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## **Report Name:** Livestock and Products Annual

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### **Report Highlights:**

Assuming a healthy calf-crop (improving reproductive rate) and steep rise in beginning cattle stock, India's calendar year (CY) 2021 cattle (*Bos taurus* or *Bos indicus*) and water buffalo (*Bubalus bubalis*) herd size will increase to 305.5 million heads. Likewise, Indian water buffalo meat (carabeef) exports in out-year (CY 2021) will recover to 1.2 million metric tons (MMT), some 14.3 percent above the current year's estimate, assuming some curbed demand and improvement in the domestic supply chain. Despite an increase, the out-year export forecast is still below its five-year average of 1.6 MMT. Note: Carabeef and beef production and trade are reported in carcass weight equivalent (CWE).

## Executive Summary:

The CY 2021 cattle (*Bos taurus* or *Bos indicus*) and water buffalo (*Bubalus bubalis*) population is estimated at 305.5 million heads, approximately 2.3 million heads above CY 2020. A steep rise in beginning cattle stocks and an expanding Indian dairy industry (private and cooperative) will support both increased cattle population and beef production, with 50 percent of the growth derived from water buffalo. Please note that meat from water buffalo is known as *carabeef*.

Buoyed by an International Monetary Fund (IMF) prediction that the Indian economy will recover in Indian Fiscal Year<sup>1</sup> (IFY) 2021, *carabeef* exports in out-year (CY 2021) will improve to 1.2 MMT, some 14.3 percent above the current year's estimate, assuming constrained demand in trade and restoration of the domestic supply chain to near normal levels. Despite an increase, the out-year export forecast is still below its five-year average of 1.6 MMT. Generally, the overall consumer confidence in the economic situation, employment, inflation, and income is currently low. The COVID-19 pandemic has restrained India's consumer spending, and economic recovery is further than previously expected.

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<sup>1</sup> IFY is from April to March.

## **Commodities:**

Animal Numbers, Cattle  
Meat, Beef and Veal

## **Production:**

Assuming a healthy calf-crop (improved reproductive rate) and a steep rise in the beginning cattle stock, India's CY 2021 cattle (*Bos taurus* or *Bos indicus*) and water buffalo (*Bubalus bubalis*) herd size will rise to 305.5 million heads, approximately 2.3 million heads above CY 2020<sup>2</sup>. Strong Indian dairy sector growth (both private and cooperative) will support an increase in the overall cattle population.

The CY 2021 *carabeef* and beef production are estimated to rise 8.5 percent to 3.96 MMT, assuming livestock markets are operational, and cattle supplies for slaughter (across municipal slaughterhouses and export-oriented units) are gradually restored. *Carabeef* production is mainly concentrated in the states of Uttar Pradesh, Andhra Pradesh, Maharashtra, and Punjab, with Uttar Pradesh having the country's largest water buffalo population. Despite alleviated lockdown measures, India's live cattle supply (until June/July) was reduced, along with a lack in farm labor, but both are expected to improve gradually through the end of this year.

With a growing backlog due to the national lockdown and a staggered, phased reopening, estimated CY 2020 cattle slaughter numbers were dropped three percent below the previous estimate<sup>3</sup> of 35.7 MMT to 34.75 million heads. Concurrently, CY 2020 *carabeef* production was also lowered by 100,000 metric tons (MT) to 3.65 MMT, and as a result, both exports and local supply will be limited. Tight domestic supplies will partly counter the drop in demand, and *carabeef* and beef prices should hold firm.

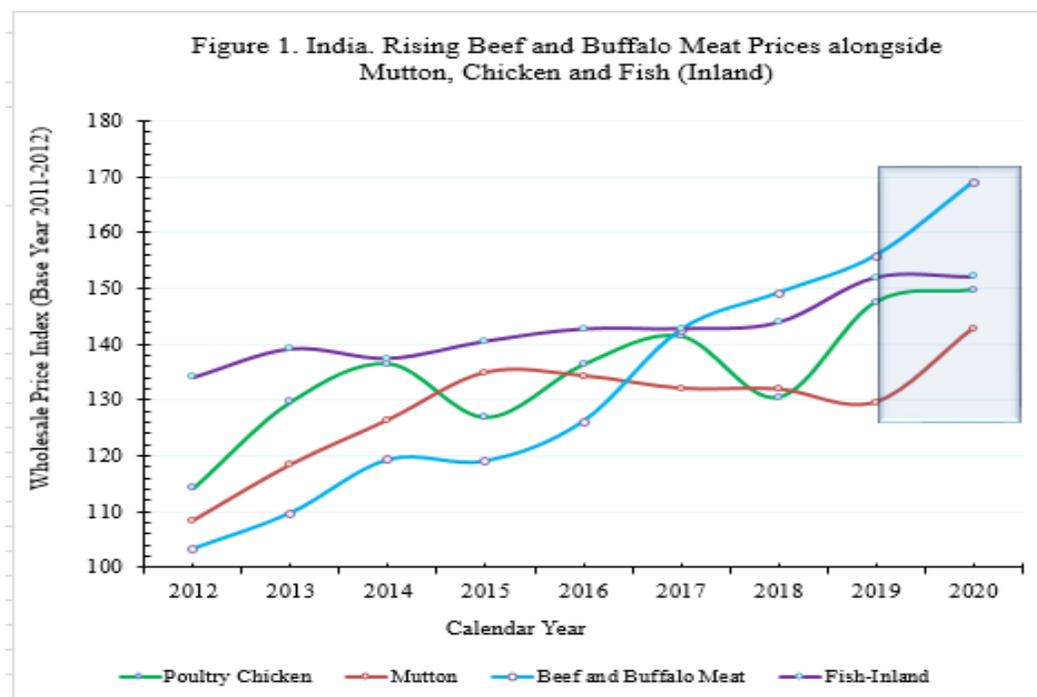
## **Prices**

After rising by more than 22 percent in the first quarter (Q1) of CY 2020, the wholesale price index (WPI) of beef and buffalo meat had diminished by eight percent in following two months ending June 2020. However, the WPI during January-June 2020 stood firm at 11 percent higher, to goat meat (mutton), which had grown consistently (Figure 1). A short-supply situation for goat meat has underpinned its prices. Conversely, poultry meat WPI fell 10 percent in quarter one (Q1) due to fabricated social media rumors that COVID-19 has zoonotic origins and can spread through poultry meat. Since Q1, poultry meat WPI has recovered and grew 18 percent in Q2, firming up its WPI by nine percent in the first half of CY 2020. However, WPI of inland fish (both capture and aquaculture) dropped 5 percent during the same period.

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<sup>2</sup> Also, Post has revised cattle beginning stocks for 2019 and 2020 to reflect official USDA estimates.

<sup>3</sup> See: [India Livestock Semi-annual, July 17, 2020](#)



Source: Ministry of Commerce and Industry, Government of India  
CY 2020 data in shaded box is from January 2019 to June 2020.

## Consumption

India's CY 2021 *carabeef* and beef consumption is projected at 2.76 MMT, 6.15 percent above last year and close to 2019 pre-pandemic levels. Assuming there is no second wave of COVID-19, and that Indian municipal abattoirs (slaughterhouses) are operational, *carabeef* demand will resume to more normal levels. Strong household consumption and a small uptick in hotel, restaurant and institutional demand will stimulate a rise in domestic meat consumption.

Indian *carabeef* is preferred due to its affordability, leanness, and halal characteristics, which contrasts with traditional beef supplies. In addition to direct consumption, some *carabeef* is processed and consumed as sausage, salami and hamburger. The extended COVID-19 lockdown and subsequent phased opening of the economy had already impacted availability and raised prices.

Culture and religion both have significant influence on the foods Indians eat. For example, Muslims and Christians routinely eat *carabeef*, but Hindu population segments do not. By contrast, poultry meat is widely consumed and is accepted by people of all faiths; it is popular and utilized in a variety of dishes, relatively inexpensive and easily available.

## Trade

The Government of India's (GOI) Ministry of Commerce and Industry regulates livestock and livestock product trade. The Department of Animal Husbandry and Dairying (DAHD), housed within the Ministry of Fisheries,

Animal Husbandry and Dairying regulates livestock and livestock product imports, in accordance with Section 3 and Section 3A provisions of the [Livestock Importation Act, 1898](#), ([Livestock Importation Act, Amended 2001](#)) to prevent the entry of exotic diseases through imported livestock<sup>4</sup> and livestock products<sup>5</sup>. Beef cattle slaughter is banned in most Indian states, and India prohibits both beef exports and imports.

## Imports

Live animal imports are subject to restrictions—first, an importer must obtain a license from the Director General of Foreign Trade (DGFT). The DGFT issues licenses based on the DAHD’s recommendation, after examining the proposal and conducting a risk analysis. Similarly, livestock import products are governed by an “open general license,” but are subject to a requisite sanitary import permit (SIP) requirement, which is then issued following a risk analysis (conducted per internationally recognized scientific principles) and a veterinary certificate receipt, to be certified by the competent authority of an exporting country.

## SIP Validity

On April 12, 2020, due to India’s national lockdown and limited national and international transportation, DAHD issued a memorandum extended the validity of SIP permits issued on or after January 1, 2020 for an additional three-month period from the issuance date. Generally, the validity of such livestock product import permits lasts between three and 12 months. On May 12, DAHD further extended the validity to June 30, 2020 for the SIPs that were set to expire beginning March 1, 2020<sup>6</sup>.

## Ports of Entry

Live animal and animal product imports are only allowed through seaports/airports in Bangalore, Chennai, New Delhi, Hyderabad, Kolkata and Mumbai, where animal quarantine and certification services are available. Fish imports and related products are allowed through the seaport of Vishakhapatnam (Andhra Pradesh), seaport and airport of Kochi and the Petrapole Land Custom Station<sup>7</sup> (Bangladesh imports only).

Indian import certification requirements and livestock and livestock products documentation are updated below and available at the following link: <http://dahd.nic.in/trade>. The webpage includes information related to SIPs, official acts, regulatory notifications, import procedures ([live animals](#) and [livestock products](#)) and procedures for recognition of zones/compartments. Tariffs for selected livestock products were updated in the [2020 Livestock Semi-annual](#) published in July 2020, and remain unchanged (See Table 1).

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<sup>4</sup> *Livestock* covers mules, asses, bulls, calves, bullocks, buffaloes, goats, swine, dogs, cats, poultry, parrots, pigeons, canaries, and finches.

<sup>5</sup> Beef is regarded as being separate and distinct from *carabeef*, or water buffalo meat.

<sup>6</sup> Source: [SIP Validity Extended](#)

<sup>7</sup> Source: DAHD

Table 1. India: Tariffs for Select Livestock Products, 2020						
HS Code	Item Description	Basic	IGST	Total Duty with SWS of 10 Percent on BCD	Import Policy	Country Preference
01012100-01012990	Live Horses	30	12	48.96	Restd	SA, Kr, ASN, My, Jp, LDC
01013010-01019090	Live Asses, Mules & Hinnies	30	0	33	Restd	SA, Kr, ASN, My, Jp^, LDC
01022100 -01029090	Live Bovine Animals	30	0	33	Restd	SA, Kr, ASN, My, Jp, LDC
01031000-01039200	Live Swine	30	0	33	Restd	SA, Kr, ASN, My, Jp, LDC
01041010 -01042000	Live Sheep & Goats	30	0	33	Restd	SA, Kr, ASN, My, Jp, LDC, MERC~
01051100 -01059900	Live poultry, that is to say, fowls of the species gallus domesticus, ducks, geese, turkeys and guinea fowls - <i>weighing not more than 185 gram, Grandparent stock, is however, freely importable</i>	30	0	33	Restd	SA, Kr, LDC
01061100-01069000	Other live animals: mammals, birds, insects	30	0	33	Restd	SA, Kr, ASN, My, Jp, LDC \$
02011000 -02013000	Meat of bovine animals, fresh OR chilled	30	0	33	R SanP	SA, Kr, ASN, My, Jp, LDC, Sg+
02021000 -02023000	Meat of bovine animals, frozen, other cuts with/out bone	30	0/5*	33/39.65	R SanP	SA, Kr, ASN, My, Jp, LDC
02031100-02032900	Meat of swine, fresh, chilled or frozen	30	0/5	33/39.65	Fr SanP	SA, Sg, MERC", Kr, ASN, My, Jp, LDC
02041000 -02045000	Meat of sheep or goats, fresh chilled or frozen	30	0/5	33/39.65	Fr SanP	SA, Kr, ASN, My, Jp, LDC
02050000'	Meat of horses, asses, hinnies, fresh, chilled or frozen	30	0/5	33/39.65	Fr SanP	SA, Sg, Kr, ASM, My, Jp, LDC
02062100 -02069090	Edible offal of bovine animals, swine, goats, horses, asses, mules or hinnes, fresh, chilled or frozen	30	0/5	33/39.65	R SanP, (#Fr SanP)	SA, Kr, MERC, CI, My, Jp, LDC, Sg
02071100-02071200	Meat, & edible offal, of the poultry of heading 0105, not cut in pieces, fresh or chilled of species gallus domesticus:	30	0/5	33/39.65	Fr SanP	SA, LDC,
02071300-02071400	Cuts & offal, fresh or chilled or frozen of species gallus domesticus:	100	0/5	110/120.5	Fr SanP	SA, Kr, LDC, CI,
02072400-02076000	Meat, & edible offal, of the poultry of heading 0105, not cut in pieces, fresh or chilled of turkeys, ducks and geese	30	0/5	33/39.65	Fr SanP	SA, Kr, LDC, CI, ASN, Jp, My
<b>Source:</b> Central Board of Indirect Taxes and Customs, GOI						
Note: IGST: Integrated Goods & Services Tax, EC: Education Cess, Restd: Restricted, R SanP: Restricted Sanitary Permit, Fr SanP: Free Sanitary Permit						
The basic duty is exempted Pure-bred breeding horses in heading 0101 2100 (Customs No.20/2017)						
Grandparent stock is freely importable for HS Codes 01050 1100, 0105 1200, 0105 1300, 0105 1400, 0105 1900						
*: '0 percent' for all goods (other than fresh or chilled) other than those put up in unit container bearing a registered brand name and actionable claim is available						
'5 percent' for all goods (other than fresh or chilled) and put up in unit container bearing a registered brand name and actionable claim is available						
Country Preference: ASN: Associaton of Southeast Asian Nations, Sg: Singapore, My: Malaysia, Jp: Japan, MERC: MERCOSUR, LDC: Least Developed Countries, CI:Chile, Kr: Korea (South), SA: SAPTA. Origin Reuirement						
# for liver of sheep and goats, ^ not included for pure-bred breeding animals, ~ for sheep, \$ Japan and Korea not preferred country for Ostrich, Emus, + Singapore for other cuts with bone						
" MERC excluded for carcass & half-carcasses						

## ***Carabeef and Beef Trade***

### ***Exports***

All exported meat products must be processed in abattoirs and meat processing plants registered with the Agricultural and Processed Food Products Export Development Authority (APEDA). Export shipments are subject to compulsory microbiological and other testing to be issued animal health certificates by the certified GOI agency. India exports mostly frozen (halal) boneless *carabeef*, which is typically thawed and resold in wet markets.

Buoyed by the IMF prediction that the Indian economy will recover in IFY 2021<sup>8</sup>, and assuming some demand and a restoration of the domestic supply chain, the CY 2021 Indian *carabeef* exports are projected to recover to 1.2 MMT, some 14.3 percent above the 2020 estimate. Despite the rise, export projections are still less than its five-year average of 1.6 MMT. Cumulative demand from countries who are consistently importing from India, albeit in smaller quantity will help increase Indian export sales, while some of the demand from traditional buyers will be partly met by competitors, thus limiting some Indian sales. Notably, *carabeef* exports from Australia and Brazil were sent to developed markets such as the United States, Japan, China and the United Kingdom, while Indian sales were destined to developing and other price-sensitive markets.

Additionally, the CY 2020 export forecast was revised lower to 1.05 MMT, an 8.7 percent reduction below the previous forecast (1.1 MMT) due to decreased exports, particularly during the national lockdown. After the staggered easing of lockdown restrictions, export sales in the second half of CY 2020 are likely to be modest<sup>9</sup>. As an example, meat processors now must ensure social distancing measures, resulting in reduced slaughter capacity, utilization, efficiency, and profits<sup>10</sup>.

Based on inputs from industry sources, and the most recent 2020 trade data (January-July, value basis, in decreasing order), the top Indian *carabeef* and beef importers were Vietnam, Malaysia, Hong Kong, Egypt (imported upwards of 55,000 MT), followed by Iraq, Saudi Arabia, Indonesia, the Philippines, United Arab Emirates (15,000 to 25,000 MT), and Algeria, the Russian Federation, Oman, Myanmar, Jordan and Bangladesh (less than 15,000 MT).

### ***Carabeef Meat Production, Programs and Policy***

On July 29, 2020, the Ministry of Home Affairs (MHA) issued guidelines for *Unlock-3* a policy where the strict enforcement of COVID-19 lockdown measures in containment zones (only essential activities allowed) were extended until August 31, 2020, with a partial reopening of some activities and services outside the

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<sup>8</sup> India's economy is expected to bounce back in IFY 2021 with a robust six percent growth. However, the projected growth rate of six percent in IFY 2021 is -1.4 percent less than its April forecast. Any incidence of a second wave of COVID-19 can reverse increased mobility and spending, and rapidly tighten financial conditions, triggering debt distress (IMF).

<sup>9</sup> In June 2020, IMF predicted that the Indian economy would contract by 4.5 percent in IFY 2020-21, following a longer COVID-19 related lockdown period.

<sup>10</sup> Even as businesses began to reopen, voluntary social distancing and enhanced workplace safety standards are weighing on business activity.

Containment Zones. Individual state and union territory governments may make their own assessments and prohibit certain activities outside the Containment Zones, or impose other restrictions as deemed necessary.

However, with *Unlock-3*, there are no restrictions on interstate and intrastate movement of persons and goods, and no separate permissions or e-permits are required for such movements ([Unlock-3](#)). Recently, the MHA reiterated this position for eliminating any restrictions on interstate and intrastate movement. There are no separate permission/permit/e-approvals ([MHA Order August 22, 2020](#)).

Additionally, the Food Safety and Standards Authority of India (FSSAI) regulates domestic slaughter and meat processing through the 2011 Food Safety and Standards Rules and Regulation (FSSR). The FSSR also defines standards and regulations for domestic and imported meat products.

Further, as part of the recently announced Atma Nirbhar Bharat Abhiyan (Self Reliant India) initiative, the GOI established a USD \$1.9 billion Animal Husbandry Infrastructure Development Fund (AHIDF). The GOI had earlier approved the Dairy Infrastructure Development Fund (DIDF) worth INR 100 billion (USD \$1.35 billion) to incentivize investments for improved dairy infrastructure. However, micro, small and medium enterprises (MSME) and private companies must be promoted with incentives for them to participate in improved dairy processing and value-added infrastructure in the animal husbandry sector.

AHIDF would incentive infrastructure investments in dairy, meat processing and animal feed processing—the eligible beneficiaries under the AHIDF scheme are farmer-producer organizations (FPO), MSMEs, Section 8 Companies<sup>11</sup>, private companies and individual entrepreneurs. Under this program, ten percent of the infrastructure costs are required from the recipient, with the remaining 90 percent covered by the government loan made available by scheduled banks (Read: [PIB Press Release](#) and [DADF Scheme Guidelines](#)).

### ***Regulation of Import of Livestock Products***

On July 15, 2020, DAHD unveiled a new regulation where Animal Quarantine and Certification Services (AQCS) officials are required to occasionally inspect the sealed samples of goods arriving at customs for physical identification purposes. Out of the 699 Custom Tariff Heads (CTH) lines presently mapped with AQCS for Risk Management, 272 CTHs lines fall under the *No Testing* category (See Table 1).

To facilitate trade and promote an early clearance of imported livestock products, customs sealed samples identified in the *No Testing* category will neither be required nor collected by AQCS for clearing imported consignments. These imported consignments will be granted AQCS clearance through the Single Window System (SWS), based on a Veterinary Health Certificate that is uploaded in the SWS along with other relevant documents when importers file the bill of entry.

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<sup>11</sup> Section 8 companies include the Federation of Indian Chambers of Commerce and Industry (FICCI) and Confederation of Indian Industries (CII). The objective of these companies is facilitating the growth of trade and commerce in India.

**Figure 1. List Custom Tariff Heads Covered under the No Testing Category (Source: DAHD)**

Tariff line covered under No Testing (NT) Category		
Sr. No	ITC HS code	Description of tariff line
1.	03011900	Other
2.	03019200	Eels ( <i>Anguilla</i> spp.)
3.	03019300	Carp ( <i>Cyprinus carpio</i> , <i>Carassius carassius</i> , <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i> )
4.	03019500	Southern bluefin tunas ( <i>Thunnus maccoyii</i> )
5.	03019900	Other
6.	03021300	Pacific salmon ( <i>Oncorhynchus nerka</i> , <i>Oncorhynchus gorboscha</i> , <i>Oncorhynchus keta</i> , <i>Oncorhynchus tshawytscha</i> , <i>Oncorhynchus kisutch</i> , <i>Oncorhynchus masou</i> and <i>Oncorhynchus rhodurus</i> ).
7.	03021400	Atlantic salmon ( <i>Salmo salar</i> ) and Danube salmon ( <i>Hucho hucho</i> )
8.	03021900	Other
9.	03022100	Halibut ( <i>Reinhardtius hippoglossoides</i> , <i>Hippoglossus hippoglossus</i> , <i>Hippoglossus stenolepis</i> )
10.	03022200	Plaice ( <i>Pleuronectes platessa</i> )
11.	03022300	Sole ( <i>Solea</i> spp.)
12.	03022400	Turbots ( <i>Psetta maxima</i> , <i>Scophthalmidae</i> )
13.	03022900	Other
14.	03023100	Albacore or longfinned tunas ( <i>Thunnus alaiunga</i> )
15.	03023200	Yellowfin tunas ( <i>Thunnus albacares</i> )
16.	03023300	Skipjack or stripe-bellied bonito
17.	03023400	Bigeye tunas ( <i>Thunnus obesus</i> )
18.	03023500	Atlantic and Pacific bluefin tunas ( <i>Thunnus thynnus</i> , <i>Thunnus orientalis</i> )
19.	03023600	Southern bluefin tunas ( <i>Thunnus maccoyii</i> )
20.	03023900	Other
21.	03024100	Herrings ( <i>Clupea harengus</i> , <i>Clupea pallasii</i> )
22.	03024200	Anchovies ( <i>Engraulis</i> spp.)
23.	03024400	Mackerel ( <i>Scomber scombrus</i> , <i>Scomber australasicus</i> , <i>Scomber japonicus</i> )
24.	03024500	Jack and horse mackerel ( <i>Trachurus</i> spp.)
25.	03024600	Cobia ( <i>Rachycentron canadum</i> )
26.	03024700	Swordfish ( <i>Xiphias gladius</i> )
27.	03025100	Cod ( <i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i> )
28.	03025200	Haddock ( <i>Melanogrammus aeglefinus</i> )
29.	03025300	Coalfish ( <i>Pollachius virens</i> )
30.	03025400	Hake ( <i>Merluccius</i> spp., <i>Urophycis</i> spp.)
31.	03025500	Alaska Pollack ( <i>Theragra chalcogramma</i> )
32.	03025600	Blue whittings ( <i>Micromesistius poutassou</i> , <i>Micromesistius australis</i> )
33.	03025900	No item found
71.	03036400	Haddock ( <i>Melanogrammus aeglefinus</i> )
72.	03036500	Coalfish ( <i>Pollachius virens</i> )
73.	03036600	Hake ( <i>Merluccius</i> spp., <i>Urophycis</i> spp.)
74.	03036700	Alaska Pollack ( <i>Theragra chalcogramma</i> )
75.	03036800	Blue whittings ( <i>Micromesistius poutassou</i> , <i>Micromesistius australis</i> )
76.	03036900	Other
77.	03038110	Dogfish
78.	03038190	Other sharks
79.	03038300	Toothfish ( <i>Dissostichus</i> spp.)
80.	03038400	Seabass ( <i>Dicentrarchus</i> spp.)
81.	03038910	Hilsa
82.	03038920	Dara
83.	03038930	Ribbon fish
84.	03038940	Seer
85.	03038950	Pomfret (white or silver or black)
86.	03038960	Ghole
87.	03038970	Threadfin
88.	03038980	Croackers, groupers, flounders
89.	03038992	No item found
90.	03043100	Tilapias ( <i>Oreochromis</i> spp.)
91.	03043200	Catfish ( <i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.)
92.	03043300	Nile Perch ( <i>Lates niloticus</i> )
93.	03043900	Other
94.	03044400	Fish of the families Bregmacerotidae, Euclichthyidae, Gadidae, Macrouridae, Melanonidae, Merlucciidae, Moridae and Muraenolepididae
95.	03044500	Swordfish ( <i>Xiphias gladius</i> )
96.	03044600	Toothfish ( <i>Dissostichus</i> spp.)
97.	03044910	Hilsa
98.	03044930	Seer
99.	03044940	Tuna
100.	03044990	Other
101.	03045300	Fish of the families Bregmacerotidae, Euclichthyidae, Gadidae, Macrouridae, Melanonidae, Merlucciidae, Moridae and Muraenolepididae
102.	03045400	Swordfish ( <i>Xiphias gladius</i> )
103.	03045500	Toothfish ( <i>Dissostichus</i> spp.)
104.	03045910	Hilsa
105.	03045930	Seer
106.	03045940	Tuna
107.	03045990	Other
108.	03046200	Catfish ( <i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.)
109.	03046300	Nile Perch ( <i>Lates niloticus</i> )
110.	03046900	Other
34.	03027100	Tilapias ( <i>Oreochromis</i> spp.)
35.	03027200	Catfish ( <i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.)
36.	03027300	Carp ( <i>Cyprinus carpio</i> , <i>Carassius carassius</i> , <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i> )
37.	03027400	Eels ( <i>Anguilla</i> spp.)
38.	03027900	Other
39.	03028100	Dogfish and other sharks
40.	03028200	Rays and skates ( <i>Rajidae</i> )
41.	03028300	Toothfish ( <i>Dissostichus</i> spp.)
42.	03028400	Seabass ( <i>Dicentrarchus</i> spp.)
43.	03028500	Seabream ( <i>Sparidae</i> )
44.	03028910	Hilsa
45.	03028920	Dara
46.	03028930	Pomfret
47.	03028990	Other
48.	03031100	Sockeye salmon (red salmon) ( <i>Oncorhynchus nerka</i> )
49.	03031400	Trout ( <i>Salmo trutta</i> , <i>Oncorhynchus mykiss</i> , <i>Oncorhynchus clarkia</i> , <i>Oncorhynchus aguabonita</i> , <i>Oncorhynchus gilae</i> , <i>Oncorhynchus apache</i> and <i>Oncorhynchus chrysogaster</i> )
50.	03031900	Other
51.	03032300	Tilapias ( <i>Oreochromis</i> spp.)
52.	03032500	Carp ( <i>Cyprinus carpio</i> , <i>Carassius carassius</i> , <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i> )
53.	03032600	Eels ( <i>Anguilla</i> spp.)
54.	03032900	Other
55.	03033200	Plaice ( <i>Pleuronectes platessa</i> )
56.	03033300	Sole ( <i>Solea</i> spp.)
57.	03033400	Turbots ( <i>Psetta maxima</i> , <i>Scophthalmidae</i> )
58.	03033900	Other
59.	03034100	Albacore or longfinned tunas ( <i>Thunnus alaiunga</i> )
60.	03034200	Yellowfin tunas ( <i>Thunnus albacares</i> )
61.	03034300	Skipjack or stripe-bellied bonito
62.	03034400	Bigeye tunas ( <i>thunnus obesus</i> )
63.	03034500	Atlantic and Pacific bluefin tunas ( <i>Thunnus thynnus</i> , <i>Thunnus orientalis</i> )
64.	03034600	Southern bluefin tunas ( <i>thunnus maccoyii</i> )
65.	03034900	Other
66.	03035400	Mackerel ( <i>Scomber scombrus</i> , <i>Scomber australasicus</i> , <i>Scomber japonicus</i> )
67.	03035500	Jack and horse mackerel ( <i>Trachurus</i> spp.)
68.	03035600	Cobia ( <i>Rachycentron canadum</i> )
69.	03035700	Swordfish ( <i>Xiphias gladius</i> )
70.	03036300	Cod ( <i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i> )
111.	03047100	Cod ( <i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i> )
112.	03047200	Haddock ( <i>Melanogrammus aeglefinus</i> )
113.	03047300	Coalfish ( <i>Pollachius virens</i> )
114.	03047400	Hake ( <i>Merluccius</i> spp., <i>Urophycis</i> spp.)
115.	03047500	Alaska Pollack ( <i>Theragra chalcogramma</i> )
116.	03047900	Other
117.	03048200	Trout ( <i>Salmo trutta</i> , <i>Oncorhynchus mykiss</i> , <i>Oncorhynchus clarkii</i> , <i>Oncorhynchus aguabonita</i> , <i>Oncorhynchus gilae</i> , <i>Oncorhynchus apache</i> and <i>Oncorhynchus chrysogaster</i> )
118.	03048300	Flat fish ( <i>Pleuronectidae</i> , <i>Bothidae</i> , <i>Cynoglossidae</i> , <i>Soleidae</i> , <i>Scophthalmidae</i> and <i>Citharidae</i> )
119.	03048400	Swordfish ( <i>Xiphias gladius</i> )
120.	03048500	Toothfish ( <i>Dissostichus</i> spp.)
121.	03048600	Herrings ( <i>Clupea harengus</i> , <i>Clupea pallasii</i> )
122.	03048910	Hilsa
123.	03048930	Seer
124.	03048990	Other
125.	03049100	Swordfish ( <i>Xiphias gladius</i> )
126.	03049200	Toothfish ( <i>Dissostichus</i> spp.)
127.	03049500	Fish of the families Bregmacerotidae, Euclichthyidae, Gadidae, Macrouridae, Melanonidae, Merlucciidae, Moridae and Muraenolepididae, other than Alaska Pollack ( <i>Theragra chalcogramma</i> )
128.	03049900	Other
129.	03051000	Flours, meals and pellets, of fish fit for human consumption
130.	03053100	Tilapias ( <i>Oreochromis</i> spp.), catfish ( <i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.), carp ( <i>Cyprinus carpio</i> , <i>Carassius carassius</i> , <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i> ), eels ( <i>Anguilla</i> spp.), Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa</i> spp.)
131.	03053900	Other
132.	03054200	Herrings ( <i>Clupea harengus</i> , <i>Clupea pallasii</i> )
133.	03054400	Tilapias ( <i>Oreochromis</i> spp.), catfish ( <i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.), carp ( <i>Cyprinus carpio</i> , <i>Carassius carassius</i> , <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i> ), eels ( <i>Anguilla</i> spp.), Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa</i> spp.)
134.	03054900	Other
135.	03055100	Cod ( <i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i> )
136.	03055910	Mumbai Duck
137.	03055920	Seer without head
138.	03055930	Sprats
139.	03055990	Other
140.	03056100	Herrings ( <i>Clupea harengus</i> , <i>Clupea pallasii</i> )
141.	03056200	Cod ( <i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i> )

142.	03056400	Tilapias (Oreochromis spp.), catfish (Pangasius spp., Silurus spp., Clarias spp., Ictalurus spp.), carp (Cyprinus carpio, Carassius carassius, Ctenopharyngodon idellus, Hypophthalmichthys spp., Cirrhinus spp., Mylopharyngodon piceus), eels (Anguilla spp.), Nile perch (Lates niloticus) and snakeheads (Channa spp.)	180.	03082900	Other
143.	03056910	Mumbai duck	181.	03083010	Live, fresh or chilled
144.	03056920	Seer without head	182.	03083020	Dried, salted or frozen
145.	03056930	Sprats	183.	03089000	Other
146.	03056990	Other	184.	04063000	Processed Cheese not grated or powdered
147.	03057100	Shark fins	185.	04064000	Blue-veined cheese and other cheese containing veins produced by <i>Penicillium roqueforti</i>
148.	03057200	Fish heads, tails and maws	186.	04069000	Other cheese
149.	03057900	Other	187.	04071100	Of fowls of the species <i>Gallus domesticus</i>
150.	03061100	Rock lobster and other sea craw fish ( <i>Palinurus</i> spp., <i>Panulirus</i> spp., <i>Jasus</i> spp.)	188.	04071910	Of ducks
151.	03061210	Whole cooked	189.	04100010	Of wild animals
152.	03061290	Other	190.	05040039	Other
153.	03061400	Crabs	191.	05051010	Of wild birds
154.	03061500	Norway lobsters ( <i>Nephrops norvegicus</i> )	192.	05051090	Other
155.	03061610	Accelerated Freeze Dried(AFD)	193.	05059010	Peacock tail and wing feather (trimmed or not)
156.	03061690	Other	194.	05059021	Of wild birds
157.	03061711	Accelerated Freeze Dried(AFD)	195.	05059029	Other
158.	03061719	Other	196.	05059031	Of wild birds
159.	03061790	Other	197.	05059039	Other
160.	03061900	Other, including flours, meals and pellets, of crustaceans, fit for human consumption	198.	05059091	Of wild birds
161.	03071100	Live, fresh or chilled	199.	05059099	Other
162.	03071900	Other	200.	05100010	Bezoar, cow ( <i>goolochan</i> )
163.	03072900	Other	201.	05100020	Ox Gallstone
164.	03073100	Live, fresh or chilled	202.	05100091	Of wild animals
165.	03073910	Clams, clam meat ( <i>bivalves-Victorita</i> , spp., <i>Mertrix</i> spp. and <i>Kataysia</i> spp.)	203.	05100099	Other
166.	03073990	Other	204.	15021010	Mutton tallow
167.	03074920	Whole squids, frozen	205.	15021090	Other
168.	03074930	Dried squids	206.	15029010	Unrendered fats
169.	03074990	Other	207.	15029020	Rendered fats or solvent extraction fats
170.	03075100	Live, fresh or chilled	208.	15029090	Other
171.	03075900	Other	209.	15030000	Lard Stearin, Lard Oil, Oleostearin, Oleo-Oil and Tallow Oil, not emulsified or mixed or otherwise prepared
172.	03076000	Snails, other than sea snails	210.	15041099	Other
173.	03077100	Live, fresh or chilled	211.	15042030	Sperm oil
174.	03077900	Other	212.	15042090	Other
175.	03079100	Live, fresh or chilled	213.	15043000	Fats and oils and their fractions, of marine mammals
176.	03079900	Other	214.	15060010	Neats Foot oil and fats from bone or waste
177.	03081100	Live, fresh or chilled	215.	15060090	Other
178.	03081900	Other	216.	15161000	Animal fats and oils and their fractions
179.	03082100	Live, fresh or chilled	217.	15171010	Of animal origin
			218.	15179030	Imitation lard of animal origin
			219.	15180040	Other
			220.	15220010	Degras
			221.	15220020	Soap stocks
			222.	15220090	Other

223.	21039090	Other	262.	51011900	Other
224.	21041010	Dried	263.	51021190	Other
225.	21041090	Other	264.	51021910	Marine Angora
226.	21042000	Homogenised composite food preparations	265.	51022090	Other (excluding pig & boar bristles)
227.	21061000	Protein concentrates and textured protein substances	266.	51031090	Other
228.	30012090	Other	267.	51032090	Other
229.	30029030	Animal blood prepared for therapeutic, prophylactic or diagnostic uses	268.	96019010	Worked tortoise-shell and articles thereof
230.	30039090	Other	269.	96019020	Worked mother-of-pearl and articles thereof
231.	31010091	Animal dung	270.	96019030	Worked bone (excluding whale bone) and articles thereof
232.	35011000	Casein	271.	96019040	Worked horn, coral and other animal carving material and articles thereof
233.	35019000	Other	272.	96020030	Gelatin capsules, empty
234.	35030010	Isinglass			
235.	35030090	Other			
236.	35040099	Other			
237.	41012090	Other			
238.	41015020	Of buffalo, including buffalo calf			
239.	41019010	Of cow, including cow calf			
240.	41019090	Other			
241.	41022130	Lamb pelt			
242.	41022910	Sheep skins			
243.	41022920	Lamb skins			
244.	41039000	Other			
245.	41041100	Full gains, unsplit, grain splits			
246.	41041900	Other			
247.	41064000	Of reptiles			
248.	41133000	Of reptiles			
249.	41139000	Others			
250.	41141000	Chamois (including combination chamois) leather			
251.	41142010	Patent leather and patent laminated leather			
252.	41142020	Metallised leather			
253.	41151000	Composition leather with a basis of leather or leather fiber, in slabs, sheets or strip, whether or not in rolls			
254.	41152010	Cuttings of leather			
255.	41152090	Other			
256.	43011000	Of mink, whole, with or without head, tail or paws			
257.	43013000	Of lamb, the following: Astrakhan, Broadtail, Caracul, Persian and Similar lamb, Indian, Chinese, Mongolian or Tibetan lamb, whole, with or without head, tail or paws			
258.	43016000	Of fox, whole, with or without head, tail or paws			
259.	43018000	Other furskins, whole, with or without head, tail or paws			
260.	43019000	Heads, tails, paws and other pieces or cuttings, suitable for furriers' use			
261.	51011100	Shorn wool			

## Livestock Feed and Animal Health

### *Livestock Health*

Through DAHD's Livestock Health & Disease Control scheme, preventative efforts are made to control and contain critically important animal diseases of such as foot and mouth disease (FMD), *peste des petits ruminants* (PPR, or sheep and goat plague), brucellosis and anthrax. The DADF also provides financial assistance to Animal Health Institutions under a Central Sector scheme (Source: [Livestock Health and Disease Control DAHD](#)).

For trading purposes, FMD is the most critical disease for India to manage<sup>12</sup>, and has a World Organization for Animal Health (OIE)-endorsed official program (initiated May 2015) for controlling the disease. On May 31, 2019, India's Union Cabinet approved a new scheme in the National Animal Disease Control Program (NADCP<sup>13</sup>) to manage foot and mouth disease and brucellosis outbreaks ([PIB Press release July 2019](#)). [Under this program, the GOI plans to](#) vaccinate over 600 million cattle nationally, in an effort to mitigate the two diseases (See: [PIB Press Release NACDP](#)).

On May 21, 2020, DAHD reported to the OIE its first occurrence of [African swine fever](#) (ASF) virus in northeast India. To manage this outbreak and prevent ASF progression to further reach an endemic status, the DAHD prepared a disease control strategy to guide state governments on how to prevent, control and contain ASF in accordance with OIE and UN-Food and Agriculture Organization recommendations.

ASF is highly contagious and highly fatal disease in domestic and feral pigs (including wild boar), transmitted through direct and indirect contacts, ingestion of contaminated feedstuffs and by certain tick vector species. The disease does not infect humans (nor zoonotic) or other livestock species. However, no vaccine or drugs are presently available to prevent ASF infections<sup>14</sup>.

### *Livestock Feed*

On July 24, 2020, the GOI's FSSAI extended the compliance date for stakeholders to adopt revised standards established by the Bureau of Indian Standards regarding commercial feed and feed ingredients intended for meat and dairy animals. The new compliance date is January 1, 2021 and has been extended to accommodate requests from industry stakeholders to postpone the implementation period due to COVID-19 and the GOI lockdown. (See: [GAIN IN2020-0094](#)).

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<sup>12</sup> FMD affects cloven-hoofed animals, including domestic and wild bovines, is fatal, resulting in reduced milk production.

<sup>13</sup> The NADCP aims to control and eradicate FMD and brucellosis in India's beef and *carabeef* herds.

<sup>14</sup> See: [GOI National Action Plan for ASF](#).

## Production, Supply and Demand Statistics

<b>Table 2. India: Commodity, Animal Numbers, Cattle, PSD</b>						
Animal Numbers, Cattle Market Year Begins	2019		2020		2021	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
India						
Total Cattle Beg. Stks (1000 HEAD)	302700	302700	303200	303200	0	305500
Dairy Cows Beg. Stocks (1000 HEAD)	125340	125340	126500	126500	0	127650
Beef Cows Beg. Stocks (1000 HEAD)	0	0	0	0	0	0
Production (Calf Crop) (1000 HEAD)	69000	69000	69400	69400	0	69800
Total Imports (1000 HEAD)	0	0	0	0	0	0
Total Supply (1000 HEAD)	371700	371700	372600	372600	0	375300
Total Exports (1000 HEAD)	0	0	0	0	0	0
Cow Slaughter (1000 HEAD)	0	0	0	0	0	0
Calf Slaughter (1000 HEAD)	0	0	0	0	0	0
Other Slaughter (1000 HEAD)	38900	38600	37400	34750	0	36000
Total Slaughter (1000 HEAD)	38900	38600	37400	34750	0	36000
Loss and Residual (1000 HEAD)	29600	29900	30140	32350	0	32600
Ending Inventories (1000 HEAD)	303200	303200	305060	305500	0	306700
Total Distribution (1000 HEAD)	371700	371700	372600	372600	0	375300
Note: Post Data is not Official USDA Data						

<b>Table 3. India: Commodity, Meat, Beef and Veal, PSD</b>						
Meat, Beef and Veal Market Year Begins	2019		2020		2021	
	Jan 2019		Jan 2020		Jan 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
India						
Slaughter (Reference) (1000 HEAD)	38900	38600	37400	34750	0	36000
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	4305	4270	4150	3650	0	3960
Total Imports (1000 MT CWE)	0	0	0	0	0	0
Total Supply (1000 MT CWE)	4305	4270	4150	3650	0	3960
Total Exports (1000 MT CWE)	1494	1494	1400	1050	0	1200
Human Dom. Consumption (1000 MT CWE)	2811	2776	2750	2600	0	2760
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	2811	2776	2750	2600	0	2760
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total Distribution (1000 MT CWE)	4305	4270	4150	3650	0	3960
Note: Post Data is not Official USDA Data						

### Attachments:

No Attachments