

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Report Highlights:

Pork production in India is limited, representing only 7% of the country's animal protein sources. The market for imported pork products in India is limited to the Hotel, Restaurant and Institutional sector (HRI), as well as other niche and specialty markets. Industry sources have indicated that Indian pork imports consist almost entirely of processed product and estimate that annual imports on a calendar year basis are approximately 150 tons annually.

General Information: PRODUCTION

Pork production in India is limited, representing only 7% of the country's animal protein sources. Production is concentrated mainly in the northeastern corner of the country and consists primarily of backyard and informal sector producers (see Table 1). According to 18th^[1] Livestock Census of India (2007), the total swine population, while small, has grown consistently over the past 50 years. However, in the most recent decade, the population has declined to approximately 12 million head from a high of 14 million in 2003, as indicated by the 17th Livestock Census of India. Industry sources suggest that this decline may be due to animal disease outbreaks.

The Indian market for processed pork products is small, and the majority of this market is supplied through imports. Although there are some local companies which manufacture processed products such as sausages and bacon, quantities are limited and the industry is small. According to The Ministry of Food Processing Industries (MoFPI), there are 3600 slaughter houses in India, although the majority of these facilities do not export. There is a small number of abattoirs in India which meet international standards. However, these facilities do not process pork meat.

TRADE

The market for imported pork products in India is limited to the Hotel, Restaurant and Institutional sector (HRI), as well as other niche and specialty markets. Industry sources have indicated that Indian pork imports consist almost entirely of processed product and estimate that annual imports on a calendar year basis are approximately 150 tons annually. A small portion of these imports include imports of high quality frozen pork meat. Major suppliers of processed pork meat to India are the Netherlands, Italy and Spain. There have been no reports of significant U.S. pork exports to India. (See Table 2 for a breakdown of Indian pork imports).

Indian exports of pork and pork products are nil.

CONSUMPTION

Indian pork consumption can be divided into two segments. The vast majority takes place in the informal sector in the form of locally raised fresh pork meat. This meat is not widely distributed in the organized retail sector. Given cultural perceptions and consumer perceptions about pork meat, consumption of fresh local meat is limited to north eastern India where pork consumption is more prevalent.

The second segment of the pork market deals with high-value imported products. These products include cured meats such as sausages, ham, bacon and canned meat products, as well as small quantities of frozen meat. They are typically found in most leading Indian hotels catering to international business travelers and tourists. Hotel and restaurant suppliers, on average, estimate that pork purchases make up approximately 10 percent of their total meat expenditures, and typically stock limited quantities of high-quality frozen pork meat in order to maintain menu options available for their diverse clientele. Additionally, there is demand for imported pork products amongst well-travelled Indian consumers and foreigners residing in India. Processed products such as sliced meats, hams, bacon and sausage can be found in specialty shops and high-end restaurants. The popularity of processed pork products amongst wealthier Indian consumers may be related to the popularity of Italian cuisine in India.

It is important to note that although many Indian consumers eat some meat, fish or egg products, typical dietary practices limit this to a small portion of a consumer's total diet. Although it is certain that overall protein consumption will increase as Indian incomes rise, significant growth is more likely to occur in preferred vegetarian options such as beans, peas and dairy products. Growth in Indian meat consumption will likely focus on the poultry sector, which is currently experiencing strong growth.

STOCKS

Due to constraints in marketing channels and the absence of a comprehensive cold chain system, stocks of fresh and frozen pork meat are nil. Pork meat importers indicate that due to uncertainty in the supply chain, pork importers supply formal sector buyers on a consignment basis and do not maintain stocks of imported pork products.

MARKETING

Imported pork products face high retail costs due to several factors. These include a fragmented supply chain, local VAT, sales taxes and municipal “octroi”, as well as applied tariffs for pork and pork products ranging between 30 and 36 percent (see Table 3). According to industry sources, these factors would lead to a 500 percent markup on U.S. origin pork products if U.S. pork was eligible for export to India. Please see table 1 for a breakdown of Indian tariffs on pork products.

Typically, imported pork products are imported either by air freight or container vessel. HRI buyers tend to purchase pork products through an importing agent who bears the responsibility of importing the product, clearing customs and managing all logistical aspects of the transaction. Given uncertainty in this market, pork is imported on an order-only basis, based on current needs and market demand.

REGULATIONS

Imports of processed and frozen pork meat into India are overseen by the Ministry of Agriculture’s Department of Animal Husbandry, Dairying and Fisheries (DAHD). Imports are allowed only upon issuance of a sanitary export certificate signed by the appropriate authority of the exporting country. India must also issue an import permit to the importer in order to ship to India. DAHD maintains strict sanitary requirements for the export of both frozen and processed pork to India, which effectively preclude the export of US pork meat and processed products to India at this time. DAHD’s sanitary requirements for pork meat and processed pork meat imports can be found at [Pork Meat](#) and [Processed Pork Meat](#).

Domestic meat production and processing is governed by the Meat Food Products Order (MFPO), 1973. This order establishes sanitary and hygienic standards for slaughter houses and sets residue levels for meat products. Until recently, the MFPO was managed by MoFPI. However, with the creation of the Food Safety and Standards Authority of India (FSSAI), the MFPO was brought under the umbrella of the Food Safety and Standard Regulations, which is overseen by FSSAI.

The Government of India supports the development of domestic food processing industry through MoFPI. Currently, the MoFPI is focused on the development of the municipal slaughter and processing facilities. Under this program, the MoFPI seeks to create public-private partnerships to develop modern, internationally recognized facilities. Note that this program is applicable to all meat products, including pork.

Table 1: State-wise Production of Pork in India in thousand metric tons, 2009-10

	States	Pork production (in 000 metric tons)
1	Andhra Pradesh	0.6
2	Bihar	61
3	Chhattisgarh	0.8
4	Goa	0.03
5	Gujarat	0.1
6	Haryana	3.5
7	Himachal Pradesh	0.1
8	Jammu & Kashmir	NA
9	Jharkhand	16
10	Karnataka	12
11	Kerala	3.4
12	Madhya Pradesh	0.9
13	Maharashtra**	5.5
14	Orissa	11
15	Punjab	0.5
16	Rajasthan**	4.1
17	Tamil Nadu**	0.7
18	Uttar Pradesh	14
19	Uttarakhand	1.2
20	West Bengal	23
21	Arunachal Pradesh	3.3
22	Assam	13
23	Manipur	7.4
24	Meghalaya	10
25	Mizoram	5.3
26	Nagaland**	31
27	Sikkim	NA
28	Tripura	7.6
29	Andaman & Nicobar Islands	0.2
30	Chandigarh	0.4
31	Dadra & Nagar. Haveli	NA
32	Daman & Diu	NA
33	Delhi	NA
34	Lakshadweep	NA
35	Puducherry	0.1
	All India	236
Source: Department of Animal Husbandry, Dairying and Fisheries		
**Unregistered sector also included		
NA-Not Available		

Table 2: Indian import of swine meat and its various products

Imports of Meat Of Swine, Fresh, Chilled Or Frozen (HS 0203) in Metric Tons					
S.No.	Partner Country	2007	2008	2009	2010 (Jan-August)
	World	32	87	145	89
1	Netherlands	6	22	71	44
2	Italy	10	29	34	15
3	Spain	12	31	24	16
4	United Kingdom	0	0	8	0
5	Belgium	3	0	7	7
6	New Zealand	0	0	0	4
7	Brazil	0	0	0	2
8	Norway	0	0	1	0
9	United Arab Emirates	0	2	0	0
10	Singapore	0	0	0	1
11	Denmark	1	0	0	0
12	Unidentified Country	0	3	0	0

Source: GTIS

Indian Imports of Hams, Shoulders And Cuts Thereof, Of Swine Bone In, Cured (HS 021011) in Metric Tons					
S.No.	Partner Country	2007	2008	2009	2010 (Jan-August)
	World	12	5	4	1
1	Spain	6	4	4	1
2	Italy	6	2	0	0

Source: GTIS

Indian Imports of Swine Meat Cured, Smoked (HS 021019) in Metric Tons					
S.No.	Partner Country	2007	2008	2009	2010 (Jan-August)
	World	6	4	5	0
1	Spain	2	3	2	0
2	Italy	2	1	2	0
3	Germany	0	0	1	0
4	France	1	0	0	0
5	Singapore	2	0	0	0

Source : GTIS

Table 3: Import duty and Import policy on swine meat and its various products

HS code	Description	Basic Duty	CVD	Special CVD	Total duty with 3% education	Import Policy

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Chap 2	MEAT AND EDIBLE MEAT OFFAL.					
203	MEAT OF SWINE,FRESH,CHILLED OR FROZEN					
	FRESH ORr CHILLED					
2031000	CARCASSES AND HALF CARCASSES	30	0	0	30.90	Fr SanP
2031200	HAMS,SHLDR & CUT OF SWINE, WITH BONE IN	30	0	0	30.90	Fr SanP
2031900	OTHER MEAT OF SWINE	30	0	0	30.90	Fr SanP
	FROZEN					
2032100	CARCASSES AND HALF CARCASSES					
2032200	HAMS,SHLDR & CUT OF SWINE, WITH BONE IN	30	0	4	36.136	Fr SanP
2032900	OTHER MEAT OF SWINE	30	0	4	36.136	Fr SanP
206	EDBL OFFAL OF BOVINE ANMLS,SWINE,SHEEP, GOAT,HORSE,ASS,MULE/HINNI,FRSH,CHLD/FRZN					
2063000	EDIBLE OFFAL OF SWINE FRESH OR CHILLED	30	0	4	36.136	Fr SanP
2064100	LIVERS OF SWINE FROZEN	30	0	4	36.136	Fr SanP
2064900	OTHER EDIBEL OFFALS OF SWINE FROZEN	30	0	4	36.136	Fr SanP
2090000	PIG FAT, FREE, OF LEAN MEAT AND POULTRY FAT, NOT RENDERED OR OTHERWISE EXTRACTED, FRESH, CHILLED, FROZEN, SALTED, IN BRINE, DRIED, OR SMOKED	30	0	4	36.136	Proh San P
210	MEAT/EDBL MEAT OFL,SLTED,IN BRINE,DRIED/ SMOKD;EDBL FLOURS&MEALS OF MEAT/MEAT OFFAL					
2101100	HAM SHOULDER CUT THREOF WTH BONE IN OF SWINE	30	0	4	36.136	Fr San P
2101200	BELLIES(STREAKY)&CUTS THEREOF OF SWINE	30	0	4	36.136	Fr San P
2101900	OTHR MEAT OF SWINE,SLTD,IN BRINE,DRD/SMKD	30	0	4	36.136	Fr San P
Source: Directorate General of Foreign Trade, Ministry of Commerce and Industry, Government of India.						

^[1] Please see [18th Livestock census, 2007](#). Note that the Indian Livestock Census was published in 2007, but was updated in 2009.