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Required Report - public distribution

Date: 3/1/2013

GAIN Report Number: IN3017

India

Livestock and Products Semi-annual

2013

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Report Highlights:

India is on track to tie or possibly overtake Brazil as the world's largest exporter of beef in 2012. January – November 2012 export growth, however, was not as great as expected, and as result, the 2012 export forecast has been decreased from 1.66 to 1.45 million tons, a 14 percent increase over 2011. 2013 carabeef (buffalo meat) exports are projected to grow by 15 percent.

Commodities:

Animal Numbers, Cattle

Meat, Beef and Veal

Production:

India's Livestock Census does not report statistics past 2007, leaving little indication of how India's cattle population is changing. Historically, Indian dairy production increased as the cattle population grew. Today Indian officials claim that the cattle population is expected to decrease over the long term as milk production becomes more efficient. Buffalo populations are also expected to decline over the long term, assuming increased emphasis on imported *Bos taurus* genetics to improve milk yields and the declining importance of draft animals. Throughout 2012, milk production continued to grow, although productivity gains can be attributed to the increased use of high quality feeds and imported genetics, in addition to cattle population increases. Despite these factors, there is no evidence that the cattle population has changed in the short term. Carabeef (buffalo meat) processors continue to expand to record levels, but given the massive size of India's calf crop, this appears sustainable. As a result, 2012 and 2013 beginning stocks reflect a 1 percent increase over the previous year. 2013 ending inventories are flat.

Slaughter rates and meat production for 2012 have been revised to reflect lower than expected exports in 2012. 2013 slaughter and production is revised to support 15 percent expected export growth and stable domestic consumption (See Trade and Consumption sections). There are no official statistics on losses. While the colossal growth of the carabeef export industry has clearly reduced losses of buffalo bull calves, losses will continue to occur within dairies specializing in *Bos taurus* and *Bos indicus* cattle.

Consumption:

Due to taboos against the slaughter and consumption of cattle, beef consumption is banned in India, with the notable exceptions of the states of Kerala and West Bengal, as well as a few northeastern states. Given the similarity between buffalo and cattle, most red meat eating Indians prefer ovine or caprine meat over buffalo. Chicken is India's preferred non-vegetarian protein source, with local production increasing by an estimated 10 percent annually. Given Indian meat preferences, domestic consumption is not expected to exceed the rate of population growth. 2012 consumption is estimated to have increased marginally, by 1.7 percent to 2.01 million metric tons. 2013 consumption is forecast at 2.05 million metric tons, a 1.9 percent increase.

Trade:

Current trade data (January – November 2012), shows Indian carabeef exports surpassing calendar year exports by 3 percent. Industry contacts report that exports to Southeast Asia picked up in the last months of 2012, and peaked in January 2013. Trade data confirms this, showing that exports to the region, led by Vietnam and Thailand, increased pace in the second half of 2012. Contacts indicate that these shipments were made in advance of the Chinese New Year celebrations, which took place in early February, 2013. Trade contacts also reported that while exports to Egypt have remained flat due to political uncertainty, Iranian imports have offset this. Iranian carabeef imports grew by 50 percent in 2011 and increased by 58 percent during January-November 2012.

Given the continued strong growth of Indian carabeef exports, India is on track to tie or possibly overtake Brazil as the world's largest exporter of beef in 2012. January – November 2012 export growth, however, was not as great as expected, and as result, the 2012 export forecast has been decreased from 1.66 to 1.45 million tons, a 14 percent increase over 2011. 2013 exports are projected to grow by 15 percent. 2011 exports are revised slightly down to reflect updated trade statistics. India does not import bovine meat.

Production, Supply and Demand Data Statistics:**Table 1: Commodity, Animal Numbers, Cattle, PSD**

Animal Numbers, Cattle	2011	2012	2013	
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India	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Total Cattle Beg. Stks	320,80 0	320,80 0	323,70 0	323,70 0	327,30 0	327,10 0	(1000 HEAD)
Dairy Cows Beg. Stocks	129,00 0	129,00 0	129,35 0	129,35 0	129,71 0	129,70 0	(1000 HEAD)
Beef Cows Beg. Stocks	0	0	0	0	0	0	(1000 HEAD)
Production (Calf Crop)	62,500	62,500	63,400	63,400	64,400	65,100	(1000 HEAD)
Total Imports	0	0	0	0	0	0	(1000 HEAD)
Total Supply	383,30 0	383,30 0	387,10 0	387,10 0	391,70 0	392,20 0	(1000 HEAD)
Total Exports	0	0	0	0	0	0	(1000 HEAD)
Cow Slaughter	1,270	1,300	1,290	1,225	1,310	1,350	(1000 HEAD)
Calf Slaughter	4,900	4,900	5,100	4,850	5,290	5,500	(1000 HEAD)
Other Slaughter	26,590	26,600	30,410	28,925	35,500	33,250	(1000 HEAD)
Total Slaughter	32,760	32,800	36,800	35,000	42,100	40,100	(1000 HEAD)
Loss	26,840	26,800	23,000	25,000	20,000	25,000	(1000 HEAD)
Ending Inventories	323,70 0	323,70 0	327,30 0	327,10 0	329,60 0	327,10 0	(1000 HEAD)
Total Distribution	383,30 0	383,30 0	387,10 0	387,10 0	391,70 0	392,20 0	(1000 HEAD)
CY Imp. from U.S.	0	0	0	0	0	0	(1000 HEAD)
CY. Exp. to U.S.	0	0	0	0	0	0	(1000 HEAD)
Balance	0	0	0	0	0	0	(1000 HEAD)
Inventory Balance	2,900	2,900	3,600	3,400	2,300	0	(1000 HEAD)
Inventory Change	1	1	1	1	1	1	(PERCENT)
Cow Change	0	0	0	0	0	0	(PERCENT)
Production Change	1	1	1	1	2	3	(PERCENT)
Production to Cows	48	48	49	49	50	50	(PERCENT)
Slaughter to Inventory	10	10	11	11	13	12	(PERCENT)
Slaughter to Total Supply	9	9	10	9	11	10	(PERCENT)

TS=TD		0		0		0	
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Table 2: Commodity, Meat, Beef and Veal, PSD

Meat, Beef and Veal India	2011		2012		2013		
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	
Slaughter (Reference)	32,760	32,760	36,800	35,000	42,100	40,100	(1000 HEAD)
Beginning Stocks	0	0	0	0	0	0	(1000 MT CWE)
Production	3,244	3,244	3,643	3,460	4,168	4,000	(1000 MT CWE)
Total Imports	0	0	0	0	0	0	(1000 MT CWE)
Total Supply	3,244	3,244	3,643	3,460	4,168	4,000	(1000 MT CWE)
Total Exports	1,294	1,267	1,680	1,450	2,160	1,950	(1000 MT CWE)
Human Dom. Consumption	1,950	1,977	1,963	2,010	2,008	2,050	(1000 MT CWE)
Other Use, Losses	0	0	0	0	0	0	(1000 MT CWE)
Total Dom. Consumption	1,950	1,977	1,963	2,010	2,008	2,050	(1000 MT CWE)
Ending Stocks	0	0	0	0	0	0	(1000 MT CWE)
Total Distribution	3,244	3,244	3,643	3,460	4,168	4,000	(1000 MT CWE)
CY Imp. from U.S.	0	0	0	0	0	0	(1000 MT CWE)
CY. Exp. to U.S.	0	0	0	0	0	0	(1000 MT CWE)
Balance	0	0	0	0	0	0	(1000 MT CWE)
Inventory Balance	0	0	0	0	0	0	(1000 MT CWE)
Weights	99	99	99	99	99	100	(1000 MT CWE)
Production Change	14	12	12	7	14	16	(PERCENT)
Import Change	0	0	0	0	0	0	(PERCENT)

Export Change	41	33	30	14	30	34	(PERCENT)
Consumption Change	1	1	1	2	1	2	(PERCENT)
Imports Percent Consumption	0	0	0	0	0	0	(PERCENT)
Exports Percent Production	40	39	46	42	52	49	(PERCENT)
Population	1,189,172,906	1,189,172,906	1,205,073,612	1,205,073,612	1,220,800,359	1,220,800,359	(PEOPLE)
Per Capita Consumption	2		2		2		(KG)
TS=TD		0		0		0	