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Indian Poultry and Red Meat Market: An Analysis



July 2014

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Scope of the Report

The report titled “Indian Poultry and Red Meat Market: An Analysis” provides an insight into overall meat sector over the years with a special focus on major categories- poultry, pork, beef, mutton, sheep etc. The report includes detailed information on production, average annual yield, channels of distribution and import & export trends in meat sector. Various regulations and laws in relation to import of livestock into India are also discussed in detail in the study. It also discusses key growth drivers of the market. Further, companies like Suguna Foods Limited, Venky’s India, Godrej Tyson Foods and VKS Farms Private Limited are profiled in the report.

Segments Coverage

⊕ Poultry Meat, Beef (Buffalo Meat), Goat Meat, Pork, Sheep Meat, Cattle Meat

Company Coverage

⊕ Suguna Foods Limited

⊕ Venky’s India Limited

⊕ Godrej Tyson Foods Ltd

⊕ VKS Farms Private Ltd

Executive Summary

The Indian meat industry is mostly based on production of fresh meat which is produced and sold daily. Frozen meat is mostly exported. India has a large resource of animal casings and other by-products. The meat production in the country grew at a healthy pace over the period 2006-07 to 2012-13 and India is now the second largest exporter of buffalo meat in the world. Poultry meat is the largest sub-sector with almost half share of total meat production in 2012-13 followed by beef/buffalo meat, goat meat, pork, sheep meat/lamb and cattle meat. Among the Indian states, Uttar Pradesh (UP) is the largest meat producer followed by Andhra Pradesh, West Bengal, Maharashtra and Tamil Nadu.

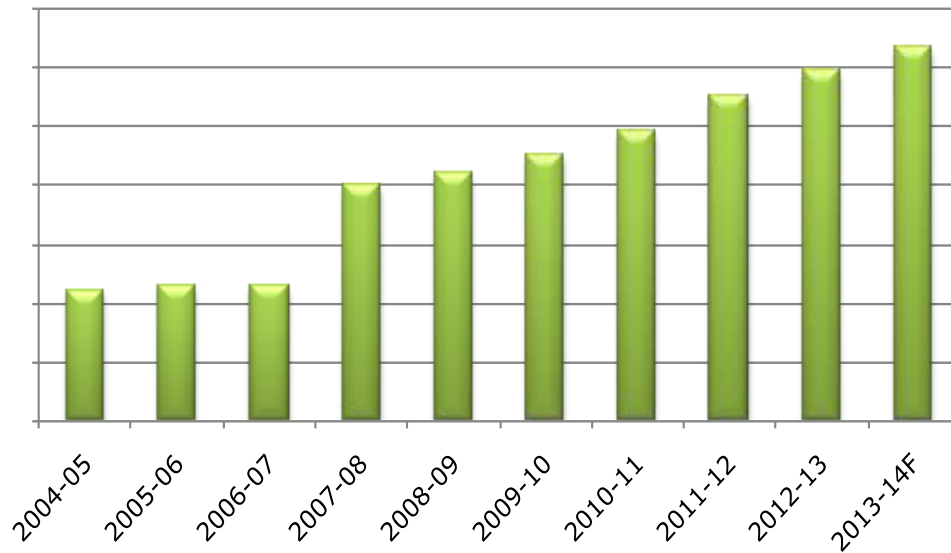
Sustained income and economic growth, a fast-growing urban population, burgeoning middle income class, changing lifestyles, improvement in transportation and storage practices and rise of supermarkets especially in cities and towns are fuelling rapid increases in consumption of animal food products.

There are about 27 integrated modern meat processing plants approved for export of meat and all Export Oriented Units (EOU) are registered with the Agricultural and Processed Food Products Export Development Authority (APEDA) of the Government of India after due inspection.

Indian Meat Sector Analysis

The meat production has registered a healthy growth from ...million tonnes at the end of Tenth Five Year Plan (2006-07) to million tonnes at the end of the Eleventh Five Year Plan (2011-12). In the year 2012-13 the production amounted tomillion tonnes, an increase of ...% y-o-y and is anticipated to reach....million tonnes by 2013-14.

India – Total Meat production in Million Tonnes, 2004-05 to 2013-14F



Production Share of Meat Categories in %, 2012-13

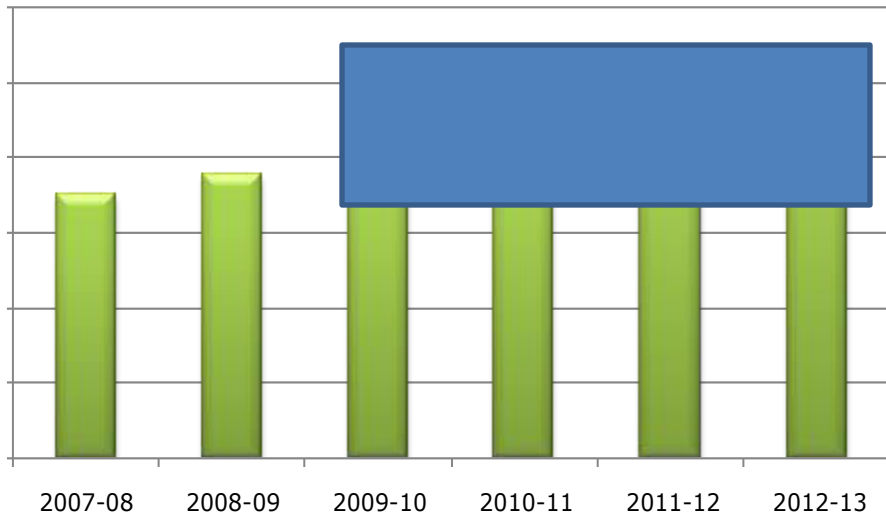


- Poultry meat is the largest sub-sector with a share of ...% of total meat production in 2012-13. Poultry occupies a crucial place in India as the eggs and chicken meat are important and rich sources of protein, vitamins and minerals.

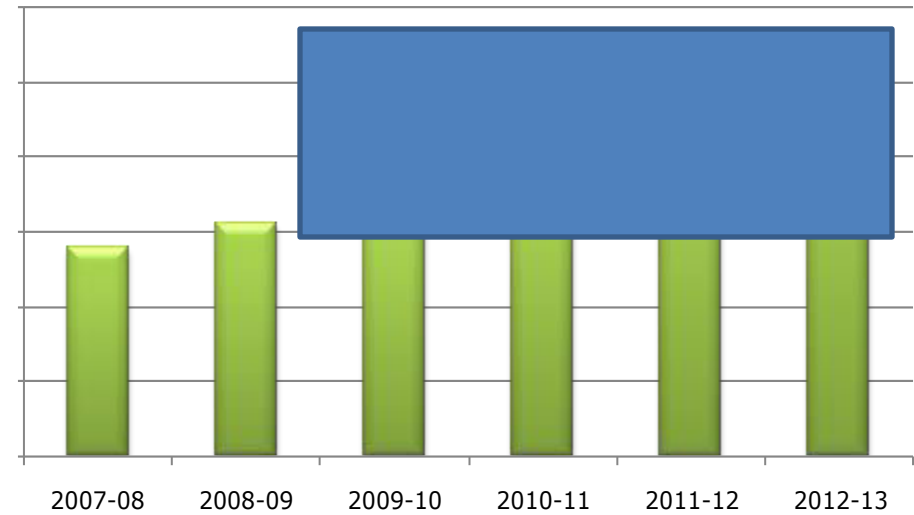
Segmentation of Meat Sector

Poultry is one of the fastest growing segments of the meat sector. Total poultry meat production in India grew at an average annual growth rate of ...% over the years 2007-08 to 2012-13 and reached million tonnes in 2012-13.

India - Poultry Meat production in '000 Tonnes, 2007-08 to 2012-13



Beef production in '000 Tonnes, 2007-08 to 2012-13



- The buffalo meat sector is one of the important sectors as it contributes around ...% of total production in India. The beef production increased from tonnes in 2007-08 to tonnes in 2012-13. There are ... meat processing plants including ..., hundred percent export oriented units who are mainly engaged in export of meat products.