

Required Report: Required - Public Distribution

Date: September 17,2020

Report Number: IN2020-0126

Report Name: Livestock and Products Annual

Country: India

Post: New Delhi

Report Category: Livestock and Products

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Report Highlights:

Assuming a healthy calf-crop (improving reproductive rate) and steep rise in beginning cattle stock, India's calendar year (CY) 2021 cattle (*Bos taurus* or *Bos indicus*) and water buffalo (*Bubalus bubalis*) herd size will increase to 305.5 million heads. Likewise, Indian water buffalo meat (carabeef) exports in out-year (CY 2021) will recover to 1.2 million metric tons (MMT), some 14.3 percent above the current year's estimate, assuming some curbed demand and improvement in the domestic supply chain. Despite an increase, the out-year export forecast is still below its five-year average of 1.6 MMT. Note: Carabeef and beef production and trade are reported in carcass weight equivalent (CWE).

Executive Summary:

The CY 2021 cattle (*Bos taurus* or *Bos indicus*) and water buffalo (*Bubalus bubalis*) population is estimated at 305.5 million heads, approximately 2.3 million heads above CY 2020. A steep rise in beginning cattle stocks and an expanding Indian dairy industry (private and cooperative) will support both increased cattle population and beef production, with 50 percent of the growth derived from water buffalo. Please note that meat from water buffalo is known as *carabeef*.

Buoyed by an International Monetary Fund (IMF) prediction that the Indian economy will recover in Indian Fiscal Year¹ (IFY) 2021, *carabeef* exports in out-year (CY 2021) will improve to 1.2 MMT, some 14.3 percent above the current year's estimate, assuming constrained demand in trade and restoration of the domestic supply chain to near normal levels. Despite an increase, the out-year export forecast is still below its five-year average of 1.6 MMT. Generally, the overall consumer confidence in the economic situation, employment, inflation, and income is currently low. The COVID-19 pandemic has restrained India's consumer spending, and economic recovery is further than previously expected.

¹ IFY is from April to March.

Commodities:

Animal Numbers, Cattle
Meat, Beef and Veal

Production:

Assuming a healthy calf-crop (improved reproductive rate) and a steep rise in the beginning cattle stock, India's CY 2021 cattle (*Bos taurus* or *Bos indicus*) and water buffalo (*Bubalus bubalis*) herd size will rise to 305.5 million heads, approximately 2.3 million heads above CY 2020². Strong Indian dairy sector growth (both private and cooperative) will support an increase in the overall cattle population.

The CY 2021 *carabeef* and beef production are estimated to rise 8.5 percent to 3.96 MMT, assuming livestock markets are operational, and cattle supplies for slaughter (across municipal slaughterhouses and export-oriented units) are gradually restored. *Carabeef* production is mainly concentrated in the states of Uttar Pradesh, Andhra Pradesh, Maharashtra, and Punjab, with Uttar Pradesh having the country's largest water buffalo population. Despite alleviated lockdown measures, India's live cattle supply (until June/July) was reduced, along with a lack in farm labor, but both are expected to improve gradually through the end of this year.

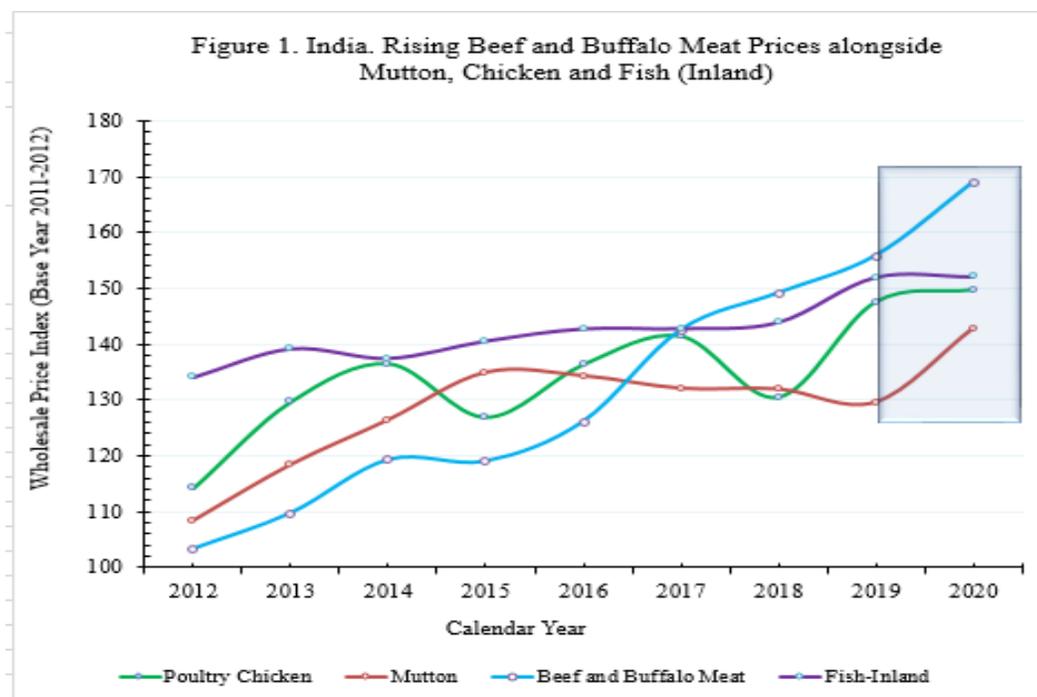
With a growing backlog due to the national lockdown and a staggered, phased reopening, estimated CY 2020 cattle slaughter numbers were dropped three percent below the previous estimate³ of 35.7 MMT to 34.75 million heads. Concurrently, CY 2020 *carabeef* production was also lowered by 100,000 metric tons (MT) to 3.65 MMT, and as a result, both exports and local supply will be limited. Tight domestic supplies will partly counter the drop in demand, and *carabeef* and beef prices should hold firm.

Prices

After rising by more than 22 percent in the first quarter (Q1) of CY 2020, the wholesale price index (WPI) of beef and buffalo meat had diminished by eight percent in following two months ending June 2020. However, the WPI during January-June 2020 stood firm at 11 percent higher, to goat meat (mutton), which had grown consistently (Figure 1). A short-supply situation for goat meat has underpinned its prices. Conversely, poultry meat WPI fell 10 percent in quarter one (Q1) due to fabricated social media rumors that COVID-19 has zoonotic origins and can spread through poultry meat. Since Q1, poultry meat WPI has recovered and grew 18 percent in Q2, firming up its WPI by nine percent in the first half of CY 2020. However, WPI of inland fish (both capture and aquaculture) dropped 5 percent during the same period.

² Also, Post has revised cattle beginning stocks for 2019 and 2020 to reflect official USDA estimates.

³ See: [India Livestock Semi-annual, July 17, 2020](#)



Source: Ministry of Commerce and Industry, Government of India
CY 2020 data in shaded box is from January 2019 to June 2020.

Consumption

India's CY 2021 *carabeef* and beef consumption is projected at 2.76 MMT, 6.15 percent above last year and close to 2019 pre-pandemic levels. Assuming there is no second wave of COVID-19, and that Indian municipal abattoirs (slaughterhouses) are operational, *carabeef* demand will resume to more normal levels. Strong household consumption and a small uptick in hotel, restaurant and institutional demand will stimulate a rise in domestic meat consumption.

Indian *carabeef* is preferred due to its affordability, leanness, and halal characteristics, which contrasts with traditional beef supplies. In addition to direct consumption, some *carabeef* is processed and consumed as sausage, salami and hamburger. The extended COVID-19 lockdown and subsequent phased opening of the economy had already impacted availability and raised prices.

Culture and religion both have significant influence on the foods Indians eat. For example, Muslims and Christians routinely eat *carabeef*, but Hindu population segments do not. By contrast, poultry meat is widely consumed and is accepted by people of all faiths; it is popular and utilized in a variety of dishes, relatively inexpensive and easily available.

Trade

The Government of India's (GOI) Ministry of Commerce and Industry regulates livestock and livestock product trade. The Department of Animal Husbandry and Dairying (DAHD), housed within the Ministry of Fisheries,

Animal Husbandry and Dairying regulates livestock and livestock product imports, in accordance with Section 3 and Section 3A provisions of the [Livestock Importation Act, 1898](#), ([Livestock Importation Act, Amended 2001](#)) to prevent the entry of exotic diseases through imported livestock⁴ and livestock products⁵. Beef cattle slaughter is banned in most Indian states, and India prohibits both beef exports and imports.

Imports

Live animal imports are subject to restrictions—first, an importer must obtain a license from the Director General of Foreign Trade (DGFT). The DGFT issues licenses based on the DAHD’s recommendation, after examining the proposal and conducting a risk analysis. Similarly, livestock import products are governed by an “open general license,” but are subject to a requisite sanitary import permit (SIP) requirement, which is then issued following a risk analysis (conducted per internationally recognized scientific principles) and a veterinary certificate receipt, to be certified by the competent authority of an exporting country.

SIP Validity

On April 12, 2020, due to India’s national lockdown and limited national and international transportation, DAHD issued a memorandum extended the validity of SIP permits issued on or after January 1, 2020 for an additional three-month period from the issuance date. Generally, the validity of such livestock product import permits lasts between three and 12 months. On May 12, DAHD further extended the validity to June 30, 2020 for the SIPs that were set to expire beginning March 1, 2020⁶.

Ports of Entry

Live animal and animal product imports are only allowed through seaports/airports in Bangalore, Chennai, New Delhi, Hyderabad, Kolkata and Mumbai, where animal quarantine and certification services are available. Fish imports and related products are allowed through the seaport of Vishakhapatnam (Andhra Pradesh), seaport and airport of Kochi and the Petrapole Land Custom Station⁷ (Bangladesh imports only).

Indian import certification requirements and livestock and livestock products documentation are updated below and available at the following link: <http://dahd.nic.in/trade>. The webpage includes information related to SIPs, official acts, regulatory notifications, import procedures ([live animals](#) and [livestock products](#)) and procedures for recognition of zones/compartments. Tariffs for selected livestock products were updated in the [2020 Livestock Semi-annual](#) published in July 2020, and remain unchanged (See Table 1).

⁴ *Livestock* covers mules, asses, bulls, calves, bullocks, buffaloes, goats, swine, dogs, cats, poultry, parrots, pigeons, canaries, and finches.

⁵ Beef is regarded as being separate and distinct from *carabeef*, or water buffalo meat.

⁶ Source: [SIP Validity Extended](#)

⁷ Source: DAHD

| Table 1. India: Tariffs for Select Livestock Products, 2020 | | | | | | |
|---|---|-------|------|--|--------------------|-------------------------------------|
| 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 - <i>weighing not more than 185 gram, Grandparent stock, is however, freely importable</i> | 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 hinnes, 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: Associaton of Southeast Asian Nations, Sg: Singapore, My: Malaysia, Jp: Japan, MERC: MERCOSUR, LDC: Least Developed Countries, CI:Chile, Kr: Korea (South), SA: SAPTA. Origin Reuirement | | | | | | |
| # 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 | | | | | | |

Carabeef and Beef Trade

Exports

All exported meat products must be processed in abattoirs and meat processing plants registered with the Agricultural and Processed Food Products Export Development Authority (APEDA). Export shipments are subject to compulsory microbiological and other testing to be issued animal health certificates by the certified GOI agency. India exports mostly frozen (halal) boneless *carabeef*, which is typically thawed and resold in wet markets.

Buoyed by the IMF prediction that the Indian economy will recover in IFY 2021⁸, and assuming some demand and a restoration of the domestic supply chain, the CY 2021 Indian *carabeef* exports are projected to recover to 1.2 MMT, some 14.3 percent above the 2020 estimate. Despite the rise, export projections are still less than its five-year average of 1.6 MMT. Cumulative demand from countries who are consistently importing from India, albeit in smaller quantity will help increase Indian export sales, while some of the demand from traditional buyers will be partly met by competitors, thus limiting some Indian sales. Notably, *carabeef* exports from Australia and Brazil were sent to developed markets such as the United States, Japan, China and the United Kingdom, while Indian sales were destined to developing and other price-sensitive markets.

Additionally, the CY 2020 export forecast was revised lower to 1.05 MMT, an 8.7 percent reduction below the previous forecast (1.1 MMT) due to decreased exports, particularly during the national lockdown. After the staggered easing of lockdown restrictions, export sales in the second half of CY 2020 are likely to be modest⁹. As an example, meat processors now must ensure social distancing measures, resulting in reduced slaughter capacity, utilization, efficiency, and profits¹⁰.

Based on inputs from industry sources, and the most recent 2020 trade data (January-July, value basis, in decreasing order), the top Indian *carabeef* and beef importers were Vietnam, Malaysia, Hong Kong, Egypt (imported upwards of 55,000 MT), followed by Iraq, Saudi Arabia, Indonesia, the Philippines, United Arab Emirates (15,000 to 25,000 MT), and Algeria, the Russian Federation, Oman, Myanmar, Jordan and Bangladesh (less than 15,000 MT).

Carabeef Meat Production, Programs and Policy

On July 29, 2020, the Ministry of Home Affairs (MHA) issued guidelines for *Unlock-3* a policy where the strict enforcement of COVID-19 lockdown measures in containment zones (only essential activities allowed) were extended until August 31, 2020, with a partial reopening of some activities and services outside the

⁸ India's economy is expected to bounce back in IFY 2021 with a robust six percent growth. However, the projected growth rate of six percent in IFY 2021 is -1.4 percent less than its April forecast. Any incidence of a second wave of COVID-19 can reverse increased mobility and spending, and rapidly tighten financial conditions, triggering debt distress (IMF).

⁹ In June 2020, IMF predicted that the Indian economy would contract by 4.5 percent in IFY 2020-21, following a longer COVID-19 related lockdown period.

¹⁰ Even as businesses began to reopen, voluntary social distancing and enhanced workplace safety standards are weighing on business activity.

Containment Zones. Individual state and union territory governments may make their own assessments and prohibit certain activities outside the Containment Zones, or impose other restrictions as deemed necessary.

However, with *Unlock-3*, there are no restrictions on interstate and intrastate movement of persons and goods, and no separate permissions or e-permits are required for such movements ([Unlock-3](#)). Recently, the MHA reiterated this position for eliminating any restrictions on interstate and intrastate movement. There are no separate permission/permit/e-approvals ([MHA Order August 22, 2020](#)).

Additionally, the Food Safety and Standards Authority of India (FSSAI) regulates domestic slaughter and meat processing through the 2011 Food Safety and Standards Rules and Regulation (FSSR). The FSSR also defines standards and regulations for domestic and imported meat products.

Further, as part of the recently announced Atma Nirbhar Bharat Abhiyan (Self Reliant India) initiative, the GOI established a USD \$1.9 billion Animal Husbandry Infrastructure Development Fund (AHIDF). The GOI had earlier approved the Dairy Infrastructure Development Fund (DIDF) worth INR 100 billion (USD \$1.35 billion) to incentivize investments for improved dairy infrastructure. However, micro, small and medium enterprises (MSME) and private companies must be promoted with incentives for them to participate in improved dairy processing and value-added infrastructure in the animal husbandry sector.

AHIDF would incentive infrastructure investments in dairy, meat processing and animal feed processing—the eligible beneficiaries under the AHIDF scheme are farmer-producer organizations (FPO), MSMEs, Section 8 Companies¹¹, private companies and individual entrepreneurs. Under this program, ten percent of the infrastructure costs are required from the recipient, with the remaining 90 percent covered by the government loan made available by scheduled banks (Read: [PIB Press Release](#) and [DADF Scheme Guidelines](#)).

Regulation of Import of Livestock Products

On July 15, 2020, DAHD unveiled a new regulation where Animal Quarantine and Certification Services (AQCS) officials are required to occasionally inspect the sealed samples of goods arriving at customs for physical identification purposes. Out of the 699 Custom Tariff Heads (CTH) lines presently mapped with AQCS for Risk Management, 272 CTHs lines fall under the *No Testing* category (See Table 1).

To facilitate trade and promote an early clearance of imported livestock products, customs sealed samples identified in the *No Testing* category will neither be required nor collected by AQCS for clearing imported consignments. These imported consignments will be granted AQCS clearance through the Single Window System (SWS), based on a Veterinary Health Certificate that is uploaded in the SWS along with other relevant documents when importers file the bill of entry.

¹¹ Section 8 companies include the Federation of Indian Chambers of Commerce and Industry (FICCI) and Confederation of Indian Industries (CII). The objective of these companies is facilitating the growth of trade and commerce in India.

Figure 1. List Custom Tariff Heads Covered under the No Testing Category (Source: DAHD)

| Tariff line covered under No Testing (NT) Category | | |
|--|-------------|---|
| Sr. No | ITC HS code | Description of tariff line |
| 1. | 03011900 | Other |
| 2. | 03019200 | Eels (<i>Anguilla</i> spp.) |
| 3. | 03019300 | Carp (<i>Cyprinus carpio</i> , <i>Carassius carassius</i> , <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i>) |
| 4. | 03019500 | Southern bluefin tunas (<i>Thunnus maccoyii</i>) |
| 5. | 03019900 | Other |
| 6. | 03021300 | Pacific salmon (<i>Oncorhynchus nerka</i> , <i>Oncorhynchus gorboscha</i> , <i>Oncorhynchus keta</i> , <i>Oncorhynchus tshawytscha</i> , <i>Oncorhynchus kisutch</i> , <i>Oncorhynchus masou</i> and <i>Oncorhynchus rhodurus</i>). |
| 7. | 03021400 | Atlantic salmon (<i>Salmo salar</i>) and Danube salmon (<i>Hucho hucho</i>) |
| 8. | 03021900 | Other |
| 9. | 03022100 | Halibut (<i>Reinhardtius hippoglossoides</i> , <i>Hippoglossus hippoglossus</i> , <i>Hippoglossus stenolepis</i>) |
| 10. | 03022200 | Plaice (<i>Pleuronectes platessa</i>) |
| 11. | 03022300 | Sole (<i>Solea</i> spp.) |
| 12. | 03022400 | Turbots (<i>Psetta maxima</i> , <i>Scophthalmidae</i>) |
| 13. | 03022900 | Other |
| 14. | 03023100 | Albacore or longfinned tunas (<i>Thunnus alaiunga</i>) |
| 15. | 03023200 | Yellowfin tunas (<i>Thunnus albacares</i>) |
| 16. | 03023300 | Skipjack or stripe-bellied bonito |
| 17. | 03023400 | Bigeye tunas (<i>Thunnus obesus</i>) |
| 18. | 03023500 | Atlantic and Pacific bluefin tunas (<i>Thunnus thynnus</i> , <i>Thunnus orientalis</i>) |
| 19. | 03023600 | Southern bluefin tunas (<i>Thunnus maccoyii</i>) |
| 20. | 03023900 | Other |
| 21. | 03024100 | Herrings (<i>Clupea harengus</i> , <i>Clupea pallasii</i>) |
| 22. | 03024200 | Anchovies (<i>Engraulis</i> spp.) |
| 23. | 03024400 | Mackerel (<i>Scomber scombrus</i> , <i>Scomber austral asicus</i> , <i>Scomber japonicus</i>) |
| 24. | 03024500 | Jack and horse mackerel (<i>Trachurus</i> spp.) |
| 25. | 03024600 | Cobia (<i>Rachycentron canadum</i>) |
| 26. | 03024700 | Swordfish (<i>Xiphias gladius</i>) |
| 27. | 03025100 | Cod (<i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i>) |
| 28. | 03025200 | Haddock (<i>Melanogrammus aeglefinus</i>) |
| 29. | 03025300 | Coalfish (<i>Pollachius virens</i>) |
| 30. | 03025400 | Hake (<i>Merluccius</i> spp., <i>Urophycis</i> spp.) |
| 31. | 03025500 | Alaska Pollack (<i>Theragra chalcogramma</i>) |
| 32. | 03025600 | Blue whittings (<i>Micromesistius poutassou</i> , <i>Micromesistius australis</i>) |
| 33. | 03025900 | No item found |
| 71. | 03036400 | Haddock (<i>Melanogrammus aeglefinus</i>) |
| 72. | 03036500 | Coalfish (<i>Pollachius virens</i>) |
| 73. | 03036600 | Hake (<i>Merluccius</i> spp., <i>Urophycis</i> spp.) |
| 74. | 03036700 | Alaska Pollack (<i>Theragra chalcogramma</i>) |
| 75. | 03036800 | Blue whittings (<i>Micromesistius poutassou</i> , <i>Micromesistius australis</i>) |
| 76. | 03036900 | Other |
| 77. | 03038110 | Dogfish |
| 78. | 03038190 | Other sharks |
| 79. | 03038300 | Toothfish (<i>Dissostichus</i> spp.) |
| 80. | 03038400 | Seabass (<i>Dicentrarchus</i> spp.) |
| 81. | 03038910 | Hilsa |
| 82. | 03038920 | Dara |
| 83. | 03038930 | Ribbon fish |
| 84. | 03038940 | Seer |
| 85. | 03038950 | Pomfret (white or silver or black) |
| 86. | 03038960 | Ghole |
| 87. | 03038970 | Threadfin |
| 88. | 03038980 | Croackers, groupers, flounders |
| 89. | 03038992 | No item found |
| 90. | 03043100 | Tilapias (<i>Oreochromis</i> spp.) |
| 91. | 03043200 | Catfish (<i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.) |
| 92. | 03043300 | Nile Perch (<i>Lates niloticus</i>) |
| 93. | 03043900 | Other |
| 94. | 03044400 | Fish of the families Bregmacerotidae, Euclichthyidae, Gadidae, Macrouridae, Melanonidae, Merlucciidae, Moridae and Muraenolepididae |
| 95. | 03044500 | Swordfish (<i>Xiphias gladius</i>) |
| 96. | 03044600 | Toothfish (<i>Dissostichus</i> spp.) |
| 97. | 03044910 | Hilsa |
| 98. | 03044930 | Seer |
| 99. | 03044940 | Tuna |
| 100. | 03044990 | Other |
| 101. | 03045300 | Fish of the families Bregmacerotidae, Euclichthyidae, Gadidae, Macrouridae, Melanonidae, Merlucciidae, Moridae and Muraenolepididae |
| 102. | 03045400 | Swordfish (<i>Xiphias gladius</i>) |
| 103. | 03045500 | Toothfish (<i>Dissostichus</i> spp.) |
| 104. | 03045910 | Hilsa |
| 105. | 03045930 | Seer |
| 106. | 03045940 | Tuna |
| 107. | 03045990 | Other |
| 108. | 03046200 | Catfish (<i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.) |
| 109. | 03046300 | Nile Perch (<i>Lates niloticus</i>) |
| 110. | 03046900 | Other |
| 34. | 03027100 | Tilapias (<i>Oreochromis</i> spp.) |
| 35. | 03027200 | Catfish (<i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.) |
| 36. | 03027300 | Carp (<i>Cyprinus carpio</i> , <i>Carassius carassius</i> , <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i>) |
| 37. | 03027400 | Eels (<i>Anguilla</i> spp.) |
| 38. | 03027900 | Other |
| 39. | 03028100 | Dogfish and other sharks |
| 40. | 03028200 | Rays and skates (<i>Rajidae</i>) |
| 41. | 03028300 | Toothfish (<i>Dissostichus</i> spp.) |
| 42. | 03028400 | Seabass (<i>Dicentrarchus</i> spp.) |
| 43. | 03028500 | Seabream (<i>Sparidae</i>) |
| 44. | 03028910 | Hilsa |
| 45. | 03028920 | Dara |
| 46. | 03028930 | Pomfret |
| 47. | 03028990 | Other |
| 48. | 03031100 | Sockeye salmon (red salmon) (<i>Oncorhynchus nerka</i>) |
| 49. | 03031400 | Trout (<i>Salmo trutta</i> , <i>Oncorhynchus mykiss</i> , <i>Oncorhynchus clarkia</i> , <i>Oncorhynchus aguabonita</i> , <i>Oncorhynchus gilae</i> , <i>Oncorhynchus apache</i> and <i>Oncorhynchus chrysogaster</i>) |
| 50. | 03031900 | Other |
| 51. | 03032300 | Tilapias (<i>Oreochromis</i> spp.) |
| 52. | 03032500 | Carp (<i>Cyprinus carpio</i> , <i>Carassius carassius</i> , <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i>) |
| 53. | 03032600 | Eels (<i>Anguilla</i> spp.) |
| 54. | 03032900 | Other |
| 55. | 03033200 | Plaice (<i>Pleuronectes platessa</i>) |
| 56. | 03033300 | Sole (<i>Solea</i> spp.) |
| 57. | 03033400 | Turbots (<i>Psetta maxima</i> , <i>Scophthalmidae</i>) |
| 58. | 03033900 | Other |
| 59. | 03034100 | Albacore or longfinned tunas (<i>Thunnus alaiunga</i>) |
| 60. | 03034200 | Yellowfin tunas (<i>Thunnus albacares</i>) |
| 61. | 03034300 | Skipjack or stripe-bellied bonito |
| 62. | 03034400 | Bigeye tunas (<i>thunnus obesus</i>) |
| 63. | 03034500 | Atlantic and Pacific bluefin tunas (<i>Thunnus thynnus</i> , <i>Thunnus orientalis</i>) |
| 64. | 03034600 | Southern bluefin tunas (<i>thunnus maccoyii</i>) |
| 65. | 03034900 | Other |
| 66. | 03035400 | Mackerel (<i>Scomber scombrus</i> , <i>Scomber austral asicus</i> , <i>Scomber japonicus</i>) |
| 67. | 03035500 | Jack and horse mackerel (<i>Trachurus</i> spp.) |
| 68. | 03035600 | Cobia (<i>Rachycentron canadum</i>) |
| 69. | 03035700 | Swordfish (<i>Xiphias gladius</i>) |
| 70. | 03036300 | Cod (<i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i>) |
| 111. | 03047100 | Cod (<i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i>) |
| 112. | 03047200 | Haddock (<i>Melanogrammus aeglefinus</i>) |
| 113. | 03047300 | Coalfish (<i>Pollachius virens</i>) |
| 114. | 03047400 | Hake (<i>Merluccius</i> spp., <i>Urophycis</i> spp.) |
| 115. | 03047500 | Alaska Pollack (<i>Theragra chalcogramma</i>) |
| 116. | 03047900 | Other |
| 117. | 03048200 | Trout (<i>Salmo trutta</i> , <i>Oncorhynchus mykiss</i> , <i>Oncorhynchus clarkii</i> , <i>Oncorhynchus aguabonita</i> , <i>Oncorhynchus gilae</i> , <i>Oncorhynchus apache</i> and <i>Oncorhynchus chrysogaster</i>) |
| 118. | 03048300 | Flat fish (<i>Pleuronectidae</i> , <i>Bothidae</i> , <i>Cynoglossidae</i> , <i>Soleidae</i> , <i>Scophthalmidae</i> and <i>Citharidae</i>) |
| 119. | 03048400 | Swordfish (<i>Xiphias gladius</i>) |
| 120. | 03048500 | Toothfish (<i>Dissostichus</i> spp.) |
| 121. | 03048600 | Herrings (<i>Clupea harengus</i> , <i>Clupea pallasii</i>) |
| 122. | 03048910 | Hilsa |
| 123. | 03048930 | Seer |
| 124. | 03048990 | Other |
| 125. | 03049100 | Swordfish (<i>Xiphias gladius</i>) |
| 126. | 03049200 | Toothfish (<i>Dissostichus</i> spp.) |
| 127. | 03049500 | Fish of the families Bregmacerotidae, Euclichthyidae, Gadidae, Macrouridae, Melanonidae, Merlucciidae, Moridae and Muraenolepididae, other than Alaska Pollack (<i>Theragra chalcogramma</i>) |
| 128. | 03049900 | Other |
| 129. | 03051000 | Flours, meals and pellets, of fish fit for human consumption |
| 130. | 03053100 | Tilapias (<i>Oreochromis</i> spp.), catfish (<i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.), carp (<i>Cyprinus carpio</i> , <i>Carassius carassius</i> , <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i>), eels (<i>Anguilla</i> spp.), Nile perch (<i>Lates niloticus</i>) and snakeheads (<i>Channa</i> spp.) |
| 131. | 03053900 | Other |
| 132. | 03054200 | Herrings (<i>Clupea harengus</i> , <i>Clupea pallasii</i>) |
| 133. | 03054400 | Tilapias (<i>Oreochromis</i> spp.), catfish (<i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.), carp (<i>Cyprinus carpio</i> , <i>Carassius carassius</i> , <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i>), eels (<i>Anguilla</i> spp.), Nile perch (<i>Lates niloticus</i>) and snakeheads (<i>Channa</i> spp.) |
| 134. | 03054900 | Other |
| 135. | 03055100 | Cod (<i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i>) |
| 136. | 03055910 | Mumbai Duck |
| 137. | 03055920 | Seer without head |
| 138. | 03055930 | Sprats |
| 139. | 03055990 | Other |
| 140. | 03056100 | Herrings (<i>Clupea harengus</i> , <i>Clupea pallasii</i>) |
| 141. | 03056200 | Cod (<i>Gadus morhua</i> , <i>Gadus ogac</i> , <i>Gadus macrocephalus</i>) |

| | | | | | |
|------|----------|--|------|----------|---|
| 142. | 03056400 | Tilapias (Oreochromis spp.), catfish (Pangasius spp., Silurus spp., Clarias spp., Ictalurus spp.), carp (Cyprinus carpio, Carassius carassius, Ctenopharyngodon idellus, Hypophthalmichthys spp., Cirrhinus spp., Mylopharyngodon piceus), eels (Anguilla spp.), Nile perch (Lates niloticus) and snakeheads (Channa spp.) | 180. | 03082900 | Other |
| 143. | 03056910 | Mumbai duck | 181. | 03083010 | Live, fresh or chilled |
| 144. | 03056920 | Seer without head | 182. | 03083020 | Dried, salted or frozen |
| 145. | 03056930 | Sprats | 183. | 03089000 | Other |
| 146. | 03056990 | Other | 184. | 04063000 | Processed Cheese not grated or powdered |
| 147. | 03057100 | Shark fins | 185. | 04064000 | Blue-veined cheese and other cheese containing veins produced by Penicillium roqueforti |
| 148. | 03057200 | Fish heads, tails and maws | 186. | 04069000 | Other cheese |
| 149. | 03057900 | Other | 187. | 04071100 | Of fowls of the species Gallus domesticus |
| 150. | 03061100 | Rock lobster and other sea craw fish (Palinurus spp., Panulirus spp., Jasus spp.) | 188. | 04071910 | Of ducks |
| 151. | 03061210 | Whole cooked | 189. | 04100010 | Of Wild animals |
| 152. | 03061290 | Other | 190. | 05040039 | Other |
| 153. | 03061400 | Crabs | 191. | 05051010 | Of wild birds |
| 154. | 03061500 | Norway lobsters (Nephrops norvegicus) | 192. | 05051090 | Other |
| 155. | 03061610 | Accelerated Freeze Dried(AFD) | 193. | 05059010 | Peacock tail and wing feather (trimmed or not) |
| 156. | 03061690 | Other | 194. | 05059021 | Of wild birds |
| 157. | 03061711 | Accelerated Freeze Dried(AFD) | 195. | 05059029 | Other |
| 158. | 03061719 | Other | 196. | 05059031 | Of wild birds |
| 159. | 03061790 | Other | 197. | 05059039 | Other |
| 160. | 03061900 | Other, including flours, meals and pellets, of crustaceans, fit for human consumption | 198. | 05059091 | Of wild birds |
| 161. | 03071100 | Live, fresh or chilled | 199. | 05059099 | Other |
| 162. | 03071900 | Other | 200. | 05100010 | Bezoar, cow (goolochan) |
| 163. | 03072900 | Other | 201. | 05100020 | Ox Gallstone |
| 164. | 03073100 | Live, fresh or chilled | 202. | 05100091 | Of wild animals |
| 165. | 03073910 | Clams, clam meat (bivalves-Victorita, spp., Mertrix spp. and Katalysia spp.) | 203. | 05100099 | Other |
| 166. | 03073990 | Other | 204. | 15021010 | Mutton tallow |
| 167. | 03074920 | Whole squids, frozen | 205. | 15021090 | Other |
| 168. | 03074930 | Dried squids | 206. | 15029010 | Unrendered fats |
| 169. | 03074990 | Other | 207. | 15029020 | Rendered fats or solvent extraction fats |
| 170. | 03075100 | Live, fresh or chilled | 208. | 15029090 | Other |
| 171. | 03075900 | Other | 209. | 15030000 | Lard Stearin, Lard Oil, Oleostearin, Oleo-Oil and Tallow Oil, not emulsified or mixed or otherwise prepared |
| 172. | 03076000 | Snails, other than sea snails | 210. | 15041099 | Other |
| 173. | 03077100 | Live, fresh or chilled | 211. | 15042030 | Sperm oil |
| 174. | 03077900 | Other | 212. | 15042090 | Other |
| 175. | 03079100 | Live, fresh or chilled | 213. | 15043000 | Fats and oils and their fractions, of marine mammals |
| 176. | 03079900 | Other | 214. | 15060010 | Neats Foot oil and fats from bone or waste |
| 177. | 03081100 | Live, fresh or chilled | 215. | 15060090 | Other |
| 178. | 03081900 | Other | 216. | 15161000 | Animal fats and oils and their fractions |
| 179. | 03082100 | Live, fresh or chilled | 217. | 15171010 | Of animal origin |
| | | | 218. | 15179030 | Imitation lard of animal origin |
| | | | 219. | 15180040 | Other |
| | | | 220. | 15220010 | Degras |
| | | | 221. | 15220020 | Soap stocks |
| | | | 222. | 15220090 | Other |
| 223. | 21039090 | Other | 262. | 51011900 | Other |
| 224. | 21041010 | Dried | 263. | 51021190 | Other |
| 225. | 21041090 | Other | 264. | 51021910 | Marine Angora |
| 226. | 21042000 | Homogenised composite food preparations | 265. | 51022090 | Other (excluding pig & boar bristles) |
| 227. | 21061000 | Protein concentrates and textured protein substances | 266. | 51031090 | Other |
| 228. | 30012090 | Other | 267. | 51032090 | Other |
| 229. | 30029030 | Animal blood prepared for therapeutic, prophylactic or diagnostic uses | 268. | 96019010 | Worked tortoise-shell and articles thereof |
| 230. | 30039090 | Other | 269. | 96019020 | Worked mother-of-pearl and articles thereof |
| 231. | 31010091 | Animal dung | 270. | 96019030 | Worked bone (excluding whale bone) and articles thereof |
| 232. | 35011000 | Casein | 271. | 96019040 | Worked horn, coral and other animal carving material and articles thereof |
| 233. | 35019000 | Other | 272. | 96020030 | Gelatin capsules, empty |
| 234. | 35030010 | Isinglass | | | |
| 235. | 35030090 | Other | | | |
| 236. | 35040099 | Other | | | |
| 237. | 41012090 | Other | | | |
| 238. | 41015020 | Of buffalo, including buffalo calf | | | |
| 239. | 41019010 | Of cow, including cow calf | | | |
| 240. | 41019090 | Other | | | |
| 241. | 41022130 | Lamb pelt | | | |
| 242. | 41022910 | Sheep skins | | | |
| 243. | 41022920 | Lamb skins | | | |
| 244. | 41039000 | Other | | | |
| 245. | 41041100 | Full gains, unsplit, grain splits | | | |
| 246. | 41041900 | Other | | | |
| 247. | 41064000 | Of reptiles | | | |
| 248. | 41133000 | Of reptiles | | | |
| 249. | 41139000 | Others | | | |
| 250. | 41141000 | Chamois (including combination chamois) leather | | | |
| 251. | 41142010 | Patent leather and patent laminated leather | | | |
| 252. | 41142020 | Metallised leather | | | |
| 253. | 41151000 | Composition leather with a basis of leather or leather fiber, in slabs, sheets or strip, whether or not in rolls | | | |
| 254. | 41152010 | Cuttings of leather | | | |
| 255. | 41152090 | Other | | | |
| 256. | 43011000 | Of mink, whole, with or without head, tail or paws | | | |
| 257. | 43013000 | Of lamb, the following: Astrakhan, Broadtail, Caracul, Persian and Similar lamb, Indian, Chinese, Mongolian or Tibetan lamb, whole, with or without head, tail or paws | | | |
| 258. | 43016000 | Of fox, whole, with or without head, tail or paws | | | |
| 259. | 43018000 | Other furskins, whole, with or without head, tail or paws | | | |
| 260. | 43019000 | Heads, tails, paws and other pieces or cuttings, suitable for furriers' use | | | |
| 261. | 51011100 | Shorn wool | | | |

Livestock Feed and Animal Health

Livestock Health

Through DAHD's Livestock Health & Disease Control scheme, preventative efforts are made to control and contain critically important animal diseases of such as foot and mouth disease (FMD), *peste des petits ruminants* (PPR, or sheep and goat plague), brucellosis and anthrax. The DADF also provides financial assistance to Animal Health Institutions under a Central Sector scheme (Source: [Livestock Health and Disease Control DAHD](#)).

For trading purposes, FMD is the most critical disease for India to manage¹², and has a World Organization for Animal Health (OIE)-endorsed official program (initiated May 2015) for controlling the disease. On May 31, 2019, India's Union Cabinet approved a new scheme in the National Animal Disease Control Program (NADCP¹³) to manage foot and mouth disease and brucellosis outbreaks ([PIB Press release July 2019](#)). [Under this program, the GOI plans to](#) vaccinate over 600 million cattle nationally, in an effort to mitigate the two diseases (See: [PIB Press Release NACDP](#)).

On May 21, 2020, DAHD reported to the OIE its first occurrence of [African swine fever](#) (ASF) virus in northeast India. To manage this outbreak and prevent ASF progression to further reach an endemic status, the DAHD prepared a disease control strategy to guide state governments on how to prevent, control and contain ASF in accordance with OIE and UN-Food and Agriculture Organization recommendations.

ASF is highly contagious and highly fatal disease in domestic and feral pigs (including wild boar), transmitted through direct and indirect contacts, ingestion of contaminated feedstuffs and by certain tick vector species. The disease does not infect humans (nor zoonotic) or other livestock species. However, no vaccine or drugs are presently available to prevent ASF infections¹⁴.

Livestock Feed

On July 24, 2020, the GOI's FSSAI extended the compliance date for stakeholders to adopt revised standards established by the Bureau of Indian Standards regarding commercial feed and feed ingredients intended for meat and dairy animals. The new compliance date is January 1, 2021 and has been extended to accommodate requests from industry stakeholders to postpone the implementation period due to COVID-19 and the GOI lockdown. (See: [GAIN IN2020-0094](#)).

¹² FMD affects cloven-hoofed animals, including domestic and wild bovines, is fatal, resulting in reduced milk production.

¹³ The NADCP aims to control and eradicate FMD and brucellosis in India's beef and *carabeef* herds.

¹⁴ See: [GOI National Action Plan for ASF](#).

Production, Supply and Demand Statistics

| Table 2. India: Commodity, Animal Numbers, Cattle, PSD | | | | | | |
|---|------------------|----------|------------------|----------|------------------|----------|
| Animal Numbers, Cattle Market Year Begins | 2019 | | 2020 | | 2021 | |
| | Jan 2019 | | Jan 2020 | | Jan 2021 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| India | | | | | | |
| Total Cattle Beg. Stks (1000 HEAD) | 302700 | 302700 | 303200 | 303200 | 0 | 305500 |
| Dairy Cows Beg. Stocks (1000 HEAD) | 125340 | 125340 | 126500 | 126500 | 0 | 127650 |
| Beef Cows Beg. Stocks (1000 HEAD) | 0 | 0 | 0 | 0 | 0 | 0 |
| Production (Calf Crop) (1000 HEAD) | 69000 | 69000 | 69400 | 69400 | 0 | 69800 |
| Total Imports (1000 HEAD) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Supply (1000 HEAD) | 371700 | 371700 | 372600 | 372600 | 0 | 375300 |
| 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) | 38900 | 38600 | 37400 | 34750 | 0 | 36000 |
| Total Slaughter (1000 HEAD) | 38900 | 38600 | 37400 | 34750 | 0 | 36000 |
| Loss and Residual (1000 HEAD) | 29600 | 29900 | 30140 | 32350 | 0 | 32600 |
| Ending Inventories (1000 HEAD) | 303200 | 303200 | 305060 | 305500 | 0 | 306700 |
| Total Distribution (1000 HEAD) | 371700 | 371700 | 372600 | 372600 | 0 | 375300 |
| Note: Post Data is not Official USDA Data | | | | | | |

| Table 3. India: Commodity, Meat, Beef and Veal, PSD | | | | | | |
|--|------------------|----------|------------------|----------|------------------|----------|
| Meat, Beef and Veal Market Year Begins | 2019 | | 2020 | | 2021 | |
| | Jan 2019 | | Jan 2020 | | Jan 2021 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| India | | | | | | |
| Slaughter (Reference) (1000 HEAD) | 38900 | 38600 | 37400 | 34750 | 0 | 36000 |
| Beginning Stocks (1000 MT CWE) | 0 | 0 | 0 | 0 | 0 | 0 |
| Production (1000 MT CWE) | 4305 | 4270 | 4150 | 3650 | 0 | 3960 |
| Total Imports (1000 MT CWE) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Supply (1000 MT CWE) | 4305 | 4270 | 4150 | 3650 | 0 | 3960 |
| Total Exports (1000 MT CWE) | 1494 | 1494 | 1400 | 1050 | 0 | 1200 |
| Human Dom. Consumption (1000 MT CWE) | 2811 | 2776 | 2750 | 2600 | 0 | 2760 |
| Other Use, Losses (1000 MT CWE) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Dom. Consumption (1000 MT CWE) | 2811 | 2776 | 2750 | 2600 | 0 | 2760 |
| Ending Stocks (1000 MT CWE) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution (1000 MT CWE) | 4305 | 4270 | 4150 | 3650 | 0 | 3960 |
| Note: Post Data is not Official USDA Data | | | | | | |

Attachments:

No Attachments