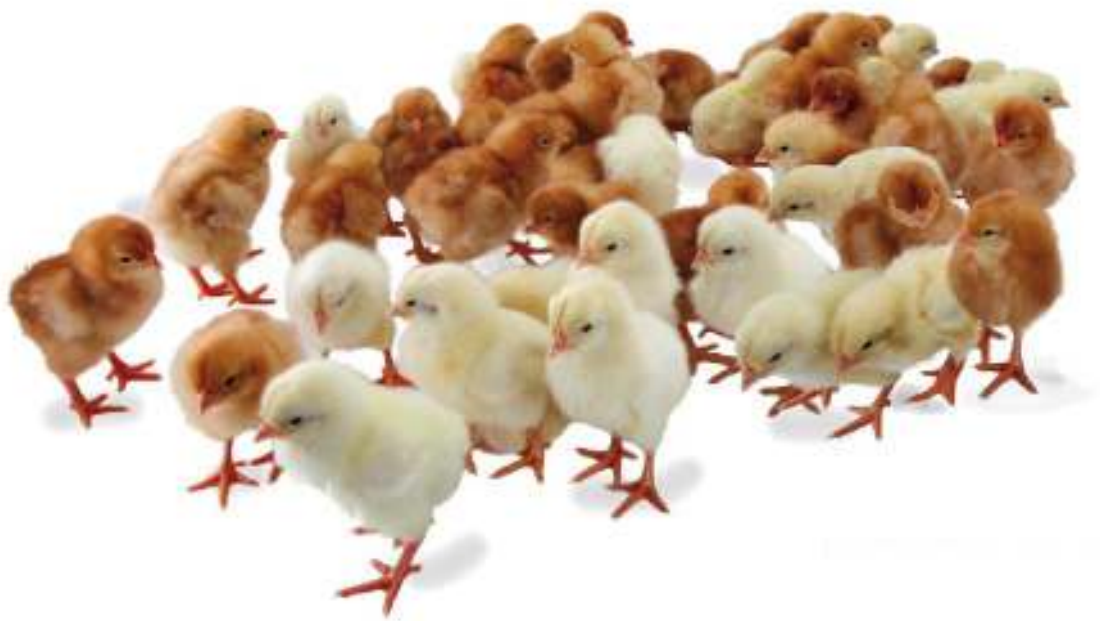
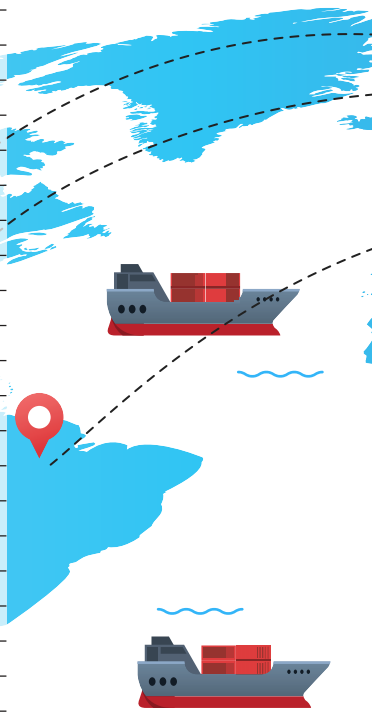


Table 5-6. Value & Volume of Day-Old Chick Export- Apr. 2018 - Jan. 2019

Month	Export Destination	Value (USD)	No.	Weight (kg)
April	Armenia	116,376	364,792	17,510
	Afghanistan	215,400	716,146	34,375
	Turkmenistan	33,000	102,292	4,910
	Sum	364,776	1,183,230	56,795
May	Armenia	136,776	424,833	20,392
	Afghanistan	465,366	1,562,479	74,999
	Turkmenistan	107,370	365,625	17,550
	Iraq	212,980	935,042	44,882
	Sum	1,652,044	3,287,979	157,823
June	Armenia	107,965	391,208	18,778
	Afghanistan	525,288	1,862,396	89,395
	Turkmenistan	205,920	637,917	30,620
	Iraq	12,800	31,625	1,518
	Sum	851,973	2,923,146	140,311
July	Armenia	134,661	440,583	21,148
	Afghanistan	459,940	1,785,063	85,683
	Turkmenistan	199,650	657,875	31,578
	Sum	794,251	2,883,521	138,409
August	Armenia	130,212	474,417	22,772
	Afghanistan	491,859	1,610,771	77,317
	Turkmenistan	300,720	977,333	46,912
	Sum	922,791	3,062,521	147,001
September	Azerbaijan	13,950	50,000	2,400
	Armenia	107,418	334,458	16,054
	Afghanistan	430,862	1,439,464	69,103
	Turkmenistan	307,470	992,688	47,649
	Sum	859,700	2,816,610	135,206
October	Azerbaijan	11,880	41,667	2,000
	Armenia	158,087	518,125	24,870
	Afghanistan	683,130	2,223,292	106,718
	Turkmenistan	425,560	1,248,833	59,944
	Sum	1,278,657	4,031,917	193,532
November	Azerbaijan	155,774	482,042	23,138
	Armenia	162,889	517,104	24,821
	Afghanistan	674,839	2,348,354	112,721
	Turkmenistan	339,316	1,032,708	49,570
	Sum	1,332,818	4,380,208	210,250
December	Azerbaijan	74,478	229,063	10,995
	Armenia	91,412	285,104	13,685
	Afghanistan	529,302	1,582,188	75,945
	Turkmenistan	138,468	419,375	20,130
	Sum	833,660	2,515,730	120,755
January	Armenia	46,081	133,792	6,422
	Afghanistan	118,470	360,063	17,283
	Turkmenistan	45,606	133,750	6,420
	Sum	210,157	627,605	837,762
	Total	8,371,275	27,712,649	1,330,207



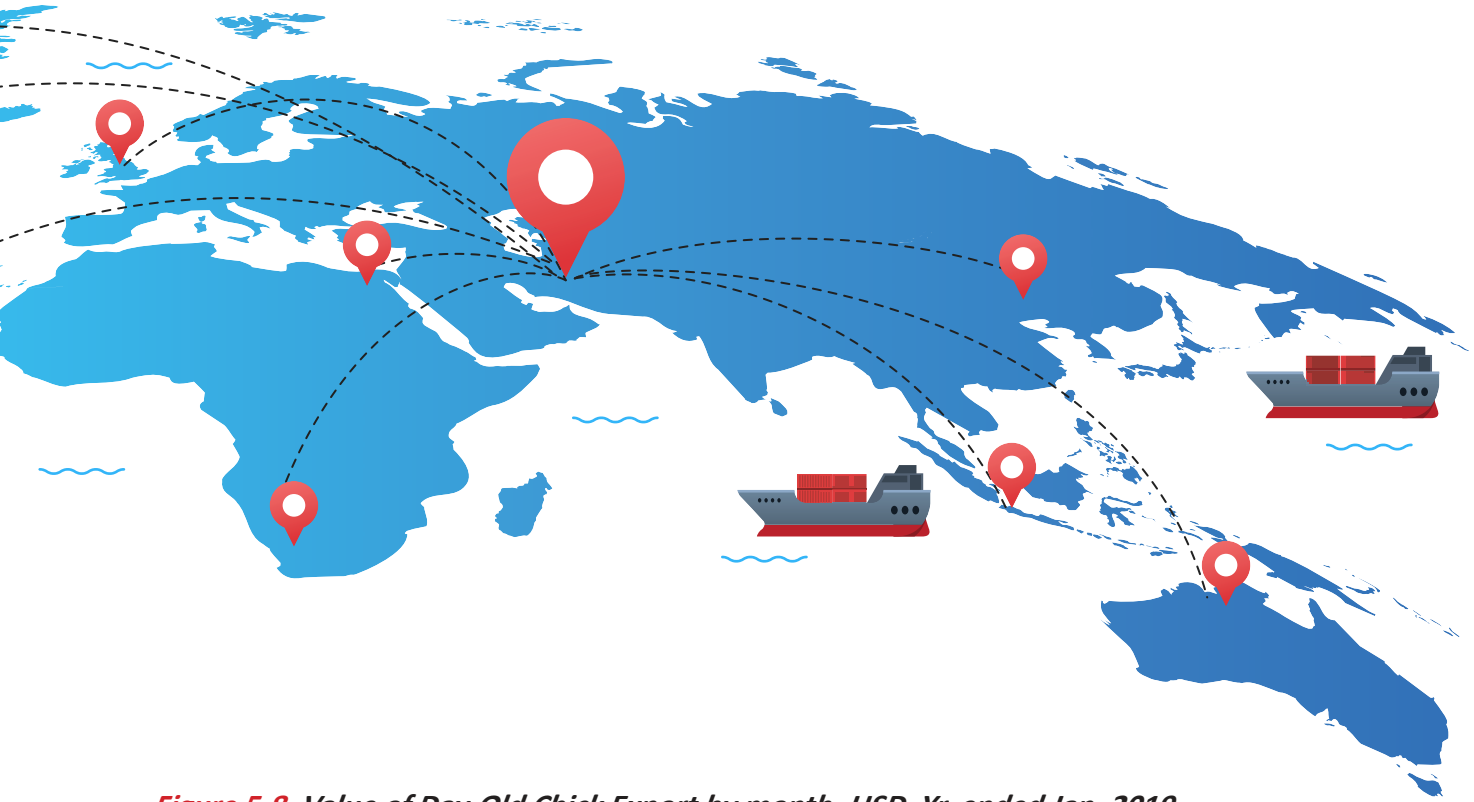
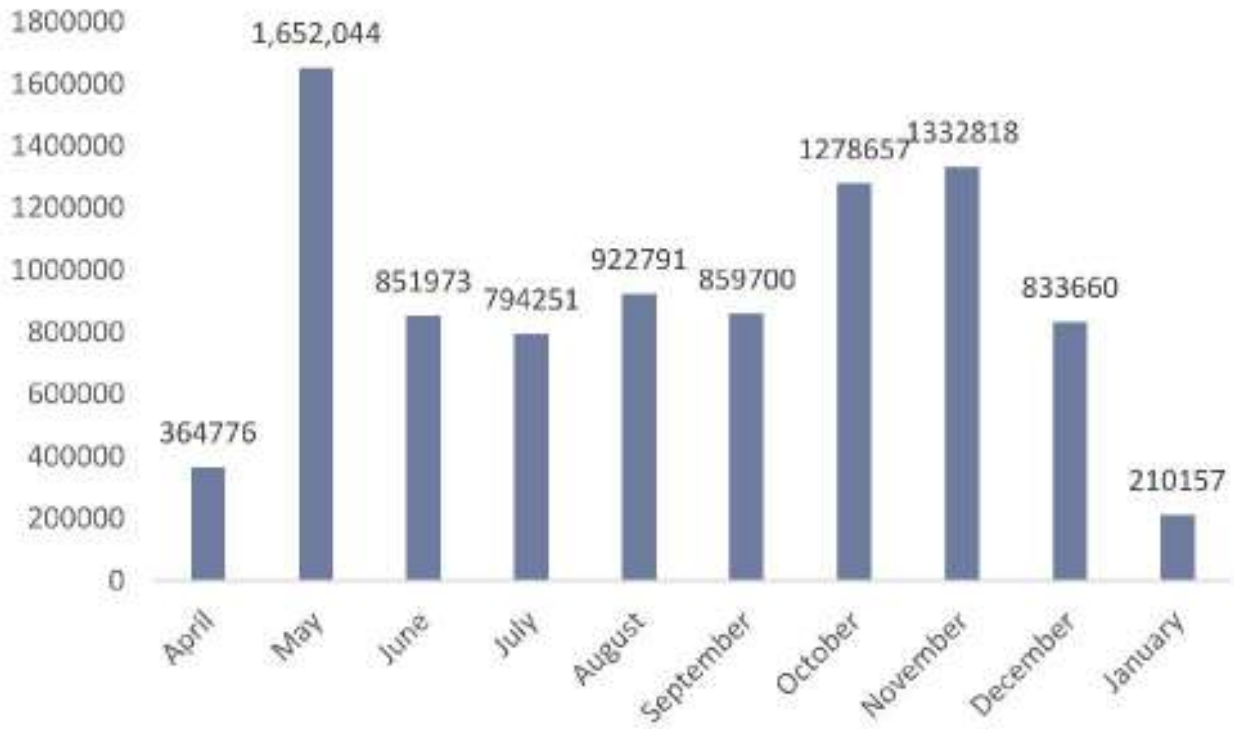
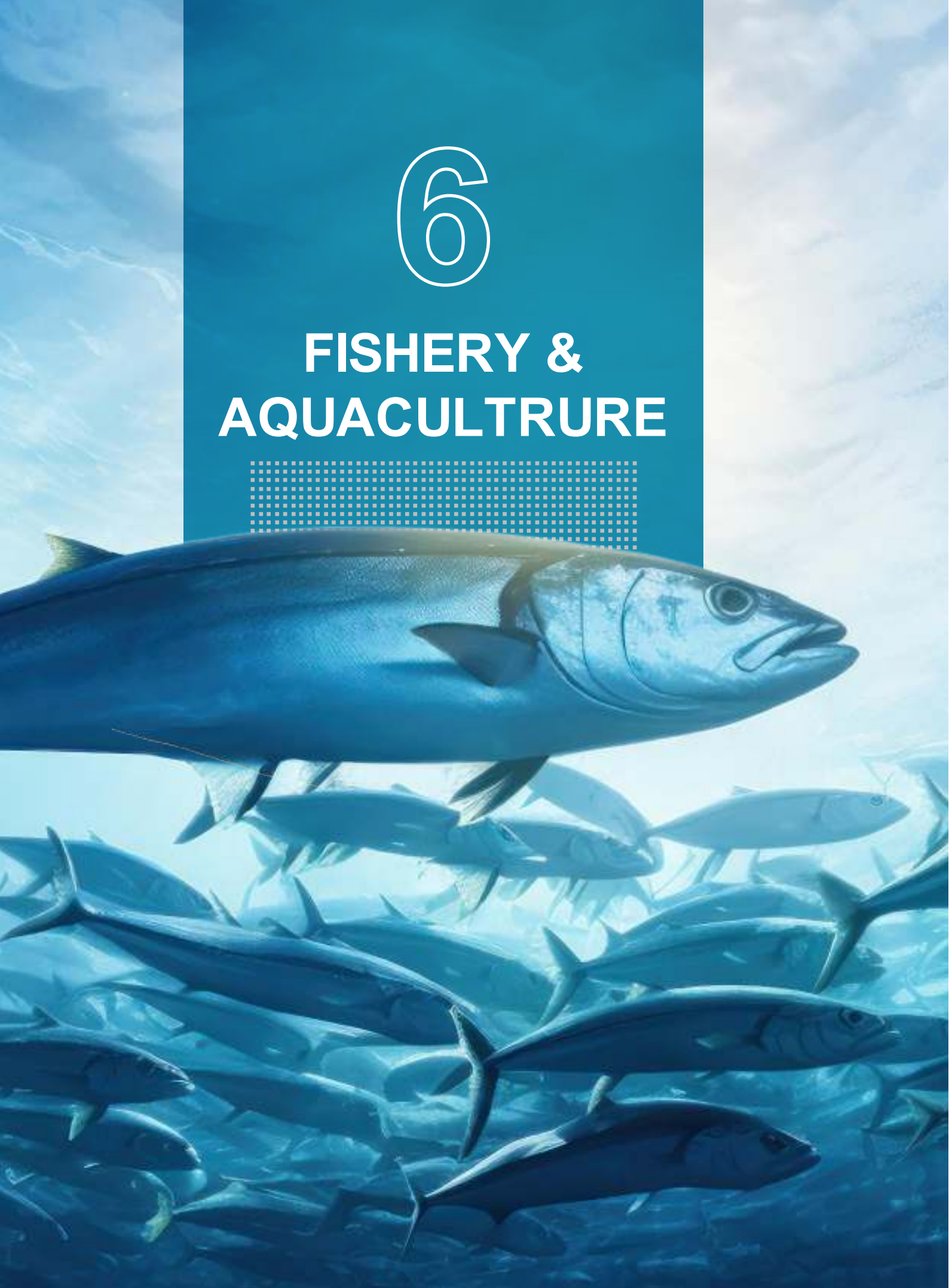


Figure 5-8. Value of Day-Old Chick Export by month- USD, Yr. ended Jan. 2019



6

FISHERY & AQUACULTRURE



Overview

The Fishery sector has an important share in both providing food for society and in balancing the ecosystem. The Food and Agriculture Organization (FAO) has defined a significant role for aquaculture in the future in terms of food supply, employment, foreign currency gains and rural development.

Shrimp & Fish Farms Status

Warm-water fish farms reached a total of 17,951 (2.7% decline) units with production reduced to 220,096 (2% decline) in the year ended March 2022. Cold-water fish farms stood at 6,891 (2.07% decline) units, the production volume reaching 189,932.

The highest number of warm-water fish farms was 5,292 (an area of 10,777 hectares) in Gilan Province, 697 cold-water fish farms in Zanjan Province (677,204 hectares) and 391 shrimp farms (5,724 hectares) in Hormozgan Province.

Figure 6-1. ***Fish & Shrimp Farms - 2022***

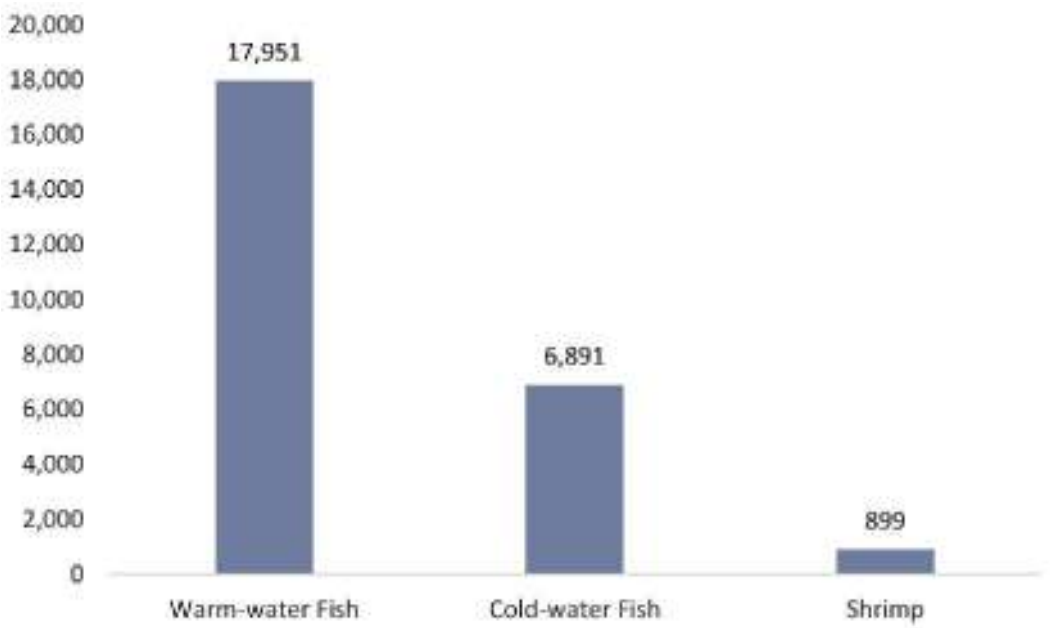


Table 6-1. ***Fish & Shrimp Farms by Province***

Province	Shrimp	Warm-water Fish	Cold-water Fish
East Azerbaijan	0	172	240
West Azerbaijan	0	40	195
Ardabil	0	105	330
Isfahan	0	571	460
Alborz	0	32	115
Ilam	0	159	68
Bushehr	357	2	0
Tehran	0	342	200
Chaharmahal & Bakhtiari	0	0	370
South Khorasan	0	650	16
Razavi Khorasan	0	1,160	351
North Khorasan	0	82	94
Khuzestan	27	1,229	20
Zanjan	0	4	697
Semnan	0	175	44
Sistan & Baluchestan	44	1,061	53
Fars	0	1,465	148
Qazvin	0	87	152
Qom	0	180	92
Kurdistan	0	10	257
Kerman	0	89	196
Kermanshah	0	86	358
Kohgiluyeh & Boyer-Ahmad	0	0	241
Golestan	80	778	48
Gilan	0	5,292	393
Lorestan	0	78	501
Mazandaran	0	3,286	400
Markazi	0	30	275
Hormozgan	391	95	0
Hamedan	0	202	247
Yazd	0	146	182
South of Kerman	0	343	148
Total	899	17,951	6,891

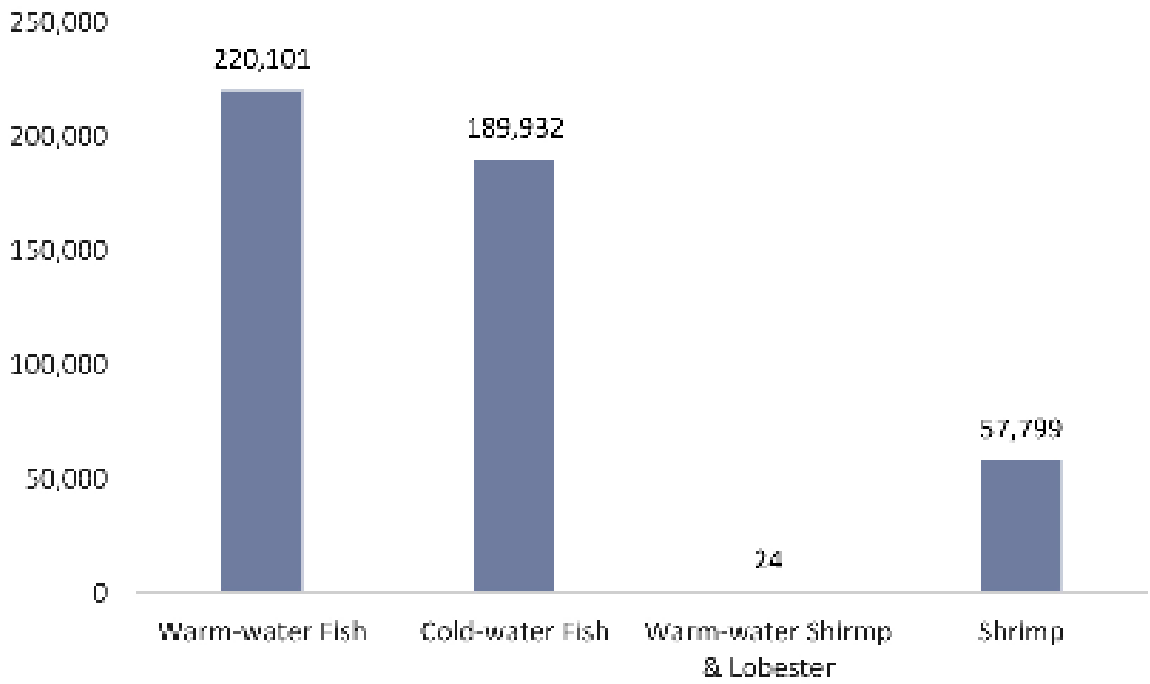
Production

The total amount of fish production was 467,856 tons, including 220,101 tons warm-water fish, 189,932 tons cold-water fish, 24 tons fresh-water shrimps and lobsters, as well as 57,799 tons shrimps in the year ended March 2022. Mazandaran, Chaharmahal & Bakhtiari, Kermanshah, and Bushehr ranked 1st with 69,262 tons warm-water fish, 20,832 tons cold-water fish, 20 tons fresh-water shrimps, and 28,051 tons shrimp production, respectively.

Table 6-2. ***Aquaculture Production-2022-tons***

	Production
Warm-water fish	239,713
Cold-water fish	208,800
Warm-water shirmp & Lobester	60,631
Shirmp	8
Other	92283
Total	601,435

Figure 6-2. ***Aquaculture production-tons***



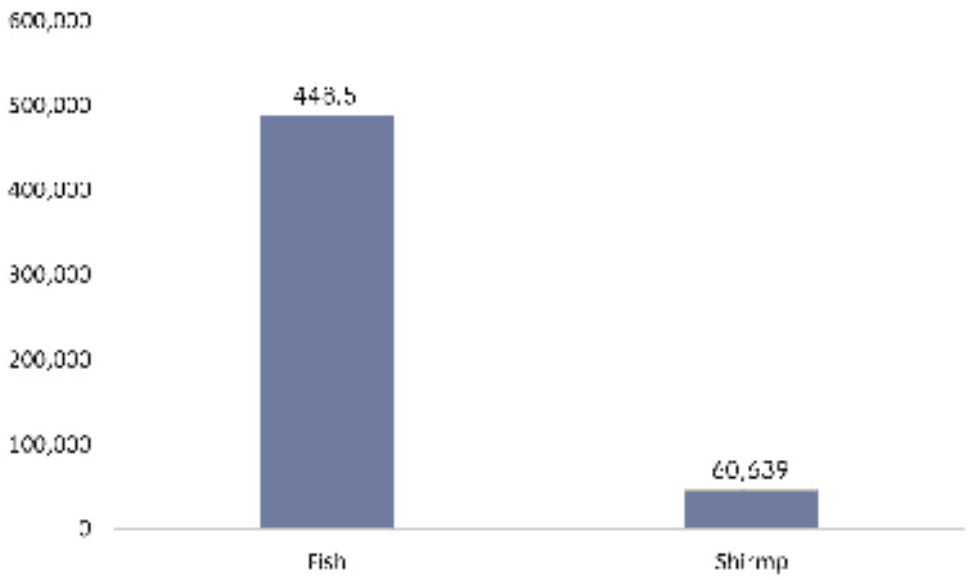
Fish & Shrimp Production

In the year ended March 2022, fish and shrimp production reached 601,435 MT with 20% yearly increase.

Table 6-3. ***Fish & Shrimp Production-000 tons***

	Production
Fish	448.5
Shirmp	60,639

Figure 6-3. ***Fish & Shrimp Production-000 tons***



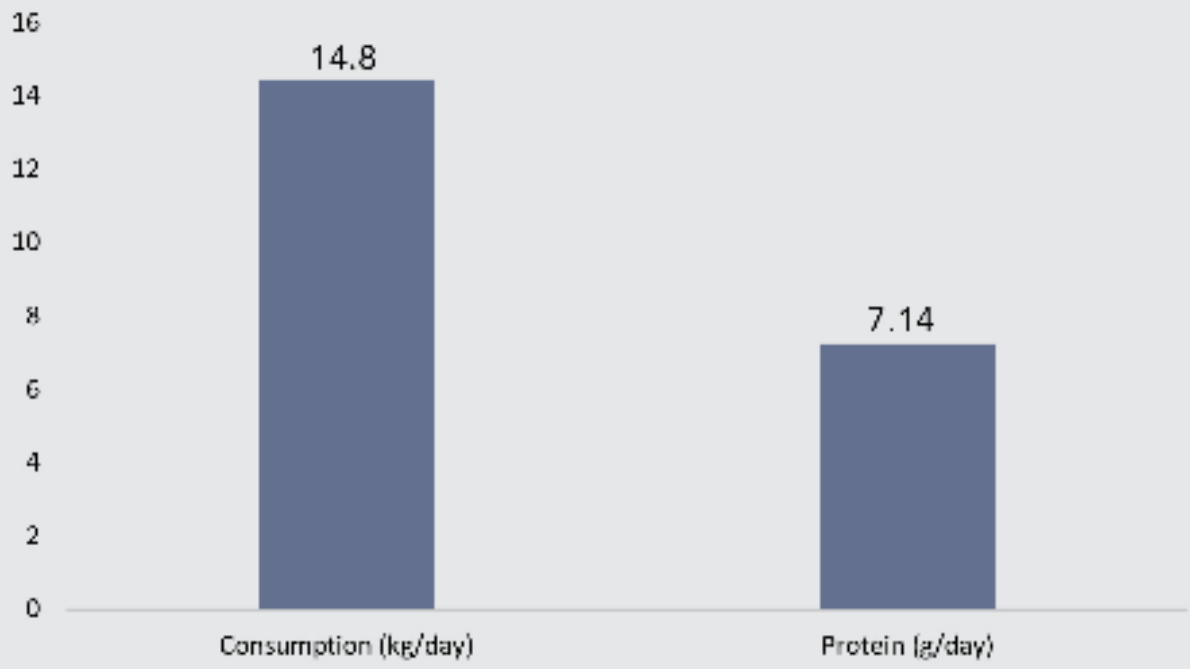
Products Consumption Per Capita

In the year ended March 2022, the total of consumption per capita of aquatic products was 14.8 kilograms (10% yearly increase), and aquatic protein consumption increased 7.14 grams per day.

Table 6-4. ***Aquatic Products & Protein Consumption Per Capita (2022)***

	Consumption
Consumption per Capita (kg/day)	14.8
Protein (g/day)	7.14

Figure 6-4. Aquatic Products & Protein Consumption Per Capita



7

ANIMAL HEALTH & SANITARY

Animal Hygiene

Health issues, relating to the animal husbandry industry, are among the most significant management factors for livestock health and economic expenditures, and therefore, applying hygiene standards and using effective tools and the right products, guarantees efficient management and increases production efficiency. In other words, maintaining hygiene standards ensures livestock health and avoiding heavy expenditure.

Animal Inoculation

Livestock is inoculated to immunize against bacterial diseases (Charbon, tetanus, blackleg, theileriosis, Pasteurellosis, enterotoxaemia, gangrene, agalactia and leptospirosis) and viral diseases (HFMD, smallpox, PPR, LSD, etc.).

In the year ended March 2022, 120,510,789 and 186,816,840 inoculations were injected for bacterial and viral diseases, respectively.

Table 7-1. ***Inoculation-Yr. ended Mar. 2022***

Type	Disease	
Cattle, Buffalo, Sheep, Goat	Bacterial (Charbon)	22,547,277
Others	Bacterial (Charbon)	32,987
Odd-toed Ungulate	Bacterial (tetanus)	9,021
Cattle, Calf, Sheep, Goat	Bacterial (blackleg)	2,067,995
Cattle & Buffalo	Bacterial(theileriosis)	178,341
Cattle, Buffalo, Sheep, Goat	Bacterial (Pasteurellosis)	7,557,306
Others	Bacterial (Pasteurellosis)	0
Cattle, Buffalo, Sheep, Goat	Bacterial (enterotoxaemia)	63,523,470
Sheep & Goat	Bacterial (gangrene)	12,917,146
Sheep & Goat	Bacterial (agalactiae)	11,677,246
Cattle, Buffalo, Sheep, Goat	Bacterial (leptospirosis)	0
Cattle, Buffalo, Sheep, Goat	Virus (HFMD)	65,648,127
Sheep & Goat	Virus (smallpox)	48,345,230
Sheep & Goat	Virus (PPR)	70,920,742
Cattle	Virus (LSD)	1,902,741
Total	307,327,629	

Supervision on Livestock Products

In the year ended March 2021, supervision took place on 3,288,124 producers of livestock.

Zoonotic Diseases

Brucellosis is one of the most common zoonotic diseases. Brucella is the main disease factor that can spread widely from animals to humans. The bacterium is very commonly found in wild and domestic mammals and is constantly a risk factor in terms of economy and healthcare.

In the year ended March 2022, 1,677,078 cases of Brucellosis were diagnosed in tested livestock, of which 1,562,771 were cattle and calves and 114,307 were sheep and goat that were vaccinated by IRIB and ver1 vaccines, respectively. Moreover, 453,337 animals were vaccinated against rabies, including watch dogs and cats.

Livestock Contagious Disease

Livestock are inoculated annually against contagious and viral diseases. The main contagious diseases are HFMD, Smallpox, Charbon, etc.

Livestock Disease Control

To eradicate Bovine TB totally, 1,361,094 Tuberculin tests were taken from cattle showing 0.0009 % of positive coefficient reactors in the year ended March 2022. Additionally, 46,220 livestock were given Mallein tests to eliminate glanders.

Table 7-2. Livestock Disease Control- Yr. ended Mar. 2022

	Type	Disease	
Inoculated Cattle & Calf (IRIB)	-	Brucellosis	1,677,078
Inoculated Sheep & Goat	-	Brucellosis	114,307
Bovine TB test (negative)	-	Bovine TB	1,361,094
Bovine TB Test No. Positive Reactor	-	-	1184
Total Vaccination by Type	Cattle, Sheep, Goat	Rabiesg	39,133
Total Vaccination by Type	Others	Rabiesg	414,204
Mallein Test	-	Glander	661

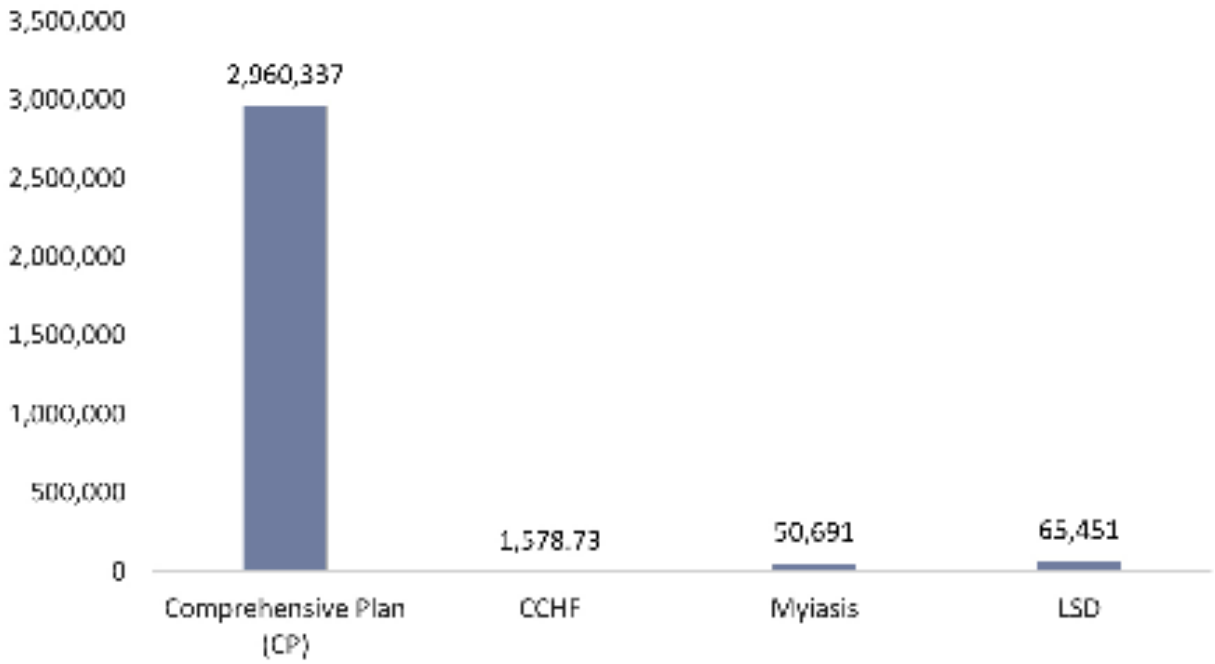
Livestock Parasitic Diseases Control

In the year ended March 2022, 4,655,208 livestock located in 13,840,743 m2 were poison prayed to control parasitic disease (cattle, calf, sheep and goat).

Table 7-3. ***Livestock Parasitic Diseases Control-Yr. ended March 2022.***

	Type	
Comprehensive Plan (CP)	Cattle, Buffalo, Sheep, Goat	2,960,337
CCHF	Cattle, Buffalo, Sheep, Goat	1,578.729
Myiasis	Cattle, Buffalo, Sheep, Goat	50,691
LSD	Cattle, Buffalo, Sheep, Goat	65,451
Total	Cattle, Buffalo, Sheep, Goat	4,655,208

Figure 7-1. ***Livestock Parasitic Diseases Control-Yr. ended March 2022.***



Broiler Pullet Disease Status

Newcastle, IBD, Bronchitis IBV and influenza are among the most common avian diseases. Based on the number of birds carrying disease, animal losses by Influenza, Bronchitis IBV, Newcastle, and IBD are estimated at 19.61, 17.97, 19.09, and 11.72, respectively.

Table 7-4. Broiler Pullet Disease Status - 2022

	IBD	Newcastle	Bronchitis IBV	Influenza
Broiler Pullet Stroke Disease in Flock (no)	993,741	26,914,638	23,600,745	28,918,873
Broiler Pullet Stroke Disease in Flock (%)	11.72	19.09	17.97	19.61

Aquaculture & Fish Farms Hygiene Status

In the year ended March 2022, 409,705 tests were conducted at aquaculture and fish farms divided into cold-water fish farms 30,251 tests, warm water fish farms 356 tests and shrimp farms 280,273 tests. Furthermore, 4,204 tests were given to other aquatic animals such as ornamental, sturgeon, and sea animals.

Table 7-5. Aquaculture & Fish Farms Hygiene Status - 2022

	Total Tests by Division				
Type	Tests	Fungal	Parasitic	Microbial	Virus
Cold Water Fish Farms	8,175	106	405	489	10,565
Warm Water Fish Farms	216	4	37	28	147
Shrimp Farms	8,589	0	203	338	8,048
Others	1,317	239	413	399	376
Total	21,687	349	1,058	1,254	19,136

Figure 7-2. ***Aquaculture & Fish Farms Hygiene Status- Yr. ended March 2022***

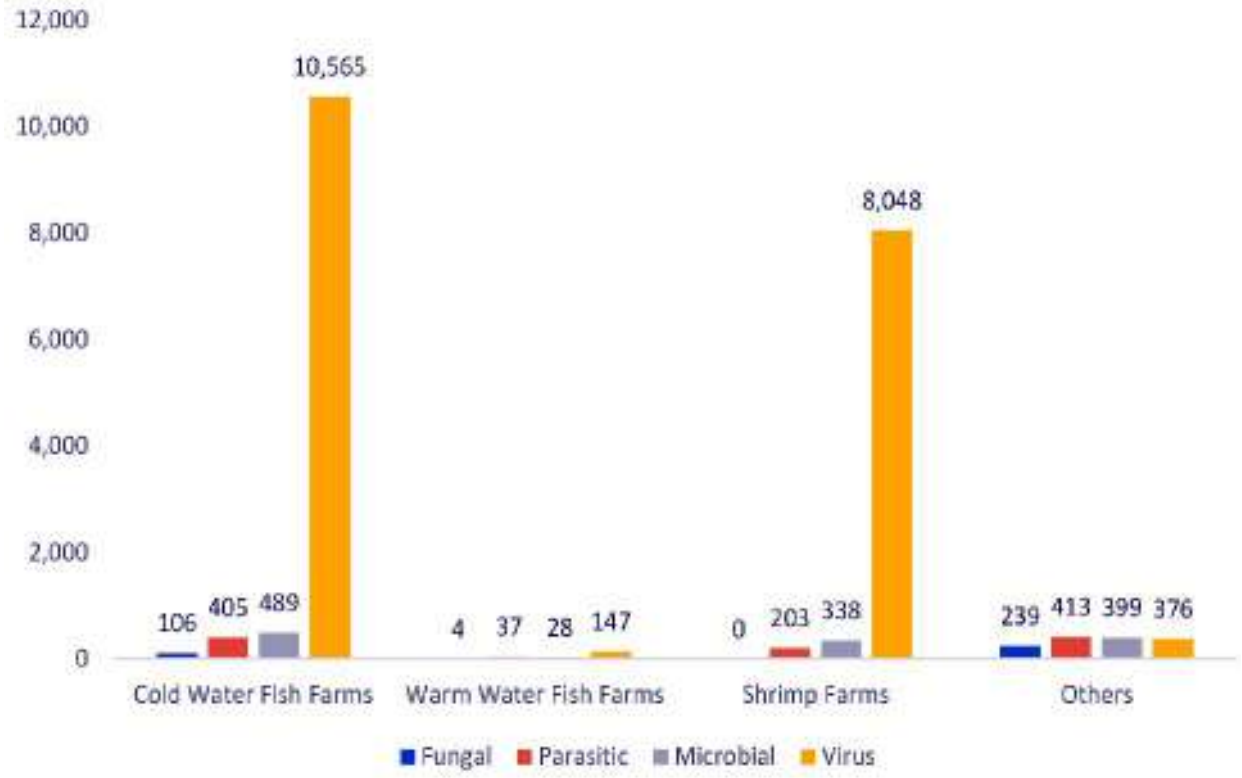
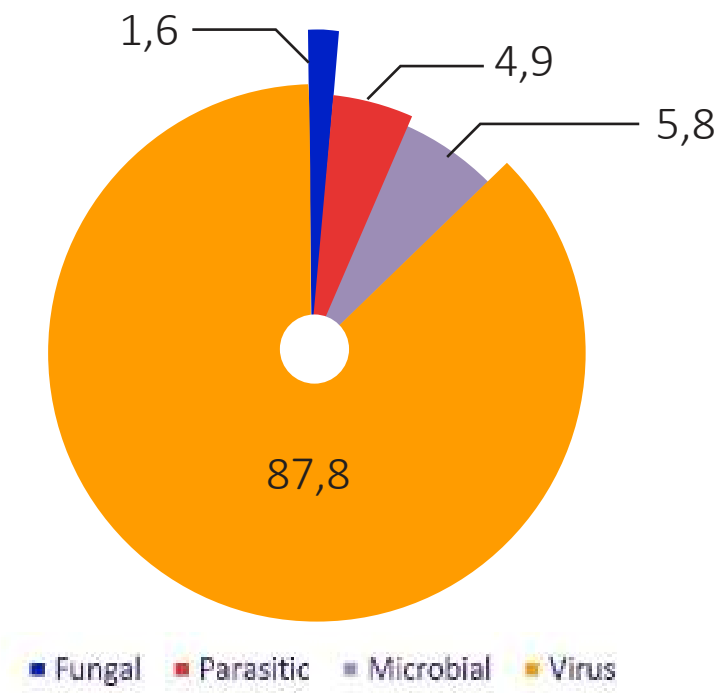


Figure 7-3. ***Total Tests by Division -%***



8

ANIMAL FEED TECHNOLOGY IN IRAN

Production Line of Animal Feed & Concentrate

Recently, ready-made feed, applied as animal feed in order to gain value added as well as facilitate progress, has increased in volume with the recycling of industrial and agricultural wastes. Supplying animals with ready-made feed could prevent diseases due to lack of pollution in the feed. A group of economically desirable substances (not available in one feed type) may be mixed, with the concentrate having a combination of vital nutrition for the animal. The concentrate may consist of cotton meal proteins, carbohydrate (prepared from grain, molasses, and beet pulp), fat, minerals and vitamins. By increasing the role or ready-made feed in husbandry economy, determining feed stuff value as well as providing farm animal feed requirements, important issues such as researches in the husbandry industry, preparing healthy feed, covering total nutrition needs can be advanced. Deficiency in protein, minerals, vitamins, and energy percentages leads to inefficiency and animal diseases. Thus, utilizing technology in mills will increase the ratio of animal production in comparison to the animal feed given and allows further standardization, leading to further production as well as less consumption of raw materials. Reaching the world standards allows cheaper and higher quality animal products.

History of Animal Feed Industry

The animal feed industry has been active for 70 years, has experienced 4 generations of technology and possesses a total of 250 old, deteriorating and inefficient mills, dating back 20 years or closed down. Most feed mills established in the last 15 years, are active and competing based on modern global standards & models and have experienced significant growth in terms of quality and quantity, reaching full capacity in the last two decades. About 400 animal feed mills were active with a nominal capacity of 10 million tons and an actual capacity of 3 million tons in the year ended March 2008, and this number reached 700 mills with a nominal capacity of 21 million tons and actual capacity of 10 million tons by 2019. In addition the technology and quality of the mills has also increased in the last 10 years.

An average of 33 mills were established with suitable technology and a nominal capacity of over 32,000 tons as well as high efficiency in the last decade. Nominal and actual capacities have increased 2 fold and 3.3 times, respectively. Moreover, most of the mills have ISO, GMP, and TUV licenses with most others new national and international standards.

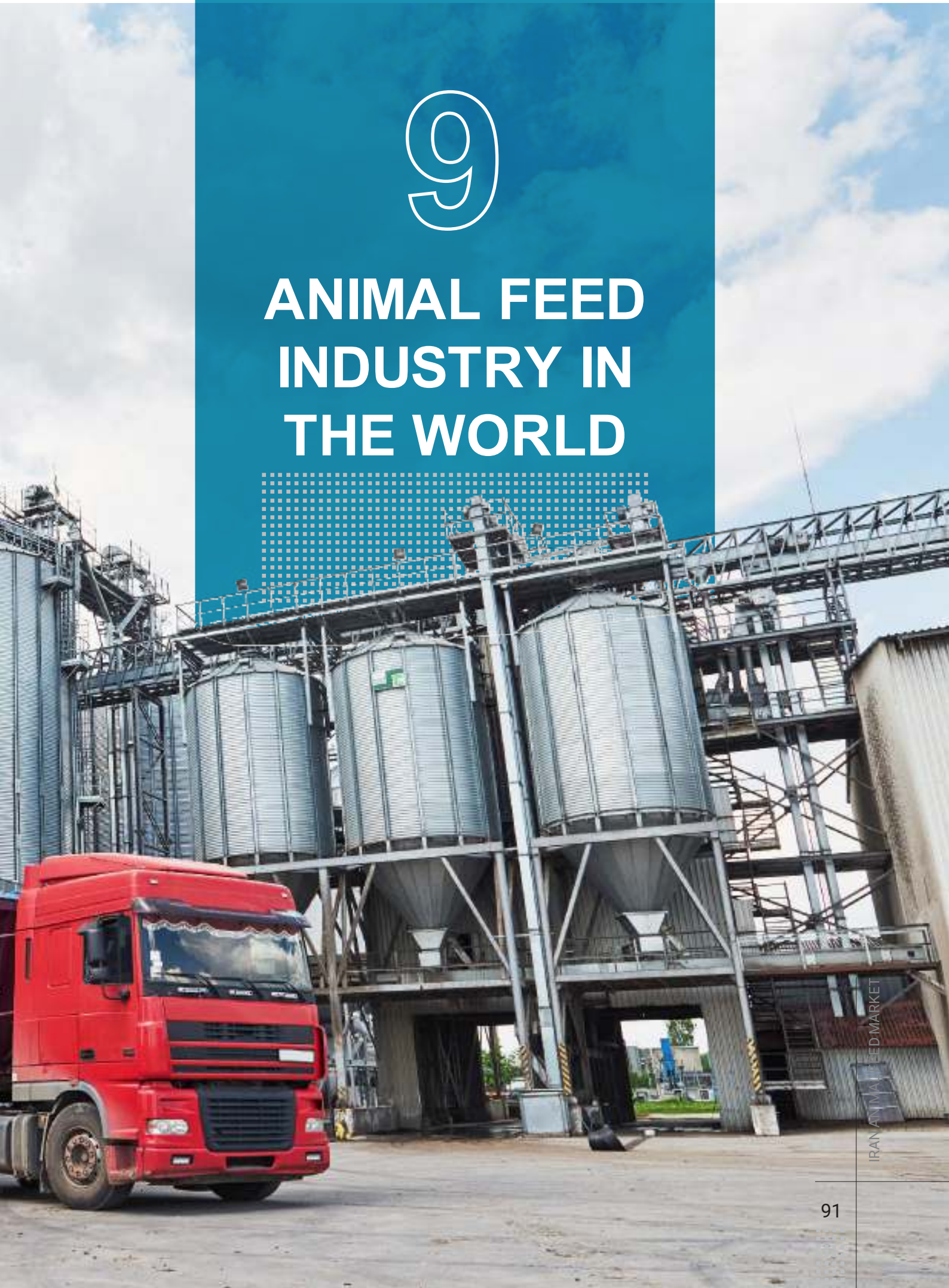
The trend of animal feed mills in the past 65 years ago:

- Yr. ended March 1953: establishment of the first feed mill
- Yr. ended March 1977: 19 feed mills and nominal capacity of 314 thousand tons
- Yr. ended March 1983: 133 feed mills and nominal capacity of 2.6 million tons
- Yr. ended March 1999: 214 feed mills and nominal capacity of 4.2 million tons
- Yr. ended March 2008: 410 feed mills and nominal capacity of 10 million tons
- Yr. ended March 2013: 517 feed mills and nominal capacity of 17 million tons
- Yr. ended March 2018: 700 feed mills and nominal capacity of 21 million tons
- Yr. ended March 2023: 1029 feed mills and nominal capacity of 27 million tons

The nominal capacity of animal feed mills was estimated at about 27 million tons from 1029 mills and the applied capacity was about 6,101,000 tons for ruminants 4,008,000 tons for poultry and total of 10,109,000 tons for the year ended March 2023.
The total value of animal feed mills investment was estimated at about 3.2 billion USD and value of animal feed production was 7.5 billion USD although no international investment has been undertaken in the industry.

9

ANIMAL FEED INDUSTRY IN THE WORLD



Global Feed Production

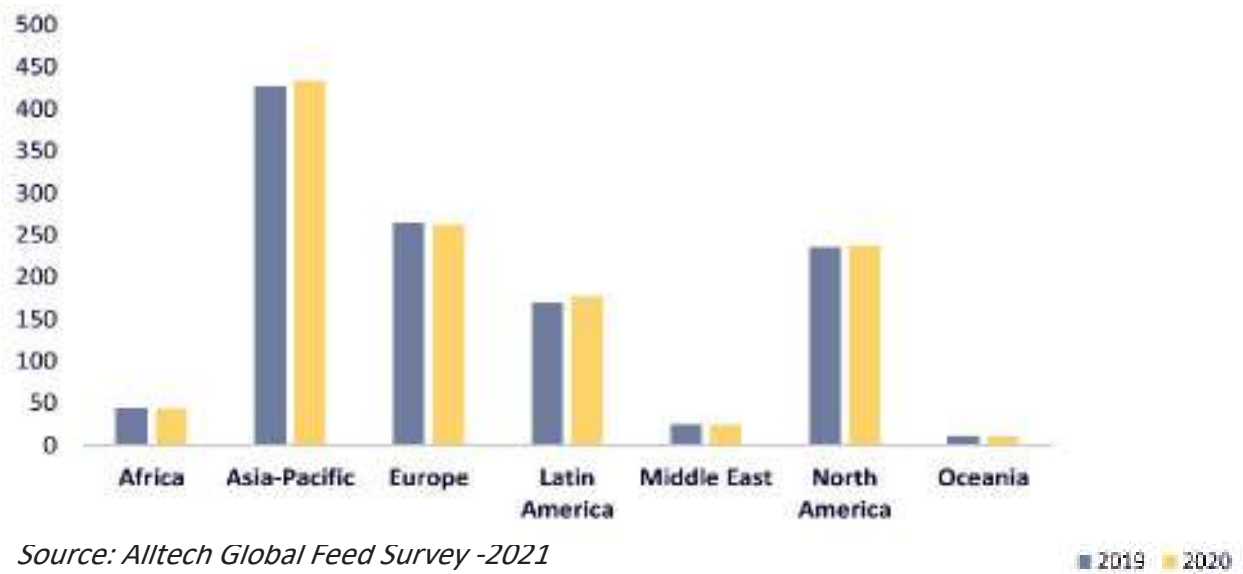
The year 2020 was challenging for many industries — and certainly, the feed, agriculture and food industries were no exception. While panic-purchasing caused many to doubt the food supply chain, the reality was that most regions learned that the food supply chain was stable and could meet consumers' needs without too much interruption. Regionally, COVID-19 had varying effects. Some regions, such as Africa, cited more challenges than others, and in many cases, this was a country-by-country determination. The rise of e-commerce was seen around the world and is expected to be an ongoing avenue for food purchasing into the future. Feed prices greatly affected producers. Additional challenges to these prices included government regulations of more sustainable practices, such as lowered nitrogen use and the reduction or elimination of antibiotics.

Table 9-1. ***Animal Feed Production in the World –MMT***

Region	2019	2020	Growth
Africa	43.7	43	-2%
Asia-Pacific	427	433.9	2%
Europe	265.3	261.9	-1%
Latin America	168.9	176.9	4%
Middle East	25.3	24.8	-2%
North America	236	237.2	1%
Oceania	10.5	10.4	-2%
Total	1,176.80	1,187.70	1%

Source: Alltech Global Feed Survey -2021

Figure 9-1. ***Animal Feed Production in the World -2019 vs. 2020***



Source: Alltech Global Feed Survey -2021

Leadership in Animal Feed Production

The top 10 countries can be viewed as a leader of the trends in agriculture. In 2020, comparing the production of top countries as a percentage of aggregate feed production of the rest of the world demonstrates how significant they are to the overall business.

Table 9-2. ***Leadership Animal Feed Production in the World***

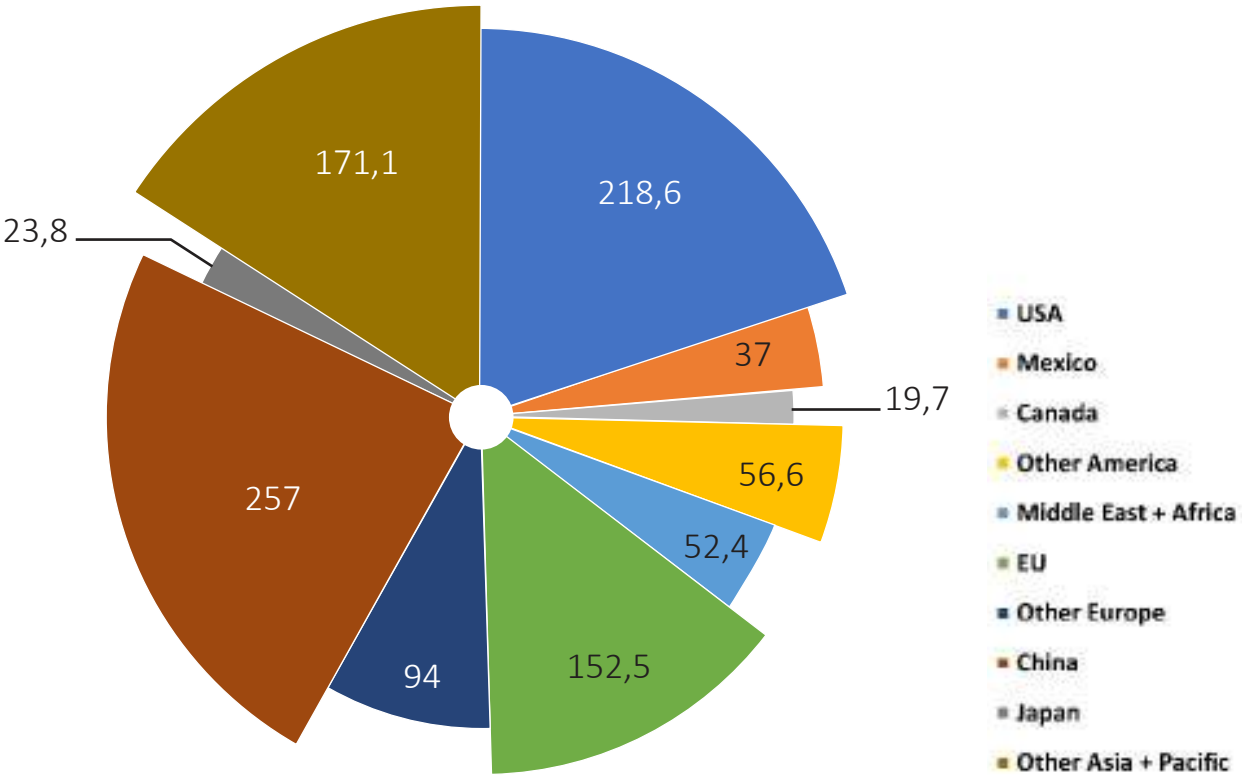
Country	2019 Production (MMT)	2020 Production (MMT)	Growth
China	228.9	240	5%
USA	214.4	215.9	1%
Brazil	70.4	77.6	10%
India	41.4	39.3	-5%
Mexico	36.5	37.9	4%
Spain	34.8	34.8	0%
Russia	30.3	31.3	3%
Japan	25.3	25.2	0%
Germany	25	24.9	0%
Argentina	21	22.5	7%

Source: Alltech Global Feed Survey -2020

Compound Feeds

The global feed market consists of a large number of feed mills creating feeds for chickens, cows, pigs, and other animals. Feed mills combine ingredients, such as poultry meal, meat and bone meal, soybean meal, corn, rice, etc. in a proper ratio to get the desired nutrition content. The mixed product is then extruded before it is baked in an oven and an oil spray is often applied. Below is what happened in global compound feed production. The figure demonstrates four countries, including China, the USA, European Nations, Brazil with about 22%, 19%, 21% and 7% respectively, produce over 69% of compound feed globally.

Figure 9-2. ***Global Compound Feed Production in 2021- MMT***



Source: IFIF Annual Report (2021-2022)

Animal Feed Market Trend

Over the last ten years, agricultural markets experienced a strong increase in demand across a wide range of commodities. Much of growth was attributable to non-food uses of agricultural commodities, mostly feedstock for animal feed. The global demand for feed reached 1.73 billion tons in 2021-2022, and is expected to increase further to 1.9 billion tons by 2027, at an annual growth rate of around 1.7%. Demand for feed is thus expected to grow faster than the demand for several commodities and markedly faster than food demand for cereals, for which 1.1% p.a. growth is expected. This growth results in 260 million tons of additional feed demand by 2027; slightly less than the development of the previous decade as demand grew by more than 300 million tons.

The main set of agricultural commodities used for feed include corn, protein meal, other coarse grains (especially barley and sorghum), wheat, and by-products of cereal processing such as cereal bran. corn and protein meal will remain the most important commodities used as feed, accounting for 60% of all feed by 2027 (up from 58% in the base period). Feed demand for corn is expected to grow by 20% over the outlook period, and demand for protein meal is expected to expand by 24%, considerably faster than the other commodities used as feed.

Figure 9-3. ***Demand for Feed (a) By feed component - million tons***

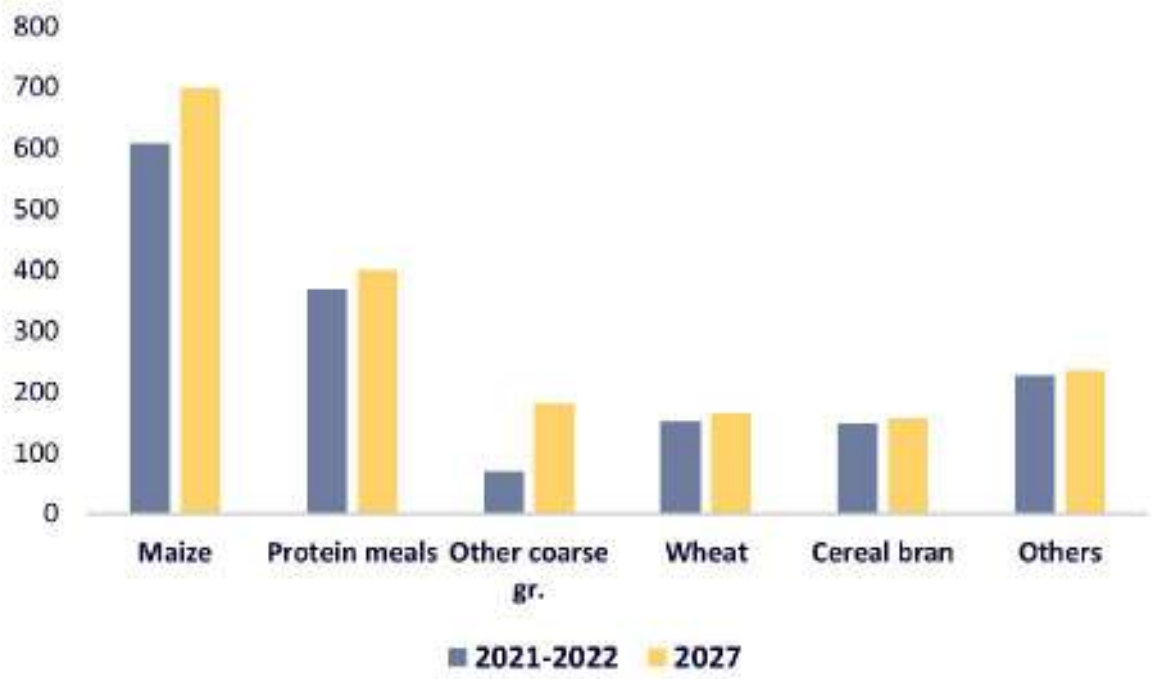
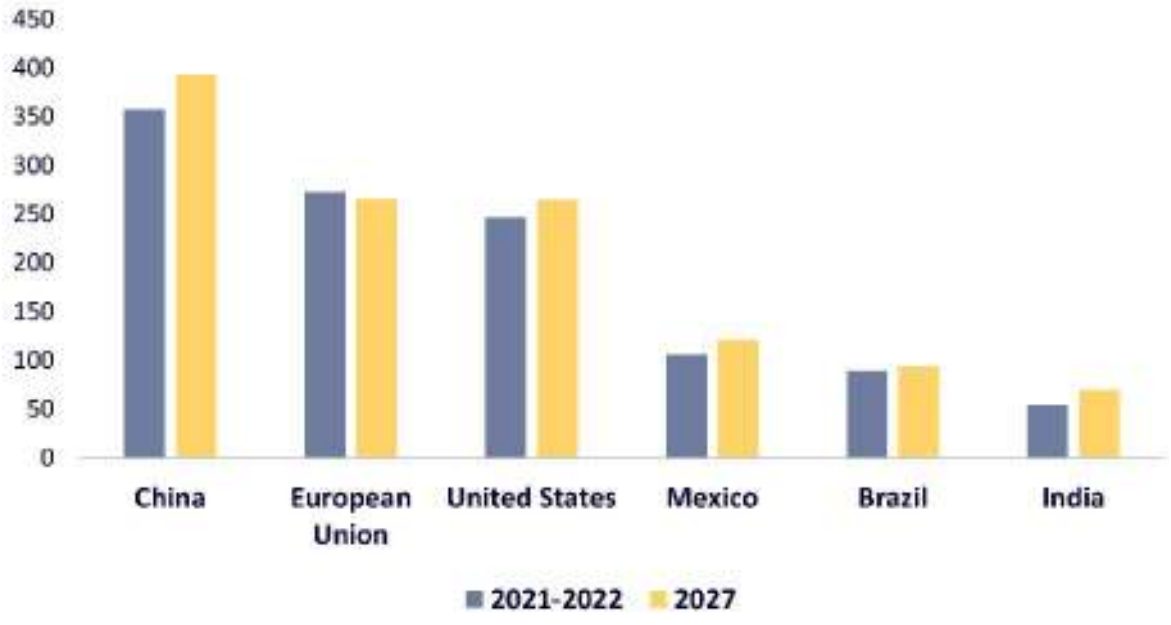


Figure 9-4. ***Demand for Feed (b) By region - million tons***



Source: OECD/FAO-2019, "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (Database)

Overall growth patterns in demand for feed will vary among geographical regions. Around 30% of the additional demand for feed will originate in China, where feed demand is expected to grow 25% over the outlook period. Strong growth in feed demand is also expected in the Middle East and North Africa (+29%, with the region expected to account for around 10% of additional global demand), as well as Brazil (+25%), and India (+31%). Growth rates in the European Union and the United States are considerably lower at 0.4% and 11% over the outlook period respectively.

Animal Feed Technology Outlook

Microbial Proteins (MP)

Industrial production of MP reveals that by 2050, depending on socioeconomic development and MP production pathways, MP can replace between 10–19% of conventional crop-based animal feed protein demand. As a result, global cropland area, global nitrogen losses from croplands and agricultural greenhouse gas emissions could be decreased by 6% (0–13%), 8% (–3–8%), and 7% (–6–9%).

Figure 9-5. Proposed Protein Supply Routes for Livestock Production based on Microbial Protein –MP

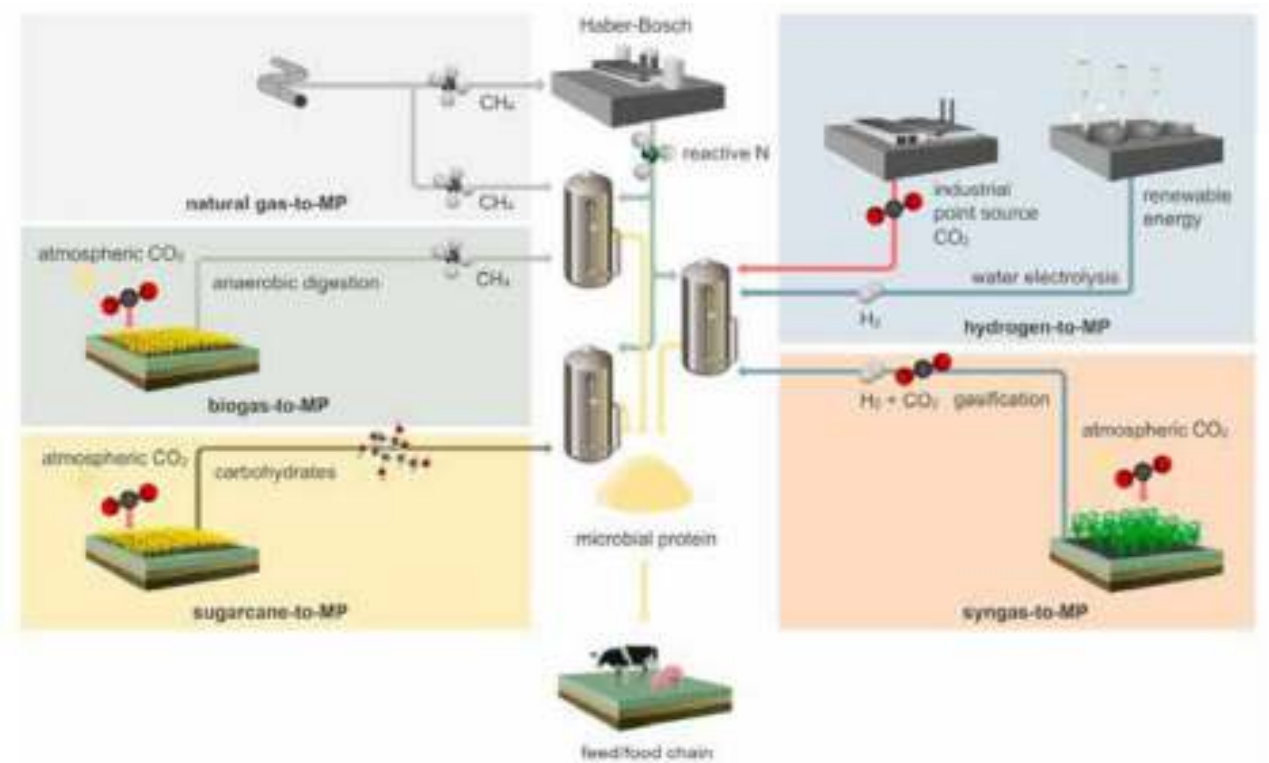
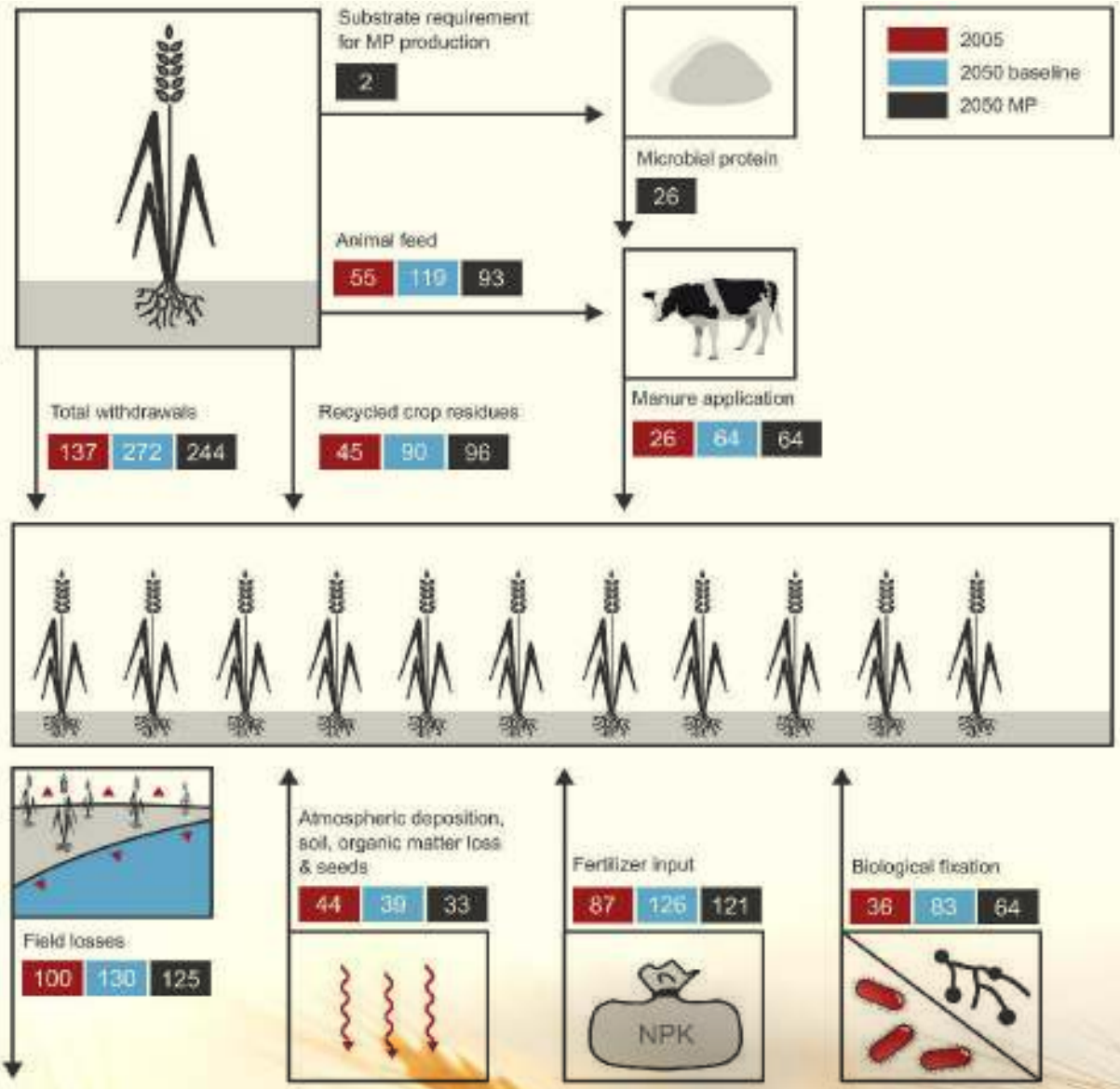


Figure 9-6. ***Global Agricultural Reactive Nitrogen Flow Flows by the year 2020***



Feed Market Potential

Challenges & Opportunities in Animal Feed & Nutrition

Fermentation

Industrial fermentation is the intentional use of fermentation by microorganisms, such as bacteria and fungi to make products useful for humans or animals. Fermented products or those derived from fermentation have several applications in animal feeding. Amino acids and enzymes are well known as fermentation products; both are crucial to optimize livestock performance.

Nutrigenomics

Nutrigenomic technologies, such as genomics (DNA level), transcriptomic (gene activity at mRNA level), proteomics (protein level), metabolomics (metabolite level) and epigenetics (phenotype and gene expression level caused by mechanisms other than changes in the underlying DNA sequence) enable to refine such measurements, particularly in combination with bioinformatics and systems biology.

The final result shows a precise determination of the animal nutrient requirement under the specific conditions, e.g. production phase, health status, farm management, environment, and social interaction.

Nutrigenetics

Another nutrigenomic technology visualizes how genetic differences between individuals can affect the response to nutrients/compounds in the feeds (Smits et al., 2007). Using above mentioned techniques, no need to get extreme nutritional treatments, induced efficiencies, or long-term production responses to understand the basic effects of diets.

Algae & Microalgae

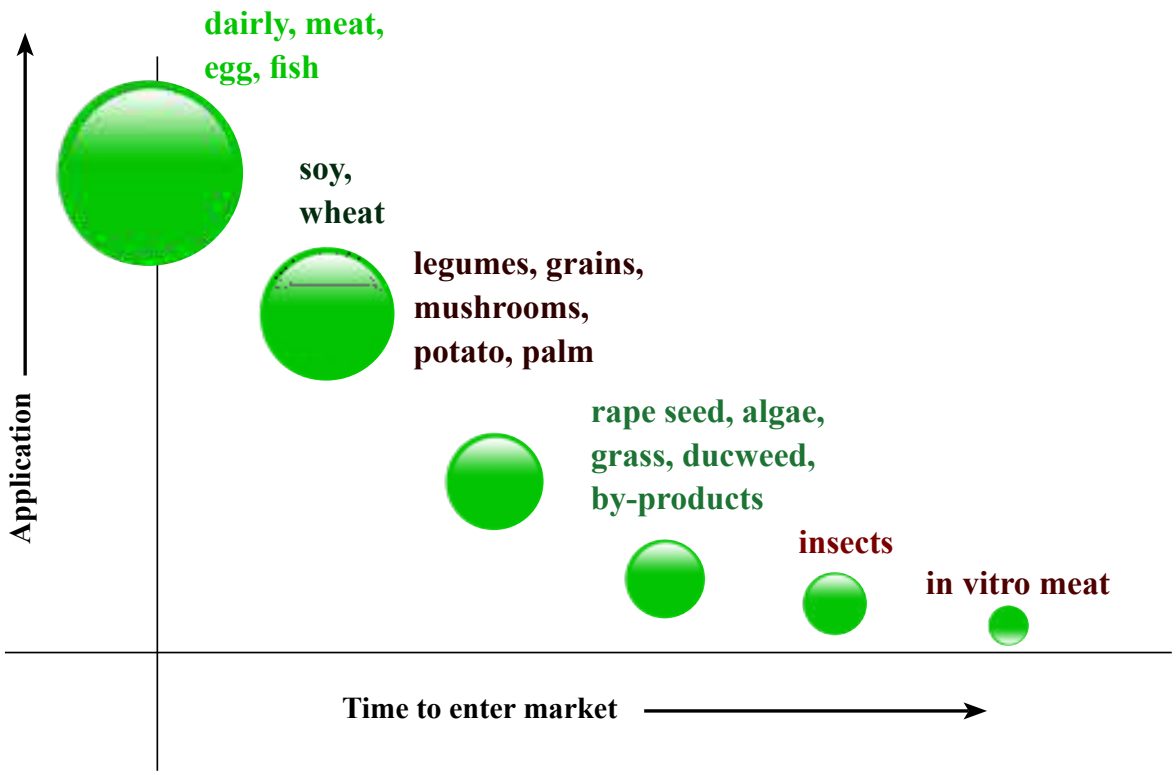
Algae farmed in aquaculture sites can become a substitute for feedstock and fishmeal. The cost of farming algae in most locations is between 400 USD and 600 USD per metric ton, 60% to 70% savings compared to fishmeal, which costs 1,700 USD per ton. Plus, algae is a more reliable source of feedstock, not dependent on catching fish providing producers with greater control over costs and the ability to forecast future investment or financial results considering the risk reduction in aquaculture farming operations.

Micro-algae are single-celled organisms growing in the different range of environmental conditions. Micro-algae provide an important direct or indirect feed source for early developmental stages of many farmed finfish, shellfish and invertebrate species as both a supplement to enhance the nutritional value of formulated feeds, and a potential feed ingredient– the protein and energy source. Already 6.4 billion Euros or 24 million tons of algae (mainly seaweed) are farmed globally and protein-rich micro-algae is seen as a forerunner resource to close the so-called “protein gap”. Approximately 30% of global algal production is sold for animal feed with potential for further increases as dried, defatted algae could compete with soybean in pig and chicken feed, potentially replacing up to one-third of soybean meal in diets.

Insect: Protein Feed for the Future

Insects are rich in protein and are a natural component of many fish and free-range poultry diet. Insect meal has a lot of unknown facts, global edible insects market size exceed 522 million USD in sales by 2023, with estimated gains at 42% CAGR (compound annual growth rate). Rich in digestible protein, key amino acids, essential fats, and micronutrients are highly suitable to include in animal feed. Among the most promising species, for industrial feed usage, the black soldier flies common housefly larvae, silkworms and yellow mealworms could be used. Experts commercially solve several environmental problems by extracting protein from waste material, facilitating significant reductions in manure mass, moisture content, and offensive odours. At the same time, the professionals provide high-value feedstuffs for cattle, pigs, poultry and fish (Newton et al., 2005).

Figure 9-7. Insects as Animal Feed



Marker Technology

Marker technology mainly focuses on animal breeding besides production and productivity, such as product quality, increasing animal welfare, disease resistance, disease receptivity, and reducing environmental impact.

Advances and Future Directions in Poultry Nutrition

Examples of some biotechnological applications widely used in animal nutrition

Applicataion	Aim(s) of developing the technology
Designer Ingredients	Nutritional enhancement (e.g. high-oil maize, high-methionine lupines) or reduction in the level of anti-nutritive components in common feed ingredients (e.g. low-phytate maize).
Feed Additives	- To suppress the growth of harmful bacteria and promote the establishment of a desirable gut flora balance (e.g. antibiotics).
a) Antimicrobials	- To increase dietary supply of specific amino acid and improve protein balance in diet formulations.
b) Crystalline Amino Acids	- To improve availability of nutrients (energy, amino acids, phosphorus etc.) in feed ingredients by reducing the negative effects of anti-nutritive components (e.g. microbial phytases acting on phytate, xylanases acting on arabinoxylans in wheat).
c) Feed Enzymes	
Gut Ecosystem Enhancers	- To promote the establishment of a desirable gut ecosystem through the proliferation of beneficial species (e.g. direct-fed microbial).
a) Probiotics	- To competitively exclude harmful organisms and promote the establishment of a desirable gut ecosystem (e.g. mannan oligosaccharides).
b) Prebiotics	

Examples of some biotechnological applications with future potential in animal nutrition

Application	Aim(s) of developing the technology
Modification of Gut Microbes	- To genetically modify microorganisms naturally present in the gut to enhance their capacity for defined functions or add new functions (e.g. rumen microbes to improve cellulose digestion).
Introduction of New Gut Microbes	- To introduce new species or strains of microorganisms into the gut.
Bioactive Peptides	- Improved growth and efficiency (e.g. growth hormonereleasing peptides), improved gut function, immunomodulation, antibacterial properties.
Antimicrobial Replacers	- Antimicrobial enzymes (e.g. lysozyme), delivery of specific antibodies via spray-dried plasma and egg products.
Transgenesis	- To modify nutrient metabolism and improve growth efficiency by transfer of genes.

World's Top 10 Feed Additive Companies

Cargill, Incorporated

Cargill Animal Nutrition & Protein delivers customized animal nutrition products and services to commercial producers in aqua, beef, dairy, pork, poultry, and pet food. The segment also provides a full range of meat and poultry products to food manufacturers, foodservice companies and retailers, as well as industrial customers. The major segments of the company are; Cargill Aqua Nutrition, Cargill Feed & Nutrition, Cargill Poultry, Cargill Premix & Nutrition and Cargill Protein. Cargill overall revenue in 2018 grew 5% to 114.7 billion USD from 109.6 billion USD (2017).

Archer-Daniels-Midland Company (ADM)

The ADM's actions are organized, managed, and classified into four reportable business segments: Origination, Oilseeds, Carbohydrate Solutions, and Nutrition. Each of the segments is organized based upon the nature of the products and services offered. The Nutrition segment includes activities related to the processing and distribution of formula feeds, animal health, nutrition products, and manufacturing contract and private label pet treats and foods. ADM's overall revenue in 2019 grew to 64.7 billion USD from 24.8 billion USD (2018).

Biovet S.A.

Biovet S.A. Laboratories were founded in 1984 by a group of veterinarians and chemists with extensive experience in clinical practice and manufacturing additives and premixes for animal nutrition. Biovet S.A. has worked regarding productivity and animal welfare offering services such as product development, additive manufacturing, feed formulation service, training and consulting zoo technical services, analytical services, microbiological analysis and mycotoxin analysis service for over 30 years.

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Blue star Adisseo Co., Ltd

Adisseo is a global leader in nutrition and health feed solutions, including research and development, production and sales with over 75 years' experience. In 2006, Adisseo joined BlueStar Group, in China's innovative chemical materials and speciality chemical industries, and established CINAbio in Toulouse of France in the same year. Adisseo supplies three types of products: Performance products (including methionine, vitamins, ammonium sulphate and sodium sulphate), Specialty products (including enzymes, rumen-protected methionine, organic selenium, and probiotics additives) and other products (including carbon disulphide, sulphuric acid, and powder processing services). Adisseo's turnover in 2018 was 1.46 billion euros.

Evonik Industries AG

Evonik is one of the world's leading speciality chemicals companies. Company's strengths include the balanced spectrum of business activities, end-markets, and regions. The company reports the revenue majorly in four business segments; Nutrition & Care, Resource Efficiency, Performance Materials, and Services. In the Nutrition & Care segment, sales advanced 3% to 4,646 million Euros (31% of total sales), driven by high global demand. Evonik's overall revenue in 2018 grew to 15.024 billion Euros from 14.38 billion Euros (2017).

BASF SE

BASF is a global supplier of innovative feed additives for livestock, aquaculture, and companion animals. BASF produces Conjugated Linoleic Acid (CLA), CLA reduces the milk fat content during the supplementary feeding phase in a dose-dependent manner and leads to lower blood glucose utilization per kilogram of milk. BASF also manufactures enzymes to feed, indigestible feed components can be digested in the gastrointestinal tract. In animal nutrition, enzymes are used predominantly for monogastric animals, such as pigs and poultry. BASF revenue report under Nutrition & Health contains products such as food and feed industries, flavour and fragrance industry, pharmaceutical industry and ethanol industry. The overall revenue of the BASF was 59.3 billion Euros in 2019.

Advanced Enzyme Technologies Limited (AETL)

Advanced Enzyme Technologies Limited (AETL) is a research-driven company with global leadership in manufacturing enzymes and probiotics. AETL is the largest Indian enzyme company, engaged in research and development, manufacturing and marketing over 400 proprietary products developed from over 68 indigenous enzymes and probiotics. AETL offers solutions to a wide variety of industries like human health care and nutrition, animal nutrition, baking etc. AETL provides enzyme-based feed additives for the animal nutrition industry, mainly catering to poultry and swine. By adding enzymes to feed, the digestibility of the components could be enhanced.

Animal Nutrition products enable animals to maximize the absorbed nutrients taken from feed, thus helping in reducing feed costs, minimizing animal waste production and consequently helping with environmental pollution reduction. The company draws 13% revenue from the above-mentioned segment. AETL overall revenue in 2018 grew to 4.24 billion INR from 3.97 billion INR (2017).

AB Vista

AB Vista is one of the largest suppliers of yeast and natural betaine to the global animal nutrition industry. The company invests heavily in research and development and has a growing portfolio of products and services spanning the poultry, swine, ruminant and aquaculture sectors. AB Agri is the agricultural section of Associated British Foods (ABF plc)- one of Europe's largest food and retail companies, with a market capitalisation of 25 billion Euros.

Kemin Industries, Inc.

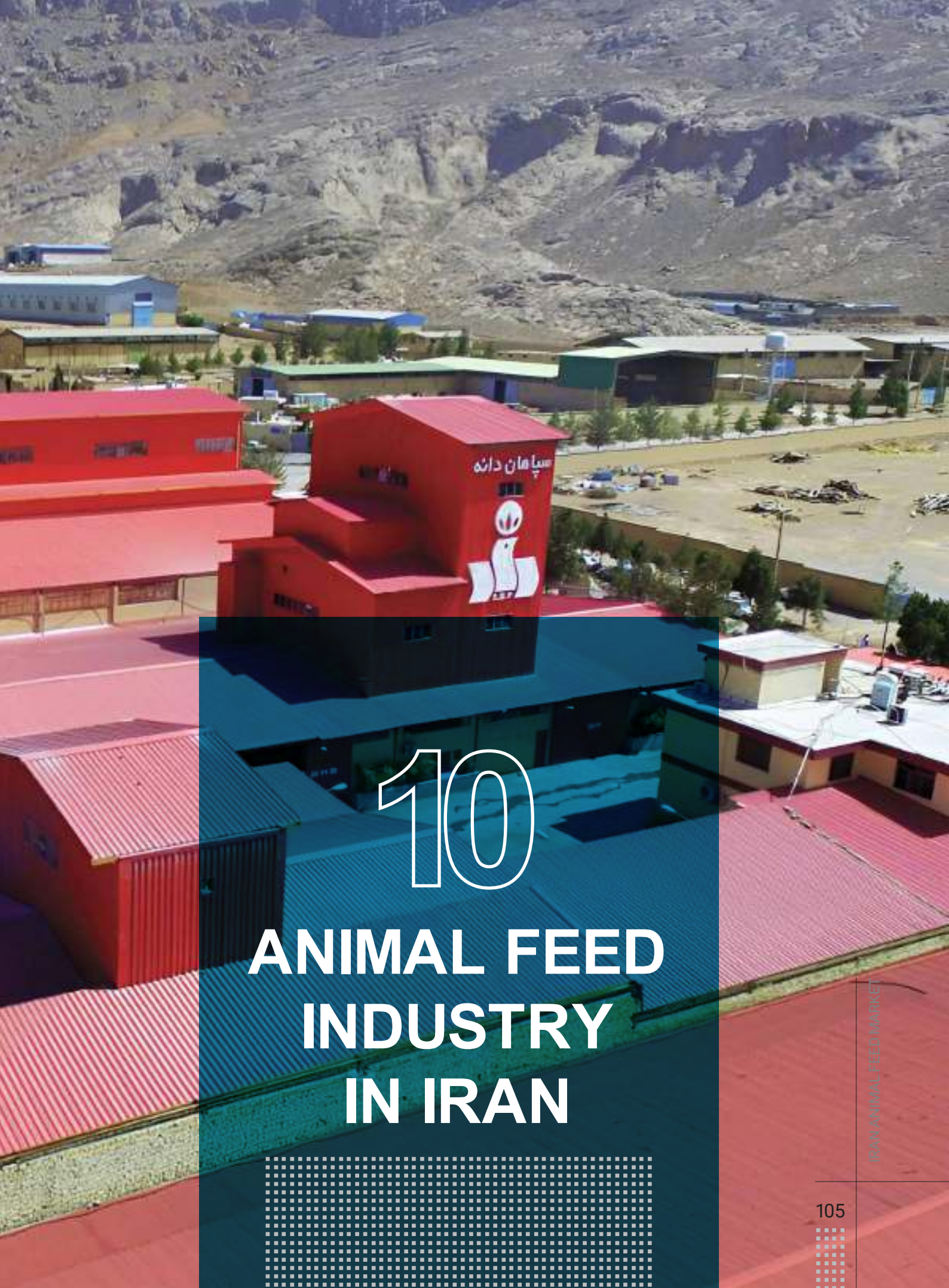
Kemin is a family-owned company started in 1961. The company has 2,400 employees, with manufacturing facilities in eight countries doing business in 90 countries, with international headquarters in Des Moines with an annual revenue of 500 million USD. Kemin's mission is to improve the human and animal life throughout the world manufacturing over 500 speciality ingredients which deliver important nutrition and health benefits of products consumed by people and animals.

Lallemand Inc.

Lallemand Inc. is a privately held Canadian company founded at the end of the 19th century that specializes in the development, production, and marketing of yeasts and bacteria. The company is organized into 11 technically driven business units focusing on various applications of yeast and bacteria in baking, fermented beverages, human and animal nutrition, fuel ethanol and for agricultural and pharmaceutical usage. Other activities of Lallemand include 65% participation in Macco Organiques Inc., which produces speciality organic acids and mineral salts. Lallemand hired over 4,000 employees of about 45 countries on 5 continents.

The World's Top 10 Feed Companies

Company	Country	Feed Production (MMT)
New Hope Group	China	28,541
Haid Group	China	19,630
Cargill	United States	19,600
CP Group	Thailand	17,000
Land O'Lakes	United States	13,500
Muyuan Foodstuff	China	13,110
JBS S.A.	Brazil	11,000
Shuangbaotai Group (Twins Group)	China	11,000
BRF	Brazil	10,071
Chia Tai Investment	China	10,000



10

ANIMAL FEED INDUSTRY IN IRAN

Overview

The Iran animal feed industry dates back 70 years. The domestic market requires about 21 mn. tons of animal feed annually, and, 11 milllion tons was provided by domestic animal feed mills and the remainder was produced by traditional livestock and poultry farms in the year ended March 2021. The total production of animal feed was 11 million tons, about 6,645,000 tons of which is allocated to livestock, 4,060,000 tons to poultry, and 295,000 tons as fish.

In other words, except for 2% imported animal compound feed, the other 98% is provided through Iranian animal feed mills and farms.

According to a report presented by the Iran Feed Industry Association, from the total of 1029 feed mills, 620 are active, 36% of the managers have 5-10 years of experience, 21% have below 5 years of experience, 41% of the managers have bachelor degrees, 17% have master's degrees, and 5% have high school diplomas.

Among active animal feed mills, 176 were established during the years ended March 2011- 2018 and 14 started operating during the years ended March 1962-1980.

About 104 mills produce flour (Mesh), 12 units are extruders, 176 produce pellet, 202 manufacture flour (Mesh) and pellet. Regarding export, 51 mills have experienced exporting of a variety of animal feed (i.e. 88% are not export-oriented). Also, 22 animal feed mills are active under license of foreign companies or in the process of receiving contracts to authenticate their products (i.e. 96% of animal feed mills must put in effort to reach international markets). About 14 animal feed mills manufacture patented products (i.e. 97% of mills are not under supervision of research and development centers).

The animal feed mills have 8,421 male and 1010 female employees. The number of vets, nutritionists, technical experts, are 399, 492 and 1,011, respectively.

Among active animal feed mills, 173 own laboratories approved by Iran Veterinary Organization and 52 have laboratories approved by ISIRI, 61 mills are qualified to take tests approved by the IRI Veterinary Organization and ISIRI, while 65% do not have microbiological laboratories.

As well, 3.51% are not able to take raw protein tests, 55% are not able to take ash tests, 61% are not able to conduct fiber tests, 63-64.5% are not able to conduct fat tests, and 29.93% cannot take heavy metal tests. As well, 264 persons work at animal feed mills laboratories. 43.07% of animal feed mills have quality control personnel at the laboratories.

Mazandaran Province has the most active animal feed mills and healthcare licenses (48), while Lorestan Province has the lowest number (2). However, the greatest number of animal feed mills are located in Razavi Khorasan, Mazandaran, Golestan, and Fars provinces.

Regarding the nominal capacity, Golestan (1.193 million tons), East Azerbaijan (985 thousand tons), and Fars provinces (968 thousand tons) hold the 1st, 2nd, and 3rd places, respectively producing 30% of the total of industrial animal feed.

In the year ended March 2017, despite 26.63% and 17.02% brooding in Mazandaran and Gilan provinces, 7.01% and 4.65% of poultry feed was produced domestically and all needs were met from other provinces.

Animal Feed Mills

In the year ended March 2022, 923 feed mills were issued for animal feed mills with total capital of 570 million USD, 15,404 employment opportunities and 16,755.5 thousand tons of capacities. Fars province received the majority of permits for animal feed mills with establishment of 123 mills, 29.2 million USD capital, 1,328 employment opportunities and capacities of 1,516.9 thousand tons.

Table 10-1. Number of Feed mills by province, Yr. ended Mar. 2024

Province	Number of Feed Mills
East Azerbaijan	32
West Azerbaijan	34
Isfahan	121
Alborz	25
Ilam	14
Bushehr	5
Tehran	35
Chaharmahal & Bakhtiari	19
South Khorasan	18
Razavi Khorasan	72
North Khorasan	10
Khuzestan	41
Zanjan	9
Semnan	17
Sistan & Baluchestan	21
Fars	34
Qazvin	26
Qom	19
Kurdistan	26
Kerman	9
Kermanshah	30
Golestan	59
Gilan	24
Lorestan	24
Mazandaran	96
Markazi	63
Hormozgan	21
Hamedan	14
Yazd	4
TOTAL	923

Source: Agricultural Statistics Data

Animal Inputs

Essential animal input was divided into bran, concentrate, soybean meals, corn feed, barley, pulp sugar beet, field corn, wheat feed, poultry feed and oyster shell flour, the total of which was 2,226,025 tons and 2,236,014 tons purchased and distributed, respectively. Barley has been the most purchased and distributed animal input with 446,371 and 440,613 tons, respectively.

Table 10-2. Animal Feed Input Supply-2022-tons

Input	Availability	Distribution	Sale	Inventory
Bran	4,805	383,510	387,111	1,204
Concentrate	2,815	279,938	280,780	1,973
Soybean Press Cake	945	96,896	95,134	2,707
Feed Corn	6,718	432,875	435,544	4,049
Barley	11,810	440,613	446,371	6,052
Sugar Beet Pulp	879	24,198	22,770	2,307
Forage Corn	464	190,813	186474	4,803
Feed Wheat	204	69,817	64,873	5,148
Poultry Feed	2,453	97,777	95,018	5,212
Oyster Shell Flour	261	13,398	8,641	5,018
Miscellaneous	1,623	206,179	203,309	4,493
Total	32,977	2,236,014	2,226,025	42,966

Source: Agricultural Statistics Data

Table 10-3. ***Total Feed Requirement -2023- 000 tons***

Concentrate	Requirement	% of Raw protein
Livestock Corn	11106	-
Livestock Barley	8017	-
Sorghum Seeds	332	-
Soybean Meal	3925	44
Sunflower Seed Meal	850	37
Colza Meal	200	32
Cotton Seed Meal	184	41
Total	24614	-

Source: Ministry of Agriculture-Jahad

Consumption of Animal Feed Ingredients

According to the official statistics of Ministry of Agriculture-Jahad, the total amount of animal feed ingredient consumption was 271580000 tons, including hay such as Alfalfa, corn silage, straw, and Concentrate such as corn, soybean meals, barley, etc. in 2022.

Table 10-4. ***Export of Animal Feed Inputs-Yr. ended Mar. 2022***

Subsidiary	Value (000 USD)	Weight (MT)	Change Percent	
			Value	Weight
Bran	15964	45263	-24%	-18%
Barley	324	400	10%	25%
Oil meal	0.06	0.06	-99%	-99%
Maize	2824	9295	40%	35%
Other Grain	44.5	64	-21%	-21%
Wheat	774	155	-	-
Chemical Products	53.5	110	104.05%	-78%
Oil Seeds	2609	1665	-57%	-51%

Source: Ministry of Agriculture-Jahad

Import of Animal Feed Inputs

In the year ended March 2023, animal feed inputs including corn, barley, soybean meal and soybean imported at a volume of 16.78 million tons and value of 7088 milion USD, an 21% and 6% increase in volume and value compared to the previous year.

Table 10-5. ***Comparative statistics of import of feed inputs in 2022&2023***

Subsidiary	2022		2023		Change %	
	Volume (Milion MT)	Value (Milion $)	Volume (Milion MT)	Value (Milion $)	Volume	Value
Corn	8.08	3270	10.2	3782	26	15
Barley	2.37	990	2.2	747	-8	-25
Soybean meal	1.34	854	1.68	1061	25	24
Soy Seeds	1.97	1974	2.7	1926	37	-3
Total	13.76	7088	16.78	7516	21	6

Source: Ministry of Agriculture-Jahad

Export of Animal Feed

In the year ended March 2019, the export value of poultry and livestock additives and ready-made feed was 30,690,198 USD. The export value of poultry and livestock readymade feed (58% increase) and additives (73% decrease) reached 26,280,618 USD and 190,624 USD, respectively. Fish ready-made feed (418% increase) and additives (23% decrease) reached 3,189,644 USD and 1,029,312 USD.

Note: export of animal feed has been banned in Iran between 2020 and August 2024.

Table 10-6. ***Export Value-USD***

Export of Animal Feed	Yr. ended Mar.2017	Yr. ended Mar.2018	Yr. ended Mar.2019
Poultry and Livestock Additives	742,451	721,328	190,624
Poultry and Livestock ready-made Feed	9,036,591	16,588,386	26,280,618
Fish Additives	5,071,559	1,343,883	1,029,312
Fish ready-made Feed	450,072	615,146	3,189,644

Source: IRICA

Import of Animal Feed

In the year ended March 2023, the total import value of poultry and livestock additives, Veterinary medicines and Aquafeed was 119,422,540 USD with 12% decrease compared to the year ended march 2022.

Table 10-7. import Value-USD

Import of Animal Feed	Yr. ended Mar.2022	Yr. ended Mar.2023	Change %
Poultry and Livestock Additives	14,278,979	28,532,392	100
Veterinary medicines	119,896,791	90,710,186	-25
Aquafeed	617,641	179,962	-342

Source: IRICA

Import Countries of Origin

The main import countries of origin for animal feed are Russia, Ukraine, Kazakhstan, Brazil, Argentina, China, the European Union (Germany, the Netherlands and Austria), Eastern Europe and Australia. Their main import products are as follows.

Table 10-8 Imported Feed Ingredients from Origin Countries

	Raw Materials
Russia	Barely, Wheat, Soybean Meal
Ukraine	Barely, Corn
Kazakhstan	Barely, Wheat, Oil Seed Cake
Brazil	Soybean Meal, Corn
Argentina	Soybean Meal, Corn
China	Premix
EU	Barely, Premix, Minerals, Vitamins, Substitutes for Milk, Supplements
Eastern Europe	Corn, Oil Seed Cake
Australia	Wheat

Source: IFIA

IR Code Animal Feed Mills

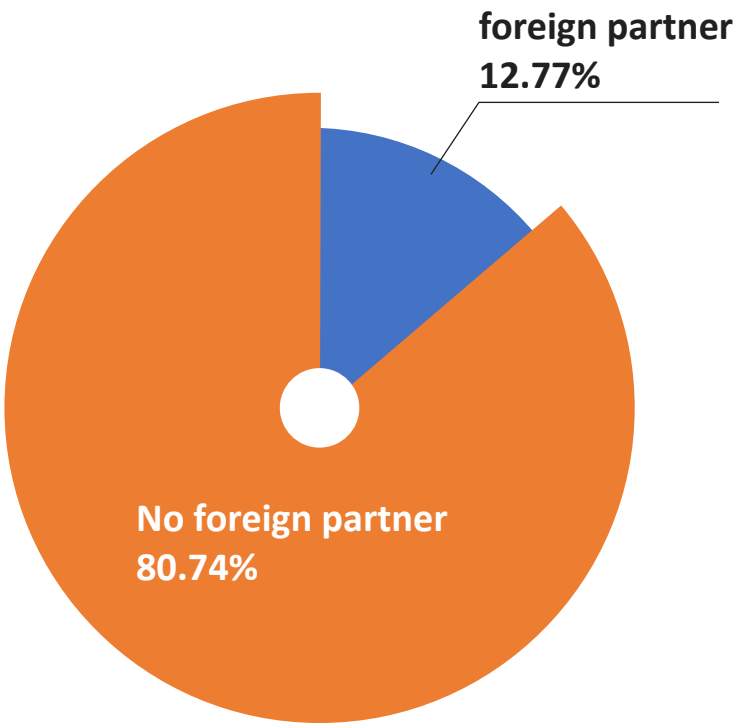
Only 42 of all active animal feed mills have IR code and 72 feed mills are receiving the sanitary code. The share of IR-equipped feed mills is 8.44%, the share of the feed mills that are receiving the IR code is 13.64%, and other feed mills do not have sanitary code.

An IR code is issued to animal feed mills that have implemented GMP, HACCP or ISO 22,000 in units, after being officially audited by the Directorate of Supervision Public Health and the appointed management of the veterinary Occupational Health. The sanitary license accelerates the export of animal feed.

Foreign Partners of Animal Feed Mills

12.77% of the active animal feed mills have foreign partners and 51 feed mills (11.4 % share) had export.

Figure 10-1. ***Animal Feed Mills with Foreign Partners -%***



Source: IFIA

Strengths & Opportunities Analysis of Animal Feed Industry

Strengths

- Ability to utilize a relatively advanced marketing system
- High potential of creating value added in pre and post sector
- Appropriate use of state facilities
- Availability of feeding Input (Import)
- Short-term return of capital
- Availability of expert work force
- Expansion to all parts of the country
- Access to the consumption market (400 million) in the region

Opportunities

- Growth of domestic market
- Benefitingunused production capacity
- Presence in growing regional markets

Iran's Animal Feed Market Outlook

Increasing global demand for meat is one of the key factors in growing demand for animal feed, while the international community's concerns regarding the prevalence of animal-related diseases has increased the importance of enzymes in livestock and poultry feed and the increase of chemical reactions in animal feed has resulted in better quality. Therefore, the increase in world population has led to an increase in global meat consumption, and per capita consumption of meat is estimated to be 39.78 Kilograms. On the other hand, livestock feed is one of the most important factors in meat production, and rising demand for meat increases the demand for animal feed.

Many developing countries in Asia, especially India and China, are the major consumers of global meat, in addition to their large population, the per capita revenue growth of the middle class in the mentioned countries has also increased the demand for livestock and poultry products. Also, Asian countries, mainly China and India, have the largest animal feed and poultry industries and markets in the region.

According to global statistics, the world-wide human consumption of cereals will increase to the equivalent to 45% and its consumption in other cases to about 60% by 2030 compared to 1996. Approximately 70% of the costs of milk, meat and egg production are related to animal feed. The statistics show the importance and economic role of feed and the need to manufacture the product at the highest standards. Analysts predict that the market will grow at an annual rate of 4.92% by 2024. According to the Globe Newswire website, the size of the market for animal feed and poultry feed will reach 22 billion USD by 2025. According to predictions, the animal feed market will continue to increase at a rate of 4% by 2025. Meanwhile, fisheries is also one of the most important sectors of global trade in animal products. According to analysts, the growth rate of the animal feed market is expected to increase by 4.2% annually, and will include a high share of global revenues in livestock and poultry feed by 2025.

On the other hand, a significant share of the revenues is spent on amino acids preparation that plays an important role in livestock and poultry feed, and accounts for more than 33% of the revenue share (About 5.5 billion USD is spent on amino acids). On the other hand, Antibiotics are other important substances used in livestock and poultry feed production, which has become even more important in recent years. According to the EU's strict regulations, it accounts for 25.7% of the livestock and poultry revenues.

The improvement of technology and expertise in Iran, has led to meeting the protein products demands in the local market (80 million people), and the industry can also export to neighboring countries (a market with a population of 400 million).According to predictions, about 200 animal feed mills will be added to the animal feed production chain with a capacity of about 7 million tons. Modern technology and high productivity by the end of 2030 will lead to growth of 12% to 20% in animal feed mills. Production capacity will increase to 26 million tons and 1.5% share of the global markets by 2031. The provinces with animal feed production capabilities are Isfahan, Khorasan Razavi, Mazandaran, South Khorasan, Fars, Golestan, West Azerbaijan, Kermanshah and Kurdistan. Nowadays, 80% of the animal feed raw materials are imported and self-sufficiency cannot be achieved in the near future, but import could be decreased by increasing productivity as well as reducing the production conversion coefficient of the milk, meat and eggs. Animal feed will be exported to 20 countries (volume of 900,000 tons and value of 400 million USD) by 2030.

11

IRAN FEED INDUSTRY ASSOCIATION PERFORMANCE

IRAN FEED INDUSTRY ASSOCIATION

Summary of Iran Feed Industry Association Performance

- The report of the Iran animal feed association was presented on Strategic, Structural and Non-Programmatic Actions to the annual general meeting in February 2024. Some guild activities are informed with the aim to develop and strengthen the share of animal feed industry, employment and the national economy.
- The amendment Approval to the Article 19 of the Veterinary Health Code approved by the government in the Article 76 Committee of the Fifth Development Plan
- Releasing export of animal feed
- Export preferential tariff of livestock feed with 3 export target countries
- Prohibiting the production of animal feed in breeding units during the notification of Iran Veterinary Organization in the year ended March 2016
- Approval of 1,000 billion IRR budget by the Iranian National Fund of Animal Feed Industry Development
- Decreasing the tax exemption from 12% to 6% in animal feed mills
- Investment risk reduction in animal feed industry
- The amendment Approval of the executive code of sentence (g)- Article 3 and Articles 7, 8 and 9 of the Veterinary Organization Law adopted in the year ended March 2012 in the Article 76 Committee of the Fifth Development Plan
- Setting up the arbitration center of animal feed industry
- Setting up ranking and competitiveness center of the animal feed industry
- Grains and animal feed swap in ECO members
- Separation of animal feed exhibition from International Livestock and Poultry Exhibition
- Setting up Statistic and economic information center of animal feed industry
- Presenting proposals of the Association of Livestock, Poultry and Aquatic Feed Industries to be included in the 7th Development Plan
- Following up 15% increase in working capital of animal feed mills
- Following up to allocate 710 billion IRR budget to modernize and improve 48 animal feed mills

The Current Activity of Iran Feed Industry Association

- The infographic is illustrated the profile of Iran animal feed association activities to members with the aim of enhancing and promoting knowledge, leadership skills, improving the business environment and promoting the community's knowledge and belief of animal feed industry role in comprehensive development.
- 105, Attendances at business seminars
- 865, Guild notifications to members
- 11, Forum seminars across the province
- 17, Forum seminars of Iran Animal Feed association with the government and parliament presence
- 12, Attendance at radio programs
- 15, Attendance at national and international TV program
- 23, Guild poll of members
- 7, MOU and cooperation documents
- 589, Publication of economic report at the press
- 22, Technical committee seminars

Services to Members in the year ended March 2024

- 16, Educational centers
- 28, Legal centers
- 39, Ranking centers
- 18, Social securities
- 89, Tax advices

Developing the International Interactions

- Major adopted boards of directors
- 31 boards of directors from Russia, Ukraine, Kazakhstan, Turkey, Emirate, Oman, Armenia, Turkmenistan, Austria, Germany, Belgium, France, Italy, Netherlands,
- South Korea, Thailand, Argentina, Brazil
- Major mission of the board of directors
- 16 boards of directors to Russia, Pakistan, Austria, France, Italy, Ukraine, Turkey, Germany, Canada, India, China, Thailand

Major Courses Held by the Association

- Holding a training course on the principles of chemical tests for animal feed, August 2016.
- Holding training course on acquaintance with national and international animal feed standards, August 2016.
- Holding two-days+ GMP for senior managers of Iranian animal feed mills by the presence of international professors, April 2018.
- Holding one-day elementary GMP+ course for the animal feed mills of North, South and Razavi Khorasan, July 2018.
- Holding arbitration training workshop for economic activists of livestock, poultry and aquatic industry, August 2018

Projects led Iran Feed Industry Association

- Setting Up "Trade Cafe"
- Setting up competitiveness development center of animal feed mill in the year ended March 2024.

Major Actions

- Holding of The 1st and 2nd International exhibition on Animal, Poultry and Aquatic Feed in Iran (2022&2023)
- Obtaining permission to hold 3 exhibitions of Livestock, Poultry & Related Industries (2024,2025 &2026) From the Trade Development Organization
- Presenting proposals of the Association of Livestock, Poultry and Aquatic Feed Industries to be included in the 7th Development Plan
- Developing a program to improve the quality and position of animal feed Mills in the country's animal husbandry industry
- Creating banking facilities for animal feed, poultry and aquatic industries
- Setting up "Business Cafe" platform
- Modifying the prices of all types of livestock, poultry and aquatic feed
- Modifying animal feed, vitamin and mineral supplements standard
- Announcement of the quarantine conditions for the import of cotton seeds for use in animal feed
- Allocation of inputs to feed mills with volume of 8.6 Milion Tones
- Arbitration center services
- Participation in the conference of world animal feed regulators at the FAO office in Rome
- Attending the annual joint meeting of the International Feed Industry Federation (IFIF) and FAO
- Attending the General Assembly of International Feed Industry Federation (IFIF) in Rome

Major MOUs

- Issuance of the permission of the government: Iran as the hub of animal feed in the region (2023)
- MOU with Tejarat Bank, Shahr Bank, Parsian Bank and Tourism bank (2023)
- Multilateral MOU with the Deputy Minister of Agricultural Jihad in Trade Affairs and Market Regulation (2023)
- MOU with the Vice President of Commercial Development of the Ministry of Agricultural Jihad (2023)
- Creating an analysis system, improving and increasing the competitiveness of animal Feed Mills (2024)
- MOU with National broiler breeders' union to provide broiler feed in the bazaargah platform (2024)
- MOU between IRFA and Russian National Feed Union, (2024)

Top 5 Aquatic Feed Mills
based on Nominal Capacity

	Aquatic Feed Mill	Nominal Capacity
1	Fara Daneh	230000 Tons
2	Gilak Daneh	45000Tons
3	Roshd Daneh	55000Tons
4	Kimiyagaran Taghziyeh	34000Tons
5	Dordaneh Falard	21000Tons

Table 11-1. ***Feed Mills with the largest Volume of broiler feed saled in the Bazaargah Platform (only from the imprest account) - Year ended March 2024***

Row	Feed Mill	Province	Volume (KG)
1	Kalhordaneh Jonoob	Khouzestan	145,041,190
2	Setare Kian Birjand	South Khorasan	58,655,203
3	Armin Tejarat Aidin Mehr	East Azerbaijan	56,406,998
4	Rezvan Daneh Tabriz	East Azerbaijan	42,617,847
5	Negin Daneh Sahra	Golestan	40,574,809
6	Pegah Jahan Nama	Golestan	35,025,207
7	Kimia Daan Torbat	Razavi Khorasan	29,716,442
8	Morvarid Sabz Beiza	Fars	28,843,953
9	Saleh Kashmar	Razavi Khorasan	20,024,317
10	Daan va Oloufeh Shargh	South Khorasan	19,514,204
11	Baradaran Farokhi	Kermanshah	19,140,355
12	Etminan Tejarat Khouzestan	Khouzestan	18,450,266
13	Aron Pars Saya Daaneh	Golestan	16,541,111
14	Athar Daaneh	East Azerbaijan	15,313,602
15	Gharb Daaneh Bita	Kordestan	13,444,653
16	Tolou Azar Kavian	West Azerbaijan	12,168,308
17	Gohar Daneh Shargh	Razavi Khorasan	12,071,083
18	Sepid Bastak	Hormozgan	11,702,630
19	Kabileh Shahreza	Isfahan	10,259,762
20	Gharb Daneh Negin Baneh	kordestan	9,857,397

Table 11-2. ***Feed Mills with the largest Volume of Layer feed saled in the Bazaargah Platform (only from the imprest account) - Year ended March 2024***

Row	Feed Mill	Province	Volume (KG)
1	Setare Kian Birjand	South Khorasan	39,178,501
2	Gohar Daneh Shargh	Razavi Khorasan	6,097,322
3	Saleh Kashmar	Razavi Khorasan	904,810
4	Pars Daneh Beyza	Fars	339,824
5	Dordaaneh	Razavi Khorasan	249,260
6	Daaneh Chin	Markazi	232,174
7	Aron Pars Saya Daaneh	Golestan	164,000
8	Ghaaem Mashhad	Razavi Khorasan	150,617
9	Halal Espadana	Isfahan	93,000
10	Khooshineh Birjand	South Khorasan	92,285
11	Kalhor Daaneh Jonoob	khouzestan	85,100
12	Khoraak Pardaaz Hezardasht	Alborz	73,797
13	Khoraak Saazaan Isfahan	Isfahan	58,090
14	Daaneh Daaraan Tous	Razavi Khorasan	55,000
15	Irik Daaneh Shokoohieh	Qom	46,000
16	Beh Daaneh Khoraak Naam ...	Isfahan	25,000
17	Behin Roshd Ghouchan	Razavi Khorasan	20,185
18	Paars Daaneh Taraaz	Markazi	20,000
19	Rezvan Daaneh Tabriz	East Azerbaijan	20,000
20	Araaz Daaneh Sepahan	Isfahan	16,000

Table 11-3. ***Feed Mills with the largest Volume of Livestock feed (bovine & Ovine) saled in the Bazaargah Platform (only from the imprest account) - Year ended March 2024***

Row	Feed Mill	Province	Volume (KG)
1	Saleh Kashmar	Razavi Khorasan	32,206,936
2	Concentrate Tous	Razavi Khorasan	19,115,806
3	Momtaz Daaneh	Razavi Khorasan	15,236,192
4	Milaad Mahabad	West Azerbaijan	14,500,000
5	Pars Gharb	Kermanshah	13,295,030
6	Rezvan Daneh Tabriz	East Azerbaijan	12,930,057
7	Talaei Jaam	Razavi Khorasan	12,851,797
8	Gorgan va Dasht	Golestan	11,637,200
9	Torshiz	Razavi Khorasan	9,730,414
10	Minou Sabah	Golestan	9,599,229
11	Raad Araad Paars	Fars	9,251,894
12	khoosheh Talaei	Golestan	9,235,145
13	Faravari Froktoz Naab	Alborz	9,186,491
14	Gohar Daneh Shargh	Razavi Khorasan	8,278,714
15	Gaavdaaraan Gonabaad	Razavi Khorasan	7,850,000
16	Mojtame Toyour Fars	Fars	7,791,580
17	Kabileh Shahreza	isfahan	7,535,071
18	Zardaneh Dizbad	Razavi Khorasan	7,390,126
19	Shah Daaneh Golshan Firouzeh	Razavi Khorasan	6,955,795
20	Boukan Khoraak	West Azerbaijan	6,255,000

Table 11-4. ***Feed Mills with the largest Volume of Aquafeed saled in the Bazaargah Platform (only from the imprest account) - Year ended March 2024***

Row	Feed Mill	Province	Volume (KG)
1	Faraadaneh	Chahar Mahaal	13,006,692
2	Khaled Raiesi	Hormozgan	490,570
3	Negin Sirik	Hormozgan	212,400
4	21 Beyza	Fars	55,618
5	Pouya Daneh Ilya	Chahar Mahaal	45,344
6	Pishro Daneh Aligoudarz	Lorestan	20,000
7	Raaman Aquafeed Industries	Fars	15,000
8	Gilak Daaneh Navid	Gilan	14,600
9	Abzi Daaneh Vaziri	Razavi Khorasan	13,736
10	Roshd Daneh Shahre Kord	Chahar Mahaal	13,500
11	Kimiagaraan Taghzieh	Chahar Mahaal	10,500
12	Firdaar Patiraa	Chahar Mahaal	8,450
13	Dordaaneh Falaard	Chahar Mahaal	8,400
14	Behsaan Taghzieh Aarian	Alborz	7,739

Iran Animal Feed Mills with IR Code

21 Beyza
CEO: Mr. Abudi
Province:Fars

Lordegan199 Cooperative
Province: Chaharmahal & Bakhtiari

Daneh Pak Khazar/Savana
CEO: Mr. Tahmasebi
Province:Mazandaran

Setareh Kian Birjand
CEO: Mr. Kheirieh
Province: South Khorasan

Kimia Daan Torbat
Province: Razavi Khorasan

Arina Roshd Shomal
CEO: Ms.Khorsand
Province: Mazandaran

Mazandaran Livestock & Aquatics Feed
CEO: Mr. Kaboli
Province: Mazandaran

Dornadan
CEO: Mr. Beigi
Province: Khorasan

Amol Behdaneh Tabarestan/Miran
CEO: Mr. Miran
Province: Mazandaran

Avizhe Darou
CEO: Mr. Habib
Province:Markazi

Behsan Taghzieh Aryan (BETA)
Province: Alborz

Gilak Daneh
Province: Gilan

Gohar Daneh Shargh
CEO: Mr. Salahshoor
Province:Razavi Khorasan

Gorgan Va Dasht
CEO: Mr. Eftekharodin
Province: Golestan

Gharb Daneh Abidar Group
CEO: Mr.Mandoomi
Province: Kurdistan

Kaivan Morgh Par Tala Mahabad
CEO: Mr. Savari
Province: West Azarbaijan

Kimiyagaran Taghziyeh
CEO: Dr. Rezaei
Province:Chaharmahal & Bakhtiari

Kalhor Daneh Jonoob
CEO: Mr.Rashidi
Province: Khuzestan

Pegah Jahan Nama
Province: Golestan

Hashtgerd Supplement
CEO: Dr. Nosrat
Province: Alborz

Alborz Dam Daroo/Alborz Dan
Province: Mazandaran

Dordaneh Razavi
CEO: Mr. Bagheri
Province: Razavi Khorasan

Khorak Pardaz Hezar Dasht
CEO: Mr. Makuei
Province: Alborz

DaneDaran Toos
CEO: Mr. Hasan Zadeh
Province: Razavi Khorasan

Behin Roshd Asak
Province: Razavi Khorasan

Javaneh Khorasan
Province: Razavi Khorasann

Behdaneh Shomal
Province:Mazandaran

Raman
Province: Fars

Lajvar Aquafeed (Khaki)
Province: Markazi

Daneh Talaei Boroojerd
Province: Lorestan

Milad Mahabad
Province: West Azarbaijan

Orom Gohar Daneh/Morgh Dehkadeh
CEO: Mr. Hossaini
Province: West Azerbaijan

Fara Daneh
CEO: Mr. Heydai
Province:Chaharmahal & Bakhtiari

Sepahan Daneh Parsian
CEO: Dr. Ghalamkari
Province: Isfahan

Sorbon Shomal
Province: Mazandaran

Behin Tash
Province: Alborz

Protein Imen Taab
Province: Mazandaran

Nazanin Daneh Pars
Province: Chahar Mahal & Bakhtyari

Hana Daneh
Province: Mazandaran

Shahan Powder
Province: Fars

703 Saral
Province: Kurdistan

Pouya Farokhzad Pet Food
Province: Tehran

Iran Feed Mills List

Eeast Azerbaijan

1	Azar Daam Salem
2	Damaneh Sabalan Sarab
3	Rahman Hajipour
4	Ali Afkhami
5	Ghaflan Roshd
6	Marand and Suburbs Livestock Cooperative
7	Hasan Motamedzadeh
8	Zaei Kabe
9	Zardaneh Karan Marand
10	Roshd Daneh Malekan
11	Kimia Daneh
12	Mehdi Fakoor
13	Salman Fathi
14	Karim Abbaszad
15	Maghsood Taheri
16	Baghi
17	Azar Daneh
18	Haghighi
19	Ahmad Talebi
20	Rezvan
21	Niroo Sahand
22	Eris Ahar Cooperative
23	Maghsood Shadbakhsh
24	Arsalan Poor Mohammad
25	Dehati
26	Ayoob Feshangi Bonab
27	Azar Daneh Bonab
28	Azaran Taghzieh Arian (ATA)
29	Union of Agricultural Cooperatives and Animal Husbandry Industry of the Province
30	Daneh Sazan Sahand Tabriz
31	Negin Daneh Gharb
32	Niroodaneh Sahand Maraghe
33	Kamel Daneh
34	Tak Daneh Motahar Azarbayjan
35	Nik Daneh Sahand Maraghe

West Azerbaijan

1	Rahele Osmani
2	Masroor Silo
3	Toyour Daan Nooshan Zist Kaboodan
4	Faaregh Daan
5	Jafar Mokhtari Zirmanloo
6	Dorafshaan Gharb
7	Eshno Gostar Cooperative
8	Mohammad Kamyar
9	Aziz Hosseini
10	Sarshaar Sardasht
11	Behzad Khazani
12	Toloo Azarbaijan
13	Jafar Sojoodi
14	Sabah Gool Oroomie
15	Toloo Azar Kavian
16	Noorodin Shojaei
17	Davood Piri
18	Negin Miandoab 476 Cooperative
19	Beshkouh Rural Cooperative
20	Sardar Bookan
21	Mir Adel Hosseini
22	Oroom Gohar Daneg
23	Keyvan Morgh Partalayi
24	Oroom Dordaneh
25	Zarrin Daneh
26	Sattar Hemati
27	Eshno Zarrin
28	Araz Dan Charpaye
29	Milad Mahabad
52	Hossein Karimzadeh
53	Bookan Khorak
54	Miandoab

Alborz

1	Afshin Avara
2	Hadi Madani
3	Borna Daan Roshd
4	Tohid Daroo Pars
5	Davood Ghafari
6	Markaz Poultry Cooperative
7	Behparvar
8	Karaj Animal Feed

9	Reza Ghasemi
10	Farhikhtegan Zarnam
11	Porsa
12	Behintash
13	Bahdat Savejbolagh
14	Mohamad Shahsavar
15	Roshd Daneh
16	Khorak Pardaz Hezardasht
17	Chine (Ajdad Zarbal)
18	Behsan Taghzie Aryan
19	Nakhl Zeitoon Azaran
20	Ali Jamali
21	Hana Sanat
22	Naghi Ahangi
23	Tala Roshd Nami
24	Hashtgerd Supplement
25	Mina Toyour Parent Chicks

Bushehr

1	Daneh Gostar Ahmad
2	Taam Sazan
3	Hoorrash
4	Berishk
5	Mehr Khalij Fars

Fars

1	Aam Fadak
2	Parsian Roshd Afza
3	Shahdaneh Gostar Hamavard Fars
4	Abzisraan Raman
5	Fath Daneh Maham Arvand
6	Ibrahim Rajabi
7	Negin Daneh
8	Shayan Animal Feed Mill
9	Gheshlaagh Feed Mill
10	Keshto Sanat Damparvari Fars
11	Dorsa
12	Zarrin Daneh Pars
13	Zorat Zardaneh Fars
14	Pouya Nahade Kimia
15	Vahdat Kharame
16	Jalal Mirzakhani
17	Arya Marvdaneh
18	Kavoosi
19	Mohsen Bahramian
20	Morvaris Sabz Beyza
21	Estakhr
22	Rouhani Animal Feed Mill and Poultry Concentrate
23	Royan Daneh Pars
24	Darya Dasht Daneh Aquafeed
25	Shirin Daneh
26	Pars Dan
27	Mojtame Toyour Fars (Fars Poultry Farm)
28	21 Beyza
29	Daneh Rizan
30	Almas Daneh Simorgh
31	Naser Sajadian
32	Pars Daam Saba
33	Shahin Pars
34	Negin Daneh

GILAN

1	Moharami
2	Rayhan Daneh Zarrin Gilan
3	Chilak Sazan
4	Gilak Daneh
5	Exir ROshd
6	Dornab Khazar
7	Gohar Naab Verna
8	Pak Daneh Fooman
9	Sabz Daneh Sahar
10	Sepid Makian
11	Dordaneh Aria Looshan
12	Looshan Animal Feed
13	Daan Varsh Goskar
14	Amlas Livestock Cooperative
15	Roodsar Animal Feed Cooperative
16	Samaam
17	Khazar Daneh Fooman
18	Shomal Protein Masooleh
28	Behpak Behshahr
29	Abdollah Navid

Golestan

1	Homa Daneh Zarrin Shomal
2	Sefid Baal Ghaboos
3	Negin Daneh Sahra
4	Morvarid Daneh Ghaboos
5	Ghader Mallah
6	Pouya Hirkanian Novin
7	Bahman Sadaf Golestan
8	Gorgan Va Dasht
9	Oloufe Afarin Golestan
10	Feiz Abaad
11	Shabaaviz Hirkan
12	Shafa Daneh Gorgan
13	Zar Daneh
14	Aria Daneh Golestan
15	Khoosheh Talaei Golestan
16	Mirdaneh Golestan
17	Arghavan Katool Broiler Farm
18	Gol Daneh Sahra
19	Araz Novin Tejarat Gostar Toyour Gorgan
20	Golza
21	Banafsh Tapeh Cooperative
22	Rameh Golestan
23	Minoo Sabah
24	Atieh Silo

25	Negin Sahra
26	Zarrin Daneh Gonbad
27	Daneh Talaei Gonbad
28	Gonbad Animal Feed (Mohammadi)
29	Artan Daneh Golestan
30	Altin Daneh Sahra
31	Nami Toyour Golestan
32	Daam Gostar Ghaboosnameh
33	Protein Imen Taab
34	Persiaan Faaz 2
35	Peigir
36	Zarrin Roshd Golestan
37	Damyar Golestan
38	Abed Golestan
39	Negar Golestan
40	Banafsh Tappeh
41	Dordane Amin Altin Sahra
42	Faravar Daneh Arya
43	Timaz
44	Chineh Sahar Farda Kordan
45	Kimia Roshd
46	Arian Roshd Kaar Gorgan
47	Salamat Daneh
48	Behshad Afarin
49	Mazrae Nemoone
50	Pegah Jahan Nama
51	Noode Keshavarz Gonbad
52	Vashmgir Beh Chineh

Hamedan

1	Feed Mill
2	Honey Bee Feed
3	Khooshe Talayi Mad
4	Moeini Livestock & Poultry
5	Chagh - o- Chelleh
6	Sabzdasht Agriculture and Industry
7	Kimia Kooh
8	Jolgeh Asad Abaad
9	Dane Daran Nahavand
10	Khezel Nahavand
11	Dane Haye Gharb Nahavand
12	Protein Daneh
13	Hami Omid Hamedan

Hormozgan

1	Sahel Jask Sardin Fish Meal
2	Talaye Daran Amin Qeshm
3	Mahdi Yari Aquafeed
4	Ard Morvarid Hormozgan
5	Meto Shahr Aftab Fishg Meal
6	Fanoos Mahian Qeshm
7	Hatami Aquafeed Coorporative
8	Saba Majd Qeshm Fish Meal
9	Kimiaye Jusk
10	Hormoz Daam
11	Sepid Daneh Bastak
12	Abdolah Hatami Fish Meal
13	Ramin Salehi Fish Meal
14	Hoorvash Fish Meal
15	Sirik Fish Meal
16	Aras Fish Meal
17	Jonoob Fish Meal
18	Hossein Amani
19	Meto Qeshm Fish Meal
20	Sayyad Qeshm Fish Meal
21	Mahmood Mobaraki Fish Meal

Isfahan

1	Novin Armaghan Talaye Silk
2	Nazdaneh Sepahan
3	Protein Sazaan Pishro
4	Tabdil Zayeaat Momtaz
5	Tabdil Zayeaat Nasiri
6	Alaa Roghan
7	Mojtaba Derakhshan
8	Roghan Sanati Bahrmand
9	Shafeie Blood Powder
10	Asadi Blood Powder
11	Morteza Derakshan
12	Taavoni Kasra
13	Kimia protein Paratak
14	Daneh Talayi Habashi
15	Rizdaneh
16	Jahan Daneh
17	Kimia Faravar Naghsh Jahan
18	Alaa Daneh
19	Zarin Roghan Toyour
20	Beh Daneh
21	central warehouse of inputs of Isfahan Province Livestock Affairs Support Company
22	Espadana Supplements
23	Kimia Daneh Zendeh Rood (Mofid)
24	Danik (Nik Daneh)
25	Ardineh
26	Kavir Naein Livestock Cooperative
27	Baharesh
28	Toyour Halal Espadana (Kouhpayeh)
29	Negin Mazrae Harand (Nam Avaran)
30	Isfahan Livestock Cooperative
31	Shahdineh Aran
32	Daneh Zarin Naghshe Jahan
33	Behdane Khorak Namavaran
34	Ashian Daam Varzaneh
35	Paak Avard Toodasht
36	Mehr Daneh Barekat
37	Roast Daneh Asia
38	Ashkan Daneh
39	Azmoon Daneh

40	Behriz Daneh Naein
41	Shaparak Daneh
42	Exir Pardaz Sepahan
43	Isfahan Mokamel
44	Sepahan Daneh
45	Larsk
46	Dordaneh Espadan Sepahan
47	Nivan Golpa
48	Zarin Dasht
49	Daan Mobin
50	Dashtchin Aali
51	Dalankooh
52	Mahdaneh Ashayeri
53	Dorsa Daneh
54	Novin Roshd Shahran Foodeh
55	Pishgam Damparvar
56	Chavdaneh
57	Livestock Cooperative Animal Feed Mill (Sheep Husbandry)
58	Livestock Cooperative Animal Feed Mill (Cattle Husbandry)
59	Khorak Sazan Isfahan
60	Marta Gostar Damyar
61	Kabileh
62	Mehr Bisotoon
63	Baharesh
64	Golbahar Isfahan
65	Golshahd Iran
66	Kimia Poodr Sazan Asia
67	Bahram Ghasemi Feed Mill
68	Behparvaran Naami Naghshe Jahan
69	Same Daneh
70	Araz Daneh
71	Zarrin Javrane Khansar
72	Tiran Va Coron
73	Ardin Daneh Sepahan Sepehr
74	Ali Shafeie Feed Mill
75	Morvarid Daneh Sepahan
76	Dan Gostar Ahook
77	Roshd Toroor Zavareh
78	Bahman Eftekhar Zavareh
79	Chakavak Daneh Zavareh
80	Ali Davoodi
81	Kimia Exir Sazan Kowsar
82	Kimia Mavad Najaf Abad
83	Kimia Afrooz Sepahan
84	Sepahan Daneh Parsian
85	Exir pardaz Sepahan
86	Isfahan Mokamel
87	Pars Shimi Ghoghnoos
88	Raha Exir Farmed
89	Barij essential
90	Daroosazi Amin
91	Dalankooh Husbandry
92	Fosfate Nemoone Fariden
93	Pazhoohej Parvar Zayand
94	Pishgam Damparvar Sepahan
95	Tabiban Shimi Sepahan
96	Dorsa Fosfat Sepahan
97	Ashkan Shimi Isfahan
98	Novin Roshd Shahran Foodeh
99	Sepahan Sulphate
100	Emad Pharmacology
101	kimia Farayand Espirooz
102	Chavdaneh
103	Azin PhosphateSepahan
104	Afarin Daneh Sepahan
105	Rayan Sepehr Naghshe Jahan
106	Kimia Roshd Sepahan
107	Zarrin Javdaneh Khansar
108	Daan Takavaran Kaveh
109	Golpooneh Sepahan
110	Taha Tajhiz Yekta Espadana Cooperative
111	Parto Ahaar Nemoone
112	Sina Tasnim Sepahan
113	Afarand Danesh Parsian
114	Spadana halal poultry chain complex
115	Roshd Khazra
116	Gol Daroo
117	Ariana PhosphateChakavak
118	Chakavak Darooye Ariana
119	Roshd Toyour Zavareh
120	Mehr Espand Maral

Ilam

1	Kabir Kooh Daneh
2	Shid Daneh
3	Shafagh Gharb
4	Arad Dan
5	Paak Chineh Gharb
6	Havin Daneh Madakto
7	Raad Daneh Zagros
8	Paak Daneh Gharb
9	Cooperative 1869
10	Ilam Ashayer
11	Roshd Kaar
12	Samin Daneh Tanin Ilam
13	Zagros Daneh Ilam
14	Morgh Daneh Ilam

Kerman

1	Saharkhizan Jonoob (South Kerman)
2	Simorgh Animal Feed
3	Royan Baharestan
4	Poroli
5	Simorgh
6	Morghe Mahan
7	Morghdaran Kerman Cooperative

8	Tavanmehr
9	Khoraksaaz

Kermanshah

1	Gholam Hossein Hossein Abaadi
2	Arvan Daneh Zarrin
3	Kord Daneh Apadana Zagros
4	Pars Daneh Momtaz
5	Sattar Hosseini
6	Mana Teb Bisotoon
7	Paak Agrin
8	Cooperative 4531 Kowsar Daneh
9	Taher Abadi
10	Cheshme Sefid
11	Animal Feed Mill
12	Gharb Daneh
13	Nagshin Aquafeed
14	Khorak Sazan Dalahoo
15	Zarrin Daneh
16	Zardaneh Elipi
17	Bisotoon
18	Pars Gharb
19	Golchin Daneh Beigi 4606 Cooperative
20	Cooperative 3075
21	Ravansar Feed Mill
22	Dorsa Daneh
23	Daan Avaran Bisotoon
24	Cooperative 3765 (Halani)
25	Daneh Haye Gharb
26	Kermanshah Daneh
27	Kiaa Daneh
28	Daan Bisotoon

Khuzestan

1	Kimia Daneh
2	Neshan Pet Food
3	Nishtman Daneh
4	Aquafeed Mill
5	Navid Aran Kurdistan
6	Asoo Garoos
7	Kimia Daneh
8	Neshan Pet Food
9	Nishtman Daneh
10	Aquafeed Mill
11	Navid Aran Kurdistan
12	Asoo Garoos
13	Kimia Daneh
14	Neshan Pet Food
15	Nishtman Daneh
16	Aquafeed Mill
17	Navid Aran Kurdistan
18	Asoo Garoos
19	Sahraye Jonoob
20	Zorat Gostar Baharak Dez
21	Zorrat Gostar Baharak Dez
22	Khodadad Bahmani
23	Silage Oloofe Sorkhe
24	Mehr 2 Shoosh
25	Tiba Daneh Sazan Novin
26	Ebrahim Taghipour
27	Daneh Talayi Cooperative
28	Shahid Beheshti
29	Shahid Beheshti
30	Vahdat
31	Etehad
32	Bazrbaran
33	Shahid Rajayi
34	Abdolkazem Sorkhe
35	Tahkim Ghadr Khoozestan
36	Abdolreza Abdolkhani
37	Khoodis Khorak Pars
38	Roomz
39	Paak Daan
40	Hasteh Daneh
41	Union of Aquatic Cooperative Companies of Khuzestan
42	Amien poodr Jonoob
43	Khuzestan Oyster & Fish Meal production and distribution company
44	Hassan Hooshmandi
45	Mojtaba Jalilian
46	Ali Saheb Mohamadi
47	Faraj Omrani
48	Abbas Jamshidian
49	Rashid Daneh Jonoob
50	Toyour Daneh Salamat Dezfool
51	Shoeibie
52	Chamran Mahshar
53	Neyshekar Haft Tappeh
54	Etminan Tejarat Khoozestan
55	Union of Behbahan Rural Cooperative Companies
56	Ronash Bidakh
57	Ahvaz Feed Mill
58	Novin Daneh Iranian
59	Ahvaz Feed Mill
60	Novin Daneh Iranian
61	Maakidan
62	Kalhor Daneh Jonoob

Kurdistan

1	Amaanj Daneh
2	Zardaneh Gostar Gharb
3	Zarivar Daneh
4	Ermiah Daneh

5	Saral Ghezel Ozen
6	Sabr Karaftoo
7	Faravar Kood Dehgolan
8	Kordestan Daneh
9	Abshaar
10	Zhinoodan
11	Leilakh
12	Saral Poulrty Supplement
13	Gharb Dane Abidar Zagros
14	Jik Daneh
15	Hakan Dane Cooperative ۳۵
16	Kamyaran Daneh
17	Gharb Daneh Bita
18	Badr
19	Gharb Daneh Negin Baneh
20	Lal Hayat Vasam

lorestan

1	Makian Daneh Hirkan
2	Taimaz Daneh Incheh Boroon
3	Abdolvand
4	Rezayian
5	Exir Daneh
6	Moslemi
7	Shadat Far
8	Zakipoor
9	Parsi Far
10	Daam Timaar
11	Pishro Daneh
12	Daneh Talaei
13	Daneh Rose
14	Sadaf
15	Roshdaza
16	Zagros Daneh
17	Maad Daneh
18	Darya Daneh Dorood
19	Teymoori
20	Nourdaneh
21	Sinood Paya Pars
22	Nayini
23	Ard Sefid
24	3298 Cooperative
25	Pars Koohdasht
26	Roshd Afza

Markazi

1	Golbar Shimi Daneh
2	Komijan Silos
3	Setare Talaei Komeijan
4	Daneh Morvarid Farahan
5	Niki Pasand Wheat Storage
6	Mohamad Saber
7	Javan Daneh Shazand
8	Ali Akbar Asadi
9	Davoud Shirazi
10	Lajvar Aquafeed (Khaki)
11	Enghelab Shazand Rural Cooperative
12	Khooshe Talaei Sana Storage
13	Kazem Sakha
14	Hadi Sakha
15	Changiz Ghasemi
16	Majid Alvand
17	Reza Moradi
18	Golrokh
19	Avijeh Daroo
20	Naser Hemati
21	Beh Roshd
22	Telavang
23	Shahid Motahari Rural Cooperative
24	Daneh Matboo
25	Salem Khorak Ofogh
26	Sabin Bonyan Saman
27	Parsian Daneh Taraz
28	Farivar Daneh Zarandieh
29	Damdaran Delijan Cooperative
30	Morghdaran Delijan Cooperative
31	Hadi Feed Mill
32	Ali Momeni
33	Jafar Mohamadi
34	Shilat Gostar Sabalan
35	Pars Daneh Khomein
36	Valiollah Zamani
37	Behdasht Peivand Sib Salamat
38	Ali Hasani
39	Hossein Najari
40	Daneh Pardaz Khomein
41	Hamid Hasani
42	Tohid Daneh Kamareh
43	Tafresh Damdaran Cooperative
44	Ashtian Damdaran Cooperative Feed mill
45	Daan Afshan Poodr Ashtian
46	Storage warehouse for supporting livestock affairs of the province
47	Rizan Pardis wheat storage warehouse
48	Arak Taban wheat storage warehouse
49	Zarkhoosheh Arak
50	Behrood Mokamel
51	Ghadiri Zadeh Feed Mill
52	Zarrin Daneh Farahan
53	Teymoori Sabet
54	Morgh Parvar
55	Mohamad Hossein Sepehr Manesh
56	Union of Agricultural Cooperative Companies of Industrial and Traditional Cattle Breeders of Markazi Province
57	Javan Daroo
58	Daneh Chin

59	Mohsen Farahani
60	Ghasem Sabz Abadi
61	Daneh Talaei Komeijan
62	Daneh Sazan Simorgh

Mazandaran

1	Amir Khosro Elahi
2	Behkam Daneh Sedaghat
3	Tirang Daneh Tabarestan
4	Marshan Talaei Mazandaran
5	Mazand Balegh Saari
6	Dorna Gostar Sefid Par
7	Abzi Gostaran Saei
8	Shimi Alayesh Shomal
9	Hassan Fattahi
10	Mazandaran Animal feed And Aquafeed
11	Sepid Daan Makian Iranian
12	Hadi Zadeh
13	Soleimani
14	Gohar Daneh
15	Astian Fish Meal
16	Morvarid Talaei Fish Meal
17	Ali Bashri Fish Meal
18	Kilka Powder Tehran
19	Kasin Fish Meal
20	Zardaneh Samim Fish Meal
21	Sefid Daneh
22	Pol Daneh
23	Gol Sefid Alborz
24	Lavich Makian
25	Arian Roshd
26	Aali Gostar
27	Negin Toyour Shomal
28	Ghatreh Tala
29	Parsadan Tabarestan
30	Kimia Palayesh Caspian
31	Maah Sanam Shomaal
32	Tirang Daneh Tabarestan
33	Beh Kaam Daneh Sedaghat
34	Morgh Behesht Pellet
35	Milad Daneh Khazar
36	Goodarzi Mill
37	Beh Daneh Tabarestan
38	Fateme Badeli
39	832 Animal feed Cooperative
40	Doost Daraan Ghadir
41	Kavosh Sanat Mamteir
42	Zare animal Feed
43	Behdaneh Shomal
44	Zarkhak
45	Taavoni Morghdarsn (Poultry Cooperative)
46	Raash Sazeh
47	Fatah Powder
48	Gol Pak
49	Sinakaar Ghaem
50	Shakri Fish Meal- Kilcomley
51	Rozhin Talaei
52	Golshan Asoor Fish Meal
53	Avid
54	Behdaneh Shomal
55	Zarin Amrvan
56	Sedghi Brothers
57	83 Cooperative
58	Daneh Paak Khazar
59	Nemati Brothers
60	Kayer Ganjineh
61	Zarnab Daneh Shomal
52	Etehad Khazar Shomal
53	Sepehr Tonekabon
54	Solar Soy Alborz
55	Saleh Kooshesh
56	Abziaan Sahel
57	Valasht Daroo
58	MAzra e Alborz
59	Dorna Pellet
60	Zarbaal
61	Toyour Bar Sefid
62	Zarbal Poultry Slaughterhouse
63	Savadkooh Supplements
64	Kesht o Sanat Shomal
65	Behpak Behshahr
66	Shimi Alayesh Shomal
67	Aras Bazar
68	Khazar Animal Feed
69	Tavakol Animal Feed
70	Zarrin Balan Shomal
71	Zayeaat Mofidi
72	Negin Boodr
73	Abziaan Shomaal
74	Kaspian Poodr Arshia
75	Cooperative 832
76	Tala Daneh Shomal
77	Bars Kilka Cooperative
78	Cooperative 581
79	Mazandaran Animal Feed
80	Kilka Sadaf
81	Naser Keramati Nia
82	Beh Nirooye Shomal
83	Amol Roshd Saaz
84	Sorbon Shomal

North Khorasan

1	Hassan Chamani
2	Chamanzar Farooj

3	Abdolrahman Taghizadeh
4	Shir Paak Mehr Asfarayen
5	Hassan Chamani
6	Chamanzar Farooj
7	Abdolrahman Taghizadeh
8	Shir Paak Mehr Asfarayen
9	شرکت تعاونی چند منظوره عام الغدیر بجنورد
10	Jebel Damavand Saba
11	Sabzdaneh Momtaz Baharan Atrak
12	Goldasht
13	Behdaneh Golestan
14	Behdam

Qazvin

1	Safavieh
2	Union of Husbandry of Qazvin Province
3	Kimia
4	Dorsa
5	Negin Khoral Lia
6	Pars Daneh Se Setare Feed Mill
7	Daam Strill
8	Takestan Poultry Cooperative
9	Sepid Daneh
10	Celolose Novin Arash
11	Chavdaneh Negin Gharb
12	Farandish
13	Razi Pour
14	Sians
15	Energy Protein Shayan
16	Ziaran Taleghan
17	Feed B
18	Sayalan Saam
19	Zarrin Daneh Masood
20	Simorgh Boien Zahra
21	Boien Zahra Dairy Husbandry Cooperative
22	Kavosh Daneh
23	Paak Daneh
24	Daneh Taak
25	Negin Daneh Almas
26	Faraz Daneh Avand

Qom

1	Ashian Bazr Zorrat
2	Ahmad Asvad
3	Livestock Cooperative
4	Mojtame Laban
5	Behparvaran Cooperative
6	Qanavat Livestock Cooperative
7	Mojtaba Amiri
8	Soheil Pars Alvand Kimia
9	Dehghani
10	Poultry Cooperative
11	Aria Dan Roshd
12	Mehrgol
13	Taaj Daneh Saba
14	Sateie
15	Ayrik Daneh Shokoohieh
16	Kimia Danesh Alvand
17	Yekdane Gostar Paya
18	Ashian Bazr Zorrat
19	Daana Day

Razavi Khorasan

1	Payam Avaran Sabz Taravat
2	Ferasat Daneh Shargh
3	Mianjalge Neishabur Agricultural and Livestock Cooperative
4	Aseh Daneh
5	Salem Daneh
6	Sani Ghoochan
7	Fariman
8	Kosari Moghadam
9	Daam Golchin
10	Dosh Doosh Beyhaq Livestock and Poultry Feed
11	Khoosheh Zarrin
12	Ranjbaran Ati Javin
13	Torbat Jam Industrial Husbandry Cooperative (Tasty)
14	Ghaem Marandiz Cooperative
15	Mirneghab Torshiz
16	Favakeh
17	Marzneshinan Ganjineh Doogharoon
18	Eghbal Bar moridi
19	Mirneghab Torshiz
20	Favakeh
21	Marzneshinan Ganjineh Doogharoon
22	Eghbal Bar moridi
23	Sarkhas Special Economic Zone Institute (Astan Quds Razavi)
24	Tarshiz Bardsken Agriculture and Animal Husbandry Cooperative
25	Dizbad Parent Chicken
26	Morghdaran Nemoone Joghatay Cooperative
27	Dizbad Parent Chicken Poultry Feed
28	Daneh Talaei Simorgh Attar Neishaboor
29	Binalood Daneh Firoozeh
30	Gholamhossein Hamidi
31	Zist Fanavar Ariana Knowledge Base Company
32	Sabzevar Animal Feed
33	Ghaem Mashhad Animal Feed and Aquafeed
34	Sepid Daneh Sarbedaran
35	Behin Roshd Ghoochan
36	Rokh Animal Feed
37	Dordaneh Ghotb Torbat
38	Damdaran Khavaf
39	Yekta Zaman Khorasan
40	Daam Saalem Jaam
41	Saleh Kashmar
42	Javaneh Khorasan
43	Talaei Jaam

44	Mashhad Animal Feed
45	Momtaz Daneh Ghoochan
46	Avijeh Daneh
47	Gonabad Moteshakel Broiler Cooperative
48	Farasudmand Toos Supplement
49	Gohar Daneh Shargh
50	Gohar Kalaye Novin Shargh
51	Zaveh Rural Cooperative Union
52	Heram Talaei Shargh
53	Behin Roshd Asak
54	Zardaneh Dizbad
55	Nazdaneh Khorasan
56	Toos Neishaboor
57	Aria Daan Neyshaboor
58	Zomorod Daneh Pars Atr
59	Dordaneh Khorasan Razavi
60	Kimia Daan Torbat
61	Zarrin Daneh Sabzevar
52	Khorasan Animal Feed Production Joint Stock Company
53	Behdam Roshd Khorasan
54	Seyed Hassan Ahmadzadeh
55	Chine Chin Supplement
56	Daneh Daran Toos
57	Farman Parent Chicks
58	Afrooz Jaam Cooperative
59	Morghdaran Sabzevar (Beihagh)
60	Tus Qochan Concentrate
61	Khorasan Animal Feed
62	Ariadam Shargh Firoozeh
63	Damdaran Neyshaboor
64	Danak Toos
65	Khorak Pardaz Hezare Novin
66	Roghan Talaei Bartar Pezhman

South Khorasan

1	Ramezan Salmani Tabas
2	Tabas Asseh
3	Nahbandan
4	Daan o Oloofe Khooshineh
5	Tabas Asseh
6	Nahbandan
7	Daan o Oloofe Khooshineh
8	Heriseh
9	Behdaneh Khezri
10	Mohamad Derakhshan
11	Goldooneh
12	Setare Kian Birjand
13	Eslamye
14	Khooshe Shafagh
15	Sajad Sorayan
16	Ashayeri Saman
17	Exir Toos Ferdows
18	Omid Sorayan
19	Sepid Daneh
20	Moodat
21	Daan-o-Oloofe Shargh

Semnan

1	Aria Mah Roshd
2	Koohsar
3	Koodmorghi Mokhtar Arab
4	Mahmoodreza Panahi Feed Mill
5	Mehregan Tolou Azad
6	Abnoos Pars Fish Powder
7	Ashayeri Cooperative
8	Zarrin Dasht Shahrood
9	Hamid Akbarian
10	Khoram Alborz Radin
11	Razie Ghandali Fish And Meat Powder
12	Bargozideh Ghoms
13	Maral Feed Mill
14	Cattle Husbandries Cooperative
15	Naab Daneh
16	Protein Sazan Poultry Feed Mill
17	Kavir Feed Mill
18	Maral Feed Mill
19	Cattle Husbandries Cooperative
20	Naab Daneh
21	Protein Sazan Poultry Feed Mill
22	Kavir Feed Mill

Sistan & Baluchestan

1	Abdolbaset Kord
2	Setare Baloochestan Khash
3	Hamoon Sistan 5027 Cooperative
4	Daneh Talaei Taftan
5	Daneh Sazan Rashin
6	Jahan Daneh
7	Gholamreza Kahid
8	Kima Daneh Zagrosh- Soy Procesing
9	Morvarid
10	Talaa Sabzaan
11	Shahd Zagros Jahanbin
12	Dordaneh Falard
13	199 Cooperative
14	Pooya Daneh Ilia
15	Azbian Daneh Talaei
16	Soorjashan
17	Kimiagaran Taghzieh
18	Ghezel Daneh Rangin Kaman
19	Faradaneh Aquafeed
20	Roshd Daneh
21	Ali Babaei Animal Feed
22	Teihoo Sanat (Essential Oil For Poultry)
23	Fidaar Patira

24	Khalij Fars
25	Hedayat Nasirpour Fish Meal
26	Daneh Talaei Chabahar
27	Part Sirang
28	Mah Daneh Jonoob
29	Naser Poorkand Fish Meal
30	Chabahar Aquatic
31	Chilan Fish Meal
32	Chile Shilat
33	Abdolkhalegh Shahnavazi
34	Rahmat Kahraze
35	Taftaan Khaash
36	Yousof Isa Zayi
37	Reza Harati
38	Gholamreza Karimian
39	Hamid Livestock Services
40	Zahedan Kavir

Tehran

1	Paye Dan Fard
2	Makian Noavar Emrooz
3	Pars Animal Feed
4	Behparvar
5	Sana Dam Pars
6	Majid Mohamad Poor
7	Raha Morgh Tehran
8	Fadak
9	Arian Rosh Ara
10	Varamin Parvarband
11	Sabzdaneh Samin Varna
12	Kaveh Mehrabani
13	Ardin Afarin Soshiant
14	Daan Pakhsh
15	Farbeh Daneh
16	Paivaran Imen Pouya
17	Pezhvak Tejarat Iran
18	Farokhzad Pet Food
19	Alireza Meftahi Pet Food
20	Hami Gostar Heyvanat Pet Food
21	Ahmad Bahrami Pet Food
22	Persia Daam Service Pet Food
23	Eram Talaei Iranian Pet Food
24	Gavdaran Parvarband Varamin
25	Amirhossein Yousefi
26	Azhe Nab Tehran
27	Pars Feed Mill
28	Behshahr Industrial Company
29	Yasna Mehr
30	Margarin
31	Mohsen Sadeghi
32	Fadak
33	Sarshar Daneh
34	Soroush Roshd
35	Daam Pishgam

Yazd

1	Yazd Livestock and Poultry Comprehensive Services Development Company
2	preparation and distribution of livestock and poultry feed Cooperative
3	Simogh
4	Rizdaneh Cooperative

Zanjan

1	Kamel Daneh Zarin
2	Arka Daneh Alborz
3	Pouyesh
4	Ahmad Salimi
5	Saba Morgh Noavaran Zanjan
6	Damparvaran Zanjan
7	Zarrin Daneh Hidaj
8	Keshtzar Gheidaj
9	Alvand

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