



# *Indian Poultry Market Update*

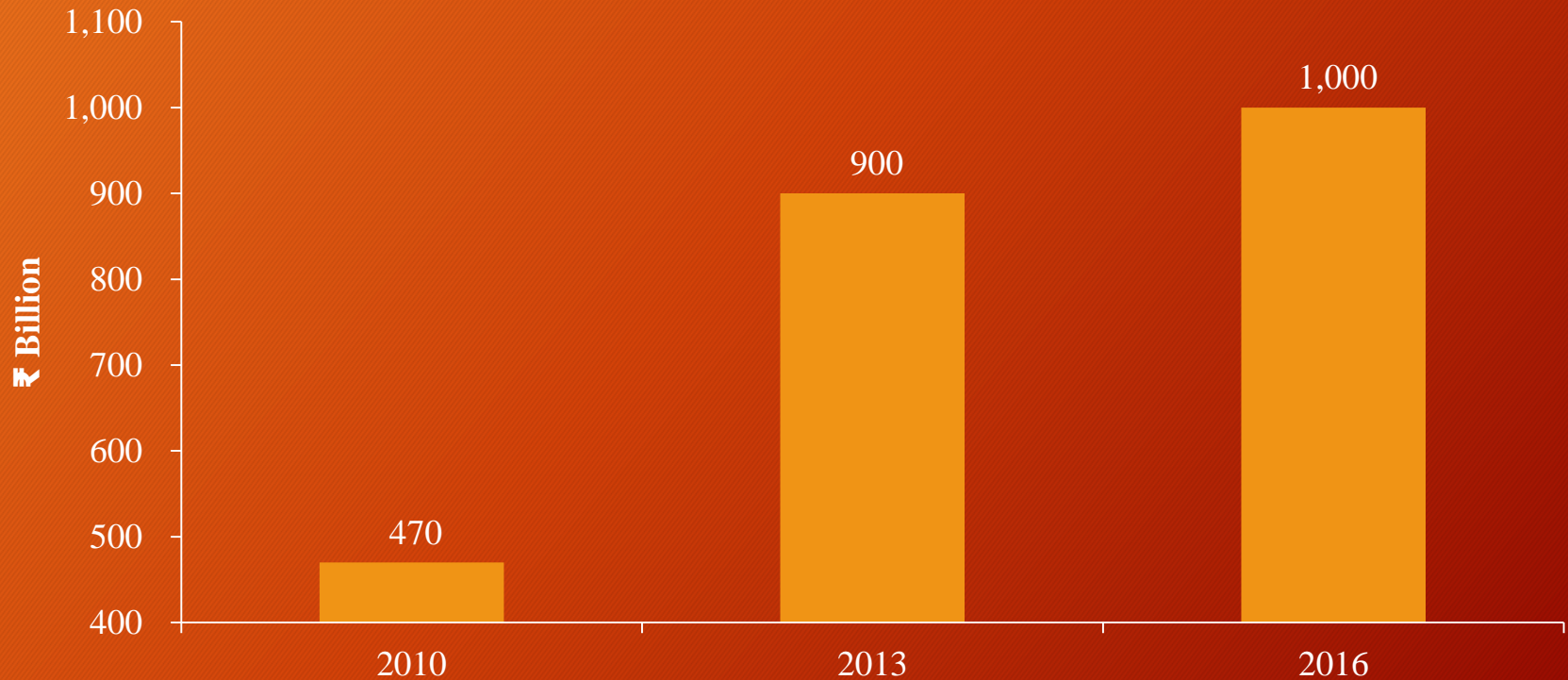


**भारतीय कृषि एवं खाद्य परिषद्**  
**INDIAN COUNCIL OF FOOD AND AGRICULTURE**

# Indian Poultry Market Overview

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## Indian Poultry Market by Value; 2010-16

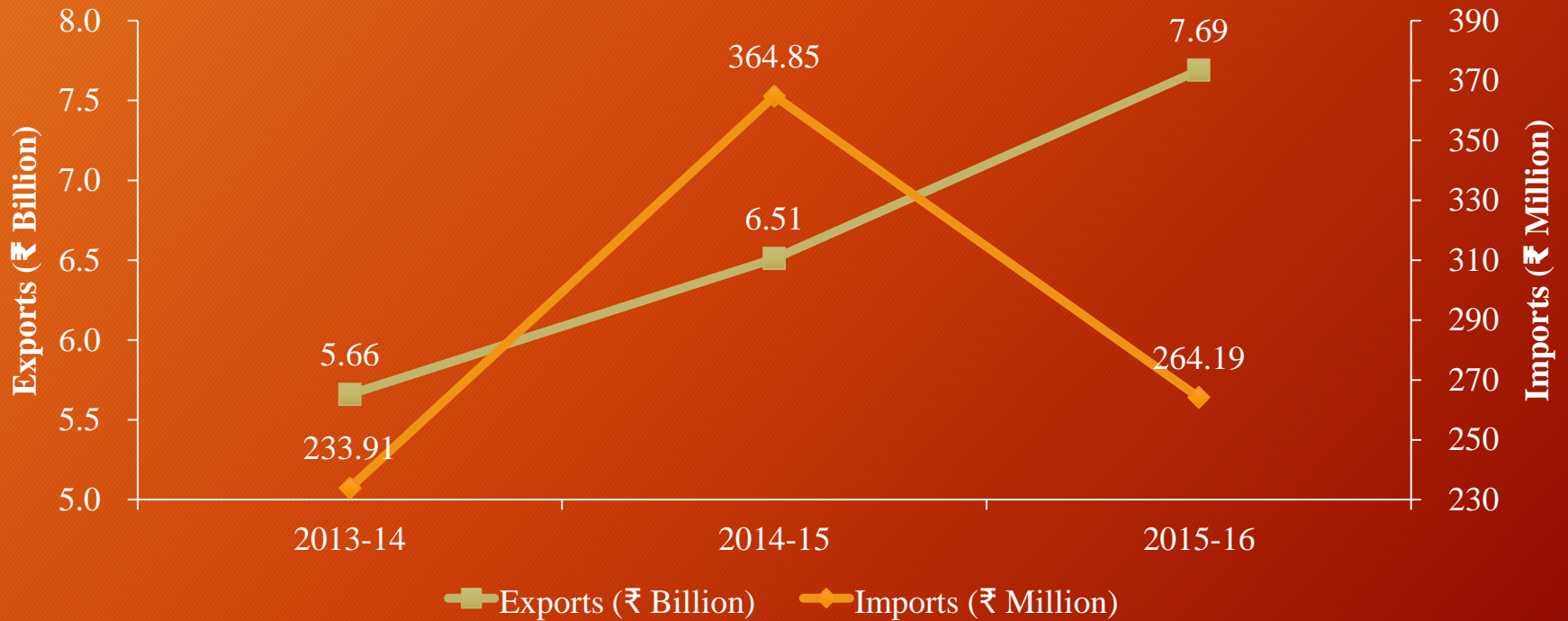


Source: Company Reports

# Indian Poultry Products Trade

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## Indian Poultry Products Export-Import by Value; 2013-16



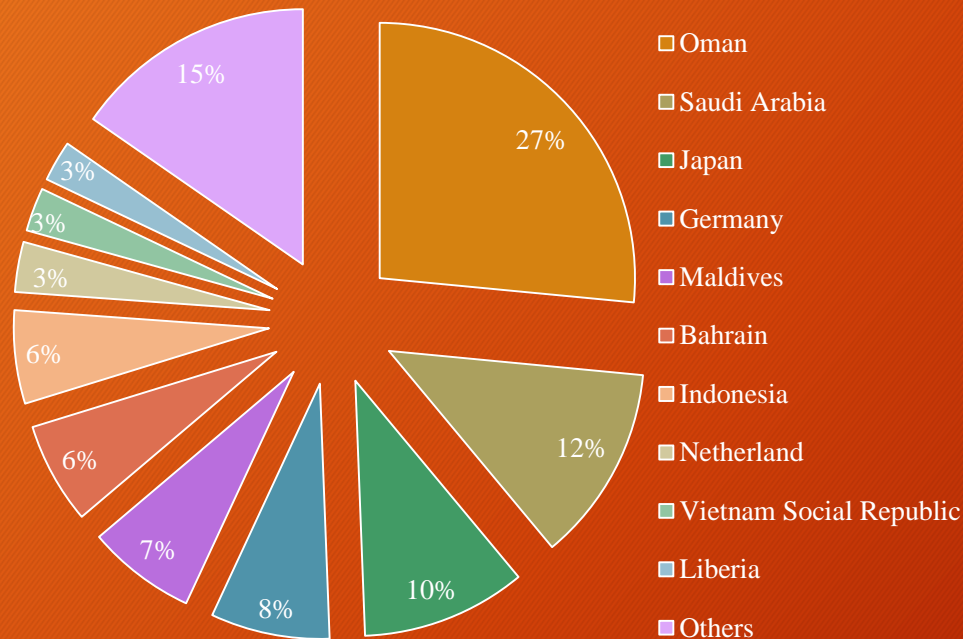
Source: APEDA



# Indian Poultry Products Trade

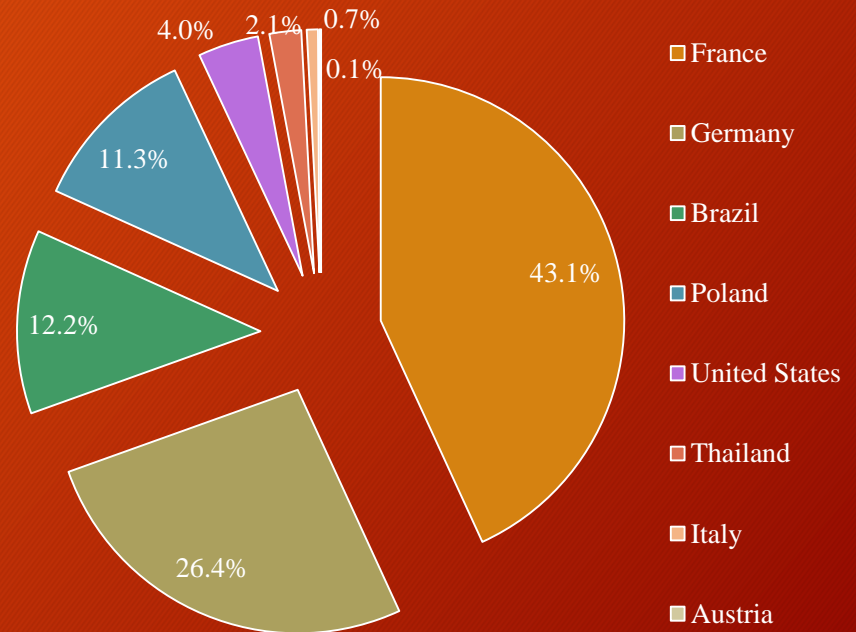
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## Major Exporting Countries; 2015-16



Source: APEDA

## Major Importing Countries; 2015-16

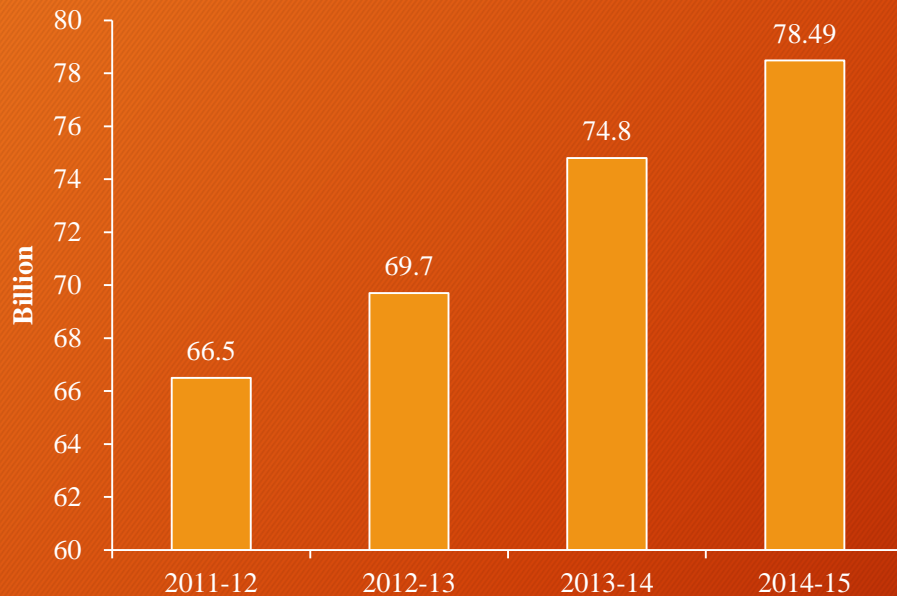


Source: APEDA

# Indian Egg Market

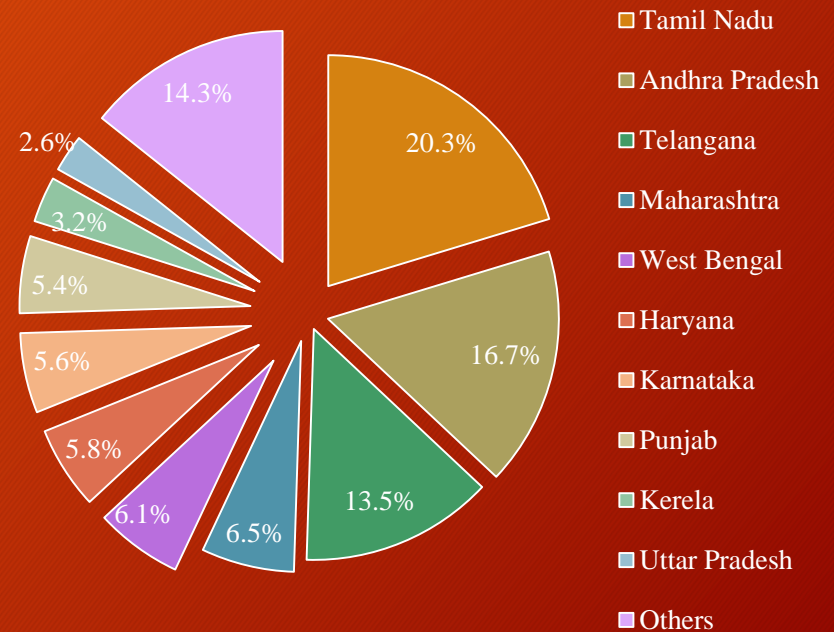
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## Indian Egg Production by Volume; 2011-15



Source: Pocket Book of Agriculture Statistics 2015

## Top 10 Egg Producing States; 2014-15

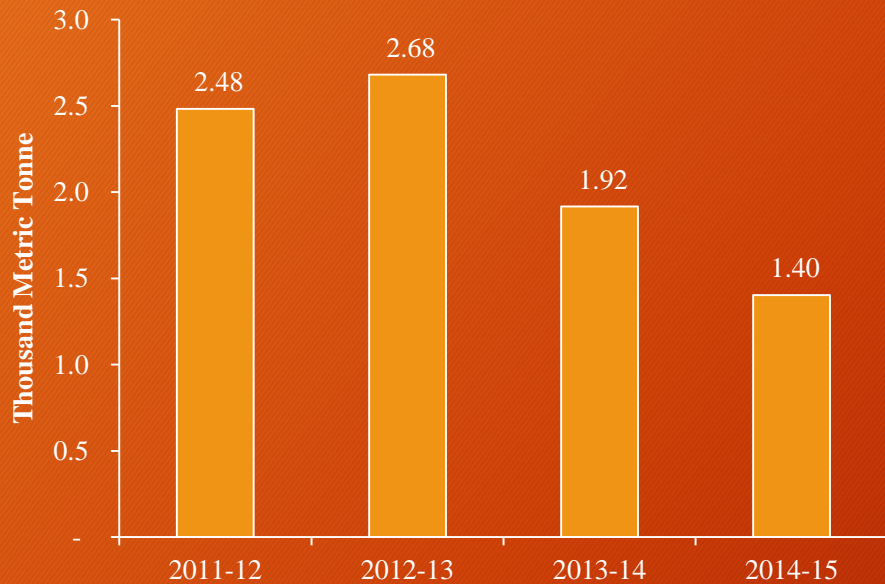


Source: MOSPI

# Indian Poultry Meat Market

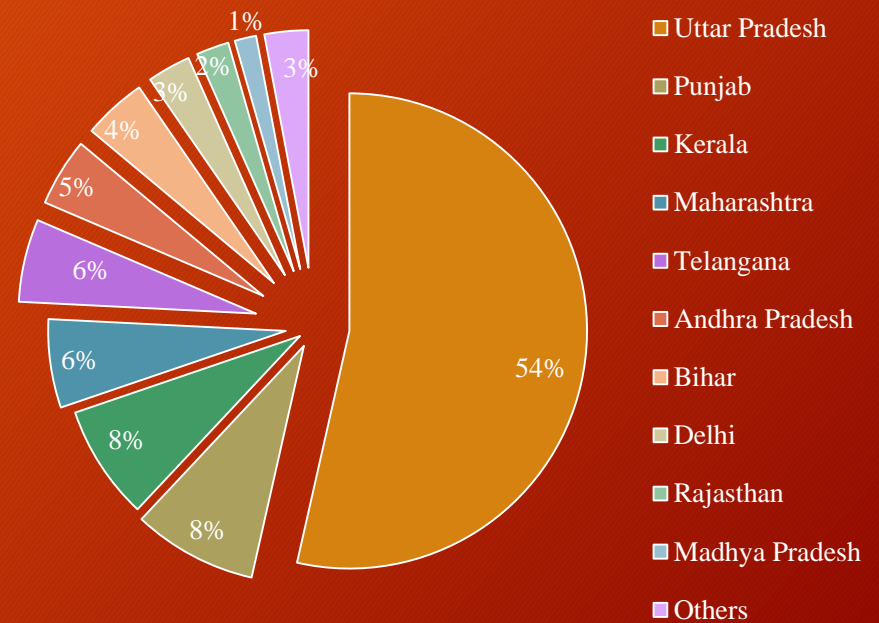
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## Indian Poultry Meat Production by Volume; 2011-15



Source: Department of Animal Husbandry, Dairying and Fisheries

## Top 10 Poultry Meat Producing States; 2014-15



Source: Department of Animal Husbandry, Dairying and Fisheries

# Challenges

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- Outbreak of diseases like Avian Influenza ( Bird Flu) causes culling of poultry, scrapping of orders and price rise which hits the industry hard.
- Shortage of raw material is another issue. Price of soybean meal, has increased, which has forced the feed manufacturers to compromise in terms of diet given to birds.
- Shortage of human resources is another problem because of the absence of veterinarians, researchers, in areas where expertise knowledge is required.
- Indian poultry sector is still unable to tap the benefit of international market. Lack of adequate cold storage, warehouses is the major factor affecting poultry sector in India.
- Majority of the production is by unorganized sector as backyard poultry for additional income.
- Increasing antibiotics level in poultry products are creating long lasting harmful effects like drug resistance in people.
- Lack of comprehensive regulating authority to maintain hygiene, and granting of licenses to businesses.
- The proximity of the birds to their waste and other birds increases risk of agents such as salmonella for consumers.



# Recommendations

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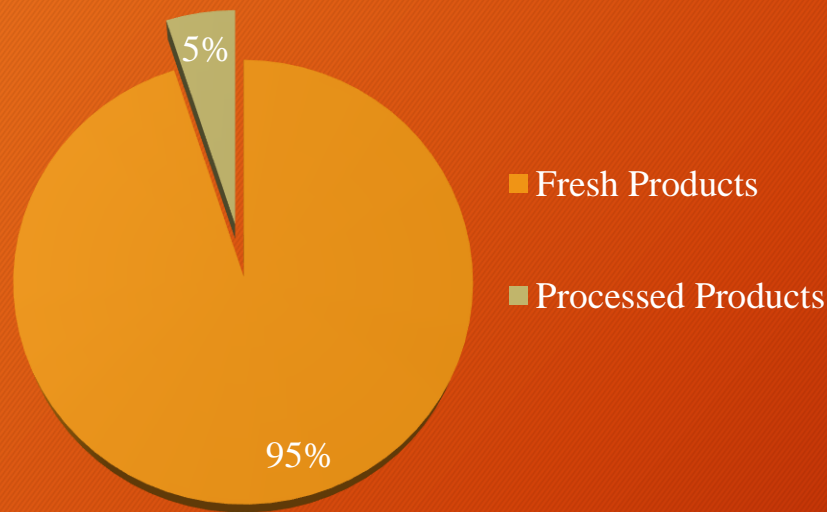
- The central government should therefore come up with clear guidelines declaring the poultry as agriculture activity, thereby extending all the benefits of farming to poultry farmers.
- Central government should frame user support policy to encourage bio plants for poultry and to move organic mass of the country.
- Government should earmark funds for awareness generation through “Social Awareness Campaigns” which could sensitize the communities and population at a large on major aspects related to poultry including,
  - Hygienic rearing, slaughtering and storage of poultry to ensure food safety and quality.
  - Health benefits of poultry products and nutritional value it offers.
  - Prevention measures for poultry from various diseases and infections.
- There is a requirement of national geographical zoning to avoid adverse effects on the overall economy in the case of an outbreak of bird influenza in any part of the country.
- Infrastructure development is key for viability and sustained growth of poultry sector especially the cold chain and processing units as there are fluctuations in poultry consumption round the year owing to religious and cultural factors.



# Indian Poultry Processing Market

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## Indian Poultry Market by Segments



- Of the total processed poultry products only about 1% undergoes processing into value-added products (ready-to-eat/ready-to-cook).
- The dominance of the live-bird market restricts the movement of poultry because of the high mortality associated with transporting live birds.
- Growth in the retail segment is being encouraged by new approaches from poultry integrators, including establishing integrator owned or franchised chilled/ frozen poultry shops, opening sales counters in existing food shops, and home delivery services.
- The modern poultry processing sector in India consists of approximately 12 firms as of 2013-14, which are mostly operated by poultry integrators located in or near major urban areas.

Source: [Indiaretailing.com](http://indiaretailing.com)

# Indian Poultry Processing Market

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## Market Drivers

- The changing lifestyles and demographic profiles of Indian households. Consumers are exposed to Western lifestyles, cuisines and cooking and expect the same from Indian markets also.
- Indian Consumers are becoming more health conscious and are willing to spend more towards healthy and clean food.
- The rapid growth of Quick Service Restaurants such as McDonalds, KFCs, Nando's, Marrybrown and various such outlets are fuelling the growth of processed poultry.
- The recent emergence of Modern Trade such as supermarkets and shopping malls is also supporting growth in the retailing of chilled and frozen poultry products. The investments in the cold chain by these modern retailers are creating channels for the growth of processed poultry.
- To streamline the meat and poultry processing industry and the production of hygienic meat, the government of India launched the National Meat and Poultry Processing Board.

## Market Challenges

- Absence of policies governing from farm to the consumer plate for the development of the processed poultry.
- Low domestic standards as compared to the international standards for processing industry.
- Environmental pollution issues created by slaughterhouse waste materials, especially in large cities and towns.
- Lack of uniform and effective national meat quality testing systems and laboratories.
- Unavailability of training institutes for workers, technicians and managers in meat processing industries.
- Insufficient initiatives from the government in creating and promoting Indian brands of healthy poultry products.

*Thank You*

