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Report Highlights:

FAS New Delhi (Post) forecasts India's market year (MY) 2024 (January-December) cattle herd at 307.42 million head, up marginally from 307.4 million head in 2023. A gradual pace of growth is likely to persist in the short- to medium-term. Government policy and focused action are propelling this growth. The production of Indian carabeef (i.e., meat derived from the Asian domestic water buffalo) is supplying domestic and international demand. Post estimates in MY 2024 carabeef production at 4.61 million metric tons (MMT) on a carcass-weight-equivalent (CWE) basis, compared to 4.47 MMT in 2023. Domestic consumption is likely to grow to 2.97 MMT in 2024, up from 2.92 MMT in 2023. Exports are expected to jump to 1.64 MMT in 2024, up from 1.55 MMT in 2023.

EXECUTIVE SUMMARY

FAS New Delhi (Post) in market year (MY) 2024 (January-December) estimates India's national cattle herd number, comprised of bovine dairy cattle (*Bos taurus and Bos indicus*) and the Asian domestic water buffalo (*Bubalus bubalis*) at 307.42 million head, marginally up from the 2023 herd count of 307.4 million head. Gradual herd growth is expected to continue throughout the short- to medium-term.

India's calf crop in 2024, is expected to roll in at 70.6 million head, up from 70.2 million head in 2023. This incremental growth in calf crop numbers is attributed to bettering animal health, improved nutrition, and a growing emphasis on increasing exports of carabeef (i.e., beef derived from the domestic water buffalo). With the waning of lumpy skin disease (LSD) in 2023, India's cattle herd numbers are expected to continue to grow.

India's carabeef production is expanding as a result of increasing domestic and international market demands. India's MY 2024 carabeef production is estimated at 4.61 million metric tons (MMT) on a carcass-weight-equivalent (CWE) basis, up from 4.47 MMT in 2023.¹ Pricing, both domestically and internationally, compared to that of the other red meats is a key demand-defining variable for carabeef production.

India's MY 2024 carabeef consumption is estimated to come in at about 2.97 MMT, up slightly from MY 2023's volume of 2.92 MMT. Domestic consumption increases are attributable to the country's growing, youthful population, combined with greater dietary awareness and evolving tastes. At the same time, there has been an increase in the marketing and promotion of carabeef consumption.

India's carabeef exports gained good momentum in MY 2023. In 2024 India's carabeef exports are similarly expected to sustain and expand on the previous year's gains. MY 2024 carabeef exports are estimated at 1.64 MMT, up nearly six percent from 2023's volume of 1.55 MMT. India's carabeef exports in 2023, benefitted from greater than anticipated demand coming from Vietnam, Saudi Arabia, Iraq, the United Arab Emirates (UAE), Jordan, Oman, Philippines, Hong Kong (Special Administrative Region of China - SAR), Uzbekistan, and Singapore.

¹ All data being reported herein is in a carcass-weight-equivalent (CWE) basis.

COMMODITIES

CATTLE

Table 1. India: Commodity, Cattle – Production, Supply and Distribution (PSD)

Animal Numbers, Cattle Market Year Begins India	2022		2023		2024	
	Jan 2022		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stks (1000 HEAD)	306700	306700	307400	307400	307635	307420
Dairy Cows Beg. Stocks (1000 HEAD)	128650	128650	129300	129300	130700	130690
Beef Cows Beg. Stocks (1000 HEAD)	0	0	0	0	0	0
Production (Calf Crop) (1000 HEAD)	70000	70000	70200	70200	70400	70580
Total Imports (1000 HEAD)	0	0	0	0	0	0
Total Supply (1000 HEAD)	376700	376700	377600	377600	378035	378000
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)	39450	39450	39965	40180	40700	40980
Total Slaughter (1000 HEAD)	39450	39450	39965	40180	40700	40980
Loss and Residual (1000 HEAD)	29850	29850	30000	30000	29635	29550
Ending Inventories (1000 HEAD)	307400	307400	307635	307420	307700	307470
Total Distribution (1000 HEAD)	376700	376700	377600	377600	378035	378000

Note: Post data is not official USDA data

PRODUCTION

FAS New Delhi (Post) in market year (MY) 2024 (January-December) estimates India's national cattle herd number, which is comprised of both bovine dairy cattle (*Bos taurus and Bos indicus*) and the Asian domestic water buffalo (*Bubalus bubalis*), at 307.42 million head, up marginally from 307.4 million head in 2023. Gradual herd growth is expected to continue in the short- to medium-term.

India's calf crop in 2024, is expected to roll in at over 70.5 million head, up from 70.2 million head in 2023. Measured growth in calf crop numbers is attributed to bettering animal health, improved nutrition, and a growing emphasis on increasing exports of carabeef (i.e., beef derived from the domestic water buffalo).² With the waning of lumpy skin disease (LSD) in 2023, India's cattle herd numbers are expected to continue to grow (see, [GAIN-INDIA | IN2023-0060 | Livestock and Products Annual - 2023](#)).

With herd numbers increasing, India's carabeef production supply is expanding to meet increasing domestic and international market demand. India's MY 2024 carabeef production is

² For the India fiscal year (IFY) (April-March) 2023-2024, the central government is allocating Indian rupees (INR) 39.2 billion (~\$489 million) to India's Department of Animal Husbandry and Dairying (DAHD). For 2024-2025 the budgetary allocation figure is set to increase to INR 45.2 billion (~\$565 million) (see, India Budget, Government of India at <https://www.indiabudget.gov.in/doc/eb/sbe44.pdf>).

estimated at 4.61 million metric tons (MMT) on a carcass-weight-equivalent (CWE) basis, up from 4.47 MMT in 2023.³ Pricing, both domestically and internationally, compared to that of the other red meats is a key demand-defining variable for expanded Indian carabeef production.

Slaughter Numbers: India’s MY 2024 other slaughter number is expected at nearly 41 million head, an uptick from 2023’s 40.2 million head. Post attributes the 2024 increase in slaughter numbers mainly to higher carabeef production being channeled to the export market.

Loss and Residual: For MY 2024, Post is estimating a lower loss and residual figure for India’s national cattle herd. It is foreseen that over 29.5 million head will be tallied up in losses and residual in 2024. In 2023, the loss and residual figure of 30 million head was tempered towards the second half of the year by the waning of the 2022 lumpy skin disease outbreak. It is anticipated that thanks to improved cattle movement controls, vaccinations, and treatment, LSD should not be of major concern in 2024.

TRADE

Import: India’s Department of Animal Husbandry and Dairying (DAHD) regulates the import of livestock in the country through Section 3 and Section 3A of the Livestock Importation Act (1898), seeking to prevent the entry of exotic diseases through imports.

Currently, there are no cattle for slaughter being imported into India. As per the Export-Import Policy, the import of live animals is subject to a restricted list – items not free to import. Acquiring an import license from the Ministry of Commerce and Industry’s (MOCI) Director General of Foreign Trade (DGFT) is an import pre-requisite. The government is authorized to regulate, restrict, and prohibit the import of live animals.

Exports: In MY 2023, India officially records exports of just 276 live animals (i.e., Asian domestic water buffaloes) to neighboring Bangladesh.⁴

³ All data being reported herein is in a carcass-weight-equivalent (CWE) basis.

⁴ Media reports claim that there is an ongoing illicit trade in cattle across the India-Bangladesh border. Trade in bovine animals among the two neighboring countries has been ongoing since pre-independence. See, Times of India, “How Millions of Indian Cattle End Up in Bangladesh,” (March 26, 2023) at <https://timesofindia.indiatimes.com/india/how-millions-of-indian-cattle-end-up-in-bangladesh/articleshow/99004187.cms?from=mdr>.

COMMODITIES

MEAT, BEEF AND VEAL

Table 2. India: Commodity, Meat, Beef and Veal – Production, Supply and Distribution

Meat, Beef and Veal Market Year Begins	2022		2023		2024	
	Jan 2022		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
India						
Slaughter (Reference) (1000 HEAD)	39450	39450	39965	40180	40700	40980
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	4350	4350	4435	4470	4555	4610
Total Imports (1000 MT CWE)	0	0	0	0	0	0
Total Supply (1000 MT CWE)	4350	4350	4435	4470	4555	4610
Total Exports (1000 MT CWE)	1442	1442	1420	1551	1460	1640
Human Dom. Consumption (1000 MT CWE)	2908	2908	3015	2919	3095	2970
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	2908	2908	3015	2919	3095	2970
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total Distribution (1000 MT CWE)	4350	4350	4435	4470	4555	4610

Note: Post data is not official USDA data

PRODUCTION

India's carabeef (derived from the Asian domestic water buffalo) industry's production is growing to meet both domestic and international market demand.⁵ Expansion in carabeef production is tied to herd growth in India's dairy sector.⁶ At the same time, India prohibits the slaughter of live bovine dairy cattle (i.e., *B. taurus* and *B. indicus*), that is in all, but a handful states, which limits the slaughter to water buffalo.⁷

⁵ The rising number of slaughter and meat processing facilities in India explains the upward trend in carabeef production. As on [November 2023](#), there are 61 Integrated slaughter and meat processing plants, and 13 processing plants for carabeef. India is the largest producer of carabeef in the world. In addition to the modern processing facilities, the government approved slaughter plants meet domestic consumption needs. Over fifty percent of the government approved plants in India are Uttar Pradesh. The local municipal bodies are mandated to regulate operations of government slaughterhouse, sale of animals, and control of private slaughterhouses. Buffalo meat wholesalers and retailers purchase meat from the approved slaughterhouses against a license from municipal corporations.

⁶ Indian carabeef is a largely a byproduct of the dairy sector. The Asian water buffaloes that are spent – no longer produce milk, and unproductive – not fit for breeding, are slaughtered for meat. Buffaloes in India are not raised specifically for meat purpose. In 2010, a program called Salvaging and Rearing of Male Buffalo Calves (SRMBC) was introduced by the central government to boost buffalo rearing for slaughter. The farmers were to be provided subsidies to raise male buffaloes for meat. The intent was to maximize resource use and minimize mortality of uncared and abandoned male buffaloes. However, the program never took-off.

⁷ All the states in the country, except for Kerala, Arunachal Pradesh, Meghalaya, Nagaland, Sikkim, Tripura, Manipur, West Bengal, and Mizoram, prohibit cow slaughter (see, Government of India, Rajya Sabha, unstarred question No. 3464 at <https://dahd.nic.in/sites/default/files/RS3464.pdf>).

FAS New Delhi estimates India's MY 2024 carabeef production at 4.61 MMT (CWE), up by about three percent from 4.47 MMT in 2023. Post is attributing higher carabeef production numbers to the combination of a rise in slaughter numbers along with improving cattle body weights. With larger outlays of central government funding earmarked for improving animal health and nutrition, animal weights are on the rise.

Policy Support for Livestock Sector: The Indian government aims to improve:

- 1. Carabeef Exports:** India's Agricultural and Processed Food Products Export Development Authority (APEDA) extends [support](#) to stimulate exports of meat and meat products. Such support entails the development of export infrastructure, quality development, and market development.⁸
- 2. Bovine Population:** Both central and states governments run programs and campaigns to increase cattle herd size, especially of water buffaloes. This aligns with farmers' interest in raising buffaloes to profit from high prices for dairy fat, and spent buffalo cows for slaughter (see, [GAIN-INDIA | IN2023-0060 | Livestock and Products Annual - 2023](#) and [GAIN-INDIA | IN2023-0072 | Dairy and Products Annual – 2023](#)).⁹
- 3. Animal Health:** The Indian government's Livestock Health and Disease Control Program (2019-2020 and 2023-2024), with an operational budget of over INR 126.5 billion (~\$1.8 billion), provides veterinary care for bovine animals (see, [GAIN-INDIA | IN2023-0072 | Dairy and Products Annual – 2023](#)).
- 4. Animal Nutrition:** The National Livestock Mission (NLM) and the Animal Husbandry Infrastructure Development Fund (AHIDF) are two key agricultural development schemes seeking to ameliorate India's fodder shortage (see, [GAIN-INDIA, | IN2023-0060 | India - Livestock and Products Annual - 2023](#)). The 2024-2025 interim budget allocates some \$3.5 billion to the Animal Husbandry Infrastructure Development Fund (AHIDF) through 2025-2026.

⁸ India's Agricultural and Processed Food Products Export Development Authority (APEDA) is the apex-export trade promotion government body. It focuses on export promotion of 15 scheduled products including, fruits, vegetables and their products, meat and meat products, poultry and poultry products, dairy products, confectionary, biscuits and bakery products, honey, jaggery and sugar products, cocoa and its products, chocolates of all kinds, alcoholic and non-alcoholic beverages, cereals and cereal products, groundnuts, peanuts and walnuts, pickles, chutneys and *papads*, guar gum, floriculture and floriculture products, herbal and medicinal plants, and cashew kernels, cashew nutshell liquid, and *kardanol*. APEDA's objectives as per Section 10(2) of the APEDA Act include, development of industries by providing financial assistance, undertaking surveys and feasibility studies, registration of exporters, fixing of standards and specifications for scheduled export products, carrying out of inspection of meat and meat products in slaughterhouse, processing, plant, storage premises, conveyances or other places where such products are kept or handled, improving of packaging, and marketing and promotion of export products (see, APEDA Operational Guidelines at https://apeda.gov.in/apedawebsite/Announcements/FAS_Guidelines_05102021.pdf?v=1).

⁹ In 2023, the prices of milk fat soared by 25 percent in India. Prices of full cream milk, comprising six percent fat and nine percent solids-not-fat (SNF) were over 20 percent higher than that of the toned milk, comprising three percent fat and 8.5 percent SNF. Price of buffaloes sold for slaughter have been rising steadily. In the state of Uttar Pradesh, it increased from less than \$375/buffalo in 2022 to nearly \$435/buffalo by 2023.

Other Dairy Development Programs:

- **Financial Incentives:** The Indian government is providing financial incentives to dairy farmers to produce milk. In some states the incentives are worth upwards of ~\$0.06/kilogram (kg) for procured milk (see, [GAIN-INDIA | IN2023-0072 | Dairy and Products Annual – 2023](#)).
- **Financial Credit:** In Indian fiscal year (IFY) 2023, of the total agricultural credit disbursement of \$222 million, nearly 12 percent targeted animal husbandry, dairy, poultry, and fisheries sectors. For the IFY [2024-2025 \(interim budget\)](#), agricultural loan amounts – for the animal husbandry, dairy and fisheries sectors – has increased to over INR 20 trillion (~\$240 billion), with the Indian government allocating INR 230 billion (~\$2.8 billion) in IFY 2024-2025.

CONSUMPTION

FAS New Delhi estimates India's MY 2024 (domestic) carabeef consumption at 2.97 MMT, up from 2.92 MMT in 2023. Indians are growing increasingly fond of consuming meat and processed meat products. The greatest receptivity for carabeef comes from more youthful consumers who are better inclined to changing dietary preferences and are more nutrition conscious.¹⁰

Animal protein pricing is a critical demand-defining variable. Carabeef, remains the most affordable and nutrition-filled red meat available today in India.¹¹ Additionally, accelerating disposable income, fast-paced urbanization, easy availability with growing outreach of supermarkets, hypermarkets, and online retail sale, and growing awareness of international cuisines are stimulating higher consumption.

Price: Domestically, besides taste and preferences, price continues to be a critical variable for carabeef demand. In 2023, the price indexes of various types of meat in India have fluctuated due to supply-side factors.¹² With the exception of inland fish, all other livestock products have closed at higher prices in November 2023 than at the beginning of the year. Based on average price indexes of 2023, except for poultry (chicken), prices for all meat types increased in 2023

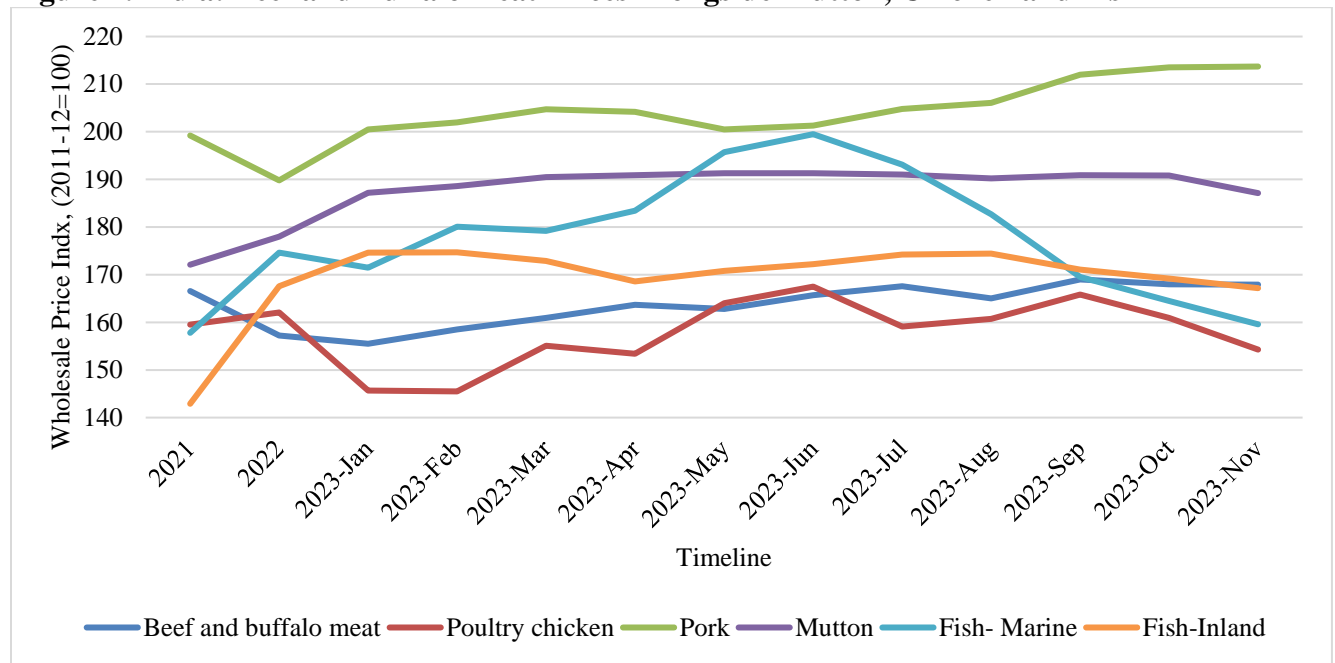
¹⁰ As much as 80 percent of the total Indian population is Hindu by religion; and will avoid buffalo meat consumption. On the other hand, the Muslims and Christians, the section commonly consuming bovine meat, constitute 16.5 percent of the total population. As per World Population Review, 2021, the Indian youth population, people below the age of 35 years, constitute nearly 65 percent of the total population of the country (see, World Population Review at <https://worldpopulationreview.com/country-rankings/hindu-countries>). The Indian population consuming non-vegetarian foods is increasing. According to India's National Family Health Survey – 5 (NFHS-5), (2019-20) [over 83 percent](#) of population between the age group of 15-49 years consume non-vegetarian foods including chicken, meat or fish (see, NFHS-5 Report Volume I at <https://rchiips.org/nfhs/>).

¹¹ The average retail price (January 2023, Delhi) of buffalo meat was found quoted at INR 300-350/kg. This is lower than the other red meat prices, such as that of pork was INR 900-1200/kg, and goat meat was priced at INR 800-900/kg.

¹² Supply side factors include erratic weather, animal disease outbreaks, rising cost of production – feed/fodder and labor cost.

relative to 2022. In India, pork remains the most expensive meat, while carabeef is the most affordable of the different types of red meats available in the country.

Figure 1. India: Beef and Buffalo meat Prices Alongside Mutton, Chicken and Fish



Source: Government of India, Office of Economic Advisor, and FAS New Delhi Office Research

TRADE

Imports: None. India’s DAHD regulates the import of livestock products by the provision of Section 3 and Section 3A of the Livestock Importation Act (1898). As per the country’s export-import policy, such imports are categorized under Open General License (OGL) and are subject to a sanitary import permit (SIP), valid for six-months to a year. This license is issued following a risk analysis (as per internationally recognized scientific principles), and receipt of a veterinary certificate issued by a competent authority of the exporting country.

Exports: Indian carabeef exports are gaining momentum. The Indian carabeef is cost competitive with other red meats and is perceived as being more natural. Indian government statistics indicate that carabeef and carabeef products exports make up almost 79 percent of the total animal products exports from India in 2022-2023 (April-March). Nonetheless, exports of meat from bovine dairy cows, oxen, and calves continue to be prohibited. It is mandatory for all meat processing facilities that process meat and meat products for export to be registered with APEDA. As of 2022, there are 67 integrated slaughter and meat processing plants registered with APEDA. Carabeef and products, for export, are subject to microbiological and other testing prior to obtaining an animal health certificate issued by a certified Indian government agency.

FAS New Delhi estimates India’s MY 2024 exports of carabeef at 1.64 MT, up by over five percent from 2023’s volume of 1.55 MMT. Post’s trade sources comment that besides the usual trend to export to established international markets, 2023 witnessed a greater than anticipated

rise in carabeef and carabeef product exports to Vietnam, Saudi Arabia, Iraq, the UAE, Jordan, Oman, Philippines, Hong Kong (SAR), Uzbekistan, and Singapore.

Price: Lower pricing makes Indian-origin carabeef price competitive, especially in the middle-to low-income countries. While the average export price/kg of Indian carabeef is \$2.05, that of beef and beef products from the United States, Australia, New Zealand, Brazil, and Argentina – the top beef exporters in the world – are priced at \$6.73, \$5.81, \$5.00, \$4.34, and \$4.27, respectively (estimated as the value of export/quantity exported, source Trade Data Monitor, 2023). Political-military upheavals in the Red and Black Sea regions will limit some carabeef exports as sea freight and insurance rates escalate in response.

Requirement of Halal Certification – Exports/Imports: On April 6, 2023, the Ministry of Commerce and Industry/Directorate of Foreign Trade issued [Notification No. 03/2023 - Final Guidelines, Streamlining of the Halal Certification Process for Meat and Meat Products](#) in which the central government amends the policy conditions for meat and meat products (see, [GAIN-INDIA | IN2023-0054 | India Halal Market – Update July 2023](#)).

Attachments:

No Attachments