

# **Present status and prospects of meat, poultry, egg and fish industry in India**

By:

**Dr. R. K. Jaiswal**

Asstt. Prof.-cum-Jr. Scientist

Dept. of LPT

Bihar Veterinary College

Bihar Animal Sciences University

Patna-800014 (Bihar)

# Ministry of Fisheries, Animal Husbandry and Dairying, GOI

- It is a newly formed ministry in May, 2019 by present government from the department of same name under Ministry of Agriculture and Farmers Welfare.
- It consists of two departments:
  1. Department of Animal Husbandry and Dairying (AH&D)
  2. Department of Fisheries

<b>Name</b>	<b>Designation</b>
<b>Shri Giriraj Singh</b>	<b>Hon'ble Minister of Fisheries, Animal Husbandry and Dairying</b>
<b>Dr. Sanjeev Kumar Balyan</b>	<b>Hon'ble Minister of State of Fisheries, Animal Husbandry and Dairying</b>
<b>Shri Pratap Chandra Sarangi</b>	<b>Hon'ble Minister of State of Fisheries, Animal Husbandry and Dairying</b>

# **Animal and Fisheries Resource Department, Govt. of Bihar**

<b>Name</b>	<b>Designation</b>
<b>Dr. Prem Kumar</b>	<b>Hon'ble Minister of Animal and Fisheries Resource Department, Govt. of Bihar</b>
<b>Dr. N. Saravana Kumar</b>	<b>Secretary, Animal and Fisheries Resource Department, Govt. of Bihar</b>

**APEDA:** Agricultural and Processed Food Export Development Authority (New Delhi)

**MPEDA:** Marine Products Export Development Authority (Kochin)

# Current Status of Meat Industry in India

- Animal food is considered as good source of quality nutrients *viz.* fat, protein, carbohydrates and minerals.
- Digestibility of animal source protein is **90-97%** while vegetable origin proteins have **75-99%**. However, proteins of animal origin are more **completely digested and nutritionally superior** than those of plant origin.
- Plant origin proteins are **deficient in at least one or more essential amino-acids** e.g. some cereals in lysine and some legumes in methionine but the animal proteins contain all essential amino acids.

Parameters	Animal protein	Plant proteins
Protein digestibility corrected amino acid score (PDCAAS)	0.9-1.0	0.42-0.70
Protein efficiency ratio (PER)	3-4	1.5-2.6
Biological value (BV)	74-94	65-73

# 20<sup>th</sup> Livestock Census-2019

ALL INDIA LIVESTOCK CENSUS (in million)				
Category	2007	2012	2019	% Change (2012 to 2019)
Cattle	199.08	190.9	<b>192.52</b>	0.85
Buffalo	105.34	108.7	<b>109.85</b>	1.06
Yak	0.08	0.08	<b>0.06</b>	-25.00
Mithun	0.26	0.30	<b>0.38</b>	26.66
Bovines	304.76	299.98	<b>302.82</b>	1.00
Sheep	71.56	65.07	<b>74.26</b>	14.13
Goat	140.54	135.17	<b>148.88</b>	10.14
Horses & Ponies	0.61	0.63	<b>0.34</b>	-45.24
Mules	0.14	0.20	<b>0.08</b>	-57.09
Donkeys	0.44	0.32	<b>0.12</b>	-61.23
Camels	0.52	0.4	<b>0.25</b>	-37.05
Pigs	11.13	10.29	<b>9.06</b>	-12.03
<b>Total livestock</b>	<b>529.70</b>	<b>512.06</b>	<b>535.82</b>	<b>4.64</b>

# Production statistics of different livestock products for 2018-19

Livestock products	Production	Per capita availability	Species wise contribution	Top three producing stste
<b>Milk</b>	187.7 million tonnes	394g/day	Buffalo-49%, Cattle-48%, Goat-3%	UP>Rajasthan>MP
<b>Egg</b>	103.32 billion numbers	79 number per annum	Improved fowl-87.33%, Desi fowl-11.52%, Improved duck-0.26%, Desi duck-0.89%	Andhra Pradesh>Tamil Nadu>Telangana
<b>Meat</b>	8.1 million tonnes	5.5 kg per annum	Poultry-50.06%, Buffalo-19.05%, Goat-13.53%, Sheep-8.36%, Pig-4.98%, Cattle-4.02%	UP>Maharashtra>West Bengal

- India has the **largest livestock population**, 55% and 16% of the world's buffalo and cattle populations respectively
- The country ranks **first in goat and buffalo, second in sheep and cattle, and eighth in poultry populations** in the world.
- Although India has been the **top producer of milk** (>187.7 million tonnes), which is one of the primary produce of the livestock sector, the meat production is only **8.1 million tonnes** annually representing mere 2% of the world production.
- Nearly **four million tonnes of poultry meat** was produced in India for 2018-19.

- The domestic market is mostly confined to **fresh meat** because of the eating habits of the Indians.
- Of the total meat produced, **90%** processed at home, only about **2% is converted into value added products** like sausages, ham, bacon, kababs, meatballs, etc. and remaining **8% is exported**
- Buffalo meat production was **1.54 million tonnes** in 2018-19 and is expected to increase.
- The growth is primarily due to increasing domestic consumption, growing exports and a new trend of salvaging male buffalo calves for meat production.



- The export of Animal Products includes Buffalo meat, Sheep/ Goat meat, Poultry products, Animal Casings, Milk and Milk products and Honey etc. for 2018-19

<b>CATEGORY</b>	<b>Value (in crores Rs.)</b>
Buffalo Meat	25168.31
Sheep/ Goat Meat	790.65
Poultry Products	687.31
Dairy Products	2422.85
Animal Casing	480.66
Processed Meat	13.52
Albumin (Eggs & Milk)	103.06
Natural Honey	732.19
<b>TOTAL</b>	<b>30,632.81</b>

- The **buffalo meat share in total meat exports from India is more than 80** percent (in value terms), followed by 3% per cent share of goat and sheep meat and the rest comprising of poultry meat and animal casings.
- The country has exported 12,36,638.39 MT of buffalo meat products to the world for the worth of, **Rs. 25168.31 Crores during the year of 2018-19.**
- **Major Export Destinations for buffalo meat (2018-19) :** Vietnam Soc Rep, Malaysia, Indonesia, Iraq and Myanmar.
- Exports of other types of meats such as from **pork, poultry, and processed meat are almost negligible** due to higher costs, inadequate meat processing facilities, and infrastructure constraints.
- For exports **mostly deboned frozen buffalo meat** is used. The demand for bovine meat has increased over the years in the global markets resulting in higher prices of cattle meat.
- This has opened new opportunities for us and led to increase in buffalo meat exports from India in recent years (**BLACK GOLD**).

- **Slaughter rate** for cattle as a whole is 20%, for buffaloes it is 41%, pigs 99%, sheep 30% and 40% for goats.
- In India there are about **3,900 licensed & authorized slaughter houses besides around 26,000 unauthorized slaughter houses.**
- Furthermore, there are **13 export-oriented**, modern, integrated abattoirs or meat processing plants registered with APEDA.
- In addition to these, there are **24 meat processing and packaging units**, which receive dressed carcasses from approved municipal slaughter houses for the export of meat.
- According to the Ministry of Food Processing Industries (MOFPI), about **70% of poultry processing is in the organised sector and 30% is in the unorganised sector.** Nearly 60-70% of the broiler industry is located in the southern states, as is much of the layer industry.

# Status of Poultry Industry in India

- Poultry is one of the **fastest growing segments** of the agricultural sector in India today.
- While the production of agricultural crops has been rising at a rate of 1.5 to 2 percent per annum, that of **eggs and broilers has been rising at a rate of 8 to 10 percent per annum.**
- Poultry sector in India is valued at about **Rs. 80,000 crore** (2015-16) broadly divided into two sub-sectors –
- One with a **highly organized commercial sector with about 80%** of the total market share (Rs. 64,000 crore)
- Other being **unorganized with about 20%** of the total market share of Rs. 16,000 Crore.

- The total poultry population in the country is **851.81 million** in 2019. The total poultry population in the country has increased by **16.8% over** the previous census (DAHD, 2019)
- The **total Backyard Poultry in the country is 317.07 million in 2019**, increased by 45.8% over previous census.
- The **total Commercial Poultry in the country is 534.74 million** in 2019, increased by 4.5% over previous census.
- Nearly **four million tonnes of broiler meat and about 103.32 billion** of eggs are produced annually in India.
- Broiler production is mainly concentrated in the states of Tamil Nadu, Andhra Pradesh, Maharashtra, Uttar Pradesh, and Telangana.

- The **Cobb** breed constitutes around 65-70 percent of the broiler market. The grandparent stock for Vencobb is owned by one major enterprise which sells parent stock to multiple integrators throughout India. Other popular breeds in India include Ross, Marshall, Hubbard, Hybro Avian, and Anak.
- The size of the poultry farms varies significantly from small farms with just 200 birds to large farms of more than 50,000 birds.
- The broilers in India are usually reared for 35-40 days to a market weight of 1.8 to 2.2 kg.
- The feed conversion ratio for broilers has reportedly improved considerably over the years to **1.65** from 2.2 in the 1990s.

- Five major players (**Suguna in Coimbatore, Venky's in Pune, CP, Sneha, and Shalimar in Kolkata**) constitute 60 per cent of the broiler meat market.
- The average live weight of 1.8-2.2 Kg. Broiler meat production has been growing in India at a rate of 7-8 per cent.
- Over all, Andhra Pradesh counts for maximum egg production and Hyderabad is the city with maximum poultry and hatcheries.
- India's **per capita consumption of broiler meat just 3.35 Kg per person per year as** compared to 45 Kg in Brazil, 43 Kg in the United States, 34 Kg in South Africa, 31 Kg in Canada, 10.5 Kg in China, and 6.5 Kg in Indonesia, and **17 Kg for the world.**
- The National Institute of Nutrition has recommended **180 eggs and 11 kg of meat per capita consumption for our country**
- India is now the **world's third largest egg producer and the sixth largest producer of broilers.**

- The country has exported 5,44,985.06 MT of Poultry products to the world for the worth of **Rs. 687.31 Crores during the year 2018-19.**
- **Major Export Destinations (2018-19):** Oman, Maldives, Japan, Vietnam Soc Rep & Indonesia.
- India's poultry product exports are mainly confined to **eggs and egg powder**, which are growing due to cost competitiveness and logistical advantages.
- There are **no restrictions on exports of poultry and poultry products.**
- India at present has only **five egg powder plants** which is inadequate considering the fact that export demand for different categories of powder viz., whole egg, yolk and albumen are increasing



# Status of Fisheries Sector

- The total fish production during **2017-18** is estimated to be **12.60** million metric tonnes, of which nearly **65%** is from inland sector and about **50% of the total production is from culture fisheries**, and constitutes about 6.3% of the global fish production.
- More than 50 different types of fish and shellfish products are being exported to 75 countries around the world.
- Fish and fish products have presently emerged as the largest group in agricultural exports from India, with **13.77 lakh tonnes in terms of quantity and Rs. 45,106.89 crore in value.**
- This accounts for around **10 % of the total exports and nearly 20% of the agricultural exports, and contribute to about 0.91 % of the GDP .**
- With over 2.4 lakh fishing crafts operating along the coast, 7 major fishing harbours, 75 minor fishing harbours and 1,537 landing centres are functioning to cater to the needs of over 4.0 million fisher folk.

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- For promoting aquaculture, 429 Fish Farmers Development Agencies (FFDAs) and 39 Brackish water Fish Farms Development Agencies (BFDAs) were established in the country.
- The annual carp seed production is to the tune of 40 billion fry and that of shrimp is about 54 billion PLs, with increasing species diversification in the recent past.
- Besides large-scale freshwater food fish culture, ornamental fish culture and high value marine fish farming are gaining importance in the recent past.

## Indian Fisheries

Global position	3rd in Fisheries 2nd in Aquaculture
Contribution of Fisheries to GDP (%)	0.91
Contribution to Agril. GDP (%)	5.23
Per capita fish availability (Kg.)	9.0
Annual Export earnings (Rs. In Crore)	45,106.89
Employment in sector (million)	14.0

## Resources

Coastline	8118 kms
Exclusive Economic Zone	2.02 million sq. km
Continental Shelf	0.530 million sq. km
Rivers and Canals	1,95,210 km
Reservoirs	3.150 million ha
Ponds and Tanks	2.414 million ha
Flood Plains lakes and derelict waters	0.798 million ha
Brackishwaters	1.240 million ha
Estuaries	0.290 million ha

## Some Facts

Present fish Production (Capture)	7.0 mmt
Inland	3.2 mmt
Marine	3.8 mmt
Potential fish production	8.4 mmt
Fish seed production	40,000 million fry
Hatcheries	1,604 units
FFDA	429
BFDA	39