

TAMIL NADU LIVESTOCK DEVELOPMENT CORPORATION

Invitation of Expression of Interest (EOI) for establishing an integrated meat processing complex for processing sheep, goat, poultry, pig, and cattle meat with a minimum capacity of processing 5 MT/day at the Post Graduate Research Institute in Animal Science (PGRIAS), Katupakkam.

Pre-submission queries	:	29.09.2025
Submission deadline	:	10.10.2025

**TAMIL NADU LIVESTOCK DEVELOPMENT CORPORATION
4TH FLOOR, INTEGRATED OFFICE COMPLEX FOR ANIMAL HUSBANDRY
AND
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Invitation of EOI to establish an integrated meat processing complex for processing sheep, goat, poultry, pig, and cattle meat with a minimum capacity of processing 5 MT/day at the Post Graduate Research Institute in Animal Science (PGRIAS), Katupakkam.

Tamil Nadu Livestock Development Corporation invites qualified private-sector entities, joint ventures and Section 8 companies to express interest in designing and constructing a state-of-the-art integrated meat production and processing facility covering all key livestock categories.

Project: Establishment of an Integrated Meat Processing Complex with full infrastructure with a minimum capacity of 5 MT/day

Location: Post Graduate Research Institute in Animal Science (PGRIAS), Katupakkam. The Post Graduate Research Institute in Animal Science (PGRIAS), Katupakkam, spans around 300 acres and focuses on cattle, sheep, Goat, Pig and poultry production.

Industry Context & Rationale

Strong Livestock Base

- As per the **20th Livestock Census (2019)**, Tamil Nadu has approximately 9.52 million **Cattle**, 0.52 million **Buffaloes**, 4.50 million **Sheep**, 9.89 million **Goats**, 0.07 million **Pigs**, 120.78 million **Poultry** (farm) and 212.64 million backyards placing the state **1st in poultry, 4th in sheep, 7th in goats, 13th in cattle**, and **14th in buffaloes nationally**.

Contribution to Economy & Rural Livelihood

- The **livestock sector contributes 5.69% to Tamil Nadu's GSVA in livestock (2022-23)** and accounts for around **45% of agriculture & allied sector output**.
- The sector provides livelihood and supplementary income for **~10% of the rural population**, especially landless labourers small and marginal farmers.

Meat Production

- Tamil Nadu ranks 6th nationally in meat output, producing roughly 0.66 million tonnes in 2019–20, representing 7.7% of India's meat production.
- Poultry meat output has grown remarkably with poultry meat production rising from just over 0.5 million tonnes in 2023 to 0.56 million tonnes in 2024.

Breed Diversity & Institutional Support

- Tamil Nadu is endowed with indigenous livestock breeds such as **Mecheri**,

Ramnad White, Madras Red (sheep) and Kanniadu, Kodiadu (goats), known for meat quality.

Strategic Implications

- The combination of a **large and diverse livestock base** ongoing **population growth, rising demands**, institutional support in **livestock production** and consistently rising **meat and poultry production** positions Tamil Nadu as a powerhouse for availability of resources(livestock) for an integrated meat processing facility.

Low Processing Levels – High Value Addition Potential

Current Processing Gaps

- Only **2% of India's meat production** is processed into value-added products; the rest is sold fresh or frozen in informal settings.
- Despite a massive livestock base, a mere **6% of poultry** and **21% of red meat** undergo formal processing.
- This is starkly lower than **60%+ processing rates in developed countries**, underscoring significant scope for modernization.

Value Addition Opportunities

- Processed and packaged meats - **sausages, kebabs, ready-to-eat/cook meals** are gaining market traction due to convenience and hygiene concerns.
- India's meat processing capacity exceeds **1 million tpa**, but only 40–50% is currently utilized.
- Exports of processed meat are growing, with **813 MT valued at USD 2.5 million** shipped in FY 2023–24.

By-Product Utilization to Boost Margins

- Modern plants convert offals, blood, bones, and hides into high-value products **pharma-grade blood meal, gelatin, bone broth, pet food, tallow, and biogas**.
- This approach not only increases revenue streams but also supports **sustainable waste management** and aligns with food safety/environmental regulations.

Technological Integration

- *Leading-edge technologies* - **automation in slaughter, vacuum/MAP packaging, IQF/blast freezing, ETP, IoT temperature sensors, and robotics** are transforming meat processing.

- Tech adoption enhances **product shelf-life, safety, traceability, and export compliance**, making Indian meat globally competitive.

Market & Policy Drivers

Pradhan Mantri Krishi Sinchayee Yojana (PMKSY)

- Under PMKSY, MoFPI offers **grant support for integrated cold-chain, value-addition, food safety, and quality assurance infrastructure** ideal for meat processing complexes.
- Scheme emphasis includes **backward/forward linkages** (collection centres, insulated transport, grade/sort infrastructure) which supports raw-material sourcing and market access at Chennai.
- Cold-chain grants under PMKSY's integrated cold chain sub-scheme typically cover **30–50% of capital costs** making it financially attractive to include IQF, blast freezing, and refrigerated transport in the facility.

Animal Husbandry Infrastructure Development Fund (AHIDF)

- AHIDF a ₹15,000 Cr fund established in 2020 provides **low-cost credit and subsidies** for private sector investment in meat processing, dairy, feed plants and bio-waste infrastructure.
- This funding mechanism is ideal for leveraging capital for slaughterhouses, rendering plants, effluent treatment, and ancillary structures at Post Graduate Research Institute in Animal Science (PGRIAS), Katupakkam improving project viability.

Tax Incentives, PLI & Priority Sector Lending

- **Tax breaks:** Food processing units receive 100% profit exemption for 5 years then 25% for the next 5 years, for capital expenditure on cold-chain/warehousing is 100% deductible.
- **Production Linked Incentive (PLI) for Food Processing:** A ₹10,900 Cr scheme (2021–27) supports scaling up and export competitiveness which would enable the Post Graduate Research Institute in Animal Science (PGRIAS), Katupakkam unit to tap export opportunities.
- **Priority Sector Lending:** Meat processing and cold chains are eligible as priority sector units, ensuring convenient bank credit at subsidized rates.

Growing Domestic & Export Meat Demand

- With only 40–50% of India's 1 million tpa processed meat capacity utilized and only 21% of red meat being formally processed, a modern not less than 5 MT/day unit serves clear unfilled capacity and demand.
- Processed meat exports (e.g., 814 t in FY 2023–24, valued at USD 2.5 M)

indicate growing international market access for value-added Indian products.

Technological & Environmental Imperatives

- Adoption of modern processing technologies, automation in slaughter, vacuum packaging, high-pressure processing (HPP), robotics, and AI-driven quality control is improving efficiency, hygiene, and sustainability.
- Sustainable infrastructure such as effluent treatment plants, rendering, biofuel/by-product utilization, and renewable energy enhances environmental compliance and cost-efficiency.

Project Objectives & Scope

Aim: To establish a hygienic, fully integrated, export-compliant meat processing hub with associated support structures and modern infrastructure.

Key Components:

- Slaughter units for sheep, goat, poultry, pig, cattle (bovine/buffalo/cow)
- Deboning/cutting/packaging lines
- Cold storage: IQF, blast freezing, multi-temperature storage
- Value-added product lines (sausages, ready-to-eat, cooked meats)
- By-product utilization: rendering for MBM, tallow, pet food, biofuel
- Quality assurance: FSSAI / HACCP / ISO lab
- Effluent treatment plant (ETP) + wastewater recycling
- Support facilities: admin block, lairage, staff housing, loading docks
- Associated services: power, water, access roads, parking

Processing Capacity & Infrastructure

- Daily throughput: Not less than 5 MT across species
- Site layout: single-story, hygienic workflow with clear zonal segregation
- Certifications: FSSAI, APEDA export license, HACCP/ISO 22000, GMP
- Grant eligibility: AHIDF, MOFPI modernization scheme Eligibility Criteria

Applicants must meet all of the following:

Organizational Setup

- Registered Entity: Pvt Ltd, Section 8, JV
- Minimum of 5 years' experience in multi-species meat/poultry processing at ≥ 5 MT/day scale

Technical & Compliance Credentials

- Possession (or in-process) of FSSAI, HACCP/ISO 22000, APEDA export registration

- Track record of constructing and running ETP, cold chain, rendering facilities

Financial Capacity

- Proven funding/source of finance (₹50 - 80 Cr project size)
- Ability to leverage grants/subsidies under AHIDF, PMKSY, PLI, etc.

Environmental & Social Safeguards

- ETP designed to meet TNPCB and CPCB norms
- Employee welfare systems, occupational safety, and land-use compliance

Project Execution Plan

- DPR to be submitted along with EOI.
- Plant readiness for commercial operation within 12–18 months

Applicants must demonstrate

- ≥ 5 years' experience in meat/poultry processing (≥10 MT/day)
- Proven capability in constructing and operating integrated facilities with associated ETP, cold chain, rendering.
- Valid FSSAI, HACCP/ISO, and APEDA certifications or applications pending
- Strong financial backing or funding plans to cover capital investment (₹50–80 Cr) with capacity to tap grants
- Commitment to environmental—and social—safeguards

Proposal Requirements

1. Organizational overview – legal structure, ownership, collaborators
2. Track record – previous projects and capacities handled
3. Technical plan – designs, equipment, workflows
4. Infrastructure layout – process flow, structures, utilities
5. Cold chain & logistics – storage, transportation plan
6. By-product management – rendering, waste utilization, ETP
7. Certifications compliance – current and planned
8. Financial viability – funding sources, cost estimates, grant linkage
9. Timeline – DPR to be submitted with EOI; plant to be operational in 12–18 months
10. Environmental & social management plan
11. Sourcing of animals
12. Commercial model – lease/PPP, revenue sharing, royalty, off-take

Role of Tamil Nadu Livestock Development Corporation

- The facilitating of the availability of land
- Limited/Nil Financial investments as per requirements and the proposal

EOI Process & Key Dates

- Pre-submission queries: 29.09.2025.
- Last date of Submission: 10.10.2025.
- EOI submission address

**THE CHIEF EXECUTIVE OFFICER,
TAMIL NADU LIVESTOCK DEVELOPMENT CORPORATION,
4TH FLOOR, INTEGRATED OFFICE COMPLEX FOR ANIMAL HUSBANDRY AND
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Documents to be submitted

Documents should be submitted in sealed cover with “Expression of Interest (EOI) for establishing an integrated meat processing complex for processing sheep, goat, poultry, pig, and cattle meat with a minimum capacity of processing 5 MT/day at the Post Graduate Research Institute in Animal Science (PGRIAS), Katupakkam” typed on it.

- Signed Covering letter for the Expression of Interest
- Company Profile in line with requirements of the project
- The expression of interest document with full details as per the proposal requirements
- Proof of past Experience
- Proof of financial credentials

Disclaimer

This EOI does not constitute a binding offer. TNLDC reserves its right to reject any/all submissions and will not compensate for proposal preparation costs.