



भारतीय कृषि एवं खाद्य परिषद्
INDIAN COUNCIL OF FOOD AND AGRICULTURE

POULTRY

NATIONAL ROUND TABLE CONFERENCE



14TH DECEMBER, 2016
INDIA INTERNATIONAL CENTRE, NEW DELHI



INDIAN POULTRY MARKET OVERVIEW

MARKET OVERVIEW

Poultry is one of the fastest growing sectors in the Indian agricultural industry. The poultry sector in India has experienced significant move in structure and operation amid most recent two decades changing from a mere courtyard activity to a significant viable activity with presence of big players with effective execution of poultry cultivating on a vast scale. This revolution intricately sizeable interest in reproducing, incubating, raising and handling exercises.

After aggressive growth over last five years, national poultry industry is in console second largest egg and third largest broiler-chicken producer in the world idation mode. Sizeable debt added over the years pooled with temperance in accruals has resulted in worsening of capital structure and coverage indicators for the businesses. The financial profile of the sector is anticipated to remain strained in near term given overwrought profitability though companies having presence in value added sections would be able to endure the liquidity pressure.

Poultry processing, though still in nascent stage, continue

to record double digit growth driven by promising socio economic factors and increasing penetration of QSR chains. India is the second largest egg and third largest broiler-chicken producer in the world. However, India remains pre dominantly a live bird market with more than 90% of broiler sales being done at customary retail channels given consumer inclination for freshly cut broiler.

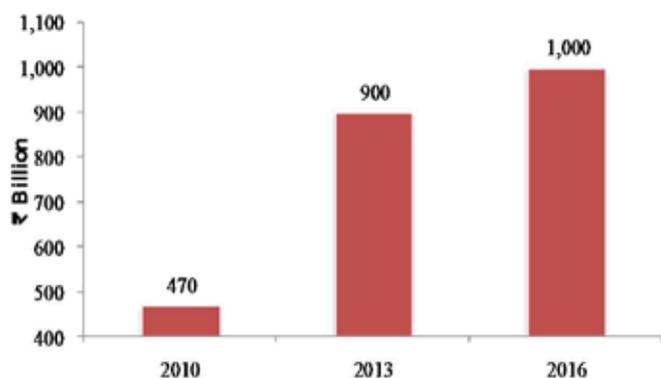
INDIAN POULTRY MARKET BY VALUE

The Indian poultry market witnessed an increasing trend over the past five years, growing at a CAGR of 11.39% during 2010-2016. At present, urban markets account for about 80% of demand, but according to the recent estimates, rural demand will rise significantly, due to lower chicken prices, improving prosperity and changing lifestyles, helping the sector post at least 8-10% expansion annually.

The current fiscal year 2016 started strongly for the poultry market with high realizations during Q1FY2016, though realizations moderated in Q2 and Q3, while feed prices continued to remain high.



Indian Poultry Market by Value; 2010-16



Source: Company Reports

The Indian poultry market is largely concentrated in Andhra Pradesh, Tamil Nadu and Telangana.

The major challenges faced by the market, other than high feed costs, include transportation infrastructure and inadequate cold chain along with high vulnerability to disease outbreaks and highly volatile realizations affecting cash flows.

India continued to report erratic instances of 'bird flu' epidemics in 2015 including in certain parts of Kerala, UP, Manipur, Chandigarh and Telangana, which had peripheral impact on poultry prices and supply for short duration in and around the affected area. Given better consumer awareness and fast action by authorities to control the spread of infection, overall impact of such regional outbreaks has been limited to the poultry market, though any large scale outbreak can have much varied effects.

Poultry integrators have partial control over feed prices and broiler realizations; and they continue to focus on improving production through better Feed Conversion Ratio (FCR) by testing with feed mixes, lower mortality rates through superior farm management, and constant efforts to improve other parameters like hatchability, average daily weight gain, reducing selection gap, etc.

While the industry had conventionally focused primarily on productivity advancement, it is currently also moving towards enhancing circulation infrastructure, swelling value additions and exercising better control over its supply network. Long-term solution

to reduce volatility in realizations and enable better distribution across the country, along with developing exports markets, lies in moving towards the processed chicken market from existing wet market orientation of consumers.

INDIAN POULTRY MARKET EXPORTS AND IMPORTS

The trade analysis of the poultry products of India depicts that the country has very negligible presence in the international trade. Although, exports have been increasing over the years, imports were not stable during 2013-2015.

Imports may not happen in the immediate future, though the World Trade Organization had ordered India to import American chicken. The USA Poultry and Egg Export Council doesn't expect India to start imports in the immediate future. This is because of the likelihood of New Delhi challenging the WTO order and India's limited system to store and distribute frozen meat.

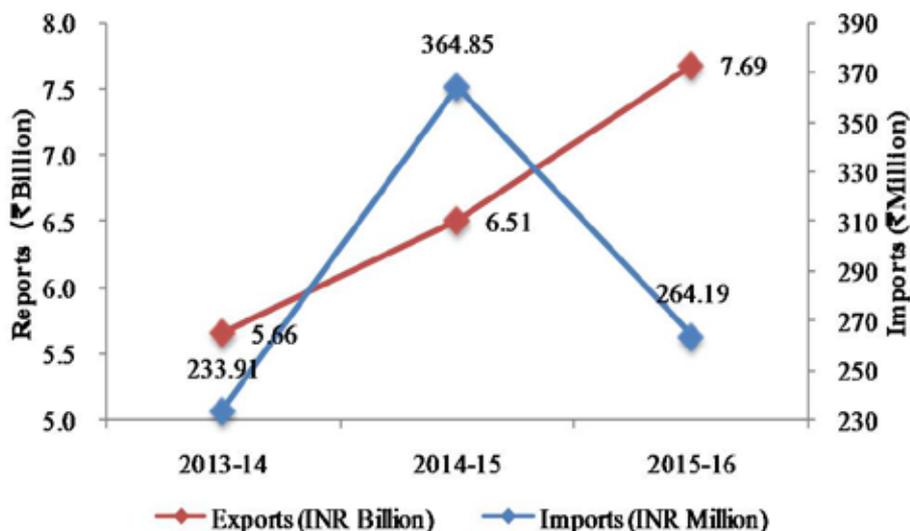
With reduced risk from imports flooding the markets and improving demand for poultry products is encouraging the domestic players to expand their production and provide with more variety of products.

INDIAN EGG PRODUCTION MARKET ANALYSIS

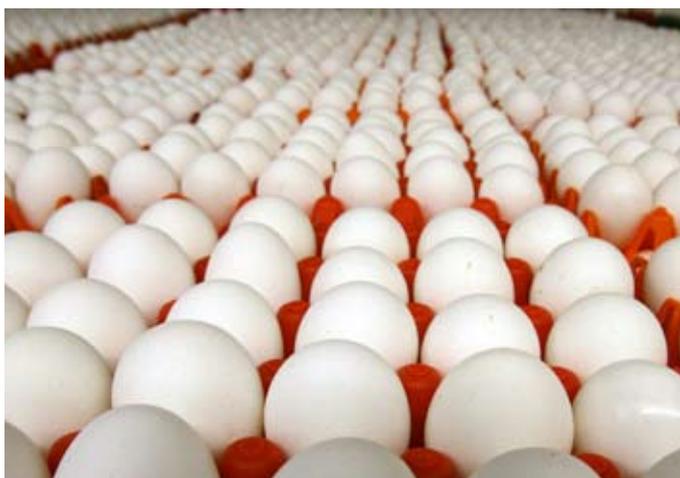
INDIAN EGG PRODUCTION BY VOLUME

The egg production in India increased to 78.49 billion in 2014 from 66.50 billion in 2011, increasing at a CAGR of

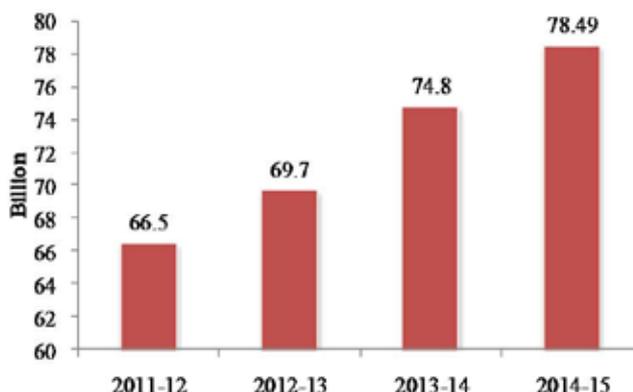
Indian Poultry Market Export and Import; 2013-2016



Source: APEDA Statistics



Indian Poultry Egg Production; 2011-15 (Billion)



Source: Pocket Book of Agriculture Statistics 2015

5.68%. The domestic demand for the eggs is expected to drive the market in the long term as 4%-5% increase in demand, annually for eggs is expected.

The market value of egg market in 2015 was estimated to be INR255 billion. The low cost of egg production, high productivity, rise in egg consumption in the north owing to growing per capita income of a young and increasingly urban population and emerging export markets are certain key growth drivers of egg production in India.

Some of the key challenges faced by the egg market in India include, High tariff, hygiene, price range of animal feed and outbreak of diseases.

However, the government should support the egg industry as it is environmentally viable and has a

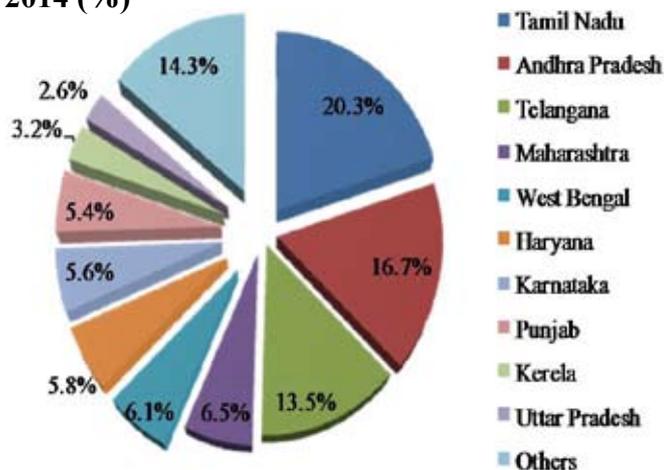
very low carbon footprint and eggs have the added benefit of being a more affordable and nutritional food option for consumers.

INDIAN EGG PRODUCTION BY STATES/UNION TERRITORIES

The egg production in India is largely dominated by Tamil Nadu, Adhra Pradesh, Telangana, Maharashtra and West Bengal. Tamil Nadu had the highest share with 20.3%, producing 15.93 billion eggs in 2014 followed by Andhra Pradesh producing 13.1 billion eggs in the aforementioned year. Telangana also had a significant share in the production of eggs with 10.62 billion eggs. Maharashtra, West Bengal, Karnataka and Punjab are also leading egg-producing states with less than 10% share in the total eggs produced.



Indian Poultry Egg Production by States/UT; 2014 (%)



Source: MOSPI

INDIAN POULTRY MEAT PRODUCTION AND CONSUMPTION ANALYSIS

In India, the production and consumption of broiler meat have been almost equal over the years. India's per capita consumption of poultry meat is estimated at around 3.1 kg per year, which is low compared to the world average of around 17 kg per year. Chicken is the preferred meat in India due to its lower price than other meat sources, and is not subject to the same religious restrictions as other meats. The demand can fluctuate due to religious and cultural practices though, as chicken and eggs may be eaten less at different times of the year.

Processed chicken meat constitutes about 5%-10% of total chicken meat production, but according to the estimates demand for processed chicken meat is growing between 15% to 20% per year, as the middle

class grows. However, Chicken prices have slowly risen in the last few years due to increased feed prices and other costs.

Although, poultry meat exports are small due to limited slaughtering and processing facilities and an underdeveloped cold chain.

CONCLUSION

Thus, robust growth in the poultry output, coupled with future growth potential and favorable socio-economic factors over the last decade makes India one of the fastest growing world markets in this segment.

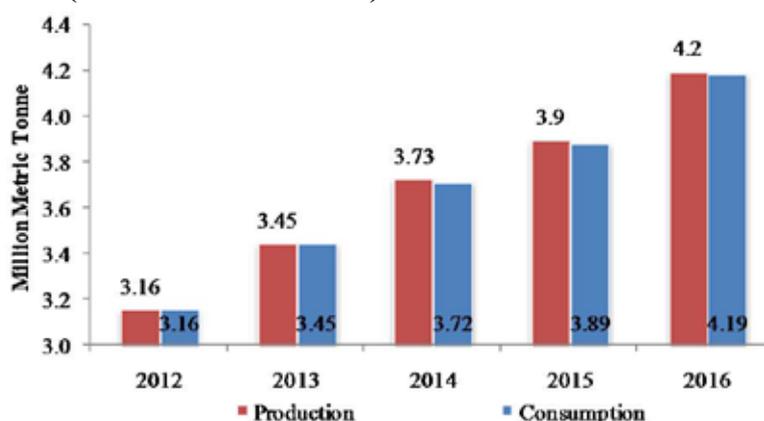
India's transition from a predominantly live bird market to a chilled/frozen market is expected to be crucial for the increased presence in international trade, where India currently has minimal presence. The need for developing efficient distribution system with large investments in cold chain infrastructure, and increasing the market acceptability of frozen chicken are going to be the key industry drivers in the long-term.

Other factors such as the increased requirement for upgraded infrastructure will also play a key role in determining India's continued presence in the global poultry market.

The industry has traditionally focused primarily on productivity improvement, but current market needs suggest increased importance of enhancing distribution infrastructure, value additions and exercising better control over its supply chain.



Indian Broiler Meat Production and Consumption; 2012-2016 (Million Metric Tonne)



Source: USDA Livestock and Poultry: World Markets and Trade 2016



DELIBERATIONS



Poultry sector in India continues to be growing in the long run through policy support by the Government and perseverance of the private sector. With timely interventions by the Government in the backyard poultry sector, farmers in the country have moved from rearing country birds to rearing low input technology birds which ensure faster growth of chicks, higher eggs per bird and increased hatchability. The sector possesses immense potential for growth, value addition, employment generation and in driving growth of India's farm sector.

Indian poultry industry however faces several challenges as well, both on policy and market front. Keeping various issues in mind, Indian Council of Food & Agriculture organized a National Round-table on Poultry on 14 December, 2016 at India International Centre, New Delhi.

Dr. MJ Khan, Chairman, ICFA welcomed the guests and provided a brief introduction on Indian Council of Food & Agriculture (ICFA). Thereafter, he dis-

cussed the poultry sector in India and highlighted its importance in the current scenario. Various policies of the Govt. as well as their success with regard to their objectives were brought to light by him. He also mentioned how the flagship of various poultry farms has the highest start-ups rate made in India.

Mr OP Chaudhary, Joint Secretary, Dept. of Animal Husbandry, Dairies & Fisheries stressed on the importance and the rapid growth of the poultry sector. He



claimed that it was important to understand the viewpoint of stakeholders in order for an economy to grow in an overall perspective. He talked about the dreams and visions of the stakeholders in taking the sector forward and making it at par with the other sectors. He enquired of ways of transforming these visions into reality. He informed of how important it is for both the organized as well as unorganized sectors to combine in order to increase the productivity scale of poultry farms. He voiced the need for focusing on the fundamentals and assured that cooperation from the government is necessary and would be definitely provided wherever the need arises.

Mr RCKhatri, Poultry Federation of India spoke of the broad issues faced by the poultry industry. He talked of the backwardness of poultry on the basis of its classification. There is a difference of opinions regarding poultry as an industry or a sector. It lies between these two and hence is often not able to reap and fully optimize the true prospective benefits and hence there is a need to recognize it as an independent industry.

Taking the discussion forward he stressed on increasing the production which would indirectly increase farmer's income rather than directly doubling the income. He talked of increasing the income of the farmer through secondary sources. He detailed on environment friendly ways of dealing with the issues. The major points mentioned by him include:

- Self- sufficient farms are beneficial to the economy as it reduces cost of production.
- Organic manure is lead free and thereby contributes towards an environmentally sustainable economy.
- One of the major reasons for the failure of the Go-bar Gas plant in India is obsolete technology. Up-gradation of farmer's equipments and agriculture technology is a must.
- The need of the situation is proper infrastructure which is highly required for increasing the efficiency and productivity. Due to severe conditions in India throughout the year. Specific machinery and equipment as well as proper infrastructure is necessary.
- The poultry farms are cessed at a high rate which leads to increase in the cost of production and hence should be looked into.
- There have been efforts made by various NGOs



pressurizing FMCGs to procure cess free eggs. This move if successful would be a hug step towards minimizing costs to the poultry sector.

- Old and existing farms should not be penalized under the guidelines set for new farms as it would be a disadvantage to them.

The main focus of Mr Khatri was on establishing poultry as an independent sector and giving it its deserved credit.

Mr. Vijay Sardana, Chairman, ICFA Working Group on Agro Tradestressed the huge potential the sector possesses in taking the economy forward. It was cited that the demand for eggs is expected to increase to 57 million tonnes by 2030 and also that every citizen would be able to achieve minimum nutritional standards. Of the total non- vegetarian consumption in India, chicken accounts for around 90% with mutton and beef making a negligible contribution. But are we ready to capitalize on this major product? India is the fastest growing non-vegetarian market in the world. There is definitely a better understanding of the market, but are we ready to seize the opportunity and capitalize on it. Nutritional aspects of poultry are well accepted and multiplier effects of poultry are positive and quite high on soya and maize. Both the maize and soya industry would face a setback and the multiplier effect would be negative in case poultry faces a problem.

Poultry sector needs minimal intervention and has the shortest crop duration with a maximum of 40 days. It is one sector that the policy makers should really look into keeping all religious sentiments aside because

if we miss out on this opportunity, the world market would take over and capitalize on it. Major points to be taken into consideration include:

- Cost of production v/s cost of retailing.
- Consumer knowledge v/s consumption opportunities
- Food safety v/s chicken health
- A separate committee needs to be formed for packaging and related issues
- Media's campaign for information dissemination needs to be properly streamlined and propagated.
- Various acts pertaining to animal transportation and welfare needs to be reviewed along with the revaluation of the principles and working of APMC.

He emphasized that poultry is a highly unorganized and fragmented. India is a rapidly growing snacking industry and poultry could be molded into snacking in order to increase gains. He spoke of negative competition present in the industry. According to him, if there is a huge demand in the market then cutting production is illogical and taking such a step implies that either they don't want to develop, are lazy or are unable to seize and discover the opportunities.

Global competitiveness of India in the world market

is an important issue and needs to be looked into. We need to benchmark our strengths and weaknesses and work on it. There is a need for practicability and structuring national strategy. Govt. should undertake proper research pertaining to the sector.

It needs to be understood that both agriculture and poultry are dependent on each other and growth and survival of one is not possible without the other. Consumer protection is another important aspect and needs to be taken into account. He opined that partial treatment of domestic workers and importers where importers are provided with heavy concessions while there is none for the domestic producers.

He also stressed that fishery although an important sector is secondary to poultry as water bodies are not present in each and every part of the country. He concluded by stressing on the need for realizing the true potential of the farmers in India.

Dr. RS Gandhi, Assistant DG, Animal Nutrition and Poultry, ICAR spoke of issues in poultry sector research and development. He explained that around 94% of poultry in India is reared by small, landless and marginal farmers. The lines between the urban poultry and rural poultry needs to be clearly demarcated and



explained in order to address the overall poultry sector. It is evident that enough emphasis is placed on the rural poultry sector and needs to be brought to light that about 12 rural poultry centers all over the country breeds the best quality eggs.

Poultry is a source of nutritional and livelihood and security and therefore should be treated as such. His major points of discussion included

- Promotion of indigenous livestock and poultry.
- Food safety and security which is a major issue.
- Impact of climate change on poultry.
- Poultry waste management
- Drug delivery usage
- Storage issues which includes breeding through semen fertilization
- Animal welfare which is a critical issue and has reached an alarming situation.
- Importance of the health and hygiene of the animals
- Transfer of technology which should be environment friendly and cost effective

Dr. AK Rajput, ED- All India Poultry Breeders Association discussed the opportunities for growth of the poultry sector. It was mentioned that India is the cheapest seller of poultry products in the world market. As most of the poultry farms are based in the rural sector there is no migration cost involved and the benefit of decongestion in metropolitan cities is present as well. However there is a lack of proper training schools which could aid in the better productivity as well as competitiveness of products in the world market.

He explained that the problems are known, what we need are the solutions. There is a need for opening market for the world economy and it needs to be understood and emphasized that export competitiveness is the need of the market. Finances should be made easily available to the small and marginal farmers. Easy available interest free loans should be provided; technology should be upgraded and modernized. At present, there is no relevant scheme in India for providing funds for upgradation. APMC should exempt farmers from the cess. It is highly required that poultry should be provided the same status as that of agricul-



ture.

It should also be noted that there is no priority sector lending present which is and should be an important objective and issue pertaining to the overall improvement of the poultry sector. Processing of meat industries is quite untimely and need to be worked on and exports by US should be allowed keeping in mind that it does not overpower our export sector.

Dr. PG Phalke, Managing Director, ICC Impex India took the discussion forward by re-emphasizing all the points made by earlier speakers and stating the spectrum of food security should be widened and nutritional sector and its security should be addressed specifically. There is a huge need to develop skills among labor and exempt custom duties.

Aman Bhatnagar, National Centre for Cold Chain Development represented the cold chain unit and addressed the growing vitality of the cold chain. He viewed cold chain as enhancing in terms of energy efficiency which in itself is an upcoming booming sector. He talked of Ministry of Food Processing coming up with cost norms of the sector. He emphasized on making the policies while keeping in mind the MIDH guidelines. He stressed on the importance of such a discussion in order to understand different ideas and viewpoints which should be considered for the betterment of the sector and resolving various issues related to poultry and allied units.

Mr. Harish Garware, President, Poultry India un-

derlined the development issues in poultry sector. PM's vision of doubling poultry income is quite exciting. The process has been taken up on various countries and is expected to be a great success in India as well. Nutrition needs to be taken seriously and government has the biggest role to play in creating awareness regarding the same. He laid emphasis on increasing production of poultry products, promoting information, proper information dissemination channels.



A radical yet pragmatic approach to doubling needs to be taken. 46% of children under the age of 3 years are malnutrition. The malnutrition rate is highest in UP, Bihar; and is slightly better in Tamil Nadu and Arunachal Pradesh. Protein consumption is an important factor and should be highly focused. He also brought to the fraternity's notice that one of the important reasons for increasing death rate among infants is malnutrition and therefore eliminating protein deficiency in pregnant and lactating mothers is of crucial importance. Complimentary feeding which is quite prevalent in India is also of low nutrient value.

We talk of hunger and often associate hunger with it but what is more important is the nutrition. Milk and eggs is the major supplier of protein and calcium. One and a half eggs provide the same amount of protein as 6 cups of porridge. He pointed out increasing communication; increasing frequencies of awareness campaign; increasing engagement of doctors, teachers and campaigners. There is a need to change traditional and cultural mindsets.

Protein is extremely vital for the proper functioning of the human body. However India stands lowest in terms of protein consumption, the average being 34 gms against world average of 64 gms. While talking of a hunger free nation, one look should be paid to other nations and their policies regarding food security. There is a need to change the eating habits replacing them with healthier alternatives. Our eating habits indirectly represent an extension of our poverty. Doubling of production is easily possible and should be outrightly done.

He further emphasized on identifying the core areas and working on them on a priority basis and extends our vision of trebling the farmer's income instead of doubling it.

Mr. OP Singh, Managing Director, Advanced Bio-Agro Tech Ltd took quite a critical view of the issue. He stated that around 78% of the vegetables are picked from roadside and we talk of road safety. Per capita consumption scenario is at a worse. Various alternatives were presented by him. He talked of increasing consumption of chicken and eggs and pressed on enabling resources of the quality capable of competing in the world market. A proper vision of the structure of the industry that the stakeholders wish to build is required. We should not just rely on social media reports without bearing the consequences on our own selves. The cost of production should be efficient and competitive with the rivals. Progress models need to be properly evaluated. Price procurement procedures are not easily accessible to the farmers and hence should be enabled so that they get fair prices for their produce.

In order to survive in this open market system, it is important to enable farmers to a lower price investment. Farmers need to be categorized and facilities should be provided according to these categories. Another point to be noted is that vitamins and amino acids are not adequately produced. Complete auditability of the system is required as well as minimum quality standards need to be implemented. He concluded by stating that production could only be trebled, if we increase con-



sumption by ½%.

Dr. T. Kotaiah, Managing Director, IndBro R&B Farm stated that if the price increase by a high proportion, there would be a definite fall in demand. Most poultry farms buy their products through middlemen who increase the cost by 30-40% by hoarding. Often the quality of the produce is also neglected which is crucial for maintaining the efficiency of the farms. Banks do not provide working capital limits to farmers. He put an important point forward while stating that when house loans could be provided at 6.5%, then why not for food. He suggested to provide loans at a cheaper rate at least around 3% which is necessary for poultry farms to maintain efficiency and reduce cost of production. He concluded by affirming the need for encouraging manufacture of amino acids which account for around 20% of the cost in India.

Mr Ricky Thaper, Managing Director, IB Group pointed that according to NSS, protein consumption in India is far less than the required level. There are around 22 processing units trying hard to market their products. Support should be provided at every level to increase awareness of protein intake through marketing outlets. Major thrust has to be provided to the retail chains. In order to increase consumption, we need to increase the selling points and outlets.

Mr Anup Kalra, Executive Director, Ayurved re-affirmed the need for addressing protein security as a separate unit instead of using it synonymously with food security. He emphasized on the importance of efficiency index. Herbal products are necessary for

increasing the market of this sector. Skill development is another necessity. Mr. Kalra mentioned SAATHI, an organization working under the PPP mode, specializing in the propagation for consumption of chicken and eggs. He also mentioned the sustainability issues regarding various biogas sources.

Mr Jasvir Jaglan, MD, Vijay Breeding Farm & Hatcheries spoke in economic terms of increasing income through increasing production. He also mentioned that by reducing input costs, output rates could be increased. Income could also be in-

creased by introducing and establishing good and efficient markets to sell the produce. His concluding remarks included providing subsidies to the farmers and compensation to be paid in case of bird flu outbreaks.

Mr. Ashok Kumar, President, Karnataka Poultry Federation threw light on lack of facilities in the sector. He mentioned that poultry is the only sector of agriculture where FDI is allowed. There is a big lobby working at the import side of chicken and eggs. India is looked as a prospective market for trade in chicken and eggs. Often policymakers are pressurized to reformulate policies in order to suit their markets. There are certain internal factors such as avian influenza involved as well. Policies on poultry often face step-mother treatment from the poultry market. There is not enough focus given to the sector and he pressed on the need to provide a thrust to it. He pressed on making education a priority and recycling waste from poultry. Also a proper mechanism for regular processing of the sector and proper storage facilities are required.

Dr. Fernando Ciscerno, DSM Nutritional Products mentioned how the world needs India to be successful and sustainable. Poultry is not only food for India but the planet as well. The waste produced by animals reduce CO2 emissions by about 60%. He further explained that countries become profitable first by the natural conditions bestowed on them and second by realizing their product of specialization working towards its betterment. He cited the examples of countries like Thailand and Mexico who had no specialization in corn and therefore diversified their production and



became the lead producers of products like cucumber, zucchini and avocado and gained comparative advantage in these products as well.

Dr. Shirish Nigam, Director, INFAH emphasized on the lack of proper information dissemination channels. He pressed on the requirement to upgrade the status of poultry farmers to that of farmers in general. A need for radical evaluation of the land holding reforms was highlighted. Cost of capital should be made at par with the world market. The policies need to be reformulated and made in sync with the present poultry sector.

Mr. Anand Bhaskar Rapolu, MP (RS), Chairman, ICFA WG on Farmers Distress briefly touched how the FDIs are often not directed towards proper and deserving receivers and how poultry which is one of the most important sectors of the Indian economy is often not given its due recognition. He primarily focused on the need for seeing FDIs as lucrative opportunities.

Mr. Vipin Malhotra, CEO, Kegg Farms Ltd. restated that doubling farmers' income is a great initiative. He further suggested that as bird flu is quite prevalent in India, so geographical production should be emphasized. If the bird flu affects the northern region, then production should be paced on the other regions so as to maintain productivity and market and to stabilize prices and gains. Unity of the stakeholders is of utmost importance. Food material is often wasted in godowns, so a system could be developed where the food lying unattended could be sold at a lower price. Overseas trade could be made easier and cheaper by teaming up with airlines such as Air India which could provide various hubs and centers for storing and marketing the products.

Mr Ajit Singh, Chief Executive, NECC underlined the

need for proper monitoring of schemes as well as correcting various implementation stages. He appreciated the success of Aarogya Bharat, a successful initiative by the Govt. and urged the stakeholders to cooperate with the Govt. and work on the same lines. He stated that since Maharashtra, Karnataka, Kerala and Bihar are major poultry producers, great emphasis should be laid on their betterment and rightful support and aid should be provided by the Govt. as well.

Mr Anil Dhumal, Founder President- Poultry India and MD- Dhumal Industries talked of incorporating better schemes for poultry sector under Make in India initiative. Incentives should be provided to farmers in lieu of their contribution to building the economy as well as to modernize their approach towards work. Firms facilitating in the marketing of the products should also be incentivized. It was stated that of total production, around 30% is wasted due to improper storage facilities so it requires immediate concern and upliftment. Better equipment and technology is needed in order to ensure and increase the durability of the product. He concluded by pressing on the requirement of a healthy interaction between the Government and the industry.

Dr. Malhotra, Agriculture Commissioner, GOI, in his closing remarks, spoke of issues related to production and allied aspects. He mentioned that production sector has given satisfactory results. More than 70% production is done in the Kharif season and area covered under the sector is expected to increase. MSP policies need to be enhanced.

Mr. Sardana in his closing remarks highlighted that State Governments are also stakeholders. He asked Mr. Chaudhary if it would be possible to create an independent committee under his chairmanship. Inputs are required by all the representatives and a deadline should be set. A proper structure needs to be built where-

- Submit inputs by 31 December or 15 January
- Draft a report by February
- Make necessary revision and revaluation
- Submit the final report by 31 March

These efforts need to be taken to deem it as a tangible effort and provide proper evidence to the Govt.

Mr. Chaudhary at last asked to jot down conclusions and examine it in the light of working of the Govt. and do the needful.



MAJOR RECOMMENDATIONS

1. The poultry sector has enormous potential for India's nutritional security, entrepreneurship development and increasing farmers' incomes from the same piece of land and resources. The sector presents immense growth potential with minimal intervention and has the shortest production duration with a maximum of 45 days. Despite this fact, currently, poultry is neither a farm nor an industry. This ambiguity prevents poultry farms to avail the benefits of being an agricultural farm or an industry. 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.

2. To increase farm revenue, there is a requirement to work towards increasing production efficiency by on farm input production which would lower the cost of farmer's produce or could provide an added income hence, enhancing farmers' profitability. Central government should frame user support policy to encourage bio plants for poultry and to move organic mass of the country. ICFA proposes 40% subsidy with a ceiling of Rs 2 crores for setting up of bioplants for production of poultry manure.

3. 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,

- a. Hygienic rearing, slaughtering and storage of poultry to ensure food safety and quality.
- b. Health benefits of poultry products and nutritional value it offers.
- c. Prevention measures for poultry from various

diseases and infections.

Furthermore aspects for awareness generation considering the importance and need could be deliberated. ICFA advocates a provision of Rs 100 crores budget for Social Awareness Campaign.

4. Whenever there is an outbreak of bird influenza in any part of the country, the entire sector suffers its detrimental effects without any compensation to the farmers to bear the economic shock. Huge quantities get wasted at ware houses rather than being sold out at lower prices. There is a requirement of national geographical zoning to avoid adverse effects on the overall economy in such a situation.

5. 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. The infrastructure like processing plant will help the farmers to get the birds dressed and kept in cold storage during the lean period. To take care of health and hygiene concerns, there is need for a dedicated fund to be created under NABARD with 50% subsidy for value addition and infrastructure development to help the poultry marketing, processing and retailing chain for renovation and purchase of equipment, including refrigeration system to maintain high standards of hygiene.

6. Indian poultry is still not competitive in foreign markets due to the unavailability of low cost genetically modified feed crops, especially soya and corn. Government should consider allowing import of GM feed for poultry to help and cover expenses of poultry farmers and increase the profitability of the ventures.



LIST OF PARTICIPANTS

1. Mr. Anand Bhaskar Rapolu, Hon'ble Member of Parliament, Rajya Sabha
2. Dr. SK Malhotra, Agriculture Commissioner, Government of India
3. Dr. OP Chaudhary, Joint Secretary – Animal Husbandry, Dairying & Fisheries, Govt of India
4. Dr. KML Pathak, Vice Chancellor, DUVASU Mathura
5. Dr. RS Gandhi, ADG Animal Food & Poultry, ICAR
6. Mr. Ramesh Chander Khatri, President, Poultry Federation of India
7. Mr. Harish Garware, President, Poultry India
8. Dr. PK Shukla, Professor & HOD Poultry Science, DUVASU Mathura
9. Mr. Ravinderjit Singh, Chief Executive Officer, Agrinnovate India
10. Mr. Ashok Kumar, President, Karnataka Poultry
11. Mr. OP Singh, Managing Director, Advanced Bio-Agro Tech Ltd (Abtl)
12. Dr. Anup Kalra, Executive Director, Ayurved
13. Rahul Khatri, Director, Bhagwati Feeds
14. Mr. Anil Dhumal, Founder President - Poultry India and MD, Dhumal Industries
15. Dr. Vijay Makhija, Business Head Asia Pacific, DSM Nutritional Products
16. Dr. Fernando Cisnerso, DSM Nutritional Products
17. Dr. Shirish Nigam, INFAH, EW Nutrition India
18. Mr. Mahavir Singh, Managing Director, Gahlot Farms Private Limited
19. Dr. G B Padmawar, Country Head, Hubbard Breeders
20. Mr. Devendra Hooda, Managing Director, Huvepharma SEA (Pune) Pvt. Ltd.
21. Dr. PG Phalke, Managing Director, ICC Impex India
22. Dr. T Kotaiah, Managing Director, Indbro Research and Breeding Farms
23. Mr. Ricky Thaper, General Manager, IB Group, Indian Agro & Food Industries Ltd
24. Mr. Bahadur Ali, Managing Director, Indian Broiler Group
25. Dr. CR Behl, Sr Vice President Poultry, Indian Broiler Group
26. Mr. Vipin Malhotra, CEO, Kegg Farms
27. Mr. Sanjiv Gupta, Managing Director, Khushboo Feed Mills
28. Mr. Milind Limaye, Director, Polchem Group
29. Mr. Krishna Rathi, Managing Director, Rathi Feeds India
30. Major Bhupendra, GM Marketing, Saife Vetmed Pvt Ltd
31. Mr. Ashok Seth, Managing Director, Seth Hatcheries
32. Dr. AK Rajput, DGM Corporate Affairs, Suguna Foods Ltd
33. Mr. Ranpal Dhanda, Managing Director, Unnat Feeds Pvt Ltd
34. Mr. Vijay Sardana, Head – Food & Agribusiness, UPL Group
35. Mr. K Giridhar, Business Manager, Venkys
36. Dr. Jasvir Jaglan, Managing Director, Vijay Breeding Farm & Hatcheries
37. Mr. Aman Bhatnagar (From the office of Mr Pawanexh Kohli - Advisor & CEO - Cold Chain)
38. Dr. MJ Khan, Chairman, Indian Council of Food and Agriculture
39. Mr. Vishnu Rathore, CEO, Indian Council of Food and Agriculture
40. Mrs. Mamta Jain, Director, Indian Council of Food and Agriculture