

Indian Meat and Poultry Industry: Current Scenario and Opportunities

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Why India for Meat and Poultry Processing?

- India has the world's largest population of livestock.
- India produces around 5.3 million MT of Meat and 75 bn eggs annually.
- India is the largest producer of buffalo meat and 2nd largest producer of goat meat.
- Growing demand in Indian customers for safe, clean, and hygienic meat as well as meat products creates an opportunity for farm automation, logistics, abattoirs, cold storage, and processing infrastructure at the point of sale.
- The government of India has taken steps for the modernization of municipal abattoirs to provide safe and hygienic meat to consumers.
- The development of abattoirs-cum-meat processing plants with the latest technology has been significantly invested in by export-oriented enterprises.

Growth of Indian Poultry Industry

Christian missionaries were the first to advocate for scientific poultry rearing. With the introduction of the second five-year plan (1956-61), coordinated efforts to establish poultry in India were initiated for the first time in 1957. In India, hybrid layer strains started out in 1955, followed by broiler strains in 1961. Period between II and IV Five-Year plan - turning point in the history of poultry industry in India.

In order to acclimate imported high-quality stock to the particular location's specific agroclimatic conditions, regional poultry farms have been established in Bangalore, Mumbai, Bhubaneswar, Delhi, and Shimla as a part of an All-India Poultry Development Project. High egg producing strains were produced by Central Poultry Breeding Farms in Mumbai, Bhubaneswar, Chandigarh, and Hesaraghatta (Bangalore); whereas Chandigarh farm

established for its well-known fast growing broiler strains. Research on poultry nutrition and breeding is currently coordinated through All India Veterinary and Agricultural Universities and is being carried out at several research institutes. Trading egg and meat from poultry at the national and regional levels is undertaken via NAFED, the National Agricultural Co-operative Marketing Federation of India.

- Random Sample units at Hesaraghatta, Mumbai Bhubaneswar and Gurgaon.
- Central Training Institute for Poultry Production and Management at Hesaraghatta.

Strengths of Indian Poultry Industry

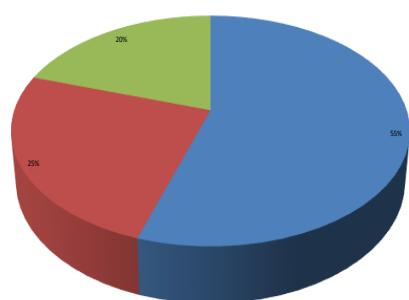
India stands out as a rapidly advancing economy, boasting the title of the world's fastest-growing economy. It leads globally in agricultural production across various commodities. Additionally, India ranks as the second-largest consumer market worldwide, driven by its sizable population. The country is strategically investing in top-notch ports, logistics, and supply chain infrastructure, showcasing its commitment to enhancing transportation and trade networks on a global scale.

India offers an investor-friendly environment with enticing incentives. It possesses a rich pool of highly skilled manpower. The government adopts proactive policies, contributing to a conducive business atmosphere. The country exhibits a significant consumer acceptance of eggs and broiler meat. Furthermore, advancements in Feed Conversion Ratio (FCR), stringent quality control, and enhanced management practices have led to improved efficiency and quality within the poultry industry.

The poultry industry is benefitting from modern feed milling technologies, optimizing feed production. There's an emphasis on sourcing high-quality raw materials for feed, enhancing overall quality. The industry ensures better breeding stocks

Distribution of Poultry

■ southern ■ eastern & central ■ northern & western



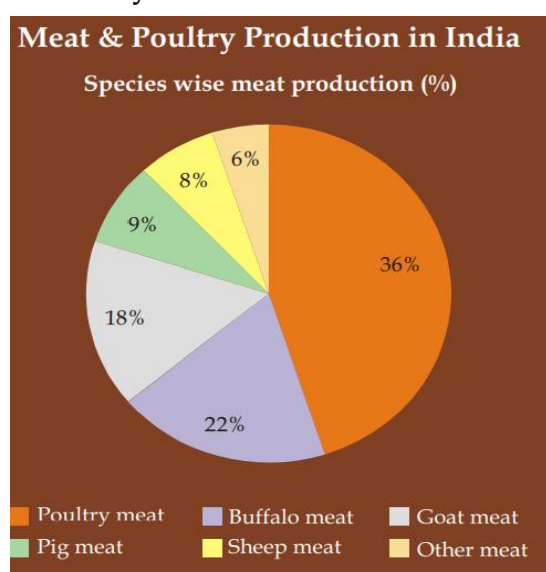
with price assurance and rationalized pricing strategies. Pelleted feeds are gaining popularity in the market.

Additionally, a variety of feed additives like

enzymes, probiotics, prebiotics, and acidifiers are readily available. Integrators and corporates are playing a positive role in the industry's development. Feed units are strategically distributed across regions, improving accessibility and efficiency.

The poultry business has seen a rise in the production of processed foods, reflecting a shift towards value-added products. A streamlined and efficient transport system facilitates the movement of both raw materials and finished goods. Marketing efforts are focusing on promoting branded eggs, adding value to the products. The industry is exploring export opportunities to expand its market reach globally. Moreover, advancements in disease diagnosis and screening procedures are contributing to better health management and biosecurity within the industry.

Meat & Poultry Production in India



Species wise meat production (%)

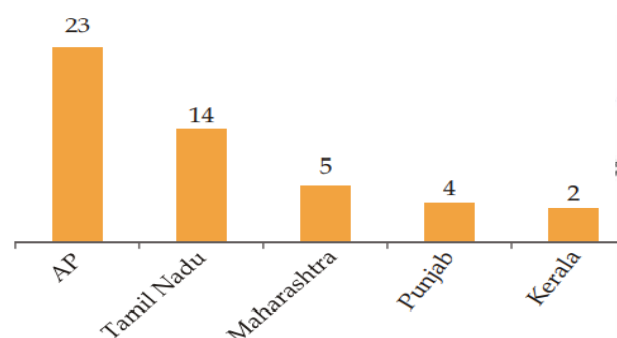
Source: Department of animal Husbandry, Dairying and Fisheries (DAHD)

Major States

Eggs

The top egg-producing states in India are Andhra Pradesh, Tamil Nadu, and Maharashtra.

Top 5 Egg Producers (in billion numbers)

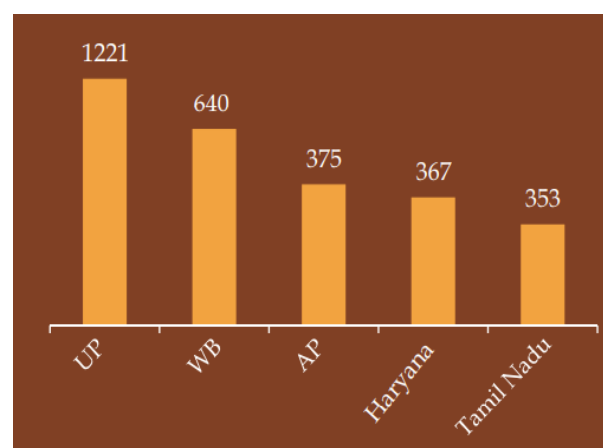


Source: Department of animal Husbandry, Dairying and Fisheries (DAHD)

Meat

Uttar Pradesh is the highest meat producer in the country which is contributing around 23% of the total meat production followed by West Bengal (12%) and Andhra Pradesh (7%).

Top 5 Meat producing states in India (production in 000'MT)

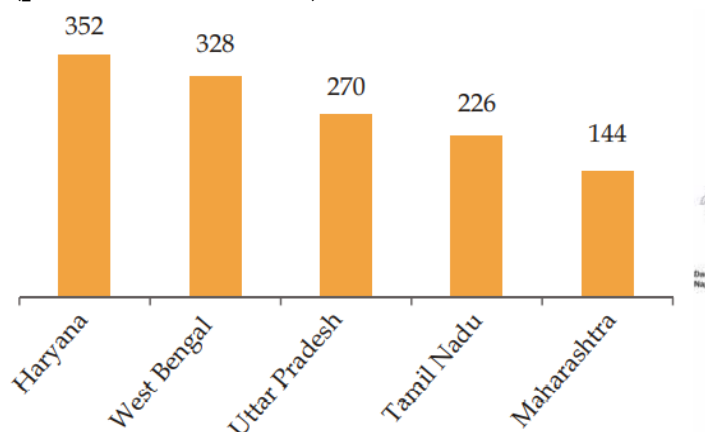


Source: Department of animal Husbandry, Dairying and Fisheries (DAHD)

Poultry Meat

India's leading poultry meat producing states are Haryana, West Bengal & Uttar Pradesh.

Top 5 Poultry Meat producing states in India (production in 000'MT)



Source: Department of Animal Husbandry, Dairying and Fisheries (DAHD)

Opportunities in Poultry & Meat Sector at a Glance

- **New technology in meat & poultry processing**

Recent emerging technologies such as Modern abattoirs, Food testing labs, Maintenance of Cold chain, and veterinary services.

- **Poultry Industry Players**

Egg powder plants, feed formulations and manufacturing operations, Hatcheries, New products with value addition like Indian ethnic snacks, frozen/chilled products, RTC/RTE.

Export Scenario

In 2014-15, India exported meat and poultry products valued at approximately USD 5 billion, of which USD 4.8 billion came from the export of buffalo meat alone. Egg powder, meat from sheep and goats, and other products are also exported. Vietnam, Malaysia, Egypt, Thailand and Saudi Arabia are major export destinations from India.

Key Fiscal Incentives

- In the food processing industry, 100% FDI is allowed via an automated way. The import benefits of the project pertain to imported equipment at a discounted price of customs duty. Income Tax deductions on capital expenditure allowed at the rate of 150% for setting up and operating cold chain or warehouse for storage of agriculture produce.
- For the first five years of operation, new food processing, preservation, and packaging facilities are exempt from income taxes at 100%; after that, they will pay income taxes at a rate of 25%-30%.
- The National Bank for Agriculture and Rural Development (NABARD) and the National Bank of India have established a fund of Rs. 20 billion to provide reasonably priced credit to approved Food Parks and their affiliated entities.
- The Ministry of Food Processing Industries (MofPI) offers several schemes, including the Mega Food Park Scheme, the Cold Chain Scheme, Value addition, Preservation Infrastructure, and the Scheme for Modernizing Government Abattoirs (with Different States Offering State-Specific Incentives).

References

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