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Report Highlights:

India's 2025 beef production (mostly carabeef) is forecast at 4.64 million metric ton (MMT), up from 4.57 MMT in 2024. The large cattle inventory, Post forecasts at 307.5 million head in 2025, is expected to continue facilitating the increased slaughter and carabeef production. The slight production growth is steered by a continued demand, both for export and domestic consumption. India 2025 carabeef export forecast is at 1.58 MMT, virtually unchanged over 1.56 MMT in 2024. While export to Southeast Asian countries, especially Indonesia, is foreseen to be weak, export growth is expected from the markets of Egypt and Middle eastern countries.

Executive Summary

New Delhi (Post) forecasts India beef production, which is mostly carabeef (i.e. meat derived from Asian domestic water buffalo), at 4.64 million metric ton (MMT) carcass weight equivalent (CWE) in calendar year (CY) 2025, up from 4.57 MMT in 2024. Production growth is facilitated by increasing availability of slaughter-ready bovine animals and increased slaughter, which further hinges on the large inventory of bovine animals in the country. Post forecasts the beginning stock of cattle, including Asian domestic water buffalo at 307.5 million head in 2025, virtually unchanged from 2024. Heightened policy attention by Government of India towards improving the livestock and dairy sector is sustaining its large cattle stock.

The demand for beef and carabeef, both for export and domestic consumption, is another key determinant of the growing carabeef production in India. While the year-over-year growth rate of Indian bovine meat export in 2025 is foreseen to be almost flat, the domestic demand of beef and carabeef is foreseen to grow by nearly two percent. Post forecasts India bovine meat export in 2025 at 1.58 million metric ton (MMT), virtually unchanged from 1.56 MMT in 2024. Post foresees bovine meat export to major markets including Indonesia, Malaysia and Vietnam to continue to be low in 2025 similar to 2024. However, export to other markets including Egypt, United Arab Emirates, Saudi Arabia, Iraq, Uzbekistan, Oman, and Qatar, is expected to grow in 2025, like in 2024. Post forecasts India bovine meat domestic consumption in 2025 to reach 3.06 MMT, up from 3.0 MMT in 2024. The expectations of easing inflation in 2025 and more domestic supply of bovine meat due to the slow-paced exports is likely to make it relatively cheaper and spur consumption.

COMMODITIES

CATTLE

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

Animal Numbers, Cattle Market Year Begins India	2023		2024		2025	
	Jan 2023		Jan 2024		Jan 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stocks (1000 HEAD)	307400	307400	307420	307420	307490	307490
Dairy Cows Beg. Stocks (1000 HEAD)	129300	129300	130690	130690	132500	132500
Beef Cows Beg. Stocks (1000 HEAD)	0	0	0	0	0	0
Production (Calf Crop) (1000 HEAD)	70200	70200	70580	70580	71030	71030
Total Imports (1000 HEAD)	0	0	0	0	0	0
Total Supply (1000 HEAD)	377600	377600	378000	378000	378520	378520
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)	40180	40180	40960	40960	41410	41410
Total Slaughter (1000 HEAD)	40180	40180	40960	40960	41410	41410
Loss and Residual (1000 HEAD)	30000	30000	29550	29550	29580	29580
Ending Inventories (1000 HEAD)	307420	307420	307490	307490	307530	307530
Total Distribution (1000 HEAD)	377600	377600	378000	378000	378520	378520
Not Official USDA Data						

PRODUCTION

New Delhi (Post) forecasts beginning stock of cattle, including both bovine cattle (*Bos taurus* and *Bos indicus*) and Asian domestic water buffalo (*Bubalus bubalis*), for calendar year (CY) 2025 at 307.5 million head, virtually unchanged from 2024. Bovine cattle continue to form a larger proportion of the total bovine population in comparison to the Asian domestic water buffalo.

Calf Crop: Post forecasts the India calf crop to continue to maintain a slow-paced growth. In 2025, its forecast remains virtually unchanged from 2024 at 71.03 million head. The Government of India's growing policy attention and budget allocations towards the development of the livestock and dairy sector is expected to keep the calf crop growth steady in 2025.

Slaughter: Post forecasts slaughter of bovine cattle and Asian domestic water buffalo at 41.41 million head in 2025, up from 40.96 million head in 2024.¹ This is attributable to the continued supply of slaughter-ready animals and a small rise in demand for beef and carabeef.

¹ In India, bovine animals for slaughter are mostly a byproduct of the dairy sector. Bovine animals are not reared specifically for meat production. While slaughter of male and dry Asian domestic water buffalo is permitted, the slaughter of bovine cattle is permitted only for local consumption in only 9 out of the 36 states and union territories in the country.

Loss and residual: For 2025, Post forecasts the loss and residual of bovine animal herd at 29.58 million head, largely unchanged from the previous year. While India did not experience any major disease outbreaks in 2024 as it has in recent years, the country continues to struggle with a high loss number. Animal mortality in India stems from extreme climate stress, and ongoing issues like foot and mouth disease, hemorrhagic septicemia, bovine viral diarrhea, bovine theileriosis, post parturient hemoglobinuria, clostridial diseases, and Johne's disease.

POLICY

The Government of India has instated various development programs and continues to extend support for its livestock and dairy sector. These programs encompass animal healthcare, breeding, feed and fodder production, strengthening dairy cooperative sector, and more. For more information on the Government of India's livestock and dairy development programs, refer to [GAIN-India | 2024-0049 | India - Dairy and Products Annual – 2024](#).

Government publications: In October 2024, Department of Animal Husbandry and Draying (DAHD), Ministry of Fisheries, Animal Husbandry & Dairying, Government of India, initiated the data collection and enumeration for the quinquennial 21st Livestock Census with a budget layout of nearly INR 2 billion (~USD \$24 million).² This will be published in 2025. In November 2024, DAHD published the annual [Basic Animal Husbandry Statistics - 2024](#). The DAHD recently published a [monthly report on Progress of Implementation of Flagship Schemes of Department of Animal Husbandry and Dairying](#). The report highlights steady improvement in implementation of the dairy development programs and utilization of budget funds.

² The last Livestock Census was published in 2019 (see, <https://dahd.gov.in/sites/default/files/2024-10/LS4449.pdf>).

COMMODITIES

MEAT, BEEF and VEAL

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

Meat, Beef and Veal	2023		2024		2025	
Market Year Begins	Jan 2023		Jan 2024		Jan 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	40180	40180	40960	40960	41410	41410
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	4470	4470	4565	4565	4635	4635
Total Imports (1000 MT CWE)	0	0	0	0	0	0
Total Supply (1000 MT CWE)	4470	4470	4565	4565	4635	4635
Total Exports (1000 MT CWE)	1552	1552	1575	1560	1645	1575
Human Dom. Consumption (1000 MT CWE)	2918	2918	2990	3005	2990	3060
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	2918	2918	2990	3005	2990	3060
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total Distribution (1000 MT CWE)	4470	4470	4565	4565	4635	4635
Not Official USDA Data						

PRODUCTION

Post forecasts India bovine meat production (mostly carabeef, i.e. meat derived from Asian domestic water buffalo) at 4.64 million metric tons (MMT) carcass weight equivalent (CWE) in 2025, up from 4.57 MMT in 2024. Increased slaughter, facilitated by continued availability of slaughter-ready animals, and rising demand for meat are steering the increase in production.

CONSUMPTION

India consumption in 2025 is forecast to increase by nearly two percent year-over-year to 3.06 MMT.³ The likely [lower estimates](#) of both headline and food inflation for 2025 are expected to facilitate domestic bovine meat consumption.⁴ In addition, the slow-paced exports in 2025 is projected to make higher volumes of carabeef available for domestic supply, making it relatively cheaper, thereby encouraging consumption. The 2024 India consumption is estimated at 3.0 MMT, negligibly higher than earlier expectations, on account of economic changes towards the year end including [easing inflation](#) and higher domestic supply of carabeef due to slow growth in exports.

³ Informal or local wet markets are the primary source of beef and carabeef supply for domestic consumption.

⁴ Price elasticity of demand for carabeef and beef in India is high, indicating higher responsiveness of demand to price change. The prices of carabeef and beef in India continue to remain lower than other red meats like mutton and pork.

PRICE

The domestic wholesale prices of carabeef and beef have been climbing steadily since 2022 on account of rising costs of production including feed and fodder, labor, fuel, etc. (see, [GAIN-INDIA | IN2024-0039 | Livestock and Products Annual](#)). The slight rise in costs is expected to continue in 2025. Like bovine meat, prices of other meat products including mutton and pork are also expected to slightly increase in 2025 on account of growing costs.

TRADE

Import: India does not import bovine meat products. There has been no policy change in 2024 for import of beef and carabeef in India. Any potential imports in this category are subject to severe restrictions, effectively banning all bovine meat importation.

Exports: Post forecasts 2025 exports at 1.58 MMT, virtually unchanged over 1.56 MMT in 2024 assuming static global or domestic policy and other facets of trade. The 2024 bovine meat export is estimated lower than earlier expectations due to weaker demand from major export markets.⁵

India carabeef exports to major markets, including Indonesia, Malaysia and Vietnam, is forecast to remain weak in 2025 similar to 2024.⁶ Nonetheless, carabeef exporters project export growth to other major markets including Egypt, United Arab Emirates, Saudi Arabia, and Iraq, like in 2024.⁷ Additionally, markets with smaller export share, including Oman, Senegal, Uzbekistan, and Qatar, are forecast to see a continued gradual growth in 2025.

TRADE POLICY

Import regulations for live animals: On September 19, 2024, DAHD , published SOP for [SIP Portal - Regarding documents required for examination of SIP applications Office Memorandum L-110111/1/2022 – Trade \(E-21390\)](#), extending clarifications regarding the documents required for examination of the online application and subsequent issuance of Sanitary Import Permit (SIP). The memorandum enumerates the required documents along with the respective details.

There are no changes in the import tariff, policy, regulations and procedure for import of livestock and livestock products in India. The Indian government restricts the import of live animals as per Section 3 of the Livestock Importation Act. Livestock products are categorized under India's Open General License (OGL) and DAHD provides import procedures for these products in notification S.O. 2666(E) of October 2015. Obtaining a DAHD-issued Sanitary Import Permit (SIP), prior to shipping is a pre-requisite. The SIP is valid for six months to a year. Obtaining an import license from the Director General of Foreign Trade (DGFT) is mandatory. The license, which is valid for six months to a year, is issued following a proposal and risk analysis conducted by the DAHD, and receipt of a veterinary certificate issued by a competent authority of the exporting country. India's livestock products certification requirements and

⁵ India's carabeef export to Indonesia in 2024 is estimated to be lower than its quota allocation of 100 thousand MT.

⁶ These countries together contributed over 41 percent of India carabeef export volume in 2023.

⁷ These countries comprised nearly 39 percent of India carabeef export volume in 2023.

documentation for livestock are accessible on the DAHD website located at:
<https://dahd.gov.in/division/trade>.

Import of bovine germplasm: To improve dairy production, the government of India allows the import of animal genetics but with restrictions (see, <https://dahd.gov.in/sites/default/files/2024-07/GuidelinesForExportImportofBovineGermplasm.pdf>). State animal husbandry departments, State livestock development boards, recognized institutes, and farmers are allowed to import bovine genetics. However, acquiring an import license issued by the Ministry of Commerce's DGFT is a pre-requisite. Further, the importer is evaluated by DAHD regarding its capability to maintain the performance record of germplasm. The importer must also abide by various requirements outlined by DAHD and follow the guidelines of the World Organization for Animal Health (WOAH), Codex Alimentarius, and the International Embryo Technology Society (IETS).

Attachments:

No Attachments