

Required Report: Required - Public Distribution

Date: November 22, 2024

Report Number: IN2024-0039

Report Name: Livestock and Products Annual

Country: India

Post: New Delhi

Report Category: Livestock and Products

Prepared By: Dr. Shruti Bhogal, Agricultural Specialist

Approved By: Karen Richards, Agricultural Attaché

Report Highlights:

India's 2025 beef production (mostly carabeef) is forecast to reach 4.64 million metric tons (MMT), up from 4.57 MMT in 2024, on steady domestic and increased export demand. Post forecasts a four percent increase in carabeef exports in 2025 over 2024 due to growth in demand from countries in the Middle East, South East Asia, and Africa. Domestic consumption is expected to remain the same in 2025 as in 2024 at 2.99 MMT. The calf crop is forecast to grow marginally in 2025 to 71.03 million head, while the cattle herd size is forecast to largely remain unchanged at 307.49 million head.

EXECUTIVE SUMMARY

Post forecasts India's beef production (mostly carabeef) in calendar year (CY) 2025 to reach 4.64 MMT, a two percent increase over 2024 based on expectations of increase in international demand. In 2025, domestic consumption in carabeef (i.e. meat derived from Asian domestic water buffalo) is forecast to remain unchanged at 2.99 MMT due to ongoing food inflation concerns.

India's carabeef exports in 2025 are forecast at 1.65 MMT, up by nearly four percent from the estimated 1.58 MMT in 2024. Shipments to the traditionally high-volume market of Egypt are expected to be down in 2024, due to higher prices. However, Indian carabeef exports are anticipated to exhibit a steady growth in markets like Malaysia, Vietnam, Iraq, United Arab Emirates, and Saudi Arabia. Additionally, other countries with a relatively smaller demand for Indian carabeef exports, including Oman, Senegal, Russia, and Uzbekistan are playing a role in the growth trend.

India's cattle herd size – comprising of bovine cattle and Asia domestic water buffalo– is forecasted at 307 million head in 2025, largely unchanged in comparison to 2024. The calf crop in 2025 is forecasted to grow marginally to 71 million head. The government of India's support for dairy development, animal healthcare, and breeding is producing growth in calf crop and reducing loss and residuals.

COMMODITIES

CATTLE

Table 1. India: Cattle – Production, Supply and Distribution (PSD)

Animal Numbers, Cattle Market Year Begins	2023		2024		2025	
	Jan 2023		Jan 2024		Jan 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stocks (1000 HEAD)	307400	307400	307420	307420	307490	307490
Dairy Cows Beg. Stocks (1000 HEAD)	129300	129300	130690	130690	132500	132500
Beef Cows Beg. Stocks (1000 HEAD)	0	0	0	0	0	0
Production (Calf Crop) (1000 HEAD)	70200	70200	70580	70580	71030	71030
Total Imports (1000 HEAD)	0	0	0	0	0	0
Total Supply (1000 HEAD)	377600	377600	378000	378000	378520	378520
Total Exports (1000 HEAD)	0	0	0	0	0	0
Cow Slaughter (1000 HEAD)	0	0	0	0	0	0
Calf Slaughter (1000 HEAD)	0	0	0	0	0	0
Other Slaughter (1000 HEAD)	40180	40180	40960	40960	41410	41410
Total Slaughter (1000 HEAD)	40180	40180	40960	40960	41410	41410
Loss and Residual (1000 HEAD)	30000	30000	29550	29550	29580	29580
Ending Inventories (1000 HEAD)	307420	307420	307490	307490	307530	307530
Total Distribution (1000 HEAD)	377600	377600	378000	378000	378520	378520
Not Official USDA Data						

PRODUCTION

India's livestock sector is thriving in comparison to its crop sector.¹ India continues to account for one of the world's largest inventories of bovine cattle and Asian domestic water buffalo. The former comprises nearly 13 percent of the world bovine cattle population and the latter accounts for 57 percent of the world buffalo population.² See Figure 1 for the breakdown of livestock within India. Post forecasts India's cattle herd in 2025 at 307.49 million head, largely unchanged in comparison to 2024.

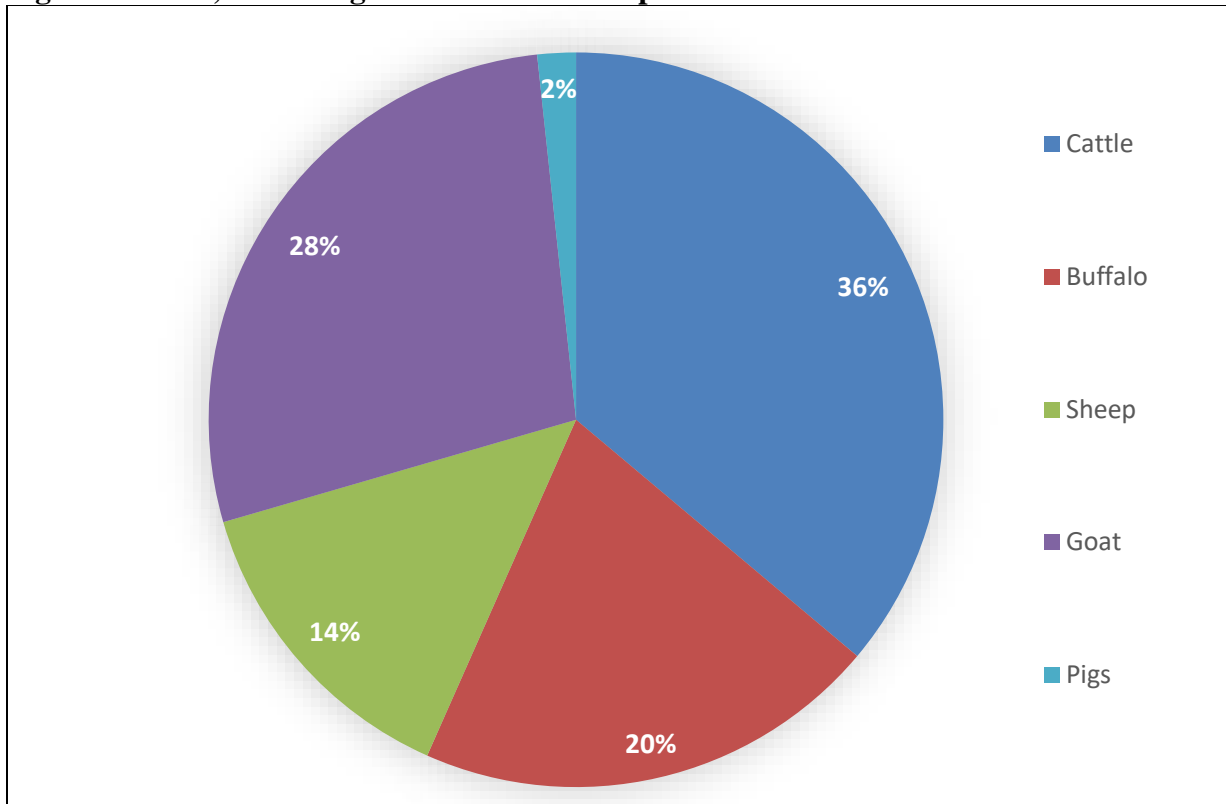
Calf Crop: Post forecasts India's calf crop, to grow marginally to 71.03 million head in 2025. Specifically, post expects government programs for dairy development, animal healthcare, and improved forage availability will further support calving in 2025.³

¹ India's [Department of Animal Husbandry, Dairying and Fisheries](#) presents that for the period 2014-15 to 2020-21, the livestock sector grew at a compound annual growth rate (CAGR) of 7.93 percent in contrast to the agriculture and allied activities sector with CAGR of 4.14 percent. India's livestock sector posits annual growth rate of 6.13 percent in 2020-21 at constant prices against 3.2 percent for agriculture and allied activities sector.

² According to India's [National Dairy Development Board](#) (NDDB), there are 50 well-defined breeds of cows and 17 breeds of buffaloes in India. The most common breeds of cows are Gir, Sahiwal, Kankrej, Tharparkar, and Red Sindhi; and that of buffaloes are Murrah, Nili-Ravi, Jaffarabadi, Surti, Mehsana, and Bhadawari.

³ Government programs to boost dairy production in the country result in improving bovine herd. Bulls, steers and dry cows (mostly Asian domestic water buffalo) are then slaughtered for meat production. There are no government

Figure 1: India, Percentage Share of Animal Species in Indian Livestock



Source: FAS New Delhi office research, Basic Animal Husbandry Statistics, 2023.

Slaughter number: In 2025, the slaughter number of both bovine cattle and Asian domestic water buffalo, is expected to reach 41.41 million head, up from 40.96 million head in 2024. The higher slaughter number is due to the availability of slaughter-ready cattle. The continued demand in carabeef domestic consumption and international markets also support the increase.

Loss and residual: For 2025, post forecasts the loss and residual of cattle herd at 29.58 million head, largely unchanged as compared to 2024. In 2024, the Indian livestock sector completely recovered from the Lumpy Skin Disease (LSD) outbreak that prevailed in 2023. There are no reported LSD cases in 2024. (See, [GAIN-India | 2023 – 0072 | India - Dairy and Products Annual – 2023](#))

schemes to promote rearing of buffaloes for meat in India, and the dairy sector growth facilitates ready supply of animals for slaughter.

POLICY

Cattle and buffaloes are not reared in India for meat. Hence, there are no government policies that support bovine animal rearing for slaughter. However, the Government of India has various programs in place that are focused on strengthening dairy production in the country which supports cattle herd size and animal health. The feeding and animal healthcare program indirectly facilitate improvement in carabeef production in the country via higher availability of the male calves/buffaloes and dry female buffaloes for slaughter. Government programs in India are centered around:

1. **Animal breeding:** The government of India offers a wide variety of support to improve the milk productivity of animals via improvement in genetic potential and veterinary care. Under the Rashtriya Gokul Mission (RGM), the government extends financial support – up to 50 percent of the project cost and up to three percent interest payments– for setting up breed multiplication farms for cattle.
2. **Animal health:** To reduce the disease outbreak in ruminants, the government of India in 2019 initiated a National Animal Disease Control Program (NADCP) – a five-year nationwide project endorsed by the World Organization for Animal Health (WOAH). With an outlay of Indian rupees (INR) 133.4 billion (1.8 billion), the NADCP targets Foot and Mouth Disease (FMD) and Brucellosis, specifically to control FMD by 2025 with vaccination and eventually eradicate by 2030. The government of India, under its Livestock Health and Disease Control program is also funding the control of diseases in other ruminants, and swine.

For more information on the Government of India’s dairy development programs refer to [GAIN-India | 2023 – 0072 | India - Dairy and Products Annual – 2023](#)

COMMODITIES

MEAT, BEEF and VEAL

Table 2. India: Commodity, Meat, Beef and Veal – Production, Supply and Distribution

Meat, Beef and Veal Market Year Begins	2023		2024		2025	
	Jan 2023		Jan 2024		Jan 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
India						
Slaughter (Reference) (1000 HEAD)	40180	40180	40960	40960	41410	41410
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	4470	4470	4565	4565	4635	4635
Total Imports (1000 MT CWE)	0	0	0	0	0	0
Total Supply (1000 MT CWE)	4470	4470	4565	4565	4635	4635
Total Exports (1000 MT CWE)	1552	1552	1575	1575	1645	1645
Human Dom. Consumption (1000 MT CWE)	2918	2918	2990	2990	2990	2990
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	2918	2918	2990	2990	2990	2990
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total Distribution (1000 MT CWE)	4470	4470	4565	4565	4635	4635
Not Official USDA Data						

PRODUCTION:

Post forecasts India's 2025 beef production (mostly carabeef), at 4.64 MMT carcass weight equivalent (CWE), a two percent increase from 2024.⁴ This is based on the expectation of continued normal weather conditions, steady domestic consumption, growing exports, sufficient availability of slaughter-ready cattle, and improved carcass weights.

CONSUMPTION

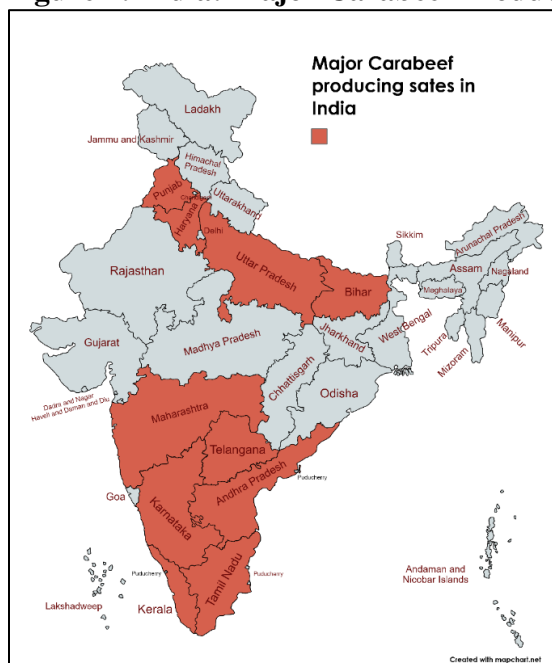
India's 2025 cattle meat consumption is expected to remain flat at 2.99 MMT due to expectations of continued food inflation. Although India's population is increasing with rising household earnings, and evolving consumption habits in favor of meat and meat products, rising food prices limit its growth.⁵⁶ Specifically, inflation in [vegetables](#) and [pulses](#) – commodities with less elastic

⁴ Bovine cattle slaughter in India is prohibited in 27 out of 36 states and union territories in the country. Cattle slaughter is allowed in the states of Kerala, Arunachal Pradesh, Meghalaya, Nagaland, Sikkim, Tripura, Manipur, West Bengal, and Mizoram (see, Government of India, Rajya Sabha, unstarred question No. 3464 at <https://dahd.nic.in/sites/default/files/RS3464.pdf>). The bovine cattle are slaughtered for domestic consumption only and is prohibited to be exported.

⁵ As much as 80 percent of the total Indian population is Hindu by religion and avoid buffalo meat consumption. On the other hand, the Muslims and Christians population that commonly consumes bovine meat, constitute 16.5 percent of the total population. As per World Population Review, 2021, the Indian youth population, people below the age of 35 years, constitute nearly 65 percent of the total population of the country (see, World Population Review at <https://worldpopulationreview.com/country-rankings/hindu-countries>). The Indian population consuming non-vegetarian foods is increasing. According to India's National Family Health Survey – 5 (NFHS-5), (2019-20) over 83 percent of population between the age group of 15-49 years consume non-vegetarian foods including chicken, meat, or fish (see, NFHS-5 Report Volume I at <https://rchiips.org/nfhs/>).

demand – is pushing consumers to cut down on meat consumption – a commodity with relatively more elastic demand – to manage their household consumption budget.⁷

Figure 2: India: Major Carabeef Producing States



Source: Source: FAS New Delhi office research, Basic Animal Husbandry Statistics, 2023.

As noted in Figure 2, the states of Uttar Pradesh, Madhya Pradesh, Rajasthan, Bihar, and Gujarat and Andhra Pradesh have more than half of the total bovine population in the country.

PRICE

The 2024 domestic wholesale price of beef and carabeef in India continues to rise, yet remains lower than pork, mutton, and fish. Price movement is influenced by overall inflation in the economy and seasonality – both weather/climate change, and religious festivities. Overall prices of livestock commodities are rising due to increasing cost of production. Such cost encompasses labor, fuel, and most critically feed and fodder.⁸

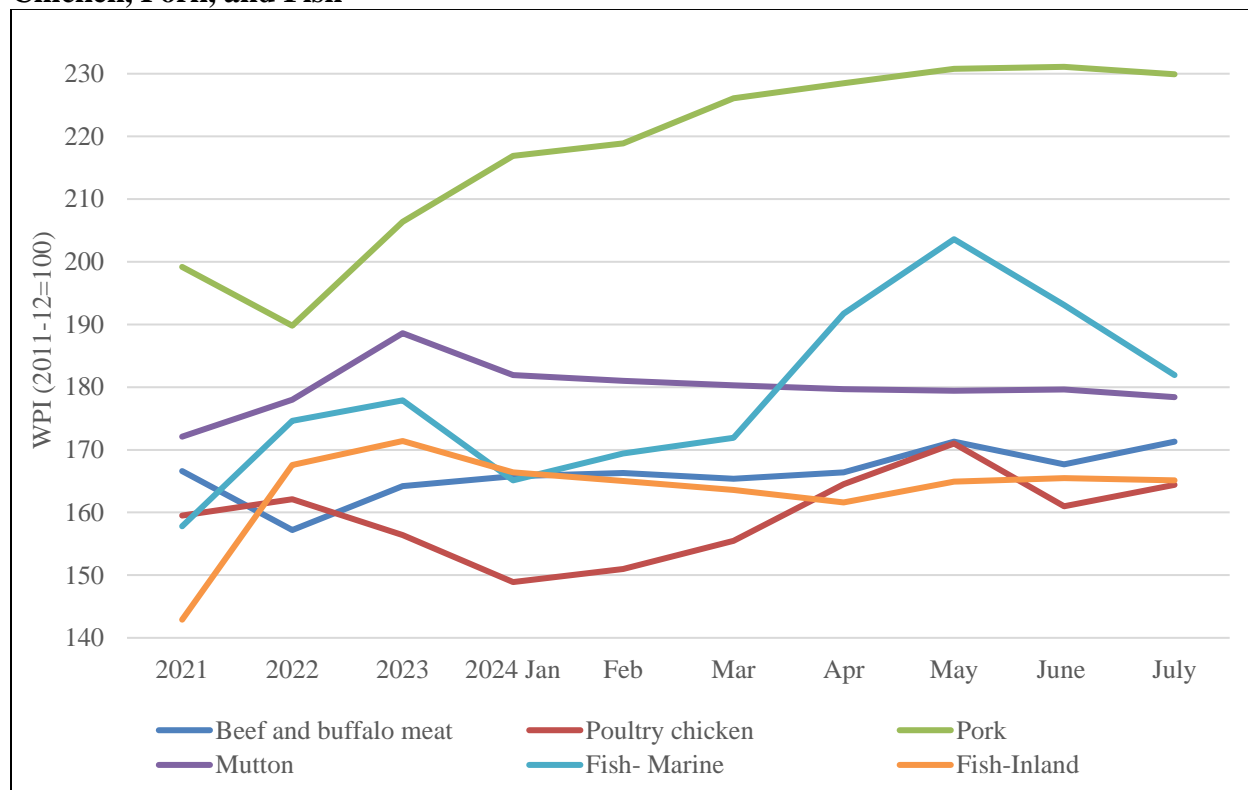
⁶Starting from nearly 5.10 percent in January, 5.09 percent in February, retail inflation was [estimated](#) at 4.83 percent in April and stood at 4.81 percent in June. Food inflation was recorded at 8.7 percent in April, up from 8.5 percent in March. Food inflation in rural areas was higher than the urban areas as it stood at 8.75 percent in April. [Vegetables were recorded to have become expensive](#), recording highest inflation rates at 29.32 percent in June, and inflation for pulses and products stood at 16.07 percent on an annual basis. Meat and fish prices were found to have risen to 8.17 percent in April in contrast to 6.36 in March.

⁷ Government of India's latest [Household Consumption Expenditure Survey](#), 2022-23, exhibits that on an average a rural Indian consumer spends nearly 4.91 percent of the total consumption expenditure budget on fish, eggs and meat in contrast to its urban counterpart that spends 3.57 percent of the total consumption budget. This percentage is much less than the budget spent on vegetables.

⁸ [ICAR-Indian Grassland and Fodder Research Institute](#) presents a shortage of green fodder, dry fodder, and concentrates to the tune of 11.24, 23.4, and 28.9 percent respectively. Such shortages are consistently raising feed prices.

Indian carabeef export prices are on a steady rise on account of the appreciating cost of production and increasing cost of freight.⁹

Figure 3: India: Beef and Buffalo Meat Wholesale Price Index (WPI) versus Mutton, Chicken, Pork, and Fish



Source: FAS New Delhi office research, Ministry of Commerce and Industry

TRADE

Imports: Import of beef and beef products are subject to severe restrictions, which effectively ban imports. India does not import any carabeef.

Exports: India’s carabeef exports are estimated at 1.65 MMT in 2025, up by nearly four percent from 2024.¹⁰ India’s key carabeef export markets include Malaysia, Vietnam, Indonesia, Iraq, the United Arab Emirates, and Saudi Arabia which comprised nearly 65 percent of India’s carabeef exports in 2023. The volume to these countries is expected to exhibit a steady growth in 2025.¹¹ However, exports to Egypt which comprised 17 percent of India’s exports in 2023 is expected to be weak due to high production and freight costs.

⁹ Buffaloes are essentially a byproduct of the Indian dairy sector. The ready availability of buffaloes and no cost of rearing these for meat keeps the cost of Indian carabeef lower than other competing countries.

¹⁰ India does not export bone-in carabeef. Only boneless carabeef – chilled or frozen – is exported from India.

¹¹ In 2024, Indonesian completed import license issuance and quota allocation for Indian carabeef in the second quarter, in contrast to the earlier trend of this being done by February.

TRADE POLICY

Import regulations for live animals: The Indian government restricts the import of live animals as per Section 3 of the Livestock Importation Act. Obtaining an import license from the Director General of Foreign Trade (DGFT) is mandatory. The license, which is valid for six months to a year, is issued following a proposal and risk analysis conducted by the Department of Animal Husbandry and Dairying (DAHD), and receipt of a veterinary certificate issued by a competent authority of the exporting country.

Import regulations for livestock products: Livestock products are categorized under India's Open General License (OGL) and DAHD provides import procedures for these products in notification S.O. 2666(E) of October 2015. Obtaining a DAHD-issued Sanitary Import Permit (SIP), prior to shipping is a pre-requisite. SIP is valid for six months to a year.

Import of bovine germplasm: To improve dairy production, the government of India allows the import of animal genetics with restrictions. State animal husbandry departments, State livestock development boards, recognized institutes, and farmers are allowed to import bovine genetics. However, acquiring an import license issued by the Ministry of Commerce's DGFT is a pre-requisite. Further, the importer is evaluated by DAHD regarding its capability to maintain the performance record of germplasm. The importer must also abide by various requirements outlined by DAHD and follow the guidelines of the World Organization for Animal Health (WOAH), Codex Alimentarius, and the International Embryo Technology Society (IETS).

Import Certification Requirements/Documentation: India's livestock products certification requirements and documentation for livestock are accessible on the DAHD website located at: <https://dahd.nic.in/Trade>. Table 3 is an overview of tariffs for selected livestock products:

Table 3: India: Tariff for Select Livestock Products

HS Code	Item Description	Basic custom duty (BCD)	IGST	Import policy
0101.2100	Live Horses for pure breeding	Free	12	Restricted
0101.2990	Live horses for polo and other	30	12	Restricted
0101.3010 - 0101.9090	Live Asses, Mules & Hinnies	30	0	Restricted
0102.2100 - 0102.9090	Live Bovine Animals	30	0	Restricted
0103.1000 - 0103.9200	Live Swine	30	0	Restricted
0104.1010 - 0104.2000	Live Sheep and Goats	30	0	Restricted
0106.1100 - 0106.9000	Other live animals: mammals. Birds, insects	30	0	Restricted*
0201.1000 - 0201.3000	Meat of bovine animals, fresh or chilled	30	0	R SanP
0202.1000 - 0202.3000	Meat of bovine animals, frozen, other cuts with/out bone	30	0/5	R SanP
0203.1100 - 0203.2900	Meat of swine, fresh, chilled or frozen	30	0/5	Fr SanP
0204.1000 - 0204.5000	Meat of sheep or goats, fresh chilled or frozen	30	0/5	Fr SanP
0205.0000	Meat of horses, asses, hinnies, fresh chilled or frozen	30	0/5	Fr SanP
0206.2100 - 0206.9090	Edible offal of bovine animals, swine, goats, horses, asses, mules or hinnies, fresh, chilled or frozen	30	0/5	R SanP Fr SanP
*Subject to import license. However, import of wild animals is prohibited.				

Attachments:

No Attachments