THE ORGANIC MEAT COMPANY LIMITED

CORPORATE BRIEFING

FY2026

Performance, resilience and the road ahead

Shareholders | Investors | Analysts



FY2026 CORPORATE BRIEFING SESSION

THE SESSION

Today’s briefing

A focused review of FY2026 performance, operating conditions and the Company’s priorities ahead.

01

Tilawat-e-Quran

Opening of the session

02

Opening remarks

Mr. Faisal Hussain | Chief Executive Officer | 5 minutes

03

Analysts’ presentation

Mr. Rizwan Punjwani | Chief Financial Officer | 20 minutes

04

Question & answer session

Shareholder and analyst discussion | 20 minutes

OPENING REMARKS

Mr. Faisal Hussain

Chief Executive Officer



COMPANY PROFILE

A broad-based halal meat processing and export platform

The Company operates across fresh and frozen meat, offal processing, cooked products and naturally dehydrated pet chews.

16.35 acres
GADAP FACILITY FOOTPRINT
Slaughterhouse, processing & fattening

2.5 acres
ADJACENT LAND ACQUIRED
For Solar Installation

3 locations
KARACHI OPERATING BASE
Gadap, Korangi & KEPZ

Multi-category
PRODUCT PLATFORM
Meat, offal & pet chews

A wide product and processing base

- Slaughtering and primary processing
- Fresh chilled, frozen and vacuum-packed products
- Offal processing, cooking and heat treatment for beef and Offals.
- Naturally dehydrated pet chews

Market access from Pakistan

The source presentation describes TOMCL as one of Pakistan’s largest halal meat processors and exporters, with broad access across the Middle East, Far East, CIS, North America and Europe.

OPERATING FOOTPRINT

Three Karachi locations support an integrated product platform

The operating footprint combines slaughtering, processing, fattening, offal handling and specialised product facilities.

01

MAIN FACILITY

GADAP

Slaughterhouse, meat processing facility, cooking / heat-treatment facilities for beef plus heat-treatment for Offals, and fattening farm on 16.352 acres. A further 2.5 acres of adjacent land has been acquired for solar Installation.

02

SPECIALISED PROCESSING

KORANGI INDUSTRIAL AREA

Offal processing, naturally dehydrated pet chews processing.

03

CASING & OFFAL

MSMHL - KEPZA

Sheep casing and offal processing facility acquired in August 2023, with acquisition of control effective during 2025 as stated in the source deck.

All three facilities are located in Karachi, Pakistan.

A diversified portfolio across meat, offal and value-added products

Fresh, frozen, vacuum-packed, heat-treated and specialised products serve different customer and market requirements.



01

Fresh & frozen meat

Beef and mutton, bone-in and boneless, chilled and frozen, including private-label formats.



02

Red & white offal

Fresh and frozen edible offal, including raw and salted white offal.



03

Cooked & heat-treated

Heat-treated / cooked boneless beef, cooked beef balls, and Heat-treated Offals.



04

Natural pet chews

Dried, dehydrated and baked natural pet chews and offal-based products.

MARKET ACCESS

A geographically diversified export footprint

Markets named in the source presentation span the Middle East, South Asia, Far East, CIS, North America and Europe.

MIDDLE EAST

Saudi Arabia • UAE • Iraq
Qatar • Kuwait • Oman
Bahrain • Jordan • Egypt

FAR EAST & SOUTH ASIA

China • Hong Kong • Thailand
Vietnam • Maldives

CIS

Uzbekistan • Tajikistan
Azerbaijan

NORTH AMERICA

Canada • United States

EUROPE

Albania • Italy
Spain (beef casing)

MARKET DEVELOPMENT

Continued diversification of markets and product categories

The source deck also identifies European Union approval and Spain for beef casing.

FY2026 PERFORMANCE REVIEW

Mr. Rizwan Punjwani

Chief Financial Officer

THE ORGANIC MEAT COMPANY LIMITED



OPERATING ENVIRONMENT

FY2026 was shaped by a sharp Q4 disruption

Following strong first-half performance and stable Q3 trading, the Company faced a significant downturn in Q4 amid escalating regional conflict.

48%

Energy and fuel costs

Energy and fuel prices increased by 48% amid disruptions in regional energy markets. Higher transportation costs also raised animal procurement costs.

41.6%

Slaughtering volumes

Q4 slaughtering volumes declined by 41.6%, reducing operational throughput and limiting the Company's ability to absorb fixed costs.

Q4

Export demand and shipment flow

Regional conflict and disruption to shipping routes affected demand, shipment schedules and fresh chilled meat exports, particularly to Dubai.

Margin

Pricing and profitability

Competitive global pricing from major exporters, including Brazil, India and Australia, placed pressure on frozen meat prices and gross profit margins.

FY2026 AT A GLANCE

A year of lower revenue and profitability

Consolidated performance reflects lower export volumes, pricing pressure and higher expected credit loss provisioning.

Rs 12.38bn

NET SALES

↓ 11.6% year on year

Rs 1.09bn

GROSS PROFIT

↓ 23.8% year on year

Rs 112.35m

PROFIT AFTER TAX

↓ 73.9% year on year

Rs 0.57

EARNINGS PER SHARE

FY2026 reported EPS

Rs 6.69bn

EXPORT REVENUE

↓ 18.0% year on year

5,989.8 MT

EXPORT VOLUME

↓ 11.6% year on year

Equity remained a strong funding base, representing 87.9% of total assets as reported in the source presentation.

EXPORT PERFORMANCE

Export volumes and revenues contracted in FY2026

Export volume (standalone) declined by 11.6%, while export revenue (standalone) decreased by 18.0%, indicating additional price and mix pressure.

EXPORT VOLUME

Metric tonnes



−11.6% Year-on-year change

EXPORT REVENUE

PKR million

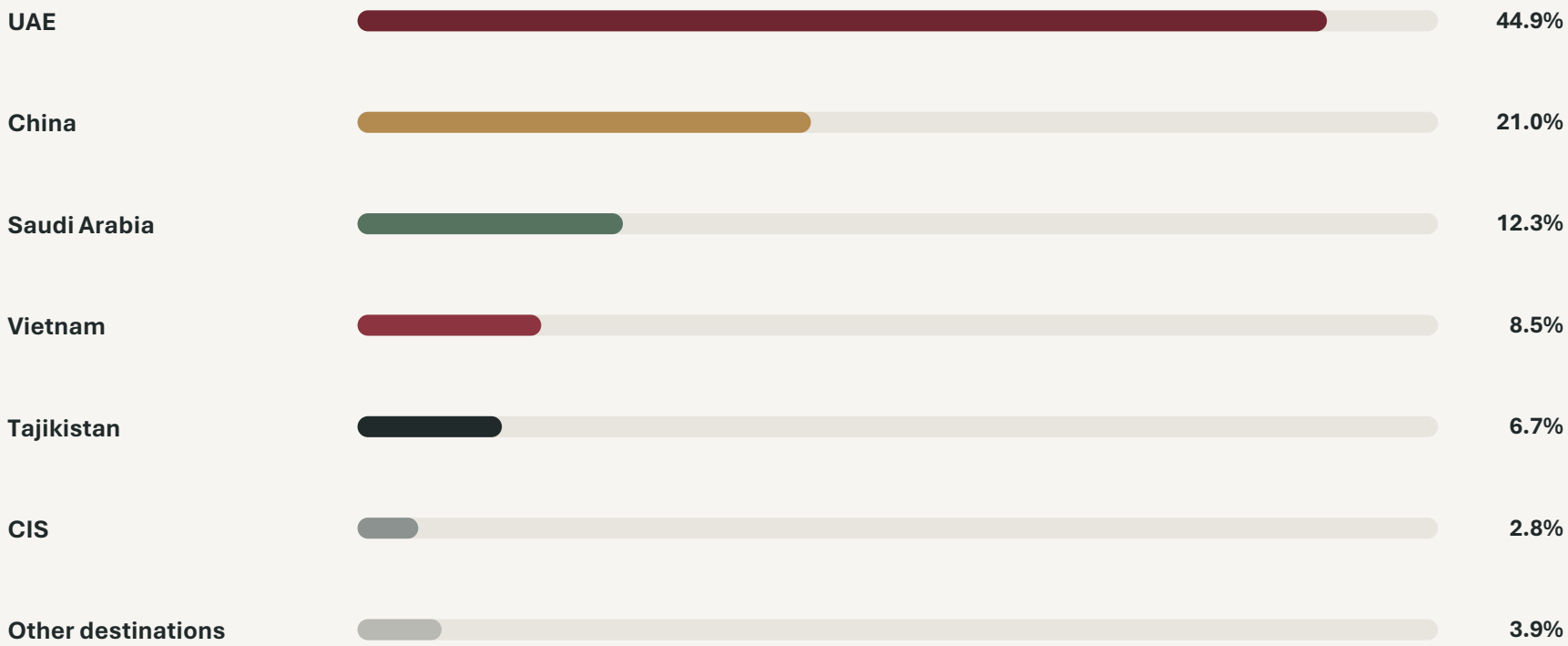


−18.0% Year-on-year change

EXPORT REVENUE MIX

The UAE remained the largest destination in FY2026

The five largest destinations represented the clear majority of export revenue, with China the second-largest market.



44.9%

UAE SHARE OF FY2026 EXPORT REVENUE

China contributed 21.0%

Source: revenue by destination mix provided in the presentation. Percentages may not sum exactly due to rounding.

PRODUCT REVENUE MIX

Beef remained the core export revenue category

FY2026 product-line revenue totalled approximately PKR 6.69 billion, with offal the second-largest category.

100% OF FY2026 EXPORT REVENUE BY PRODUCT LINE



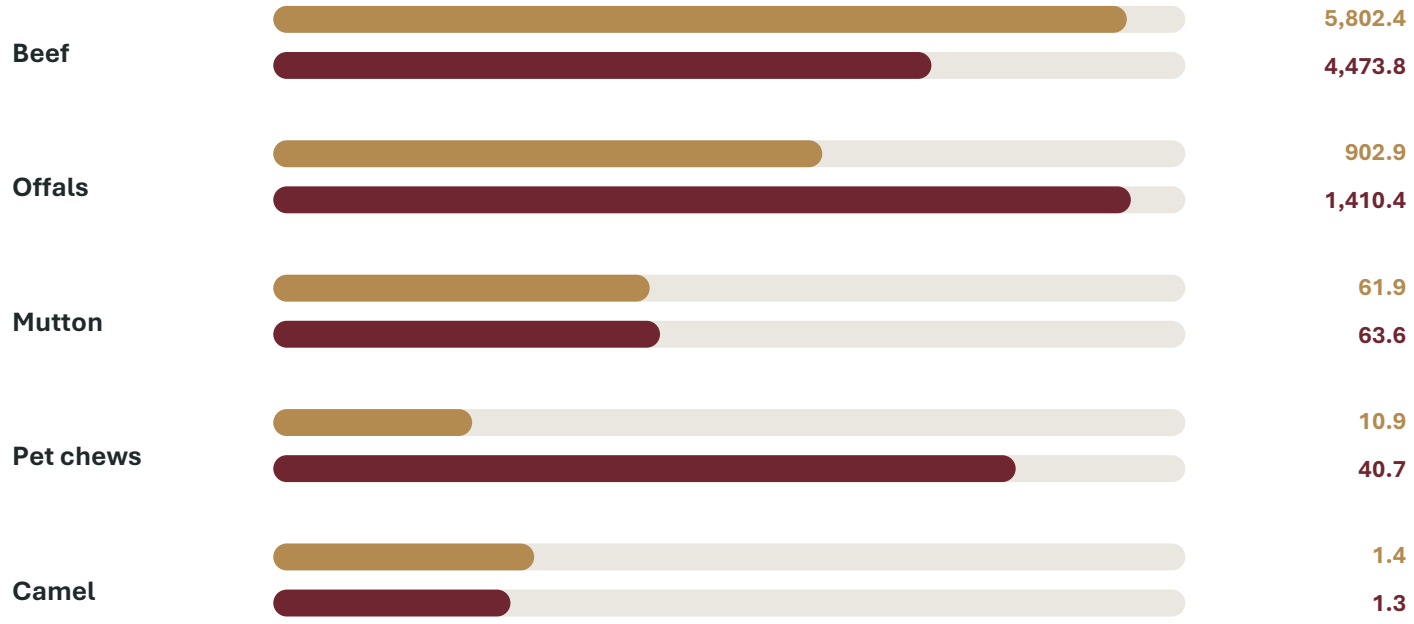
Beef	PKR 5,860.94m	87.60%
Offals	PKR 666.60m	9.96%
Mutton	PKR 124.47m	1.86%
Pet chews / organs	PKR 37.87m	0.57%
Camel	PKR 0.84m	0.01%

EXPORT VOLUME BY PRODUCT

Offal volumes expanded while beef volumes declined

FY2026 exports show a changing product mix. Bars are scaled within each product category to compare year-on-year movement.

EXPORT VOLUME (METRIC TONNES)



FY2025

FY2026

+56.2%

Offal export volume growth

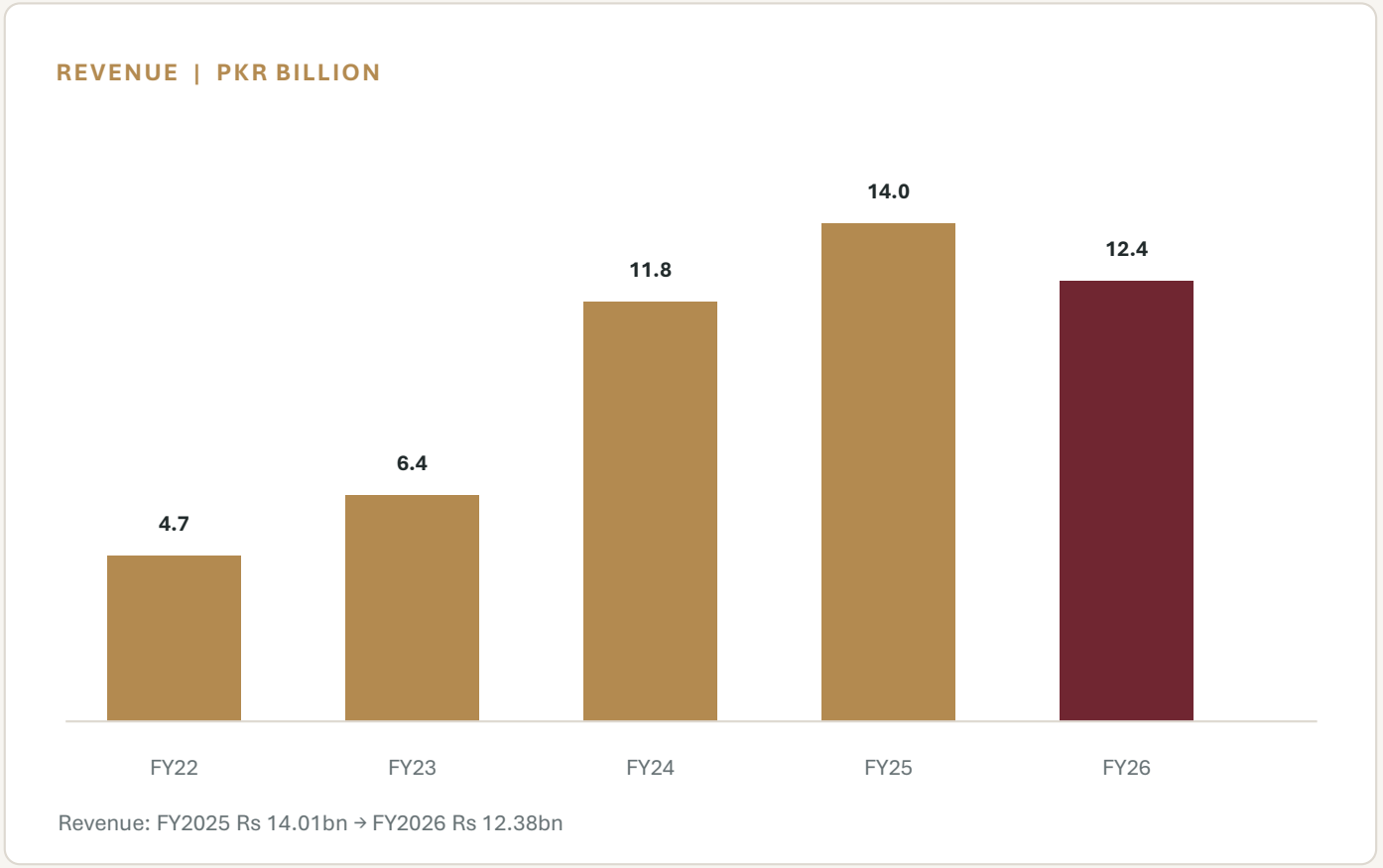
Total export volume

5,989.8 MT

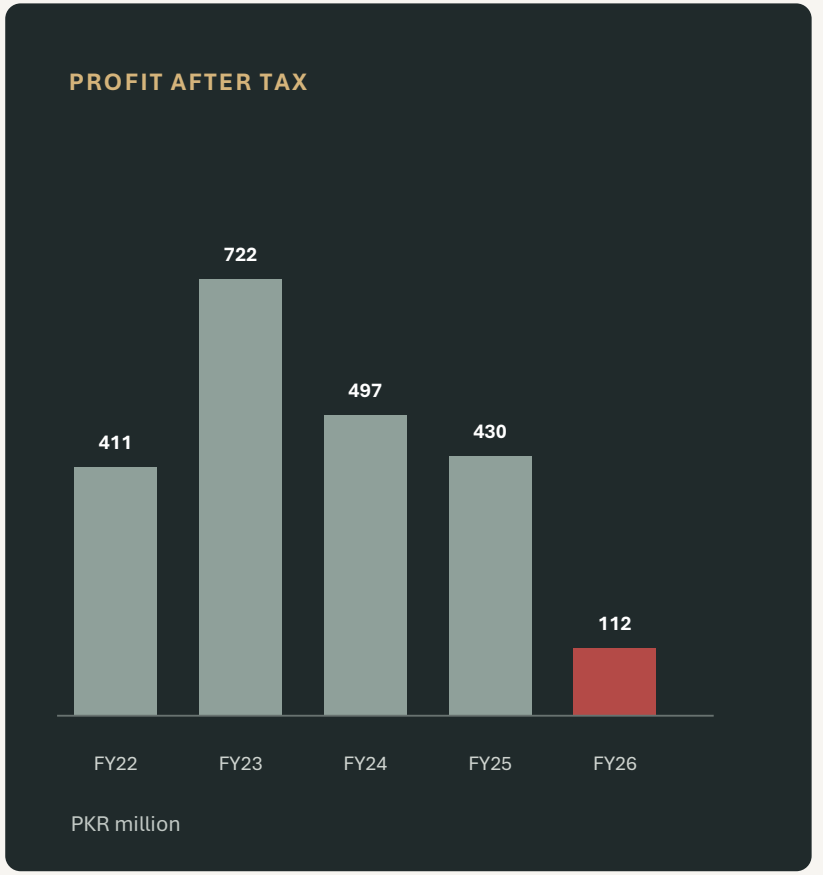
down 11.6% year on year

Revenue growth moderated in FY2026

The Company's revenue increased strongly through FY2025 before moderating in FY2026; profit after tax declined more sharply.



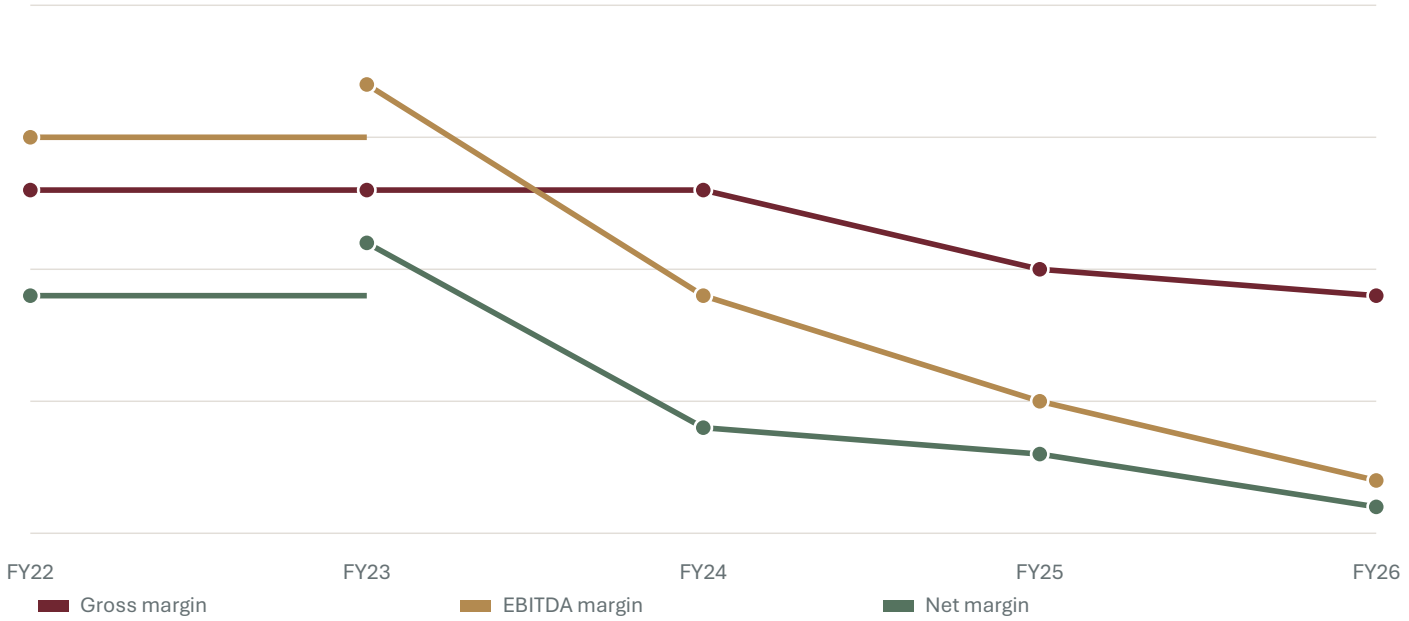
Revenue: FY2025 Rs 14.01bn → FY2026 Rs 12.38bn



Margins and shareholder returns remained under pressure

Five-year trends show a softer margin profile and lower returns in FY2026.

MARGIN TRENDS (%)



RETURN ON EQUITY

2%

FY2026

ROE trend

16% → 7% → 2%

FY2023 FY2025 FY2026

Earnings per share: Rs 0.57 in FY2026 (reported).

Profitability was affected by lower sales and higher credit provisioning

PKR million, unless otherwise stated. FY2026 compared with FY2025.

FINANCIAL METRIC	FY2026	FY2025	CHANGE	VARIANCE
Net sales	12,381.2	14,006.1	(1,624.8)	−11.6%
Gross profit	1,086.7	1,425.9	(339.1)	−23.8%
Operating expenses	837.8	768.3	69.5	+9.1%
Finance costs	64.2	140.2	(76.0)	−54.2%
Other income	12.6	88.9	(76.3)	−85.9%
Profit before tax	197.3	606.3	(409.0)	−67.5%
Profit after tax	112.4	429.8	(317.4)	−73.9%

Key drivers: lower export meat sales and volumes, competitive frozen-meat pricing, higher ECL provision and foreign-exchange losses. Lower KIBOR rates reduced finance costs.

CONSOLIDATED BALANCE SHEET

Capital investment continued despite a tighter cash position

Key asset movements reflect investment in facilities and equipment, working capital movements and lower livestock levels.

Rs 3.84bn

PROPERTY, PLANT & EQUIPMENT

+13.4% year on year

Rs 377m

TRIPE PROJECT CWIP

As reported in FY2026 remarks

Rs 2.38bn

TRADE DEBTS

+Rs 67.9m year on year

Rs 205.6m

CASH & BANK BALANCES

Down Rs 242.5m

PPE additions and project spend

- Gadap land acquisition: Rs 170m
- Generator: Rs 39.2m
- Korangi solar installation: Rs 12m
- Three vehicles: Rs 18m
- Tripe processing project CWIP: Rs 377m

Other working capital movements

- Stock-in-trade: Rs 364.3m, down 8%
- Biological assets: Rs 15.1m, down 84%
- Loans and advances: Rs 120.1m, down 27%
- Trade debts: Rs 2,382.5m, up 3%
- Cash reduced following capex and working capital outflows

CAPITAL STRUCTURE

Equity remained the principal source of funding

The consolidated balance sheet reflects a substantial equity base alongside moderate short-term borrowings and operating liabilities.

Rs 6.30bn

EQUITY AND RESERVES

87.9% of total assets per source deck

Rs 1.96bn

PAID-UP SHARE CAPITAL

Up 10% following bonus issue

Rs 583m

SHORT-TERM BORROWINGS

Up Rs 78.1m / 15.5%

EQUITY COMPOSITION | PKR MILLION



Paid-up capital	1963.4
Reserves	3536.3
Revaluation surplus	796.6

OTHER KEY LIABILITIES

- Trade and other payables: Rs 149.9m (+13.3%)
- Staff retirement benefits: Rs 19.3m (+43%)
- Accrued expenses and other liabilities: Rs 44.2m (+4.9%)

The FY2026 agenda centres on risk control and margin recovery

The operating environment calls for disciplined execution across export markets, receivables, pricing and cost management.

KEY RISKS

01 Geopolitical disruption

Export demand, shipment schedules and collections affected by Middle East conflict.

02 International pricing

Competitive pressure from major global exporters weighed on frozen meat prices.

03 Credit and FX exposure

Higher ECL provisioning and foreign-exchange losses reduced reported earnings.

04 Working capital

Delayed export realisations and lower cash balances require continued focus on collections.

MANAGEMENT FOCUS

01 Diversify export markets

Build resilience through broader geographic reach and additional customer channels.

02 Strengthen collections

Prioritise recovery of foreign receivables and closer monitoring of overdue balances.

03 Restore contribution margins

Align product mix, pricing and operating throughput with market conditions.

04 Control cost and cash

Improve cost discipline, manage working capital and complete priority projects.

FUTURE OUTLOOK

Resilient core, clear path to margin recovery

The stated outlook combines export market development with operating efficiency and investment in selected growth and energy initiatives.

01

Broaden export growth

Accelerate export development through a more diversified product portfolio and wider geographic reach.

02

Improve operating efficiency

Target workforce rationalisation, process improvements and other cost-reduction opportunities to rebuild margins.

03

Invest in strategic capacity

Advance the Tripe Processing Project and renewable energy initiatives to strengthen the operating platform and reduce dependence on costly diesel-generated electricity.

04

Completed Heat treatment Offals Unit - Gadap

The heat treatment unit for offals intended for the Chinese market has been completed at the Gadap facility, and the application for approval from the General Administration of Customs of China (GACC) is currently under process.

Execution priorities: protect cash conversion, improve throughput, complete the investment programme and rebuild sustainable margins.

DISCUSSION

Questions & Answers

20 minutes

We welcome questions and feedback from shareholders, investors and analysts.



THE ORGANIC MEAT COMPANY LIMITED

Thank you

We appreciate your continued interest and support.



IMPORTANT INFORMATION

Disclaimer

Please read the following information together with the Company's published financial statements and regulatory disclosures.

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Consolidated statement of profit or loss

PKR million. Rounded to one decimal place. Figures are based on the FY2026 and FY2025 amounts in the source presentation.

DESCRIPTION	FY2026	FY2025	CHANGE	VARIANCE
Net sales	12,381.2	14,006.1	(1,624.8)	−11.6%
Cost of sales	(11,294.5)	(12,580.2)	1,285.7	−10.2%
Gross profit	1,086.7	1,425.9	(339.1)	−23.8%
Administrative expenses	(281.4)	(269.9)	(11.5)	+4.3%
Selling expenses	(344.6)	(339.8)	(4.8)	+1.4%
Allowance for doubtful debts	(211.9)	(158.6)	(53.2)	+33.6%
Finance costs	(64.2)	(140.2)	76.0	−54.2%
Other income	12.6	88.9	(76.3)	−85.9%
Profit before tax	197.3	606.3	(409.0)	−67.5%
Taxation	(85.0)	(176.5)	91.5	−51.9%
Profit after tax	112.4	429.8	(317.4)	−73.9%

Consolidated balance sheet | Assets

PKR million. Amounts rounded to one decimal place.

DESCRIPTION	FY2026	FY2025	CHANGE	VARIANCE
Property, plant & equipment	3,841.9	3,387.7	454.2	+13.4%
Deferred tax asset	38.3	—	38.3	—
Stock-in-trade	364.3	398.0	(33.7)	−8.5%
Biological assets	15.1	96.6	(81.4)	−84.3%
Trade debts	2,382.5	2,314.6	67.9	+2.9%
Loans and advances	120.1	164.5	(44.4)	−27.0%
Cash and bank balances	205.6	448.0	(242.5)	−54.1%

PPE additions included Gadap land acquisition, a generator, solar installation at Korangi, vehicles and Rs 377m capital work-in-progress for the Tripe Processing Project.

Consolidated balance sheet | Equity & liabilities

PKR million. Amounts rounded to one decimal place.

DESCRIPTION	FY2026	FY2025	CHANGE	VARIANCE
Issued, subscribed & paid-up capital	1,963.4	1,784.9	178.5	+10.0%
Reserves	3,536.3	3,587.3	(50.9)	−1.4%
Revaluation surplus	796.6	811.8	(15.2)	−1.9%
Deferred tax liability	—	40.4	(40.4)	−100.0%
Staff retirement benefits	19.3	13.5	5.8	+43.4%
Short-term borrowings	583.0	504.9	78.1	+15.5%
Trade and other payables	149.9	132.2	17.7	+13.3%
Accrued expenses & other liabilities	44.2	42.1	2.1	+4.9%

The 10% increase in paid-up capital reflects the bonus issue during FY2026.

Consolidated statement of profit or loss | Revenue and cost of sales

Management explanations accompanying the FY2026 movements.

Net sales

−11.6% | decrease of Rs. 1,624.8m

The 11.6% variance is primarily driven by a significant decline in export meat sales, which fell from Rs. 8.13 billion to Rs. 6.76 billion. This downturn in exports is attributed to the Middle East conflict and closure of the State of Hormuz, resulting in a reduction of approximately 500 metric tonnes of meat and 220 metric tonnes of offal, specifically affecting fresh chilled meat shipments to Dubai. Furthermore, frozen meat prices were impacted by competitive global pricing from major exporters, including Brazil, India and Australia.

Cost of sales

−10.2% | reduction of Rs. 1,285.7m

The 10.22% variance is primarily driven by a significant decline in export volumes, compounded by prevailing market rates in key exporting regions during the year, which directly impacted the cost of sales. Furthermore, the conflict in the Middle East, initiated in Q3 2026, constrained demand across fresh chilled, vacuum-packed bone-in and vacuum-packed boneless categories. Consequently, this reduction in sales volume resulted in a downward trend in both direct and indirect costs.

Consolidated statement of profit or loss | Operating expenses

Administrative expenses, selling expenses and expected credit loss provisioning.

Administrative expenses

+4.3% | increase of Rs. 11.5m

The rise in administrative expenses for FY2026 is primarily driven by inflationary pressure on food costs, the depreciation impact of Rs. 95m in capital additions and elevated shipment insurance premiums amid geopolitical instability.

Selling expenses

+1.4% | increase of Rs. 4.8m

The source remarks describe an insignificant decrease in selling expenses of Rs. 1.7m, mainly due to lower export remittances received during FY2026, resulting in reduced Export Development Surcharge (EDS) charges. Lower slaughtering volumes also reduced quarantine-related expenses. These reductions were offset by higher clearing and forwarding charges; however, the overall impact was described as a marginal increase in selling expenses.

Source remark retained as stated; its reference to a Rs. 1.7m decrease differs from the increase in the financial schedule.

Allowance for doubtful debts

+33.6% | increase in provision of Rs. 53.2m

The negative variance is primarily driven by foreign receivables, which rose from Rs. 1.732 billion to Rs. 2.382 billion year on year. In line with the conservative policy followed by the Company, an additional provision of Rs. 211.9m was taken in the books, compared with the provision of Rs. 158.6m against foreign receivables.

The source remark cites prior-year foreign receivables of Rs. 1.732bn; the financial schedule reports Rs. 2.315bn.

Consolidated statement of profit or loss | Finance, other income and tax

Movements reflect lower borrowing costs, foreign-exchange results and lower taxable income.

Finance costs

−54.2% | reduction of Rs. 76.0m

Borrowing costs decreased significantly from Rs. 140m in FY2025 to Rs. 64m in FY2026, primarily due to the reduction in KIBOR rates during the year, which lowered the cost of the Company's floating-rate borrowings.

Other income

−85.9% | decrease of Rs. 76.3m

This significant change is solely attributable to realised and unrealised exchange gains or losses due to foreign remittances. The Company recorded a foreign exchange loss of Rs. 45m in FY2026, contrasting with a gain of Rs. 41m in FY2025. This unfavourable variance primarily stems from currency market volatility and the timing of export proceeds realisation. Export sales declined from Rs. 8.1bn in FY2025 to Rs. 6.8bn in FY2026, while total remittances dropped from Rs. 8bn to Rs. 5.9bn, increasing year-end outstanding foreign currency receivables. These balances were subject to retranslation at the closing rate, resulting in unrealised losses. Furthermore, fluctuations between invoicing rates and the rates at the time of settlement contributed to realised foreign exchange losses throughout the fiscal year.

Taxation

−51.9% | reduction of Rs. 91.5m

The observed variance is primarily driven by fluctuations in sales, cost of goods sold and operating expenses, which collectively resulted in reduced profitability and, consequently, lower taxable income. Throughout the year, changes in sales volume, cost of sales, selling expenses and finance costs significantly impacted reported earnings and the corresponding tax provision.

Consolidated balance sheet | Non-current assets

Capital additions and deferred tax movements underpin the reported asset variances.

Property, plant and equipment

+13.4% | increase of Rs. 454.2m

This increase is primarily attributed to the following asset additions and capital work-in-progress (CWIP): land acquisition in Gadap of Rs. 170m; plant and machinery, including a generator acquisition of Rs. 39.2m and a solar system installation at the Korangi facility totalling Rs. 12m; acquisition of three vehicles amounting to Rs. 18m; and CWIP of Rs. 377m representing expenditure for the new Tripe Processing Project, including civil works and installation of associated plant, machinery and infrastructure. The net movement reflects these additions and ongoing CWIP, offset by a depreciation charge of Rs. 187m for the year.

Deferred tax asset

FY2026 balance: Rs. 38.3m

The current year reflects a 100% impact due to accounting and tax base differences concerning property, plant and equipment, biological assets, unrealised gains on trade debtors, and provisions for doubtful debts and gratuity, following the Rs. 40m deferred tax liability recorded last year. Furthermore, in response to heightened geopolitical risk, auditors increased the Expected Credit Loss (ECL). This resulted in an additional Rs. 212m provision, which increased the deferred tax balance and effectively shifted it to a deferred tax asset.

Consolidated balance sheet | Current assets

Working capital movements reflect inventory, livestock, export realisations, advances and cash deployment.

Stock-in-trade

−8.5% | decrease of Rs. 33.7m

The variance of Rs. 33.68m is attributable to reduced inventory levels of cooked meat, raw meat, offal and packing materials relative to the previous year.

Biological assets

−84.3% | decrease of Rs. 81.4m

The 84% variance is primarily attributable to the year-end headcount for both reporting years. The fluctuation is driven by several factors, most notably the unforeseen situation arising from the Middle East conflict, which resulted in maintaining a low headcount of animals.

Trade debts

+2.9% | increase of Rs. 67.9m

The net increase in foreign trade receivables is primarily attributable to delayed export realisations, despite a reduction in sales volume. These delays stemmed from disruptions related to the Middle East conflict during the latter part of the third quarter; however, trade debts are considered good and maintained a satisfactory cash flow cycle.

Loans and advances

−27.0% | decrease of Rs. 44.4m

The variance is attributed to advances made to meat offal suppliers to secure raw materials in anticipation of future export demand. However, geopolitical instability resulting from the Middle East conflict disrupted regional trade flows, thereby reducing advances during the fiscal year.

Cash and bank balances

−54.1% | decrease of Rs. 242.5m

The reduction in cash and bank balances from Rs. 448m to Rs. 200m is primarily attributed to capital expenditure totalling Rs. 265m, advances issued to suppliers for livestock and raw material procurement, and settlement of trade payables. These outflows resulted in a lower cash position at year-end.

Consolidated balance sheet | Equity

The movements reflect the bonus issue, current-year profit and depreciation on revalued assets.

Issued, subscribed and paid-up share capital

+10.0% | increase of Rs. 178.5m

A 10% change has been reported, attributable to the bonus shares issued during the year.

Reserves

−1.4% | decrease of Rs. 50.9m

The decline of Rs. 50.9m is due to bonus shares issued for Rs. 178m, which was offset by profit for the year of Rs. 112m and incremental depreciation (net of tax) of Rs. 15m.

Revaluation surplus

−1.9% | decrease of Rs. 15.2m

The Rs. 15m impact is attributable to the revaluation surplus on property, plant and equipment, with its corresponding incremental depreciation.

Consolidated balance sheet | Non-current liabilities

Deferred taxation and the unfunded gratuity scheme explain the movements reported for FY2026.

Deferred tax liability

−100.0% | reduction of Rs. 40.4m

The current year reflects a 100% impact due to accounting and tax base differences concerning property, plant and equipment, biological assets, unrealised gains on trade debtors, and provisions for doubtful debts and gratuity, following the Rs. 40m deferred tax liability recorded last year. Furthermore, in response to heightened geopolitical risk, the Expected Credit Loss (ECL) provision for current exports to the Middle East increased by Rs. 212m. This resulted in an additional Rs. 100m provision, which increased the deferred tax balance and effectively shifted it to a deferred tax asset.

Staff retirement benefits

+43.4% | increase of Rs. 5.8m

A 43% variance has been identified in staff retirement benefits. The Company maintains an unfunded gratuity scheme for employees with at least two years of service, for which annual provisions are recorded. Gratuity is calculated based on one month's basic salary per year of service, reflecting the ongoing accumulation of obligations for current staff. As there was no staff turnover during the fiscal year, the liability increased in accordance with both service tenure and compensation growth.

Consolidated balance sheet | Current liabilities

Borrowings and operating liabilities moved in line with working capital and settlement activity.

Short-term borrowings

+15.5% | increase of Rs. 78.1m

The source remark states that the observed 25% increase is primarily attributable to borrowings obtained from banks during the fiscal year for working capital requirements.

Source remark cites 25%; the final financial schedule in this presentation reports a 15.5% increase.

Trade and other payables

+13.3% | increase of Rs. 17.7m

The 13.35% variance is primarily driven by the settlement of outstanding contractor and trade creditor balances during the current fiscal year.

Accrued expenses and other liabilities

+4.9% | increase of Rs. 2.1m

The change is insignificant. A substantial portion of these accrued expenses and other payable balances consists of amounts due to freight forwarders and meat/offal suppliers.

THE ORGANIC MEAT COMPANY LIMITED

TOMCL

CORPORATE PRESENTATION

