



Poultry Producers Concerns Vis-a-vis Government Policies

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Indian Poultry at Glance

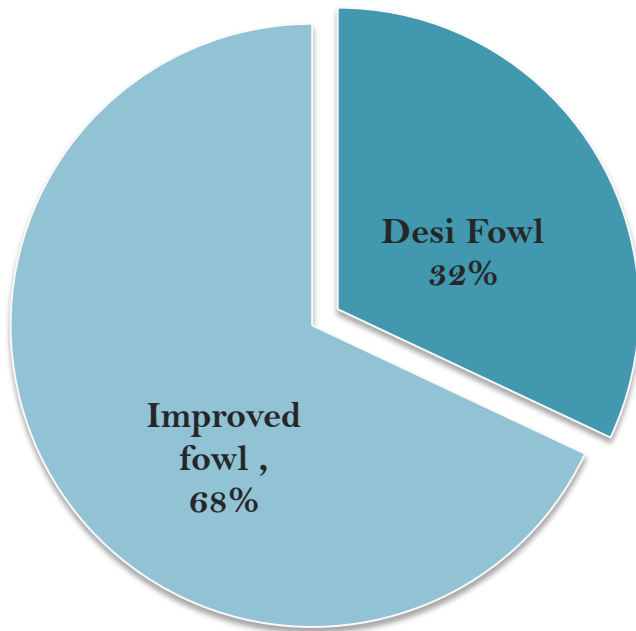


- **Contribution to Indian National GDP is estimated at Rs. 1.5 lakh crores.**
- **India is ranked 2nd in egg production and 4th for Chicken meat production in the world.**
- **Egg Production is estimated to be 129.6 billion, Commercial 109.93 billion @ 88.67% , and backyard poultry 19.67 billion @ 10.23%.**
- **The table egg production from commercial farms is estimated at 30-31 crores/day and growing at 6.19% growth per annum.**

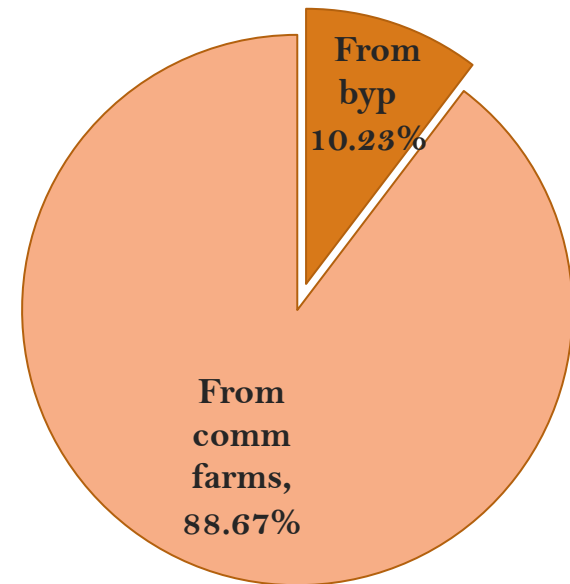




Share of Layer population



Contribution to Egg production



Indian Poultry at Glance



- The chicken meat production is estimated at 6.37 million tons i.e. plus 60 % of total meat production and growing @ 6.86% per annum as per DADF .
- Industry estimates broiler DOC placement of 41-42 crores per month and in season shall go up to 45 crore DOC per month.
- The Value of Poultry production to National GDP is estimated at 1% and for the live stock sector 14%.



Indian Poultry at Glance



- Generates direct employment, 25000 layers and over 5 lakh broiler farmers and indirectly to over 2 million , mostly in Villages .
- As per the “National Action Plan for Eggs and Poultry” prepared by DADF , 30 million rural households are involved in backyard poultry.
- The price of poultry products has risen the **LEAST** in the last three decades as shown in international reports.



Consumer Price for Eggs



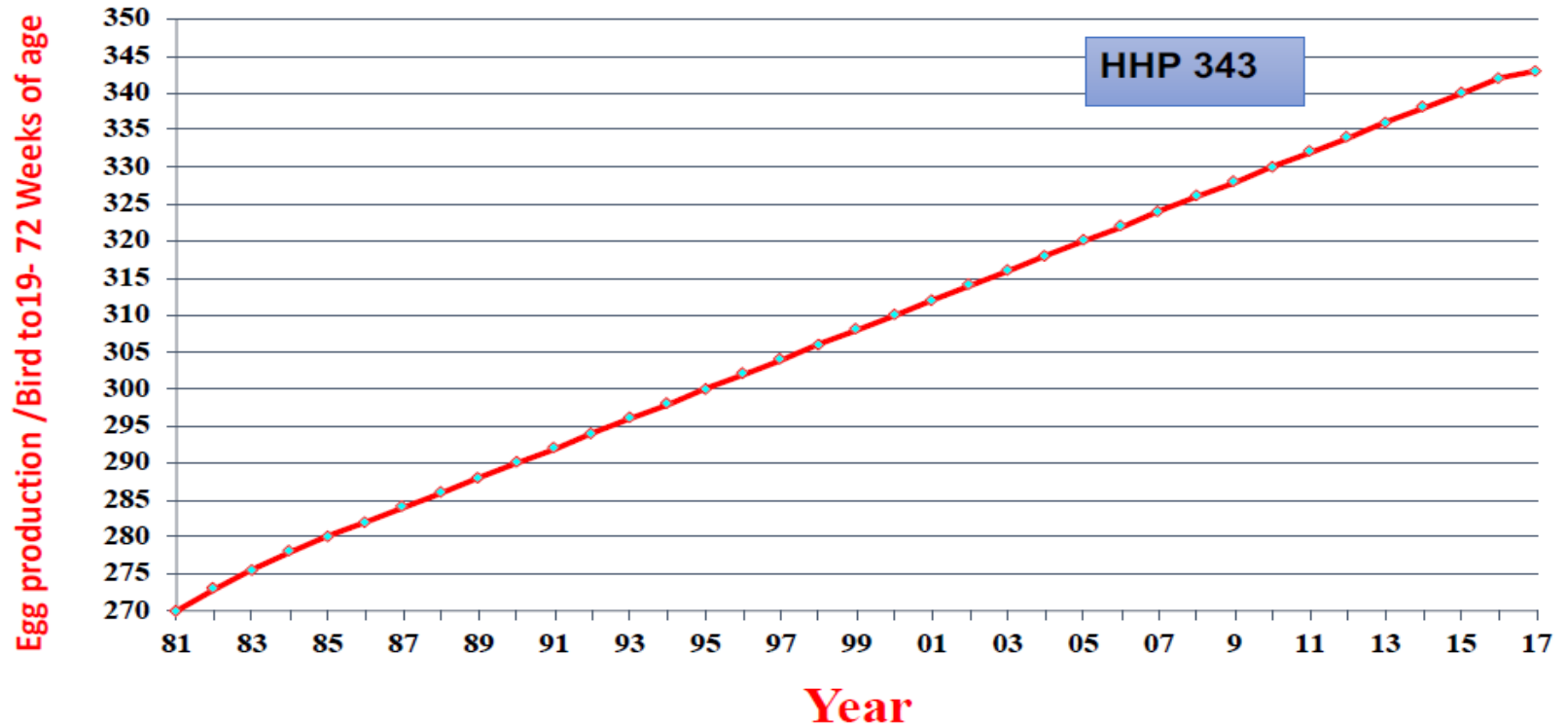
Sr. No	Country	Eggs (12) in USD
1	United States	4.51 \$
2	Russia	1.21 \$
3	China	1.83 \$
4	Brazil	2.08 \$
5	Mexico	2.12 \$
6	Singapore	2.95 \$
7	UAE	3.00 \$
8	Sri Lanka	2.08 \$
9	Japan	1.83 \$
10	Bangladesh	1.20 \$
11	Pakistan	1.01 \$
12	Nepal	1.47 \$
13	India	0.95 \$

Source : www.numbeo.com



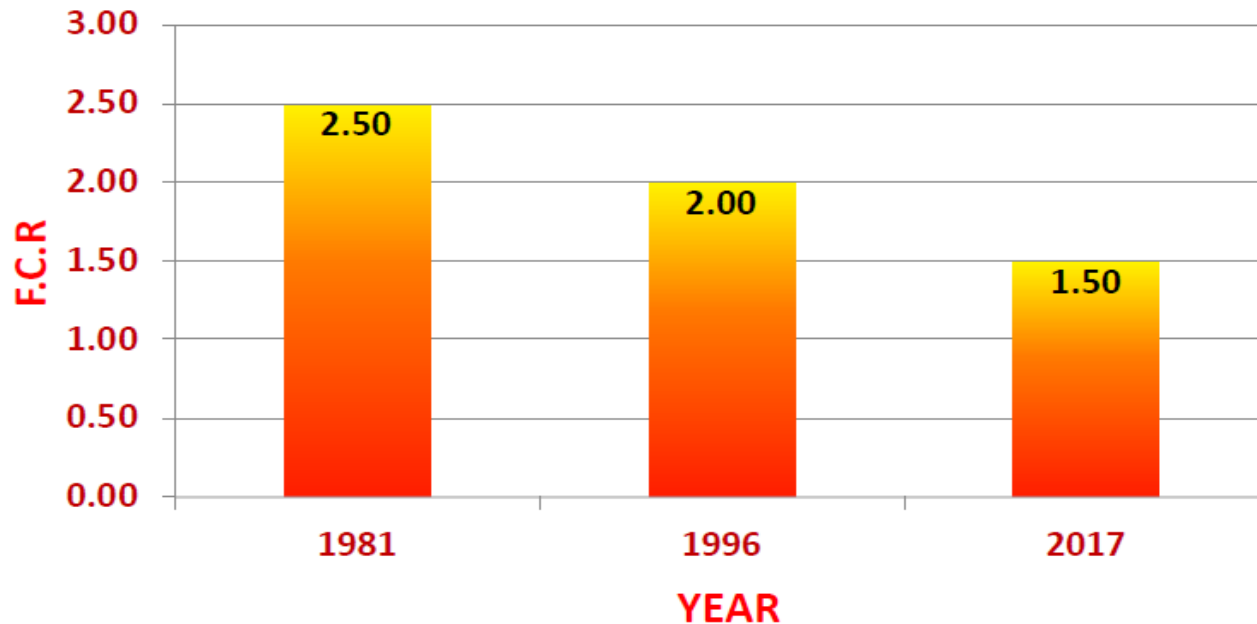


Genetic Gain in BV300 Improvement in Egg Number 1981 - 2017





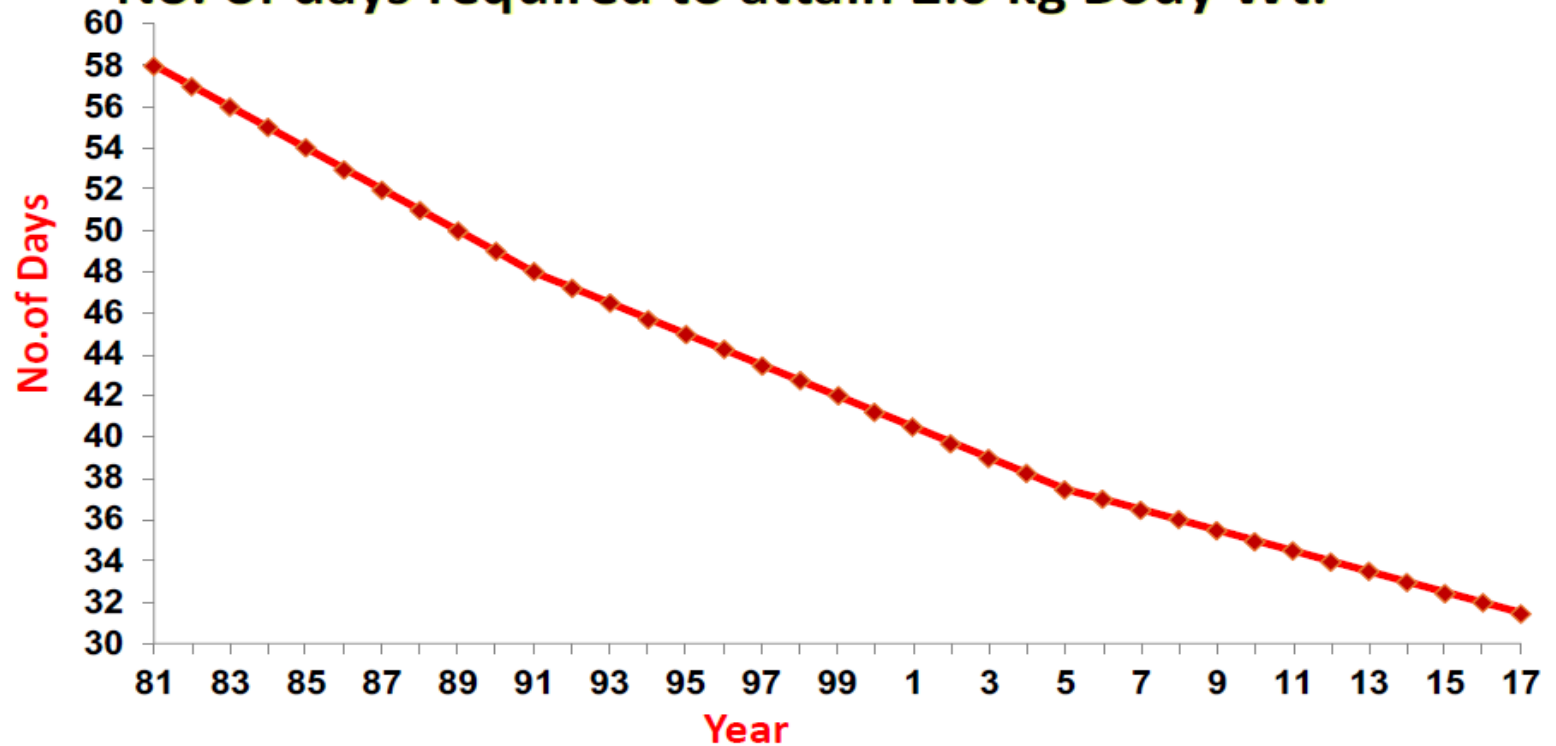
Genetic Improvement (Vencobb Broilers) In F.C.R – Feed Conversion Ratio(2.0 Kg Body Wt.)





GENETIC IMPROVEMENT (Vencobb Broilers)

No. of days required to attain 2.0 kg Body Wt.



Indian Poultry Sector



Quantum Leap : Fruits of Indigenous Genetic Research

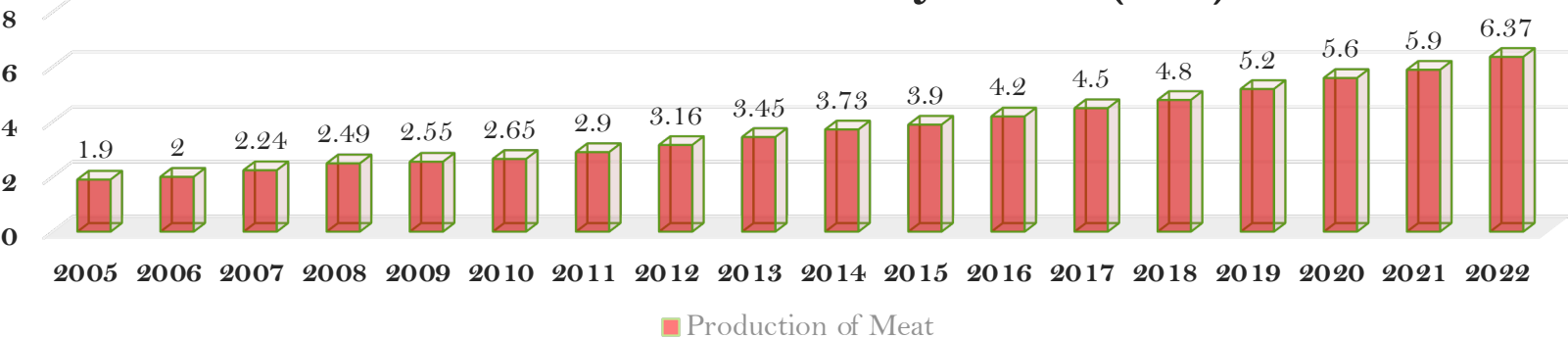
Year	Broiler Farm Size	Layer Farm Size	Broiler Performance	Layer Performance
1960s	10-20	10-20		
1970s	10-20	100-500	2Kg-80 days	
1980s	100-500	1000-5000	2Kg-58 days	280 Eggs
1990	500-1000	2000-8000	2Kg-49 days	300 Eggs
2000	1000-3000	10000-15000	2Kg-42 days	315 Eggs
2010	3000-5000	15000-20000	2Kg-35 days	330 Eggs
2019	5000-8000	20000-25000	2Kg-32 days	343 Eggs



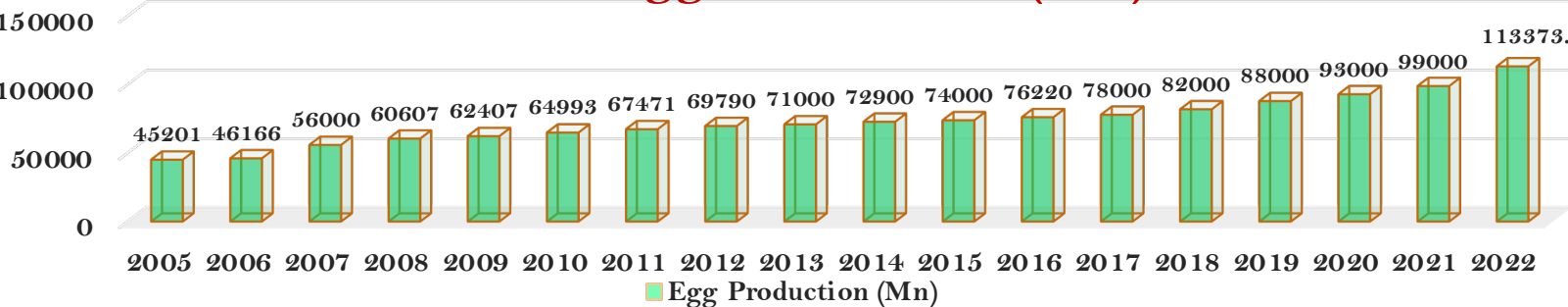
YOY Growth Of Poultry



Production of Poultry Meat (Mn)



Egg Production (Mn)





Concern : I

Availability of Raw Material





Animal Feed Industry India

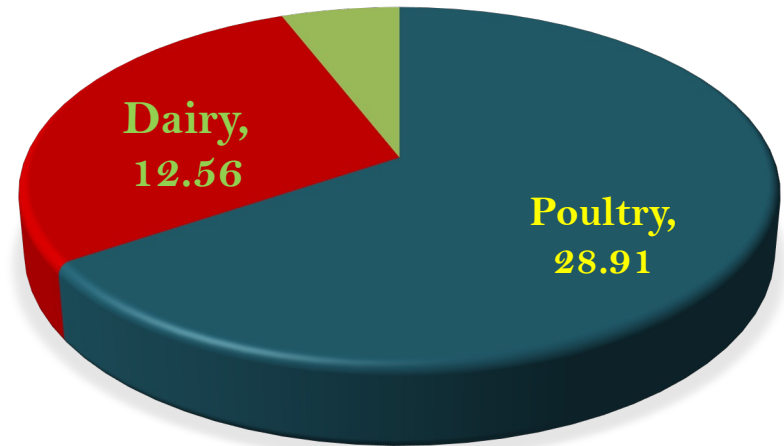
Indian Poultry Feed production 28.91 million MT growing and the industry growing by 7-8% year on year.

Dairy compound feed production is approximately 12.56 million MT in India (Altech 2022 global survey)

Aqua feed production is 2.6 million MT in India.

ANIMAL FEED PRODUCTION IN MILLION MT

Aqua,
2.6





Maize production-India (MMT)

Year	Production
2010-11	21.73
2015-16	22.57
2020-21	31.65
2021-22	32.40





Maize Consuming Sectors (MMT)

Poultry Feed	16.15
Cattle Feed	2.0
Starch	4.6
Human Cons	1.85
Distilleries	2.5
Exports	3.0
Losses / Wastage	1.0
Total	31.45





Soya production-India (MMT)

Year	Production Bean	DO Soya Meal
2010	12.73	
2015	8.57	
2020	12.61	
2022	13.16	6.57



India's Soya Bean



	2020-21	2021-22	2022-23	Oct-Sept
C/F PREVIOUS YEAR	0.50	0.00	1.54	
PRODUCTION (AS PER SOPA)	10.45	11.89	12.04	
IMPORTS SB	0.50	0.55	0.10	
TOTAL SUPPLY	11.45	12.44	13.68	
RESERVED FOR SOWING	1.30	1.30	1.30	
DIRECT HUMAN CONSUMPTION	0.50	0.55	0.60	
EXPORT OF SEEDS	0.50	0.50	0.50	
MARKETABLE SURPLUS	9.15	10.09	11.28	
MEAL EQUIVALENT	7.50	8.27	9.25	82%
DOMESTIC REQUIREMENT	5.60	5.90	6.00	@4.8
EXPORTS	1.90	0.65	0.65	
HUMAN FLOOD(MEAL/FLOUR)	0.58	0.75	0.75	
DEMAND IN TOTAL	8.08	7.30	7.4	
GAP	-0.58	0.97	1.85	
IMPORT MEAL	0.20	0.55		
IMPORT PROTIEN ISOLATE 60%	0.01	0.015	0.02	
C/F	-0.38	1.54		

Note : Red Marked Values / Words are incomplete.

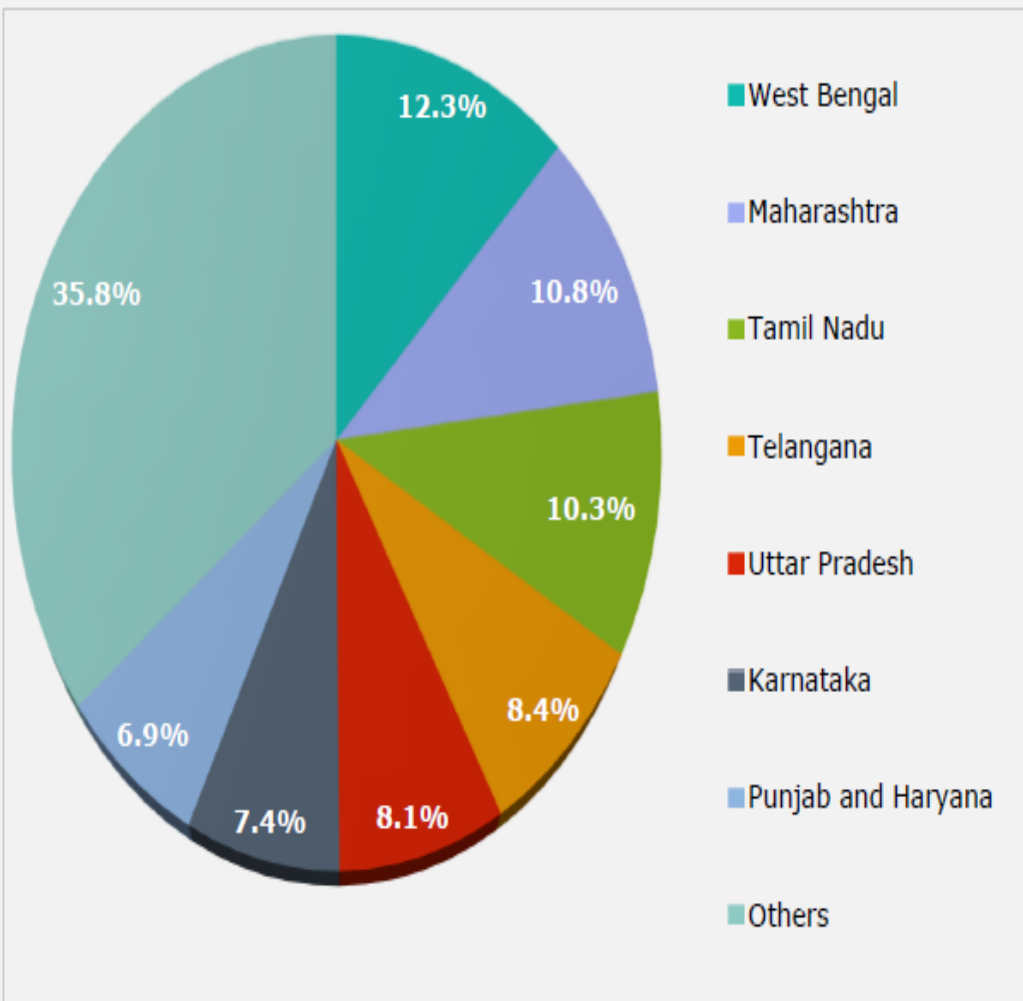




India Broiler Industry: State Analysis



India: Broiler Market: Breakup by States (%),
2020



Broiler Industry : By State

- In 2020, West Bengal represented the largest broiler producing state, accounting for a share of 12.3% of the total India broiler production volume.
- West Bengal was followed by Maharashtra (10.8%), Tamil Nadu (10.3%), Telangana (8.4%), Uttar Pradesh (8.1%), Karnataka (7.4%), Punjab and Haryana (6.9%).
- Other states together constituted around 35.8% of the India broiler production.

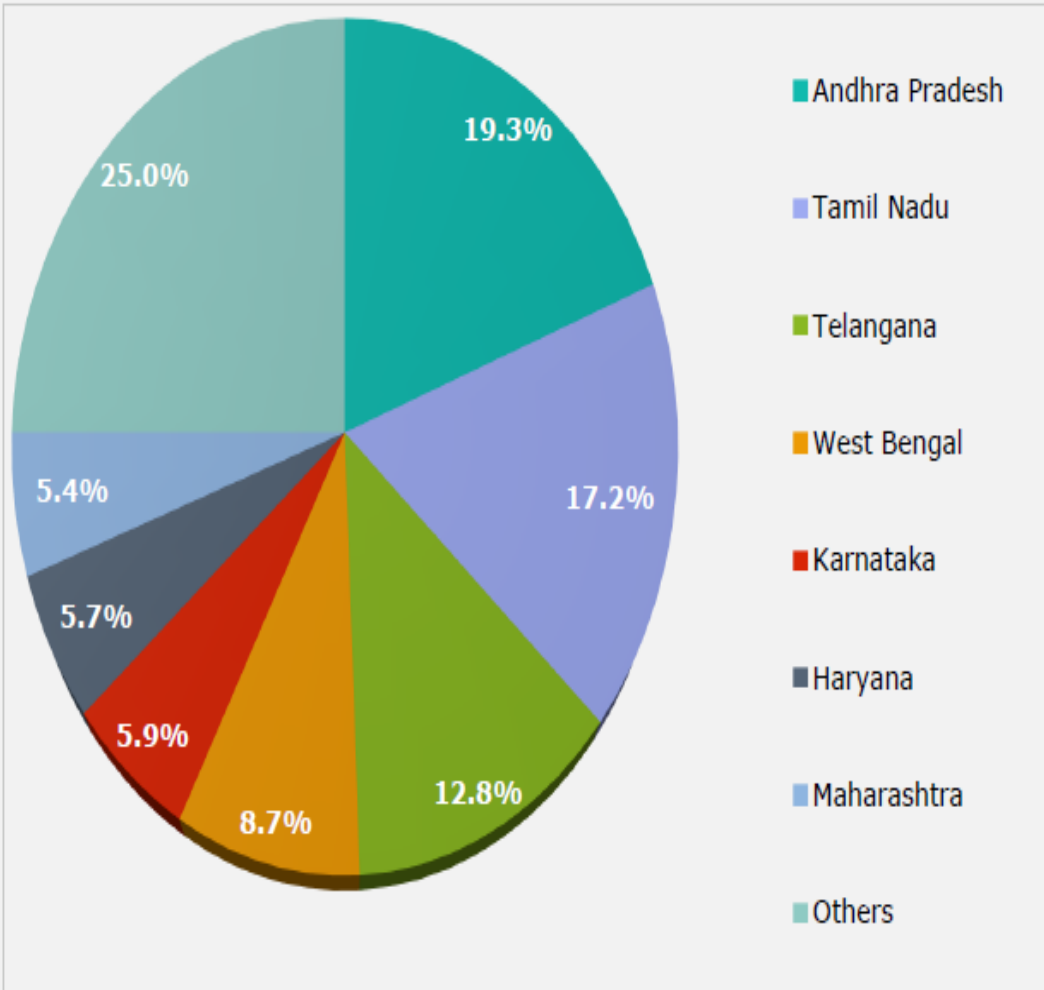


India Egg Industry: State Analysis



India: Eggs Market: Breakup by States (%),
2020

Egg Industry : By State



- In 2020, Andhra Pradesh held the largest share for egg production in India, accounting for a share of 19.3% of the total production.
- Andhra Pradesh was followed by Tamil Nadu (17.2%), Telangana (12.8%), West Bengal (8.7%), Karnataka (5.9%), Haryana (5.7%), Maharashtra (5.4%).
- Other states together constituted around 25.0% of the India egg industry.



Maize Requirement – India (MMT)

Year	Broiler	Layer
2022	$4800 \times 3.6 \text{ Kg} \times 60 \% = 10.368$	$350 \times 42 \text{ Kg} \times 35\% = 5.145$
2025	$5880 \times 3.5 \text{ Kg} \times 60 \% = 12.348$	$410 \times 42 \text{ Kg} \times 35 \% = 6.027$
2030	$7700 \times 3.4 \text{ Kg} \times 60 \% = 15.708$	$540 \times 42 \text{ Kg} \times 35 \% = 7.938$

Source : Sri .Raghava Rao , Kohinoor Hatcheries



Soya Requirement – India (MMT)



Year	Broiler	Layer
2022	$4800 \times 3.6 \text{ Kg} \times 22 \% = 3.801$	$350 \times 42 \text{ Kg} \times 12 \% = 1.764$
2025	$5880 \times 3.5 \text{ Kg} \times 22 \% = 4.527$	$410 \times 42 \text{ Kg} \times 12 \% = 2.066$
2030	$7700 \times 3.4 \text{ Kg} \times 22 \% = 5.759$	$540 \times 42 \text{ Kg} \times 12 \% = 2.721$

Source : Sri .Raghava Rao , Kohinoor Hatcheries



Indian Agri Challenge



- Land constraint , small holding per individual.
- Water shortage and Low area under irrigation.
- Climate and vagaries of monsoon.
- Local varieties and Low yields of crops.
- Lack of GM varieties and mechanization.



Food for Fuel



- **Diversion of edible food grains for biofuel needs review, is it socially, economically and ethically desirable ?**
- **Have to meet the Food / Feed needs of people and livestock.**
- **The USA has huge corn production i.e 380 MMT per year. But India ??**
- **Government target of 20% blending of fuel by Ethanol , at what cost?**
- **National debate ??**



Poultry Industry Deserves Policy Support



- Ensure adequate cereals prod. and Augment supply of Corn by increase in acreage under irrigation and productivity (GM) .
- We import - 3.5 million tons soya oil; equals- 20ml tons soybean, allow poultry end users to import meal.
- Bean import ?? Economic benefits .
- Government, Scientists and Industry should frequently meet for timely solutions and the way forward for healthy poultry growth and address feed ingredient shortages .



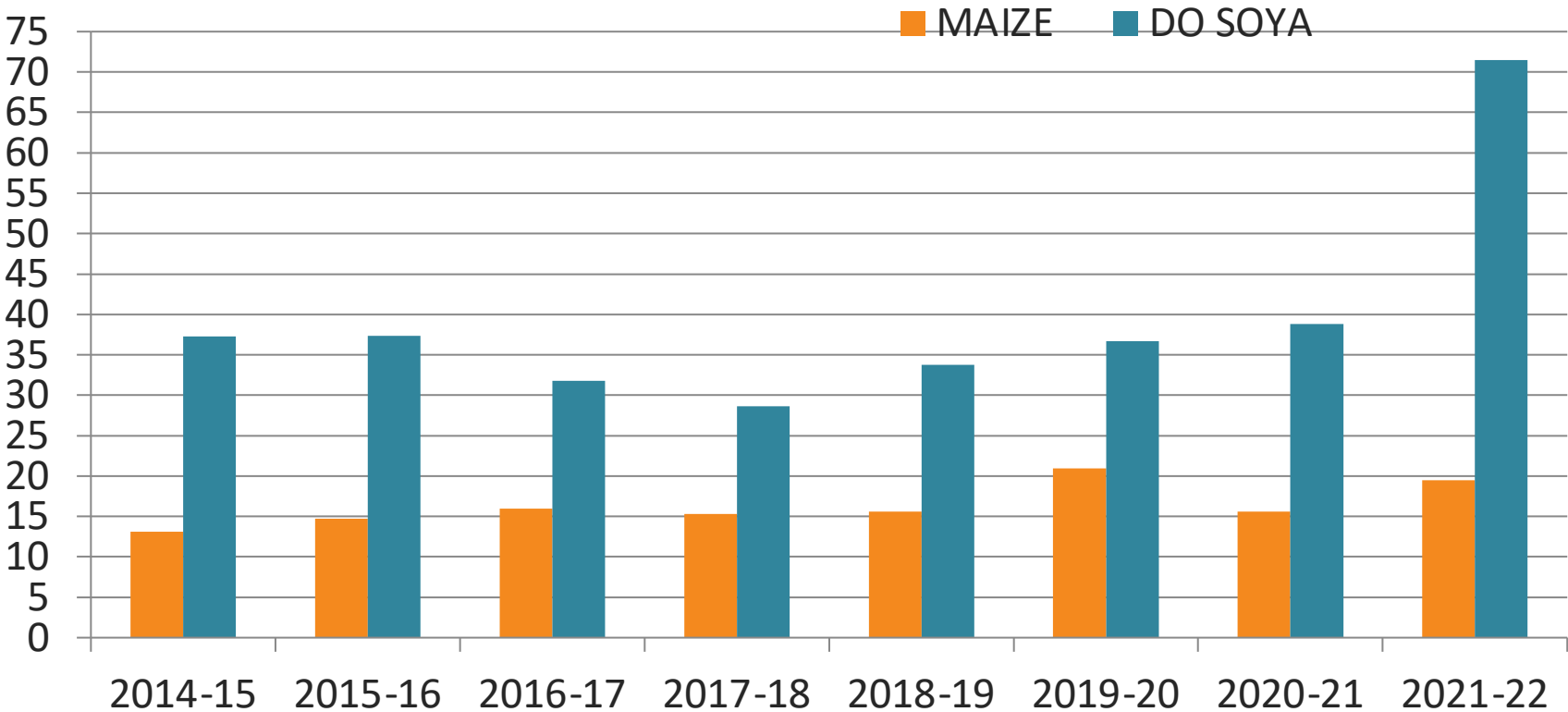


Concern : II

Sky Rocketing Prices Of Feed Ingredients



Maize & DoSoya Price Chart



Month wise Commercial Broiler Sales Avg. Rates From 2019-22



Month	2017-18	2018-19	2019-20	2020-21	2021-22
April	71.31	68.73	91.04	71.00	86.68
May	94.36	90.88	90.73	106.09	65.46
June	92.37	87.61	101.78	92.38	86.82
July	71.61	73.14	72.81	88.13	115.02
August	70.68	66.88	61.35	82.17	108.13
September	76.96	64.01	65.39	103.91	109.95
October	67.25	75.60	63.00	106.56	102.12
November	59.02	66.78	77.42	82.81	81.46
December	76.41	81.80	81.58	76.75	81.71
January	73.53	72.15	75.08	62.98	81.82
February	64.84	64.08	44.17	69.84	97.43
March	59.00	76.14	24.75	96.11	123.66
Year Avg.	72.89	73.50	71.99	86.56	94.60

GREEN – PROFIT MONTH

PINK – HIGH RATE MONTH

RED – LOSS MONTH



Month wise Commercial Eggs Sales Avg. Rates From 2017-21



Month	2017	2018	2019	2020	2021
January	330.26	390.61	422.84	405.42	411.06
February	311.04	361.57	420	343.38	400.39
March	316.84	323.71	344.71	285.55	361.45
April	266.47	300.57	291.67	359.33	395.43
May	324.19	333	328.10	329.97	448.26
June	365.2	378.93	378.43	367.78	499.27
July	337.03	412.68	371.52	326.42	468.97
August	341.84	336.45	326.13	367.66	400.13
September	352.8	332.57	354.83	474.73	418.83
October	379.03	359.1	394.71	504.65	400.1
November	473.13	396.6	409.27	452.1	431.07
December	381.16	417.23	436.06	464.81	466.65
Year Avg.	348.24	361.91	373.18	390.15	425.13



Poultry Industry Deserves Policy Support



- Allot non edible food grains with FCI or in state for Layer Industry to poultry farmer associations and if possible at concessional rates.
- Import of Corn or DOSOYA when domestic prices skyrocket if monsoon failure or in off season months due to demand supply gap.
- Rationalization of import duties on feed additives.





Concern : III

Emerging Diseases.



Poultry , Government & Scientists Coordination



- **Effective surveillance for timely diagnose of new disease challenges .**
- **Fast track process for early solutions.**
- **Effective coordination between IVRI, Scientists and Vaccine manufacturers for right vaccine and schedule.**
- **Monitor results and feedback from Industry for constant upgrading**
- **Ease in import of media, serum, equipment, Lab wares.**
- **Facilitate export of Vaccines through Government to Government coordination with neighbouring countries.**





Concern : IV

Multiple Agencies monitoring on Poultry



Vets in Poultry

Difficulties to Start New Poultry Unit



- **Approval from Multiple authorities to start a new Poultry Farm.**
 - **Gram Panchayat**
 - **DTPC Approval**
 - **Pollution Board Clearance**
 - **Irrigation Department Clearance.**
 - **Department Of Mining .**
 - **Electricity Department .**
 - **Department Of Labour.**

- **Registration with Department of AH , State Government ??**

- **Can We have Single Window Clearance for Poultry Farm like many industries on Fast Track ? ?**



Operational Difficulty for Poultry Farm



- **Need to constantly “Satisfy” local authorities and always under threat from local bodies even for a well maintained farm.**
- **Government should give clear guidelines and ensure minimum interference from village authorities for poultry units to function smoothly .**
- **Formation of National Poultry Board ??**





Concern : IV

Additional Consumption of Eggs in PM Poshan Scheme in North & Central India



Government Scheme Details



Sl.No	State	Mid Day Meal	Anganwadi	Tax	Electricity Subsidy	Water
1	Andhra Pradesh	5/week	6 months to 3 years 4; 3 to 6 years 4; pregnant & lactating mothers 4/week			
2	Arunachal Pradesh					
3	Assam	1	-			
4	Bihar	1	-			
5	Chhattisgarh	2	2			
6	Goa					
7	Gujarat					
8	Haryana					
9	Himachal Pradesh					
10	Jammu & Kashmir	1	-			
11	Jharkhand	2	3			
12	Karnataka (7 districts)	2	-			
13	Kerala	1	-			
14	Madhya Pradesh					
15	Maharashtra					



Government Scheme Details



SI No	State	Mid Day Meal	Anganwadi	Tax	Electricity Subsidy	Water
16	Manipur					
17	Meghalaya					
18	Mizoram					
19	Nagaland					
20	Orissa	2	5			
21	Punjab					
22	Rajasthan					
23	Sikkim					
24	Tamil Nadu	5	3			
25	Telangana	3/week	6 months to 3 years 16; 3 to 6 years 30; pregnant & lactating mothers 30/month	Rs.100/year per farm(G.Panchayat & Municipality)	Rs.2/unit	
26	Tripura	2	1			
27	Uttar Pradesh				Rs.1,200/month	
28	Uttarakhand	1	-			
29	West Bengal	2	3			



Government Scheme Details



Sl.No.	Union territories	Mid day meal	Anganwadi	Tax	Electricity Subsidy	Water
1	Andaman & Nicobar Islands					
2	Dadra and Nagar Haveli					
3	Daman and Diu					
4	Lakshadweep					
5	Puducherry	3	2			
6	Delhi (National Capital Territory)					
7	Chandigarh	1	-			

Under the Mid Day Meal scheme there are 11 crores beneficiaries. If weekly 2 eggs are implemented, consumption will be for 32 weeks, 704 crore eggs per annum.

Under the Anganwadi scheme 10.26 crores beneficiaries. If weekly 2 eggs are implemented, consumption will be for 52 weeks 1,065 crore eggs per annum





Concern : V

Export of Poultry Products



Poultry needs Support to Tap Export Potential



- In addition to registration of farms for exports (compartmentalization) , need to examine if regional pockets like Namakkal , Godavari Districts, Hyderabad could be brought under “ Zoning “ and enable export bigger quantities .
- Industry / Govt / APEDA to participate in outside country exhibitions to promote Indian Poultry.
- Industry and Government set processes to minimize use of antibiotics (only approved as per EU) and implement residue monitoring plan strictly both for domestic and international supplies.



Government Support



- **Contribution of AHIDF – Animal Husbandry Infrastructure Department found for 3 more years as farmers putting up infra like feed mills, Hatcheries and EC Sheds.**
- **Clarification on rules of Animal Welfare Board that Poultry & Fish are not “Animals “ and shops be allowed to dress in retail shops.**
- **Promotion of Eggs and Chicken by Govt. as healthy food to build immunity in Schools and Hospitals.**



CONCLUSION



For Poultry Sector healthy growth the farmers request both Central & State Government to :

- 1) **Ensure availability of Maize and DoSoya as required for coming years.**
- 2) **The price of principal feed ingredients be comparable to international prices (CBOT) and allow imports, GM varieties**
- 3) **Surveillance and timely Vaccine solutions to counter Emerging diseases.**
- 4) **Government to advice to States to include Eggs in noon meal Scheme.**
- 5) **Remove Constraints for Poultry Exports and “ Zoning ”.**
- 6) **Government Schemes like AHIDF to be continue**





Thank you.....



Vets in Poultry