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Report Highlights:

India's cattle inventory beginning 2027 is forecast at 307 million head, marginally lower over last year, as rising slaughter (driven by strong domestic and export demand for bovine meat) modestly outpaces herd growth. Cattle/buffalo slaughter is forecast to rise 1.6 percent to 44.2 million head, supporting bovine meat production growth to 5.0 million metric tons (MMT) carcass weight equivalent (CWE). India's carabeef exports continue near-record growth, reaching a forecast of 1.9 MMT CWE in 2027 (up 2.7 percent year-over-year), driven by competitive pricing and expanding markets. Domestic consumption is also rising steadily, supported by affordability relative to other meats.

EXECUTIVE SUMMARY

India's cattle and buffalo herd remains among the largest in the world, with beginning inventory forecast at 307 million head in 2027, marginally lower than last year. Growth in higher-yielding crossbred cattle and buffalo is being offset by continued culling of unproductive stray and non-descript animals, as improved incomes from selling spent animals for slaughter reduce the incentive to abandon them. The 2027 calf crop is projected at 72.5 million head, supported by favorable weather, adequate feed/fodder, and improving animal husbandry practices, while disease losses remain contained due to government FMD and other disease vaccination programs.

Total slaughter is forecast to rise 1.6 percent to 44.2 million head in 2027, driving bovine meat (carabeef) production up 2 percent to 5.0 MMT CWE. Because cattle slaughter is prohibited across most states for religious reasons, India's beef trade is effectively a buffalo-meat (carabeef) industry, concentrated in organized, export-registered abattoirs in Uttar Pradesh, Maharashtra, Andhra Pradesh, and Telangana. Domestic consumption is expected to reach 3.1 MMT CWE, up 1.6 percent over last year fueled by a growing non-vegetarian population and carabeef's price advantage over other meats. Exports are the standout growth driver: 2027 shipments are forecast at 1.9 MMT CWE, up 2.7 percent from 2026 and 12.5 percent from 2025, as India's price-competitive, Halal-certified carabeef gains share in Egypt, Vietnam, Jordan, the Philippines, and emerging markets like Uzbekistan. Export price realization has climbed nearly 18 percent year-over-year.

Trade policy remains unchanged: live cattle exports and beef imports are effectively prohibited, while carabeef exports require APEDA/FSSAI-registered facilities and sanitary certification. Federal budget support for the sector rose 16 percent in FY2026/27, reinforcing infrastructure and productivity programs.

CATTLE

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

Animal Numbers, Cattle	2025		2026		2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stks (1000 HEAD)	307490	307490	307500	307500	0	307000
Dairy Cows Beg. Stocks (1000 HEAD)	132500	132500	133400	133500	0	133600
Beef Cows Beg. Stocks (1000 HEAD)	0	0	0	0	0	0
Production (Calf Crop) (1000 HEAD)	71100	71100	71600	72100	0	72500
Total Imports (1000 HEAD)	0	0	0	0	0	0
Total Supply (1000 HEAD)	378590	378590	379100	379600	0	379500
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)	41590	41590	42000	43500	0	44200
Total Slaughter (1000 HEAD)	41590	41590	42000	43500	0	44200
Loss and Residual (1000 HEAD)	29500	29500	29500	29100	0	28800
Ending Inventories (1000 HEAD)	307500	307500	307600	307000	0	306500
Total Distribution (1000 HEAD)	378590	378590	379100	379600	0	379500
(1000 HEAD)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

India accounts for one of the world's largest cattle inventories comprising bovine cattle (both *Bos taurus* and *Bos indicus*) and the Asian domestic water buffalo (*Bubalus bubalis*), primarily raised for dairy purposes. Post forecasts India's beginning cattle inventory in 2027 at 307 million head, marginally lower than last year on higher than earlier estimated cattle slaughter in 2026 driven by strong domestic and export demand for bovine meat. 2027 cattle ending inventory is forecast lower to 306.5 million heads on expected higher slaughter to meet the continued strong demand for bovine meat. Industry sources expect a continued slow growth in cross bred cattle and higher yielding buffalo populations which will be more than offset by reducing numbers of low productive non-descript cattle and water buffalo and stray unproductive animals (old spent cows/buffalo, male calves/bulls/buffalo).

India's livestock/dairy sector continues to be dominated by small and marginal farmers with backyard dairy operations having 2-5 animals in most states. Industry sources report a gradual reorganization of the dairy operations in the major progressive dairy producing states. There is a growing trend towards specialized dairy operations with 20-50 animals, while backyard dairy operations limit number of milch animals for home dairy consumption. With the declining size of farm holding and increasing mechanization, dairy farmers are increasingly replacing lower yielding cows/buffaloes with high yielding animals in their herds. Increasing mechanization and improved rural road infrastructure has

further affected use of bullocks and buffalo bulls as draft animals. Besides, strong recovery in export demand for buffalo meat (or carabeef), expansion of modern abattoirs and meat processing facilities, and steady domestic demand has supported higher price realization from these unproductive/spent animals augmenting farmer incomes instead of discarding them as strays.

Calf Crop: Post forecasts India's 2027 calf crop at 72.5 million head, slightly above the previous year. Continued adoption of improved dairy and animal husbandry practices, adequate feed and fodder, and favorable weather in late 2025 and the first half of 2026 are expected to support animal health, reproductive performance and calving.¹ 2026 dairy cow beginning stocks and calf crop inventory estimates have been raised marginally higher to 133.5 million heads and 72.1 million heads as favorable 2025 monsoon and weather conditions supported higher feed/fodder availability and lower disease incidence compared to previous years supporting calving in 2026.

Slaughter: In 2027, the slaughter number of both bovine cattle and Asian domestic water buffalo, is forecast to grow by 1.6 percent over last year to 44.2 million heads on expected sufficient availability of slaughter-ready cattle as farmers to augment their incomes by selling male calves/unproductive animals instead of discarding them as strays. The expected steady firm demand in carabeef domestic consumption and international markets also support the increase. 2026 slaughter estimate has also been raised to 43.5 million heads, an increase of five percent over last year on strong offtake of cattle due to strong exports and steady domestic demand.

Bovine cattle slaughter continues to be prohibited in most parts of the country on religious sensitivities.² Buffalo slaughter is not prohibited across the country, and meat derived from buffalo (carabeef) are allowed for exports, enabling India to emerge as one of the leading beef (i.e., carabeef) exporters in the world. Typically, male water buffalo calves/bulls and dry/spent female water buffalo are routed for slaughter for meat exports. The states of Uttar Pradesh, West Bengal, Madhya Pradesh, Rajasthan, Bihar, Gujarat, and Andhra Pradesh have more than half of the total bovine population in the country.

Loss and Residual: Assuming no major extreme weather events or disease outbreaks in 2027, loss and residual of cattle herd is forecast slightly lower at 28.8 million heads as farmers are more incentivized to raise unproductive cattle (male calves and old cows/buffaloes) for sale instead of discarding them as stray. 2026 loss and residual estimate have also been lowered to 29.1 million heads on favorable weather conditions, absence of any major disease outbreaks and favorable market for bovine meat.

Disease Status: In 2026, media reports of sporadic incidences of Lumpy Skin Disease in few states, but industry sources report no significant losses due to the extensive vaccinations program implemented by the Government of India during 2022-2023, and effective monitoring and mitigative measures undertaken by the state governments on detection of any incidence. FMD is the most economically damaging livestock disease in India causing significant morbidity in cattle and buffalo. The government runs the National Animal Disease Control Programme (NADCP) which provides free FMD vaccination. The other major diseases are Hemorrhagic Septicemia (highly fatal bacterial disease), Black

¹ Cattle and buffalo calving and mortality are adversely affected by weather events like drought, floods and other extreme climate events.

² Cattle slaughter is effectively prohibited in 27 out of 36 states; allowed in the states of Kerala, West Bengal and some northeastern states. (Source: [Rajya Sabha, unstarred question No. 3464](#)).

Quarter (fatal clostridial disease), Mastitis (bacterial infection in udder), and Brucellosis (bacterial disease).

Production Policy

India's Department of Animal Husbandry and Dairying (DAHD) stated in their last annual report that the livestock sector is a cornerstone of India's rural economy vital to creating employment and boosting farmers income.³ Due to religious sensitivities, there are no government policies that support bovine animal rearing for slaughter. However, various government livestock and dairy support programs in place indirectly facilitate higher availability of the male calves/buffaloes and dry female buffaloes for slaughter.

Federal Budget Support: The Government of India (GoI) continues to be bullish about the contribution of the Indian dairy and livestock sector in the national economic growth and development. The Indian government in the 2026/2027 fiscal budget allocated INR 61.5 billion (US\$669 million) for the Department of Animal Husbandry and Dairying, a whopping increase of 16 percent over the previous year allocation.

Federal Programs: DAHD has various development programs focused on enhancing animal productivity through breed improvement, feed and fodder availability, supply chain and other infrastructure development, and animal health. The programs include [Rashtriya Gokul Mission](#), [National Livestock Mission](#), [National Programme for Dairy Development](#), [Animal Husbandry Infrastructure Development Fund](#), and [Livestock Health and Disease Control Program](#) among [few others](#). In addition, most state governments have state specific livestock and dairy production support and disease management programs. These support schemes encourage bovine animal rearing and thus, continued supply of animals for slaughter (mostly carabeef).

21st Livestock Census Results Awaited: India conducted its 21st [Livestock Census](#) from October 2024 to March 2025. This quinquennial exercise counted 15 domesticated animal species, including cattle and Asian domestic water buffaloes. The results, originally expected in late 2025, have been delayed by technical issues affecting data compilation and validation.

³ Over the past decade, the sector has expanded rapidly, with its Gross Value Added (GVA) nearly tripling from 2014–15 to 2023–24 reflecting an annual growth of 12.78 percent, nearly one third to the GVA of the agriculture and allied sector and nearly 5 percent of India's overall economy.

MEAT, BEEF and VEAL

Table 2: India: Meat, Beef and Veal-Production, Supply and Distribution

Meat, Beef and Veal	2025		2026		2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	41590	41590	42000	43500	0	44200
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	4680	4680	4725	4900	0	5000
Total Imports (1000 MT CWE)	0	0	0	0	0	0
Total Supply (1000 MT CWE)	4680	4680	4725	4900	0	5000
Total Exports (1000 MT CWE)	1688	1688	1700	1850	0	1900
Human Dom. Consumption (1000 MT CWE)	2992	2992	3025	3050	0	3100
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	2992	2992	3025	3050	0	3100
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total Distribution (1000 MT CWE)	4680	4680	4725	4900	0	5000
(1000 HEAD), (1000 MT CWE)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

Post forecasts India's 2027 cattle meat production at 5.0 MMT CWE, a two percent increase from 2026. The expected continued strong export demand for carabeef and steady domestic demand for bovine meat; coupled with adequate supply of slaughter-ready cattle/buffaloes from the large cattle inventory and improved carcass weights will together foster the forecast growth in production. 2026 bovine meat production estimate has been revised higher to 4.9 MMT CWE, about a 5 percent increase over previous year owing to strong demand and prices boosting production.

India's cattle meat sector is dominated by the organized carabeef industry, which sources spent water buffaloes and male buffalo calves and bulls from the dairy sector. Uttar Pradesh, Maharashtra, Andhra Pradesh, and Telangana are the principal carabeef-producing states and host most modern abattoirs and export-registered meat-processing facilities. In states where cattle slaughter is permitted, beef production is largely managed by small, unorganized operators serving local wet markets because interstate transport and exports are prohibited. Rising bovine meat and slaughter-animal prices over the past two years have improved the supply and quality of animals for slaughter.

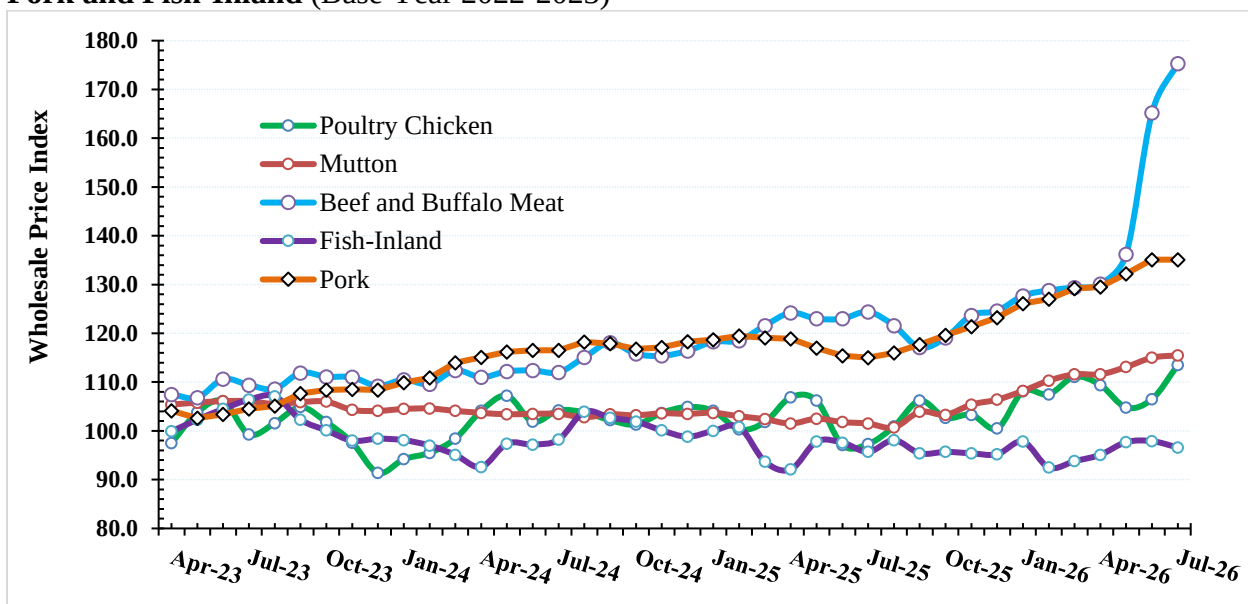
Consumption

India's 2027 carabeef and beef consumption is forecast at 3.1 MMT CWE, an increase of 1.6 percent over last year. Post's 2026 consumption estimate is raised marginally higher to 3.05 MMT CWE, two percent increase over previous year as beef/carabeef prices are more affordable compared to other meats. The main factors in driving consumption are:

- Changing demography with beef/carabeef consumption population increasing⁴
- Evolving food habits preferring meat/meat products
- Beef/carabeef more affordable compared to other types of meat
- Expanding availability of processed/package beef products

Prices Rise; Still Inexpensive: The 2026 domestic wholesale price index of beef and carabeef in India rose sharply compared to other meats like poultry, pork, mutton, and fish, owing to strong exports and increase in export price realization.

Figure 3. India: Monthly Wholesale Price Index of Beef/Carabeef Compared to Mutton, Chicken, Pork and Fish-Inland (Base Year 2022-2023)



Source:

Office of Economic Advisor, Govt of India, and FAS New Delhi Office research.

While there are no reliable and published data series for meat prices, industry sources report that beef/carabeef prices are still significantly lower than mutton and pork prices, and lower or comparable to poultry and fish prices depending on the type, quality, or cut⁵.

Trade

Imports: India does not import bovine meat as (i) imports of beef and beef products are subject to severe restrictions, which effectively ban imports, and (ii) imports of carabeef not viable as Indian carabeef is highly price competitive in the global market.

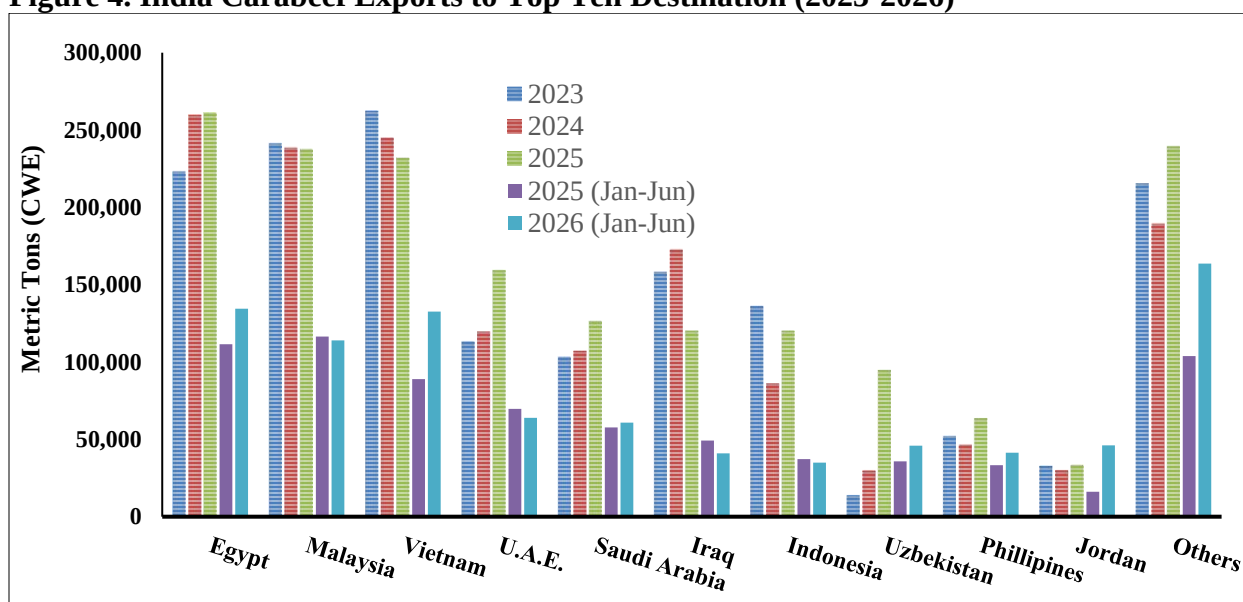
⁴ India's expanding middle class and growing youth population is fueling consumption of non-vegetarian food. Nearly 20 percent of the Indian populations are non-Hindu consuming beef/carabeef, and not all Hindus abstain from consuming beef/carabeef. Sources report higher population growth in carabeef/beef consuming population compared to people abstaining due to religious reasons.

⁵ Market sources reported retail prices in Delhi wet market in the last week of August – buffalo meat INR 250-350 per kilogram (kg); mutton INR 750-1300 per kg, pork INR 400-600 per kg, poultry INR 275-375 per kg, and fish INR 200-950 per kg depending on variety.

Exports: Assuming steady export demand from traditional markets and current price parity for Indian carabeef compared to beef from other origins, India’s carabeef exports will continue to grow in upcoming year, with 2027 exports forecast at 1.9 MMT CWE, about 2.7 percent increase over 2026 estimated exports and 12.5 percent increase over 2025 exports. Based on the latest official trade data from Trade Data Monitor reflecting strong pace of monthly exports, CY 2026 export estimate has been raised to a near-record 1.85 MMT CWE.⁶

The latest official trade data estimates carabeef exports during January-June 2026 at 879,000 MT CWE, a whopping increase of 22 percent over the exports during the same time last year. There has been a strong surge in exports to major markets like Egypt, Vietnam, Jordan, Philippines, and new markets like Uzbekistan.

Figure 4. India Carabeef Exports to Top Ten Destination (2023-2026)



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

Trade sources expect continued strong demand owing to highly competitive prices, logistical advantages for traditional markets (lower sea freight) and expanding sales to newer markets compared to beef from other competing origins. Assuming current price parity for Indian carabeef, and pace of monthly exports during the second half of the year, 2026 will reach 1.85 MMT CWE. The continued strong rise in export price realization for Indian carabeef in 2026 will encourage sufficient export supplies in upcoming marketing year 2027⁷.

India exports Halal certified frozen boneless carabeef, which is thawed and resold in retail markets for direct consumption, and smaller quantities processed into meat products like sausages, salami, and meat patties. Indian carabeef is preferred due to its affordability, leanness and Halal certification compared to beef from other origins.

⁶ India exported a record 2.02 MMT CWE bovine meat in 2014.

⁷ Indian carabeef export price realisation during first half of 2026 was estimated at \$3073 per MT CWE, a strong increase of nearly 18 percent compared to price realisation during the same period in 2025.

Trade Policy

India's trade policy affecting exports/import of live animals, and livestock products have been unchanged in 2026.

Import regulations for live animals: The Indian government restricts the import of live animals as per Section 3 of the Livestock Importation Act. Obtaining an import license from the Director General of Foreign Trade (DGFT) is mandatory. The license, which is valid for six months to a year, is issued following a proposal and risk analysis conducted by the Department of Animal Husbandry and Dairying (DAHD), and receipt of a veterinary certificate issued by a competent authority of the exporting country.

Import regulations for livestock products: Livestock products are categorized under India's Open General License (OGL) and DAHD provides import procedures for these products in notification S.O. 2666(E) of October 2015. Obtaining a DAHD-issued Sanitary Import Permit (SIP), prior to shipping, is a pre-requisite. The SIP is valid for six months to a year. Obtaining an import license from the Director General of Foreign Trade (DGFT) is mandatory. The license, which is valid for six months to a year, is issued following a proposal and risk analysis conducted by the DAHD, and receipt of a veterinary certificate issued by a competent authority of the exporting country.

India's livestock products certification requirements and documentation for livestock are accessible on the DAHD website located at: <https://dahd.gov.in/division/trade>. See Appendix Table 1 for an overview of tariffs and import policy for select livestock products.

Export regulations for live animals: India's existing trade policy effectively prohibits export of live cattle for breeding or meat purpose.

Export regulations for livestock meat and products: India effectively prohibits exports of beef. Even in case of carabeef, exports are permitted for boneless meat of buffalo (both male and female) fresh, chilled, or frozen (HS 02012000 and 02013000). Export allowed on production of certificate from the designated veterinary authority of the State, from which the meat or offal emanate, to the effect that the meat or offal's are from buffaloes not used for breeding and dairy purposes.

Carabeef exports are permitted only from the Agricultural and Processed Food Products Export Development Authority (APEDA)-registered abattoirs and meat-processing plants approved by the Food Safety and Standards Authority of India (FSSAI). Each export consignment must undergo mandatory microbiological and other testing and have a pre-shipment inspection certificate issued by a government-certified agency. Only meat consignments that meet notified standards and specifications are eligible for export.

Halal certification regulations: The current Government of India regulations for halal certification were established in 2023. For exports of 'Halal certified' meat and meat products, the producing or processing facilities will require a certificate under the Indian Conformity Assessment Scheme (i-CAS) of the Quality of India (QCI) which is issued by a certification body accredited by the 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](#)).

Appendix Table 1. India: Tariff for Select Livestock Products

HS Code	Item Description	Basic custom duty (BCD)	IGST	Import policy
0101.2100	Live Horses for pure breeding	Free	12	Restricted
0101.2990	Live horses for polo and other	30	12	Restricted
0101.3010 - 0101.9090	Live Asses, Mules & Hinnies	30	0	Restricted
0102.2100 - 0102.9090	Live Bovine Animals	30	0	Restricted
0103.1000 - 0103.9200	Live Swine	30	0	Restricted
0104.1010 - 0104.2000	Live Sheep and Goats	30	0	Restricted
0106.1100 - 0106.9000	Other live animals: mammals. Birds, insects	30	0	Restricted*
0201.1000 - 0201.3000	Meat of bovine animals, fresh or chilled	30	0	Restricted, Sanitary Permit
0202.1000 - 0202.3000	Meat of bovine animals, frozen, other cuts with/out bone	30	0/5	R SanP
0203.1100 - 0203.2900	Meat of swine, fresh, chilled, or frozen	30	0/5	Free, Sanitary Permit
0204.1000 - 0204.5000	Meat of sheep or goats, fresh chilled or frozen	30	0/5	Free, Sanitary Permit
0205.0000	Meat of horses, asses, hinnies, fresh chilled or frozen	30	0/5	Free, Sanitary Permit
0206.2100 - 0206.9090	Edible offal of bovine animals, swine, goats, horses, asses, mules, or hinnies, fresh, chilled, or frozen	30	0/5	R SanP for Bovine animals; Fr SanP for others
*Subject to import license. However, import of wild animals is prohibited.				

Attachments:

No Attachments