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Prepared By: Shruti Bhogal, Agricultural Specialist and Mariano J. Beillard, Senior Regional Agricultural Attaché

Approved By: Mariano Beillard, Senior Regional Agricultural Attaché

Report Highlights:

FAS New Delhi (Post) in market year 2024 (January-December) forecasts India's national cattle herd growing to 307.6 million head, up by some 135 thousand head from the U.S. Department of Agriculture (USDA) official 2023 estimate of 307.5 million head. Post attributes the slight increase in cattle herd numbers to the calf crop growing in 2024 to 70.4 million head, up by 300 thousand head compared to the USDA official 2023 estimate of 70.1 million head. Post forecast India's 2024 meat production (i.e., carabeef, derived from Asian domestic water buffaloes) at 4.55 million metric tons (MMT) on a carcass-weight-equivalent (CWE) basis, up over two percent compared to the USDA official 2023 production estimate figure of 4.44 MT. All data reported herein is in CWE. The marginal increase from the USDA official figure is due to a foreseen uptick in 2024 slaughter numbers. FAS New Delhi forecasts India's 2024 carabeef exports at 1.50 MMT, up two percent compared to the USDA official 2023 estimate of 1.47 MMT.

EXECUTIVE SUMMARY:

FAS New Delhi (Post) in market year 2024 (January-December) forecasts India's national cattle herd growing to 307.6 million head, up by some 135 thousand head from the U.S. Department of Agriculture (USDA) official 2023 estimate of 307.5 million head. Post attributes the slight increase in cattle herd numbers to the calf crop growing in 2024 to 70.4 million head, up by 300 thousand head compared to the USDA official 2023 estimate of 70.1 million head. Indian government and industry sources anticipate that the national cattle herd will experience continued growth over the next few years, thanks to improved breeding, nutrition, and better animal health.

Facilitating cattle herd growth are Indian government schemes and programs focused on improved breeding and animal health. Government programs and campaigns aim to increase indigenous bovine dairy cattle and water buffalo numbers. Similarly, several Indian states such as Tamil Nadu, Telangana, Gujarat, Karnataka, and Arunachal Pradesh have programs that facilitate, promote, and encourage cattle and buffalo rearing geared to increasing their herds. These schemes and programs are stimulating Indian calf production.

FAS New Delhi forecasts total slaughter in 2024 at 40.7 million head of largely of Asian domestic water buffalo. This is a slight increase from Post's 2023 estimate of 39.96 million head, which is 20 thousand head lower than the USDA official 2023 estimate of 39.98 million. The increase in total slaughter in 2024 is attributed to growing domestic demand for carabeef (the meat and meat products derived from water buffaloes) and increased export demand.

Post forecast India's 2024 meat production (i.e., carabeef, derived from Asian domestic water buffaloes) at 4.55 million metric tons (MMT) on a carcass-weight-equivalent (CWE) basis, up over two percent compared to the USDA official 2023 production estimate figure of 4.44 MT. All data reported herein is in CWE. The marginal increase from the USDA official figure is due to a foreseen uptick in 2024 slaughter numbers. India's carabeef production is growing thanks to increased demand from overseas markets for affordable animal protein. Domestically, increased demand from Indian consumers is growing due to factors such as changing lifestyles, shifts in dietary patterns, growing supplementary sales channels, increasing urbanization, greater cultural diversity, and disposable income.

FAS New Delhi forecasts India's 2024 carabeef exports at 1.50 MMT, up two percent compared to the USDA official 2023 estimate of 1.47 MMT. Considering that not much has changed in the Indian government's policy regarding carabeef exports and international market demand, carabeef exports growth rate remains like that of 2023. India's 2023 (January-May) carabeef exports have dropped nearly four percent compared to 2022 to 0.58 MMT (\$1.22 billion). Indian government officials and trade sources foresee exports picking up towards the latter part of 2023 with improving demand coming from traditional export destinations.

COMMODITY:

CATTLE

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

Animal Numbers, Cattle Market Begin Year 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. Stocks (1000 HEAD)	306700	306700	307500	307400	0	307635
Dairy Cows Beg. Stocks (1000 HEAD)	128650	128650	129300	129300	0	130700
Beef Cows Beg. Stocks (1000 HEAD)	0	0	0	0	0	0
Production (Calf Crop) (1000 HEAD)	70000	70000	70100	70200	0	70400
Total Imports (1000 HEAD)	0	0	0	0	0	0
Total Supply (1000 HEAD)	376700	376700	377600	377600	0	378035
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	39985	39965	0	40700
Total Slaughter (1000 HEAD)	39450	39450	39985	39965	0	40700
Loss and Residual (1000 HEAD)	29750	29850	29730	30000	0	29630
Ending Inventories (1000 HEAD)	307500	307400	307885	307635	0	307705
Total distribution (1000 HEAD)	376700	376700	377600	377600	0	378035

Note: Post data is not official USDA data.

PRODUCTION

FAS New Delhi (Post) in market year 2024 (January-December) forecasts India's national cattle herd growing marginally to 307.6 million head, up by some 135 thousand head compared to the U.S. Department of Agriculture (USDA) official 2023 estimate of 307.5 million head. Post attributes the slight increase in cattle herd numbers to the calf crop growing in 2024 to 70.4 million head, up by 300 thousand head from the USDA official 2023 estimate of 70.1 million head. Indian government and industry sources anticipate that the national cattle herd will experience continued growth over the next few years, thanks to improved breeding, nutrition, and better animal health.

India accounts for the world's largest inventory of bovine dairy cattle (*Bos taurus* and *Bos indicus*) and the Asian domestic water buffalo (*Bubalus bubalis*).¹ The country's stock of the two

¹ India's A1 milk producing cow breeds (crossbreed – *B. taurus*) include largely Holstein Friesian, Karan Swiss, Jersey, and Brown Swiss. Whereas India's A2 milk producing cow breeds (pure desi breed – *B. indicus*) include the Gir, Sahiwal, Red Sindhi, and the Kankrej. The zebu, also known as indicine cattle or humped cattle, is a species or subspecies of domestic cattle originating in the Indian sub-continent. The zebu has a fatty hump on its shoulders, a large dewlap, and often drooping ears. Used often in the past as a draught animal, crossbreeding with foreign imported breeds has led to the increased incidence of smaller humps in bulls and bullocks (steers), reducing their value as draught animals. Key physiological differences that *B. indicus* and *B. taurus* cattle evidence include delayed age at puberty along with higher circulating concentrations of hormones such as estradiol, progesterone, insulin, and IGF-I. Overall reproductive success of *B. indicus* animals is inferior to that of *B. taurus* ones. However, *B. indicus*, is heat tolerant and parasite resistant, making it better adapted to India's hot, humid climatic conditions. These animals can be used for both meat and milk production; however, meat quality characteristics vary and milk its milk production is not necessarily very high.

is gradually marching upwards, registering a growth rate of over one percent during the period 2019-2022 (see, [GAIN-INDIA | IN2023-0018 | Livestock and Products Semi-Annual](#) and [GAIN-INDIA | IN2022-0075 | Livestock and Products Annual - 2022](#)). India, in the 2019 census (latest edition) reports that the national cattle herd is composed of over 192 million head of bovine dairy cattle (*B. taurus* and *B. indicus*) and roughly some 110 million head of Asian domestic water buffaloes.² Post estimates that in 2023, that Indian cattle herd of 307.5 million head is composed of some 194.2 million head of bovine dairy cattle and 113.3 million water buffaloes.

Continued Cattle Herd Growth Anticipated: The Indian government is prioritizing the national livestock sector. It considers the sector as a means of [poverty alleviation](#), as well as for improving nutritional and food security. The livestock sector's contribution to India's gross value added (GVA) is on the rise.³ It has been appreciating from four percent in 2011-2012 to [over six percent in 2020-2021](#). Considering the focused policy action on improving animal husbandry and the dairying sector, the overall cattle (i.e., bovine dairy and water buffaloes) herd size is expected to continue growing.

Facilitating cattle herd growth are Indian government schemes and programs focused on improved breeding and bettering animal health.⁴ Government programs and campaigns aim to [increase indigenous bovine dairy cattle](#) and water buffalo numbers. Similarly, [a number of Indian states](#) such as [Tamil Nadu](#), [Telangana](#), [Gujarat](#), Karnataka, and Arunachal Pradesh have programs that facilitate, promote and encourage cattle and buffalo rearing geared to increasing their herds. These schemes and programs are stimulating Indian calf production.

Animal Disease Afflicting the Herd: India's bovine dairy cattle and water buffalo herds remain exposed to various animal diseases. The 2022 outbreak of lumpy skin disease (LSD), which continued into 2023, leads Post to adjust up its 2022 loss and residual figure to 29.8 million head (i.e., 100 thousand head higher than the USDA official 2022 number of 29.7 million).⁵ The Indian government estimates that LSD resulted in the loss of some 200 thousand head of cattle between 2022 and 2023. Post puts this number closer to the 250 thousand head figure during this same period. Post estimates India's 2023 cattle loss and residual figure at 30 million head. With herd health improving, along with a drop in LSD cases, Post forecasts 2024 cattle loss and residual at some 29.6 million head.

Slaughter Numbers: FAS New Delhi forecasts total slaughter in 2024 at 40.7 million head of largely water buffaloes. This is a slight increase from Post's 2023 estimate of 39.96 million head,

² Out of the 192 million head of bovine dairy cattle, it is estimated that around 51 million head are foreign (exotic) introduced and or crossbreed animals; about 142 million head are indigenous (*B. indicus*)/ non-descript. Goats, sheep, and pigs represent about 232 bovid animals.

³ GVA provides a value for goods and services being produced in a country, subtracting inputs and raw materials costs related to that production. GVA adjusts gross domestic product (GDP) by accounting for the impact of subsidies and taxes on products.

⁴ India's Department of Animal Health and Dairying, a subsidiary department of the Ministry of Animal Husbandry, Dairying and Fisheries which was formed in 2019, provides a list of animal breeding schemes and programs at: <https://dahd.nic.in/schemes-programmes>.

⁵ Lumpy skin disease has a [mortality rate of less than 10 percent and morbidity rate of two to 24 percent](#) (see, [GAIN-INDIA | IN2022-0066 | Outbreak of Lumpy Skin Disease in Cattle Raises Alarm in Cattle-rearing Communities in Gujarat](#) and [GAIN-INDIA | IN2022-0070 | India Update - Lumpy Skin Disease Spreads to Northern States of India](#)).

which is 20 thousand head lower than the USDA official 2023 estimate of 39.98 million. The increase in total slaughter in 2024 is attributed to growing domestic demand for carabeef (the meat and meat products derived from water buffaloes) and increased export demand.

TRADE

Imports: None. At present no livestock is being imported. The import of live animals is subject to onerous restrictions. A potential importer must first obtain an import license from the Director General of Foreign Trade (DGFT). Import licenses require the approval of the Ministry of Animal Husbandry, Dairying and Fisheries/ [Department of Animal Husbandry and Dairying](#) (DAHD), which reviews the import license request and conducts a risk analysis. India's import certification requirements and documentation for livestock imports are available on the DAHD website located at: <https://dahd.nic.in/trade>.

Exports: None. India is not an exporter of live cattle for slaughter, nor of dairy animals or of animals for breeding stock. India does not permit exports of livestock, neither of bovine dairy cattle nor of water buffaloes.

POLICY

Livestock Health: The Indian government in the Indian fiscal year (IFY) 2023/24 (April-March) fiscal budget is realigning the Livestock Health and Disease Control (LH & DC) Program and the National Animal Disease Control Program (NADCP).⁶ In 2019, the Indian government initiated the National Animal Disease Control Program (NADCP) – a World Organisation for Animal Health (WOAH) endorsed five-year nation-wide project with an outlay of Indian rupees (INR) 133.4 billion (~\$1.8 billion). The NADCP targets control of foot-and-mouth (FMD) disease in India through vaccination by 2025; and with FMD eradication by 2030.⁷ The [Indian government claims](#) to have vaccinated nearly 95 percent of animals in the country against FMD and brucellosis, however FMD still persists in India.⁸

Livestock Feed – Export Ban DORB: In response to the shortage of animal feed and fodder, the Indian government notified the [Amendment in Export Policy of De-Oiled Rice Bran](#)

⁶ In 2003-2004, India initiated a Foot-and-Mouth Disease Control Program (FMD-CP) in 54 districts (nine percent of the then total districts). The program was extended to 221 districts in 2009-2010, and in 2012 became a pan-India program. The FMD-CP has not achieved full-control and/or eradication of FMD. The program fell short primarily because the vaccination program was implemented in a staggered fashion, covering only a few districts during a period; secondly, the vaccinations were subsidized but not free of cost; and thirdly, the program covered only large ruminants (e.g., bovine dairy and buffaloes) even though small ruminants and pigs are also carriers of the virus.

⁷ The Indian government provides for procurement, storage, vaccination charges, accessories, cold chain infrastructure, awareness creation and capacity building. This program is combined with the [Pashu Adhar scheme](#) (unique identification number for animals). The [government claims](#) to have vaccinated 169 million bovine dairy cattle and buffaloes in the first round, followed by 44.6 million in the second round. During this period, the Indian government reports vaccinating for brucellosis 2.7 million female bovine dairy cattle calves (4-8 months of age).

⁸ Conclusive data on FMD cases, recoveries, deaths, vaccination is unavailable. The risk of FMD outbreaks persist in various Indian states in varying magnitude and extent. None of the Indian states that produce over 97 percent of country's carabeef meat are seen to be free from the risk an FMD outbreak (see, [GAIN-INDIA | IN2023-0044 | India's FMD Status and its Water Buffalo – Carabeef Trade Update 2023](#)).

(DORB).⁹ The Indian government is banning through November 30, 2023, the export of de-oiled rice bran. DORB is a key ingredient in cattle, poultry, and fish feed.

Livestock Feed – Promotion of Feed and Fodders Development: Under the National Livestock Mission [to promote development of feed and fodders](#), the Indian government is contributing up to INR 5 million (~\$60,495) to each beneficiary for setting up value addition facilities for feed and fodders.¹⁰ Activities include: fodder conservation; development of grasslands; promotion of superior varieties of fodder seeds; silage; green fodder alternatives; mineral mixtures; developing and [upgrading feed and fodder processing units](#).

Livestock Feed – FSSAI Developing Guidelines for Cattle Feed: The Food Safety and Standards Authority of India (FSSAI) is taking the lead in issuing guidelines for cattle feed. The FSSAI has detected inconsistencies in the food safety of Indian milk and milk products (including baby food) being supplied. Wet distiller's grains (WDGS) from India's ethanol production plants, often carrying fungus and molds resulting in high aflatoxin levels.¹¹ This feed ingredient is fed to cattle. Reportedly there have several dairy processing plants closed due to the detection of aflatoxins in the final product (i.e., making them unfit for human consumption).

National Digital Livestock Mission (NDLM): On October 7, 2021, the Department of Animal Husbandry and Dairying unveiled the National Digital Livestock Mission (NDLM) blueprint, a digital platform developed jointly by the DAHD and the National Dairy Development Board. The aim of NDLM is to create a farmer-centric, technology-enabled ecosystem where farmers can realize better income through livestock activities with the right information. The NDLM identifies livestock at the state, national, and international trade levels. The system also includes robust animal breeding systems, nutrition, and disease surveillance and control programs.

⁹ The notification of the Amendment in the Export Policy of De-Oiled Rice Bran is located at: <https://www.dgft.gov.in/CP/?opt=notification>.

¹⁰ NLM focuses on 1. development of small ruminant, poultry and piggery sector & Fodder sector, 2. Breed development, 3. Ease feed and fodder supply chains, 4. Encourage establishment of fodder processing units, 5. Capacity building, etc. https://dahd.nic.in/schemes/programmes/national_livestock_mission

¹¹ Wet distiller's grains (WDGS) are the main byproduct by volume that remains after fermentation of corn starch to ethanol. Nutrient-rich syrup or the "solubles fraction" is separated during the fermentation process, which can be sold for feeding purposes or added back to the final product to obtain WDGS. Disadvantages of WDGS as a feed source for cattle is that sulfur levels in WDGS range from 0.35 to 1.4 percent, which can cause health concerns in cattle. Cattle have a nutrient requirement for sulfur of 0.15 percent dry matter with a maximum tolerable threshold of 0.4 percent (NRBC- 2016, National Academies of Sciences – Engineering – Medicine). Another downside is that WDGS are a challenge to store in hot climates and summers, such as India's, due to its high moisture content; the shelf life of WDGS is three- to five-days piled on the ground without molding occurring.

COMMODITIES:

MEAT, BEEF AND VEAL

Table 2: India, Commodity, Meat, Beef, and Veal, Production, Supply, and Distribution (PSD)

Meat, Veal, Beef Market Begin Year India	2022		2023		2024	
	Jan 2022		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	39450	39450	39985	39965	0	40700
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	4350	4350	4440	4435	0	4555
Total Imports (1000 MT CWE)	0	0	0	0	0	0
Total Supply (1000 MT CWE)	4350	4350	4440	4435	0	4555
Total Exports (1000 MT CWE)	1442	1442	1475	1472	0	1500
Human Dom. Consumption (1000 MT CWE)	2908	2908	2965	2963	0	3055
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	2908	2908	2965	2963	0	3055
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total distribution (1000 MT CWE)	4350	4350	4440	4435	0	4555
Balance	0	0	0	0	0	0
Inventory Balance	0	0	0	0	0	0
Weights	110.3	110.3	111	111	0	111.9
Production Change	4	0	2	2	0	3
Import Change	0	0	0	0	0	0
Export Change	3	0	2	2	0	2
Consumption Change	4	0	2	2	0	3
Imports Percent Consumption	0	0	0	0	0	0
Export Percent Production	33	33	33	33	0	33
Per Capita Consumption	2.1493	0	2.1695	2.17	0	2.18
Annual % Change Per Cap. Cons. (percent)	2.9	0	0.9	100	0	0.5
(1000 HEAD), (1000 MT CWE)						

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The marginal increase from the USDA official figure is due to a foreseen uptick in 2024 slaughter numbers. India's carabeef production is growing thanks to increased demand from overseas markets for affordable animal protein. Domestically, increased demand from Indian consumers is growing due to factors such as changing lifestyles, shifts in dietary patterns, growing supplementary sales channels, increasing urbanization, greater cultural diversity, and disposable income.

Cattle Slaughter: Most Indian states' legislation prohibits the slaughter of bovine dairy cattle of

¹² Indian carabeef is a byproduct of the Indian dairy industry as buffaloes are reared primarily for dairy. The spent Dry buffalo and cattle (wherever permitted) are slaughtered for beef production. There are no special farms in India that rear buffaloes solely for slaughter.

all ages, including both female and male calves. The Indian states of Gujarat, Madhya Pradesh, Punjab, Rajasthan, Maharashtra, Himachal Pradesh, Jammu and Kashmir, Haryana, and Delhi (union territory) all prohibit cattle slaughter, including that of bulls and steers of all age.

The Indian states of Assam and West Bengal, however, do permit some bovine dairy cattle slaughter if the animal is at least 14-years of age and receives a ‘fit-for-slaughter’ certificate from the local state authorities. Kerala also allows for cattle slaughter for animals that are unfit for work, cannot breed, or are permanently injured, and are over 10-years old. Arunachal Pradesh, Meghalaya, Manipur, Mizoram, Nagaland, Tripura, and Lakshadweep (union territory) have not enacted any regulations, or laws that address or specifically prohibit cattle slaughter. Most Indian states that prohibit the slaughter of bovine dairy cattle will arrest an alleged perpetrator without a warrant. Delhi, Goa, Puducherry, Punjab, and Uttar Pradesh can also deny bail (see, [GAIN-INDIA | IN5085 | India - Cattle Slaughter Legislations – July 7, 2015](#)).¹³

Improvements in animal health that lead to better carcass weights are deemed important factors determining increased production. Post foresees improvement in overall carcass weights due to bettering animal health care and breeding. However, the [shortage of green and dry fodders and feed concentrates](#) persist, limiting greater potential carcass weight gains.

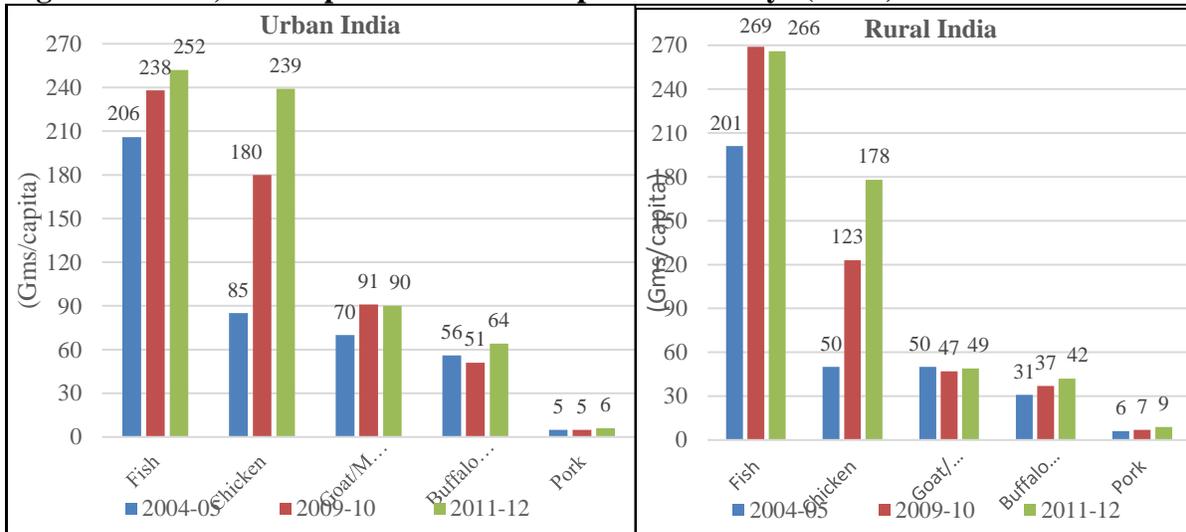
CONSUMPTION

The 2022 outbreak of lumpy skin disease dampened consumer confidence, constraining domestic consumption of red meat. Post estimates 2023 consumption at 2.96 MMT carcass-weight-equivalent (CWE). FAS New Delhi forecasts 2024 consumption at 3.05 MMT CWE as concern with LSD recedes. Considering red meat’s positive and [high-income elasticity](#), along with rising average per capita income, will accelerate domestic consumption of carabeef and beef (wherever permissible). Also with non-vegetarian Indians ([National Family Health Survey](#)) consumers increasing in numbers, a shift in consumption behavior is anticipated.

Demand for carabeef in India’s urban centers is higher than that in rural areas. With projections of [increasing national income](#) and [urbanisation](#), demand for carabeef is foreseen to grow. Carabeef is a highly affordable protein source for non-vegetarian consumers. The Indian National Survey (NSS) study reveals that up to 40 percent of Muslims, 27 percent of Christians and two percent of Hindus [consume carabeef in India](#). With the overall increase in population, which includes a [steady growth of population across all religions](#), the demand for carabeef is foreseen to continue growing.

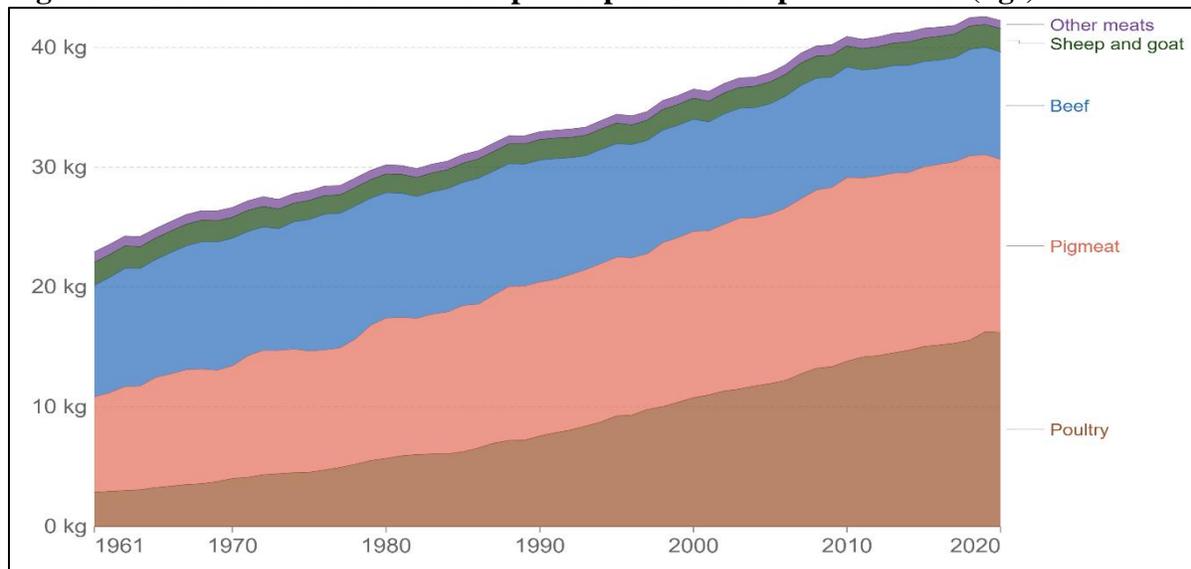
¹³ Article 48 in the Indian Constitution suggests that states should consider preventing cattle slaughter but provides no specific enforceable laws or directives on the subject. Agricultural policy, including cattle slaughter, is governed individually by each Indian state. Many Indian states and union territories address cattle slaughter and the interstate movement and trade of live cattle and animal products. However, because there are no central or federal laws for cattle slaughter, most states and union territories have developed dissimilar legislation, including creating different legal definitions for calves, bulls, and bullocks. See, <https://www.fas.usda.gov/data/india-cattle-slaughter-legislations>.

Figure 1: India, Per Capita Meat Consumption in 30-days (GMS)



Note: Indian government data on household consumption is from the Consumer Expenditure Survey (2011-12). Source: Household Consumption of Various Good and Services in India, 2011-12, NSSO 2014, FAS New Delhi office research.¹⁴

Figure 2: Global Scenario of Annual per Capita Consumption of Meat (kgs)



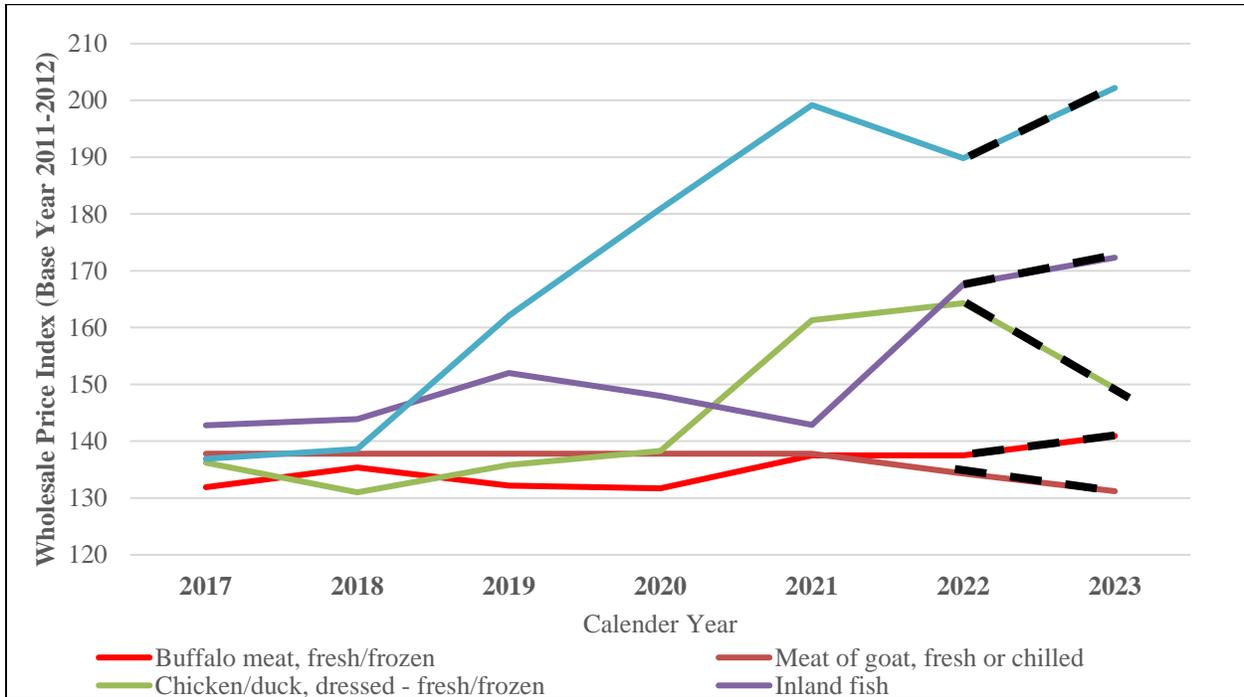
Note: Data does not include fish or seafood, figures do not include food wasted at consumption level. Global per capita beef consumption is on a rise ranging from 10-20 kilograms (kgs) in 1961 to 30-40 kgs in 2020. Source: FAO, <https://ourworldindata.org/meat-production>.

Prices: The price of Indian carabeef is of significant as it sets the world floor price. In India, the wholesale price index (WPI) – an indicator of price change – for processed carabeef fresh/frozen in 2023 (January-June) rose by 2.8 percent compared to the WPI during the same period in the previous year. This can be mainly attributed to factors such as rise in cost of production – especially due to a double-digit growth in animal feed prices, decline in demand and supply of

¹⁴ Consumer Expenditure Survey (2011-12), located at: https://mospi.gov.in/sites/default/files/publication_reports/Report_no558_rou68_30june14.pdf.

water buffaloes for carabeef meat production due to the spread of LSD. At the same time the WPI for goat meat fresh/chilled (classified in India as mutton), declined by nearly four percent. The WPI for chicken/duck, dressed, fresh/frozen, declined by nearly 13 percent. Such decline is a ramification of [shrinking gap between demand and supply brought on by high temperatures](#). The WPI of inland fish and pork appreciated by 5.4 and 9.3 percent, respectively during the given period.

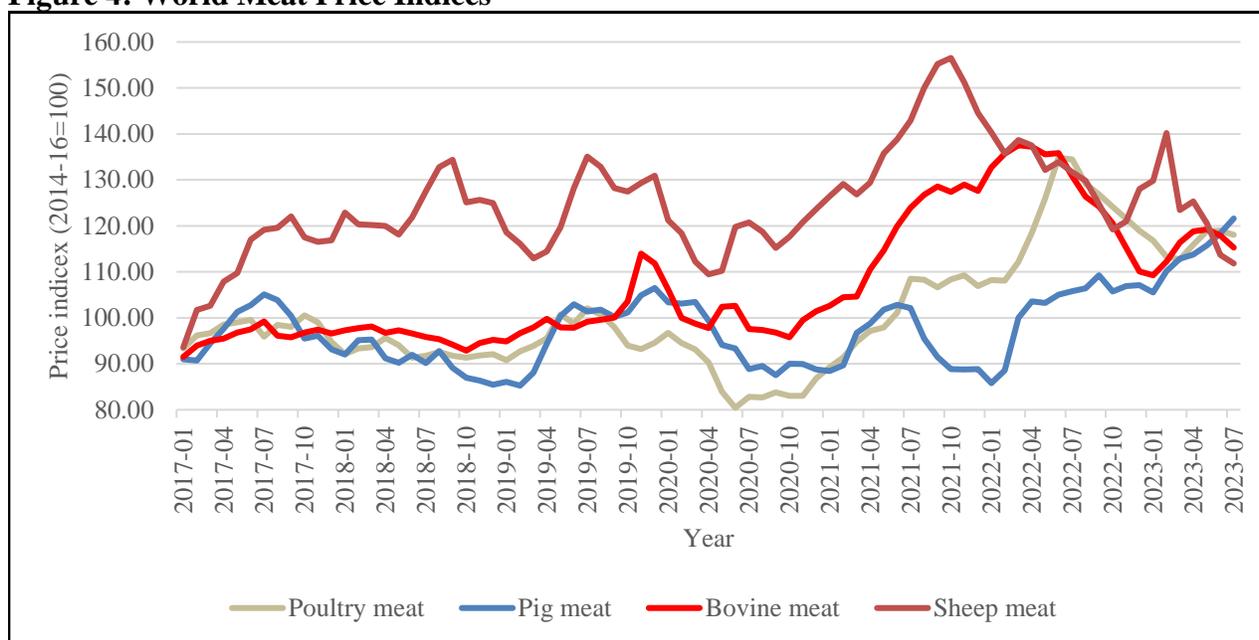
Figure 3: India, Beef and Buffalo Meat, WPI versus Mutton, Chicken, Pork, Fish (Inland), 2012 to 2023



Note: The prices referenced are wholesale index prices, not retail prices. Data from 2022 to 2023 corresponds to January to June 2023. There is only a single base year for the commodities (poultry/chicken, mutton (goat), beef and buffalo meat, fish (inland), and pork).

Source: Ministry of Commerce and Industry, Trade Data Monitor, and FAS New Delhi office research.

Figure 4: World Meat Price Indices



Source: FAO, FAS, New Delhi office research. <https://www.fao.org/markets-and-trade/commodities/meat/fao-meat-price-index/en/>

Note: Bovine meat includes meat of cattle (*B. taurus*) and water buffalo (*Bubalus bubalis*).

TRADE

Imports: The import of beef and beef products is subject to severe restrictions, whose procedures effectively ban imports. A potential Indian importer must first obtain an import license from the Director General of Foreign Trade (DGFT). Import licenses require the approval of the Ministry of Fisheries, Animal Husbandry and Dairying/Department of Animal Husbandry and Dairying, which will review the import license request and conduct a risk analysis. The import of livestock products is governed by an “open general license” (OGL). This licensing is subject to obtaining the requisite sanitary import permit (SIP), issued following a risk analysis (per internationally recognized scientific principles) and with the receipt of the exporting country’s competent authority’s veterinary certificate. The validity of SIPs varies from six-months to one-year.

Import Certification Requirements/Documentation: India’s livestock products certification requirements and documentation for livestock are accessible on the DAHD website located at: <https://dahd.nic.in/Trade>.

In February 2022, India lowered import duties on certain frozen fishery products (i.e., frozen mussels/squids) and ingredients (i.e., select species of live shrimps/algal oils). Duties for the meat and edible offal of bovine animals remain unchanged.

Table 3. India, Tariffs for Select Livestock and Products, 2022

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 - weighing not more than 185 gram, Grandparent stock, is however, freely importable	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 hinnies, 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

Source: 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: Association of Southeast Asian Nations; Sg: Singapore; My: Malaysia; Jp: Japan; MERC: MERCOSUR; LDC: Least Developed Countries; CI: Chile; Kr: Korea (South); SA: SAPTA; Origin Requirement

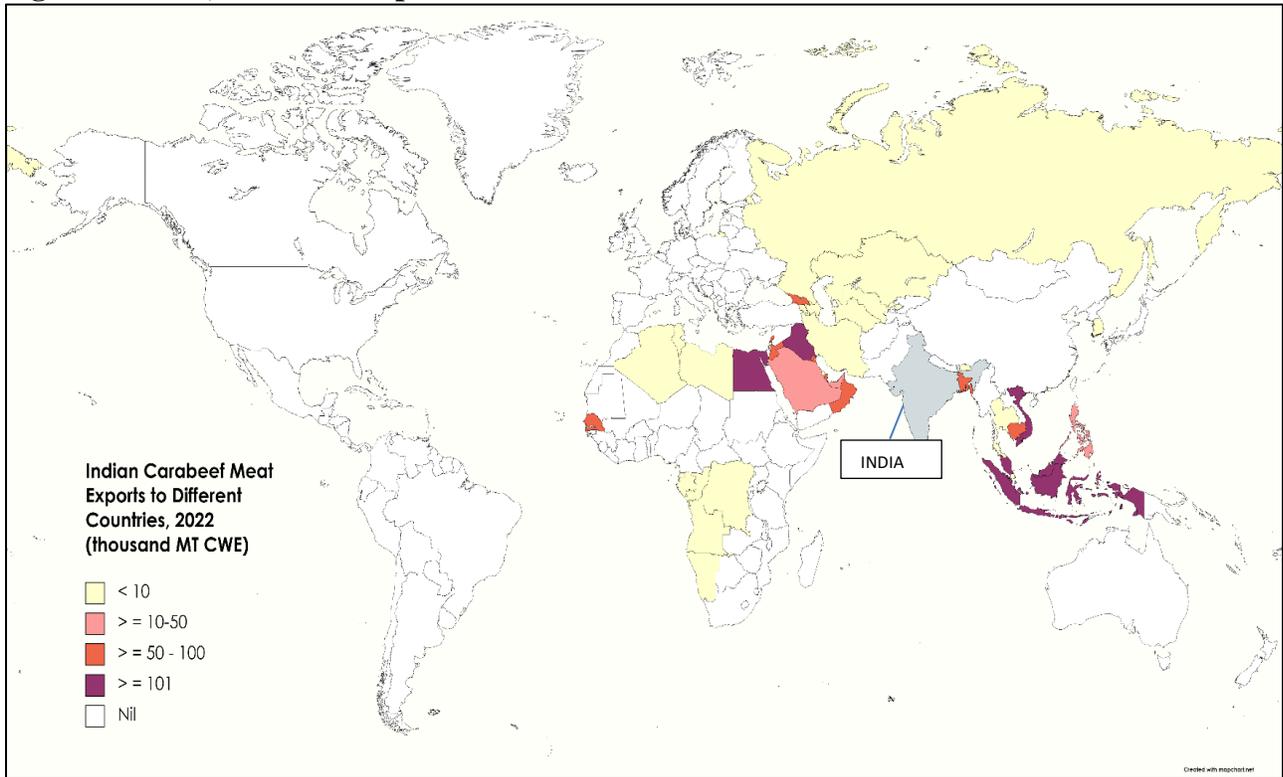
for liver of sheep and goats, ' not included for pure-bred breeding animals, ~ for sheep, \$ Japan and Korea not preferred country for Ostrich, Emus, + Singapore for other cuts with bone

" MERC excluded for carcass & half-carcasses

Exports: FAS New Delhi forecasts India’s 2024 carabeef exports at 1.50 MMT, up two percent compared to the USDA official 2023 estimate of 1.47 MMT. Considering that not much has changed in the Indian government’s policy regarding carabeef exports and international market demand, carabeef exports growth rate remains like that of 2023.

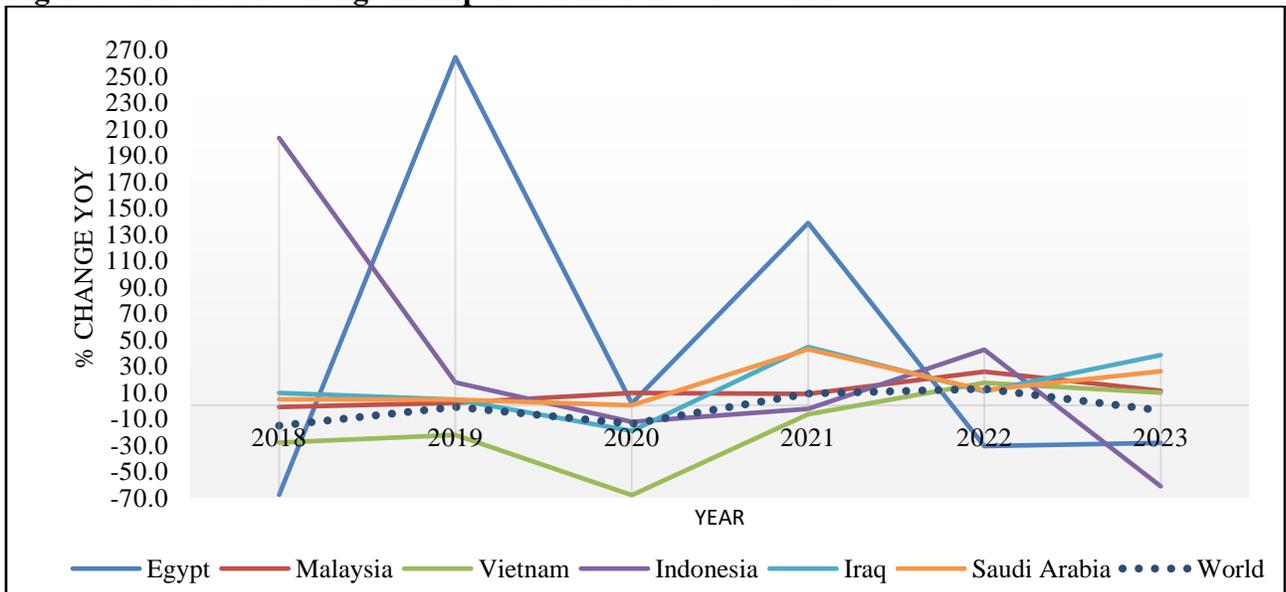
India’s 2023 (January-May) carabeef exports have dropped nearly four percent compared to 2022 to 0.58 MMT (\$1.22 billion). Indian government officials and trade sources foresee exports picking up towards the latter part of 2023 with improving demand coming from traditional export destinations.

Figure 5: India, Carabef Exports Destinations



Source: Trade Data Monitor; FASS New Delhi office research.

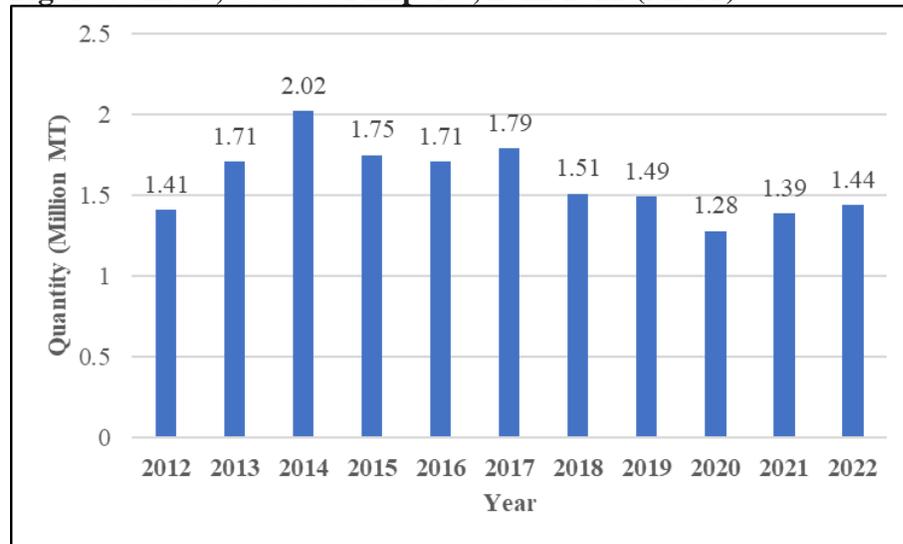
Figure 6: Trends of Change in Exports of Indian Carabef Meat



Source: Trade Data Monitor; FAS New Delhi office research.

Note: Period 2022-2023 includes January-May figures.

Figure 7: India, Carabeef Exports, 2012-2022 (MMT)



Source: Trade Data Monitor; FAS New Delhi office research.

Figure 8: India, Carabeef Export Growth, Percent, 2012-2022



Note: Growth based on change in quantities.

Source: Trade Data Monitor; FAS New Delhi office research.

Top Export Destinations for Indian Carabeef: Egypt, Malaysia, Vietnam, Indonesia, Iraq, and Saudi Arabia are India’s top trading partners for export of carabeef. Egypt accounted for nearly 17 percent of the total Indian carabeef exports in the year 2022, and nearly 25 percent in the year 2021. Various economic factors are stifling the potential growth of Indian carabeef exports to Egypt. Rising inflation, insufficient availability of currency (U.S. dollars) for trade, instability of import procedures and high prices of halal certification act as a deterrent for imports into Egypt (see, [GAIN-EGYPT | EG2022-0032 | Livestock and Products Annual - 2022](#)).¹⁵ Post estimates

¹⁵ Located at: <https://www.fas.usda.gov/data/egypt-livestock-and-products-annual-7>.

sluggish demand for Indian carabeef from Egypt in 2023. In fact, the carabeef exports from India to Egypt during the January-May 2023 period have dropped about 30 percent. Post projects in 2024 a marginal increase in exports to Egypt.

Table 4: India, Carabeef Top Export Destinations, CY 2022

	Countries	Total Exports Value	Total Exports Percent
	Total World	\$2,967,364,000	100.0
1	Malaysia	\$490,038,000	16.5
2	Egypt	\$472,219,000	15.9
3	Vietnam	\$429,535,000	14.5
4	Hong Kong	\$338,670,000	11.4
5	Iran	\$216,746,000	7.3
6	Saudi Arabia	\$179,332,000	6.0

Source: Trade Data Monitor, FAS New Delhi office research.

Malaysia's share in India's carabeef exports was nearly 17 percent in 2022 and 14 percent in 2021. Malaysian imports have increased in 2023 (Jan-Dec) by about 11 percent year-on-year (YOY) basis. Malaysia imports nearly 37 percent of India's total exports of carabeef. Malaysia continues to be a promising export destination for Indian carabeef.

The Indonesian market for Indian carabeef accounts for nearly 11 percent of India's total carabeef exports in 2022, is currently bearish. Export figure in 2023 (Jan-May) have decreased by 63 percent. Though it is expected to increase in the latter half of the year, it is likely to shy away from the previous year's numbers. The quota for imports from India for the year 2023 is 0.10 MMT which is lower than the 0.11 MMT figure in 2022. Most of the imports of Indian carabeef by Indonesia are being substituted by imports from Australia and Brazil. Post foresees marginal export growth in 2024 but anticipates a positive outcome from negotiations between India and Indonesia to increase the quota volume.

Exports to Vietnam are mostly transshipments to other countries. There is a shortfall in the expected rate of growth of exports to Vietnam due to import stringency and inflation in the destination countries. Yet, considering growing domestic demand in Vietnam and the approaching year-end festive season in the destination countries, Indian carabeef exports to Vietnam are expected to further increase in 2023.

Countries with a share of five percent or less of India's total exports of carabeef are seen as evolving markets for trade. For instance, the United Arab Emirates (UAE), Jordan, Georgia, and Oman have registered a YOY increase in their imports from India by 18, 37, 62, 21 and 29 percent, respectively during 2023 (January-May). Trade sources expect these smaller markets to offer more trade potential for the future.

All exported meat products are processed in abattoirs and meat processing plants registered with India's [Agricultural and Processed Food Products Export Development Authority](#) (APEDA).¹⁶

¹⁶ APEDA is an apex body that promotes India's export trade in food and agricultural products (including fresh fruits and vegetables, processed food products, livestock products, and cereals). It is an agency of the Ministry of

Export shipments are subject to compulsory microbiological and other testing requirements. The registered processing establishment must submit an online request for issuance of animal health certificate to the Indian (sub-national) state animal husbandry office under which it falls. This certificate is issued by the Indian state veterinarian officer. India exports primarily frozen (halal) boneless carabeef, which is typically thawed and resold in wet markets.

Halal Regulations - Exports/Imports: On April 6, 2023, the Ministry of Commerce and Industry/Directorate General Foreign Trade (DGFT) issued Notification No. 03/2023 informing stakeholders of its final halal certification process guidelines for the export of India-origin meat and meat products. For exports of ‘Halal certified’ meat and meat products, the producing or processing facilities will require a certificate under Indian Conformity Assessment Scheme (i-CAS) of the Quality of India (QCI) which is issued by a certification body accredited by National Accreditation Board for Certification Bodies (NABCB). For exporting to countries with specific ‘Halal certificate’ requirements, obtaining an i-CAS certificate shall be voluntary (see, [GAIN-India | IN2023-0054 | Halal Market - Update July 2023](#)).

On January 5, 2020, India’s Ministry of Commerce and Industry/Agricultural and Processed Food Products Export Development Authority (APEDA), the Indian authority responsible for promoting farm product exports, removed the word ‘halal’ from its Indian Meat Industry - Red Meat Manual stating that “the animals are slaughtered according to the requirement of the importing country.” Until that point, halal had been an important pre-condition which an Indian exporter had to meet to export to countries with mandatory halal import requirements (see, [GAIN-INDIA | IN2022-0005 | India Halal Overview](#) - 2022).¹⁷

Indian Carabeef Attempts to Tap High-Income Markets: The Ministry of Commerce and Industry regulates India’s livestock and livestock product exports. Through Agricultural and Processed Food Products Export Development Authority, it champions the export of food and agricultural products. Domestically the Food Safety and Standards Authority of India (FSSAI) regulates slaughter and meat processing by means of the Food Safety and Standards Rules and Regulation (2011).

India at present lacks market access to most of the world’s high-income markets, including the United States. These countries do not allow imports of fresh/chilled/frozen carabeef (harmonized tariff system code – HS 0201.10; 0201.20; 0201.30; 0202.10; 0202.20; 0202.30; 0210.20; 1602.50) from countries (including from India) classified by the WOA as FMD-endemic.

Currently, most of India’s lower cost carabeef exports ship to low- and middle-income developing countries, which are less concerned with India’s FMD status. In fact, India’s top six export destinations for carabeef account for 72 percent of Indian carabeef exports (see, [GAIN-](#)

Commerce and Industry.

¹⁷ India with the number of Muslim citizens totaling 209 million (14.2 percent of the national population) has the third-largest Muslim population in the world. In India, halal is a religious attestation. The government neither mandates halal certification, nor does it provide a unifying regulatory law. The FSSAI’s standard certification is the requirement for consumer edible products. Halal certification in the form of an internationally recognized certificate is not necessary to obtain trade permission either for exports or imports. There are no specific labeling requirements for imports of halal food products. For all U.S.- origin meat and non-plant-based food products shipped to India, halal certification is strictly voluntary. Located at: <https://www.fas.usda.gov/data/india-india-halal-overview-2022>.

[INDIA | IN2022-0005 | - India Halal Overview](#) and [GAIN-INDIA | IN2023-0010 | India Halal Market Update](#)). These countries, much like India, are also currently classified as by the WOA, and the United States, as being FMD-endemic.

POLICY

Trade Policy: India's Ministry of Commerce and Industry regulates the livestock and livestock products' trade. The Department of Animal Husbandry and Dairying regulates the import of livestock and livestock products, in accordance with Section 3 and Section 3A provisions of the Livestock Importation Act of 1898 (Livestock Importation Act, Amended 2001). It aims to prevent the entry of exotic diseases through imported livestock and livestock products.¹⁸ Beef from bovine dairy cattle slaughter is banned in most Indian states; India also prohibits beef (bovine dairy cattle) exports, as well as imports.

Carabeef Meat Production, Programs, and Policy: The Food Safety and Standards Authority of India regulates domestic slaughter and meat processing by means of the Food Safety and Standards Rules and Regulation (2011). The regulation defines standards and regulations for domestic and imported meat products.

Animal Husbandry Realignment of Schemes: To boost growth in the livestock sector and increase the profitability of animal husbandry, the Indian government has approved implementation of a special livestock sector package. This package includes revising and realigning various components of Indian government schemes over the next five years (2021-2026). It envisions government support of roughly \$1.32 billion over five years. Under the IFY Budget 2023/24, the fund allocations to the DAHD are [\\$52.8 million](#) (a 40 percent increase over preceding year).

The IFY 2023/24 budget realigns and renames some animal husbandry and dairying schemes/programs, including:

- **Development Program:** Is the new name given to the earlier White Revolution Scheme which is now realigned with other prevailing schemes such as: i) Rashtriya Gokul Mission, which includes accelerated breed improvement program and establishment of breed multiplication farms; ii) National Program for Dairy Development, which focuses on the improvement in productivity and production of milk; iii) National Livestock Mission, which includes development and establishing of the rural poultry hatcheries, private breeding farms for sheep, goat and pigs and also their feed and fodder, and fodder seed multiplication facilities; iv) Livestock Census and Integrated Sample Survey; and (v) Dairying through Cooperatives (EAP).
- **[Animal Husbandry Infrastructure Development Fund \(AHIDF\)](#):** The AHIDF incorporates the Dairy Infrastructure Development Fund (DIDF) and the scheme for support of Dairy Cooperatives and Farmers Producers Organizations.

¹⁸ Livestock covers mules, asses, bulls, calves, steers (bullocks), buffaloes, goats, swine, dogs, cats, poultry, parrots, pigeons, canaries, and finches. Beef is regarded as being separate and distinct from carabeef, or water buffalo meat.

Regulation of Import of Livestock Products: Besides the EXIM policy, in accordance with Section 3A of the Live-stock Importation Act (1898), the Government of India regulates, restricts, and prohibits import of livestock products. On October 17, 2015, in notification S.O. 2666(E), the Government of India listed out the procedures for import of livestock products. Sanitary Import Permits (SIPs) – which is a certificate and not a license – is issued based on import risk analysis and is required prior to shipping from the country of origin¹⁹. The SIPs for livestock products may be used for multiple consignments for a period of six-months to one-year from the date of issue. Different notifications for the regulation of imports of livestock products are:

- [Provisions to Regulate the Import of Poultry and Poultry Products under the Livestock Importation Act \(1898\)](#)²⁰
- [Amendment Notification S.O. 1355 \(E\) \(March 25, 2021\) - Import of Live Bovines into India](#)²¹
- [Amendment Notification S.O. 4559 \(E\) - Amendments to the Livestock Importation Act \(1898\)](#)²²
- [Amendment Notification S.O. 4559 \(E\) Import of Fishery Products](#)²³
- [Veterinary Certificate for Import of Sheep into India \(January 14, 2019\)](#)²⁴

Attachments:

No Attachments

¹⁹ Located at: <https://dahd.nic.in/trade>.

²⁰ Located at: https://dahd.nic.in/sites/default/files/Poultrynotificationdated14112019_0.pdf.

²¹ Located at: <https://dahd.nic.in/Trade/sanitary-requirement-veterinary-health-certificate-import-various-live-animals>.

²² Located at: <https://dahd.nic.in/sites/default/files/NotificationSO4559Edated16thDecember2020.pdf>.

²³ Located at: <https://dahd.nic.in/sites/default/files/NotificationSO4559Edated16thDecember2020.pdf>.

²⁴ Located at: <https://dahd.nic.in/Trade/sanitary-requirement-veterinary-health-certificate-import-various-live-animals>