



भारतीय कृषि एवं खाद्य परिषद्  
INDIAN COUNCIL OF FOOD AND AGRICULTURE

# INDIAN MEAT MARKET



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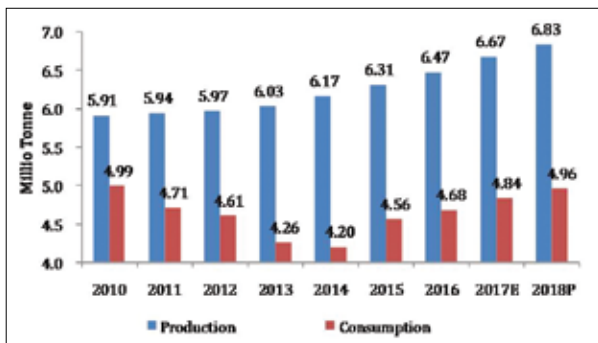
# Indian Meat Market

Livestock sector is an important sub-sector of the agriculture of Indian economy. It forms an important livelihood activity for most of the farmers, supporting agriculture in the form of critical inputs, contributing to the health and nutrition of the household, supplementing incomes, offering employment opportunities, and finally being a dependable “bank on hooves” in times of need. It acts as a supplementary and complementary enterprise. India has vast resource of livestock and poultry, which plays a vital role in improving the socio-economic conditions of rural masses. There are about 300.00 million bovines, 65.07 million sheep, 135.2 million goats and about 10.3 million pigs as per 19th Livestock Census in the country.

Globally, India is the second fastest growing processed

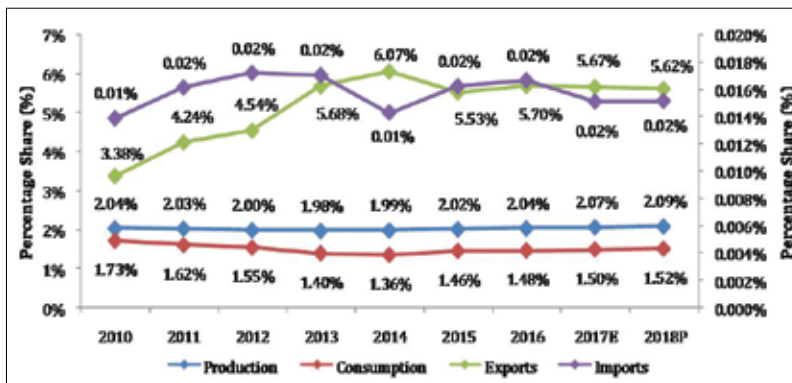


## INDIAN MEAT MARKET – PRODUCTION AND CONSUMPTION



Source: OECD Statistics, Note: E = Estimated, P = Projected

## INDIA'S SHARE IN THE GLOBAL MEAT MARKET



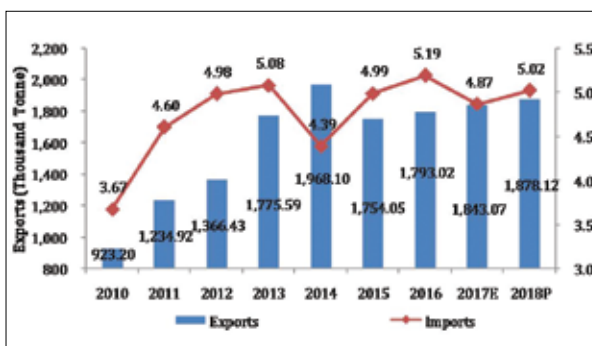
Source: ICFA Analysis, Note: E = Estimated, P = Projected

meat and poultry market with a CAGR of 22%. However, Indonesia stands first in this category with 26.7% CAGR between 2011 and 2015 followed by Vietnam at 15.5%, China at 13.9% and Brazil at 10.9%. Global innovation within the processed meat category has increased over the years and many markets with the highest growth potential are from the Asia Pacific region, especially India.

## INDIAN MEAT MARKET

India is one of the countries with the lowest per capita meat consumption in the world, with 5.6 kg in 2013 as compared to the global average of 33.2 kg. With the population of about 1.3 billion, even a tiny per capita consumption increase has the potential to translate into a significant rise in the fresh meat volumes. Moreover, the erosion of traditional culinary habits and the acceleration of consumer lifestyles, underpinned by ongoing urbanization, are leading to a decrease in the time spent cooking at home in India, particularly amongst younger consumers. As a result, there is a growing demand for convenient, packaged processed meat products.

## INDIAN MEAT MARKET TRADE



Source: OECD Statistics, Note: E = Estimated, P = Projected



## INDIAN MEAT MARKET – PRODUCTION AND CONSUMPTION ANALYSIS

The meat production has registered a healthy growth. However, there is very little processing. Hardly 1% of the total meat produced in the country is used for processing and remaining meat is sold in fresh or frozen form. Pork and Poultry meat are used for production of ham, sausages, patties etc., for the elite market.

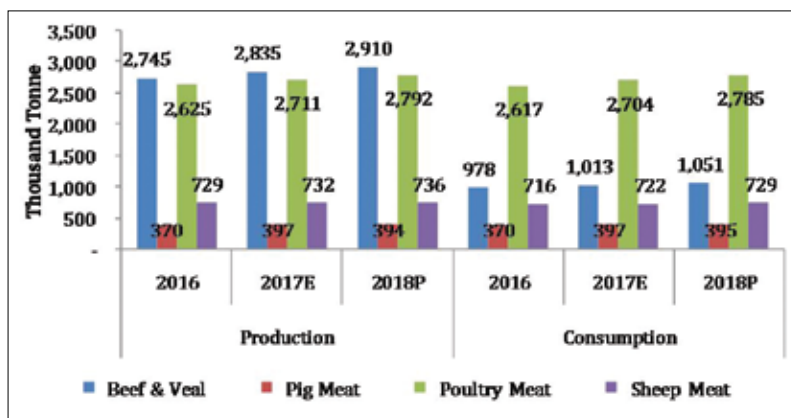
Although, with vegetarian diets supported by strong cultural and religious traditions, India has the lowest level of meat consumption in the world. Only 70% of the Indian population aged over 15 consumed non-vegetarian diets in 2014, according to a survey released by the Registrar General of India in 2016. Moreover, this represented a four percentage point fall since 2004, as consumers were increasingly attracted to the purported health benefits of a vegetarian diet. This process is expected to continue over 2016-2021, with the easy availability of vegetarian food bolstering the health-orientated drift towards vegetarianism.

## INDIAN MEAT MARKET – TRADE ANALYSIS

Meat industry, which has shown a tremendous development in the last decade, has a greater scope of improvement with support of the industrialists and government. India's international trade in livestock and livestock products is mainly in live animals (17%), meat and meat products (82%), dairy products and eggs (1%). At the global level, India's exports and imports account for only 0.17% of each. Meat and meat products have dominated the exports from livestock.

Driven by the structural changes in agriculture and food consumption patterns, the importance of meat

## INDIA'S SHARE IN THE GLOBAL MEAT MARKET



Source: OECD Statistics, Note: E = Estimated, P = Projected

sector has been undergoing a steady transformation. In recent years the meat industry for export has attracted heavy investment as major meat exporters are expanding their processing capacities to meet demand in new worldwide markets. The Government of India is also taking steps to provide thrust to the buffalo meat sector by introducing schemes on salvaging and rearing of buffalo male calves and modernization of abattoirs.

## INDIAN MEAT MARKET BY SEGMENTS

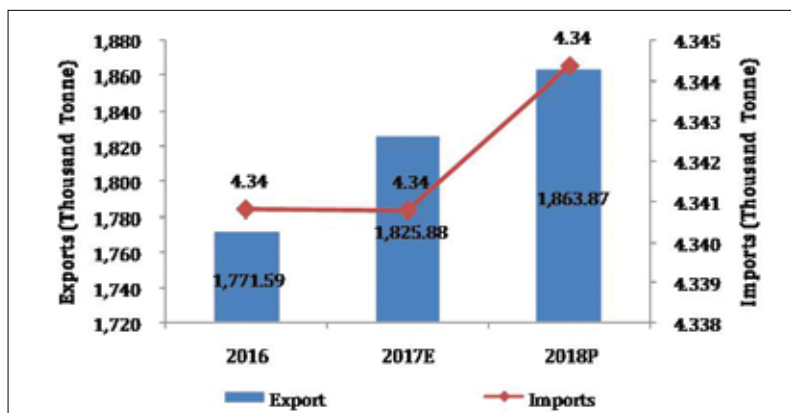
Major portion of meat from sheep, goat, pig and poultry is primarily used for domestic consumption in the form of hot meat. Certain portion of meat from buffaloes, cattle and sheep is

exported.

India exports both frozen and fresh chilled meat to more than 60 countries of the world. The major items of export include deboned and deglanded frozen buffalo meat, which accounts for approximately 97% of the total meat export. Major market for Indian buffalo meat is Malaysia and Egypt and for sheep and goat meat are UAE, Iran and Jordan. India also exports small quantity of processed meat to Thailand, Yemen, and Japan and poultry products to Saudi Arabia, Oman, Kuwait and Qatar.

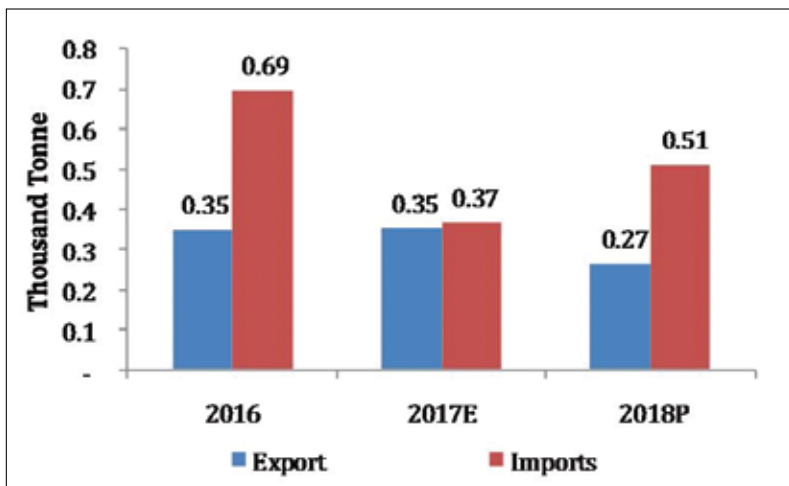
With a high proportion of Muslims and vegetarians in the population, pork consumption per person in India is negligible. However, demand from the hotel, restaurant and institutional

## INDIA'S SHARE IN THE GLOBAL MEAT MARKET



Source: OECD Statistics, Note: E = Estimated, P = Projected

### INDIAN PIG MEAT MARKET TRADE



Source: OECD Statistics, Note: E = Estimated, P = Projected

sector as well in high-end retailers helped to push up imports to 0.69 thousand tonnes in 2016. Imported products include pork belly, chops, loin, tenderloin, neck, shoulder, spare ribs, bacon, ham, salami and sausages.

While demand from high-end hotels, restaurants and retailers is driving imports of pork products to India, there is a largely separate but significant market for locally produced pig meat in north-eastern states - which include Assam, Nagaland, Arunachal Pradesh, Manipur, Meghalaya, Mizoram, Sikkim and Tripura - as well as in Bihar, Jharkhand, West Bengal, Goa and Kerala.

India's per capita consumption of poultry meat is estimated at around 3.1



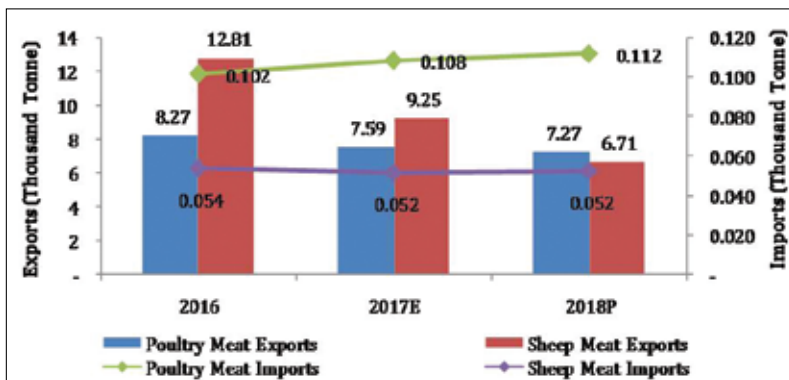
kg per year, which is low compared to the world average of around 17kg per year. However, the consumption is expected to grow in the near future. India is the ninth largest producer

of poultry meat in the world. Indian poultry meat products have good markets in Japan, Malaysia, Indonesia and Singapore.

Meat sector plays an important role in India as it not only provides meat and by-products for human consumption but also contribute towards sustainable livestock development and livelihood security for millions of men and women from weaker sections. Meat production and supply of meat for local consumption is the most neglected sector in the country. Meat is sold in open premises leading to contamination from dirt,

dust, flies and other pollutants. The traditional production systems and the unhygienic practices have ruined and flawed the image of the Indian meat industry. Indian meat industry on scientific and modern lines is needed for benefiting livestock producers, processors and finally consumers. Indian meat contains less fat and the present international trend is favorable for low fat meat. Average fat content of Indian meat (buffalo/poultry) is around 4% compared to 15-20% in most of the developed countries. Moreover, meat is free from growth promoters of other therapeutic residues and mad cow disease, which favors Indian meat in the international market. ■

### INDIAN POULTRY AND SHEEP MEAT MARKET TRADE



Source: OECD Statistics, Note: E = Estimated, P = Projected



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