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## India

## Livestock and Products

## Annual

## 2001

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### Report Highlights:

**Moooooving Up: India exported an estimated 300,000 tons of beef (largely water buffalo meat) in CY2000, nosing out Ireland as the world's seventh largest supplier. This year's exports are expected to top 375,000 tons.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
New Delhi [IN1], IN

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## **PART I: SITUATION AND OUTLOOK**

### **Production**

Improved fodder supplies and better prices for meat animals are expected to boost cattle/buffalo populations by about two percent in CY 2002. Preference for water buffalos (which make up 45 percent of the bovine population) continues to increase due to the higher fat yield of their milk, their ability to thrive on inferior rations, and the expanding export market for carabeef (buffalo meat). Unlike for cattle, most states have fewer restrictions on the slaughter of buffaloes, thus allowing the growth of this largely export-driven meat sector. Although the slaughter of cows is banned in all but two states due to religious sensitivities, some illegal slaughter does occur.

Use of commercial feeds in the meat and dairy sectors is extremely low as most herds consist of just a few animals, dependent upon locally available feedstuffs. The continued capitalization of the dairy and meat-export sectors is expected, however, to lead to the greater use of commercial feeds. Currently, bovines consume only about 5 percent of India's 96 million tons of compound feeds. Most goes to the poultry sector.

### **Consumption**

Livestock slaughter remains mainly a small-scale operation, done in street corner shops in an unorganized manner. This responds to strong consumer preference for freshly slaughtered meat. The market for fresh/chilled meat is weak, and most consumers continue to have a very negative view of frozen meat. Demand for sheep/goat meat continues to outstrip supply. The current retail price of sheep/goat meat averages \$2.50/kg compared with \$1.60/kg. for poultry meat and \$1.38/kg for beef. Per capita consumption of beef (considered to be the poor man's meat) is estimated at 1.75 kg. Sheep/goat consumption is 700 grams/capita, and poultry consumption is about 800 grams. At the institutional level, cheap beef is often blended with small amounts of the more expensive sheep/goat meat to enhance its taste and texture..

### **Production Policy**

The Indian livestock sector receives no government assistance except for the GOI's funding of research and animal health programs. These are largely oriented towards milk, rather than meat production. Development of the meat industry falls largely to the private sector. There are seven export-oriented plants which have incorporated HACCP and/or ISO 9000 standards, in addition to the government's BIS standards which are obligatory for export-oriented slaughter houses.

Private meat processors develop their respective catchment areas through a variety of services (e.g., feed, breeding, veterinary support). A few have established disease free zones in order to overcome the tough quarantine requirements stipulated by buyers. Some animals are raised under buyback guarantees. These measures by the private sector have led to reduced male calf deaths, particularly in the buffalo population, which earlier considered bull calves a liability.

**Trade**

Trade in live bovine animals is effectively banned by licensing requirements due to quarantine considerations. Since August 1999, the GOI has also banned the import of bovine, ovine and caprine embryos/ova/semen; fresh meat, meat products, tissue/organ; and meat and bone meal of ruminant origin from countries where any of the TSE diseases have been reported.

Meat and meat product exports are permitted subject to periodic inspections by APEDA, the nodal agency monitoring meat exports. Indian beef exports are estimated have nearly doubled to 300,000 tons in 2000, from an estimated 167,000 tons in 1999. Besides increased exports to traditional markets in the Middle East, Malaysia, Philippines, Thailand and Mauritius, there has been a significant increase to relatively new African markets such as Egypt, Gabon, etc., due to their bans on EU meat imports. This has boosted 2001 export prospects to 375,000 tons. Trade sources forecast 2002 beef exports at 410,000 tons, especially if supported by improved access to the Russian market.

India, though claiming to be a secular state, prohibits beef imports due to religious sensitivities.

**PART II: STATISTICAL TABLES**

## Commodity, Animal Numbers, PSD

PSD Table							
Country:							
Commodity:							
		2000		2001		2002	UOM
	Old	New	Old	New	Old	New	
Calendar Year Begin							(MONTH/YEAR)
Total Cattle Beg. Stks	312572	312572	313774	313774	0	320200	(1000 HEAD)
Dairy Cows Beg. Stocks	132800	132800	134000	134000	0	134900	(1000 HEAD)
Beef Cows Beg. Stocks	0	0	0	0	0	0	(1000 HEAD)
Production (Calf Crop)	45200	45200	45800	45800	0	46700	(1000 HEAD)
Intra EC Imports	0	0	0	0	0	0	(1000 HEAD)
Other Imports	2	2	2	2	0	1	(1000 HEAD)
TOTAL Imports	2	2	2	2	0	1	(1000 HEAD)
TOTAL SUPPLY	357774	357774	359576	359576	0	366901	(1000 HEAD)
Intra EC Exports	0	0	0	0	0	0	(1000 HEAD)
Other Exports	0	0	0	0	0	0	(1000 HEAD)
TOTAL Exports	0	0	0	0	0	0	(1000 HEAD)
Cow Slaughter	1400	1400	1300	1300	0	1250	(1000 HEAD)
Calf Slaughter	2900	2900	2800	2800	0	2800	(1000 HEAD)
Other Slaughter	8700	8700	9100	9500	0	10200	(1000 HEAD)
Total Slaughter	13000	13000	13200	13600	0	14250	(1000 HEAD)
Loss	31000	31000	25800	25776	0	29151	(1000 HEAD)
Ending Inventories	313774	313774	320576	320200	0	323500	(1000 HEAD)
TOTAL DISTRIBUTION	357774	357774	359576	359576	0	366901	(1000 HEAD)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 MT CWE)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT CWE)

Commodity, Meat, Beef and Veal, PSD

PSD Table							
Country:	India			0.65	<-Conversion factor for CWE		
Commodity:	Meat, Beef and Veal						
		2000		2001		2002	UOM
	Old	New	Old	New	Old	New	
Calendar Year Begin		01/2000		01/2001		01/2002	(MONTH/YEAR)
Slaughter (Reference)	13000	13400	13200	13600	0	14050	(1000 HEAD)
Beginning Stocks	0	0	0	0	0	0	(1000 MT CWE)
Production	1700	1750	1740	1770	0	1810	(1000 MT CWE)
Intra EC Imports	0	0	0	0	0	0	(1000 MT CWE)
Other Imports	0	0	0	0	0	0	(1000 MT CWE)
TOTAL Imports	0	0	0	0	0	0	(1000 MT CWE)
TOTAL SUPPLY	1700	1750	1740	1770	0	1810	(1000 MT CWE)
Intra EC Exports	0	0	0	0	0	0	(1000 MT CWE)
Other Exports	290	300	310	375	0	410	(1000 MT CWE)
TOTAL Exports	290	300	310	375	0	410	(1000 MT CWE)
Human Dom. Consumption	1410	1450	1430	1395	0	1400	(1000 MT CWE)
Other Use, Losses	0	0	0	0	0	0	(1000 MT CWE)
TOTAL Dom. Consumption	1410	1450	1430	1395	0	1400	(1000 MT CWE)
Ending Stocks	0	0	0	0	0	0	(1000 MT CWE)
TOTAL DISTRIBUTION	1700	1750	1740	1770	0	1810	(1000 MT CWE)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 MT CWE)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT CWE)

## Commodity, Meat Export Trade Matrix

Export Trade Matrix		Meat		
Country:			Units:	Metric Tons
Commodity:			Partial Begin:	
			Partial End:	
Exports for	1999	2000	2000	2001
	Full	Full	Partial	Partial
U.S.	198	99		
Others				
Malaysia	53192	88856		
Egypt	2487	53866		
U.A.E.	41558	43204		
Philippines	27640	51470		
Iran	8023	14038		
Jordan	5877	13417		
Kuwait	4151	4503		
Oman	3599	6892		
Gabon	3166	4130		
Yemen	2760	3689		
Total for Others	152453	284065	0	0
Others not listed	14357	16219		
Grand Total	167008	300383	0	0