

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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POLICY

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India

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Report Highlights:

The CY 2016 cattle and water buffalo population forecast levels are revised up to 302.6 million head due to less slaughter in CY 2015 because of low demand in the Southeast Asian market. CY 2016 *carabeef* exports are projected at 2.1 MMT CWE on expectations of stronger demand from Southeast Asian countries.

Executive Summary:

The CY 2016 cattle and water buffalo population forecast levels are revised up to 302.6 million head due to less slaughter in CY 2015 because of low demand in the Southeast Asian market. CY 2016 water buffalo meat (*carabeef*) production is estimated at 4.45 million metric tons (MMT) carcass weight equivalent (CWE) on expectations of stronger export demand in Southeast Asian countries. CY 2016 *carabeef* exports are projected at 2.1 MMT CWE on expectations of stronger demand from Southeast Asian countries.

Commodities:

Animal Numbers, Cattle

Meat, Beef and Veal

Production:

The CY 2016 cattle and water buffalo population forecast levels are revised up to 302.6 million head due to less slaughter in CY 2015 because of low demand in the Southeast Asian market. CY 2016 *carabeef* production is estimated at 4.45 MMT CWE on expectations of stronger export demand in Southeast Asian countries. CY 2015 *carabeef* production level estimates are lowered to 4.1 MMT CWE on less exports.

India's *carabeef* production is mainly concentrated in Uttar Pradesh, Kerala, Punjab, Andhra Pradesh, Telangana, and Maharashtra (Figure 1). Throughout the past year, sensitivities remain with certain religious and political groups on whether Indian consumers should be allowed to eat beef. Although cow slaughter is almost completely prohibited in India, it is allowed in two states: West Bengal and Kerala. Please see GAIN [IN4080](#) and [IN5085](#) for further information on the dairy, beef, and *carabeef* sector.

Consumption:

The CY 2016 domestic consumption forecast remains unchanged at 2.35 MMT CWE. Chicken meat is the most preferred non-vegetarian protein source followed by *carabeef* due to its affordability.

Trade:

CY 2016 *carabeef* exports are projected at 2.1 MMT CWE on expectations of stronger demand from Southeast Asian countries. Vietnam is the largest export market for India followed by Egypt, Malaysia, Thailand, and Saudi Arabia (Figure 2). CY 2015 *carabeef* exports are lowered to 1.9 MMT on slow export pace (Figure 3).

Policy:

***Carabeef* Production Programs and Policies**

The Department of Animal Husbandry, Dairying, and Fisheries (DAHDF) within the Ministry of Agriculture and Farmer's Welfare focuses on policies and programs to improve the productivity of the livestock sector. For information on these policies, including information on other programs that affect the *carabeef* industry, such as the National Dairy Plan, please see GAIN report [IN5106](#) and [IN5009](#). The Government of India's Agricultural and Processed Food Products Export Development Authority (APEDA) approves the export-oriented slaughterhouses/meat processing units and provides guidance to industry for sanitary and hygiene standards for the products destined for export markets. The Food Safety and Standards Authority of India (FSSAI) regulate domestic slaughter and meat processing industry through the regulation entitled: Food Safety and Standards Rules and Regulation, 2011 (FSSR). For further details, please refer to FAS GAIN Report [IN4080](#).

Trade Policy

The DAHDF regulates imports of livestock and related products through the Livestock Importation Act, 1898 and its further amendments. All livestock products including meat product exports to India require a sanitary import permit issued by DAHDF. India does not permit beef and beef product imports.

Import guidelines and procedures for livestock and livestock products, including germplasm, are available at: <http://dahd.nic.in/dahd/trade.aspx>. For further details, please refer to FAS GAIN Report [IN5106](#).

Production, Supply and Demand Data Statistics:

Table 1. India: Commodity, Animal Numbers, Cattle, PSD

<i>Animal Numbers, Cattle</i>	2014		2015		2016	
<i>Market Begin Year</i>	Jan 2014		Jan 2015		Jan 2016	
<i>India</i>	USDA Official	New Post	USDA Official	USDA Official	New Post	USDA Official
Total Cattle Beg. Stks	300600	300600	301100	301100	301600	302600
Dairy Cows Beg. Stocks	123000	123000	125000	125000	127000	127000
Beef Cows Beg. Stocks	0	0	0	0	0	0
Production (Calf Crop)	66000	66000	67000	67000	68000	68000
Total Imports	0	0	0	0	0	0
Total Supply	366600	366600	368100	368100	369600	370600
Total Exports	0	0	0	0	0	0
Cow Slaughter	0	0	0	0	0	0
Calf Slaughter	0	0	0	0	0	0
Other Slaughter	37000	37000	38000	37000	40500	40000
Total Slaughter	37000	37000	38000	37000	40500	40000
Loss	28500	28500	28500	28500	27200	28000
Ending Inventories	301100	301100	301600	302600	301900	302600
Total Distribution	366600	366600	368100	368100	369600	370600

Table 2. India: Commodity, Meat, Beef and Veal, PSD

<i>Meat, Beef and Veal</i>	2014		2015		2016	
<i>Market Begin Year</i>	Jan 2014		Jan 2015		Jan 2016	
<i>India</i>	USDA Official	New Post	USDA Official	USDA Official	New Post	USDA Official
Slaughter (Reference)	37000	37000	38000	37000	40500	40000
Beginning Stocks	0	0	0	0	0	0
Production	4100	4100	4200	4100	4500	4450
Total Imports	0	0	0	0	0	0
Total Supply	4100	4100	4200	4100	4500	4450
Total Exports	2082	2082	2000	1900	2175	2100
Human Dom. Consumption	2018	2018	2200	2200	2325	2350
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	2018	2018	2200	2200	2325	2350
Ending Stocks	0	0	0	0	0	0

Total Distribution	4100	4100	4200	4100	4500	4450
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