

## 4.6.6 India

### 4.6.6.1 Demographics

In India, an estimated 124,000 farms were poultry farms<sup>17</sup>. About 70%, or 86,800 poultry farms were household or micro-producer chicken farms (Figure 223). On average, a micro-producer chicken farm in India had 750 head. Commercial chicken farms represented the remaining 30% or 37,200 poultry farms with an average 19,514 head.

India's poultry production and consumption consistently increased between 2010 and 2019. In 2019, both poultry production (4.2 million metric tons) and consumption (4.2 million metric tons) were twice as large their corresponding volumes in 2010. India's poultry production and consumption have declined since 2019, but both remained higher than their volumes in 2010. Poultry production and consumption each rose 64% from their levels in 2010 (see Figure 224).

According to FAO, poultry stocks of India totaled 826.5 million with 791 million chickens, and 35.5 million ducks. Since 2010, poultry stocks increased 20%, overall (Table 66). Chicken stocks increased 19%, and duck stocks increased 40% compared to 2010.

India's poultry slaughter was nearly 2.7 billion head in 2020. An estimated 2.6 billion head were chickens. The remaining 35.8 million head in poultry were ducks. Chicken and duck slaughter increased 45% and 40%, respectively. Chicken production totaled 3.6 million metric tons, and duck production totaled 47,000 metric tons in 2020. Compared to 2010, chicken and duck production increased 62% and 40%, respectively.

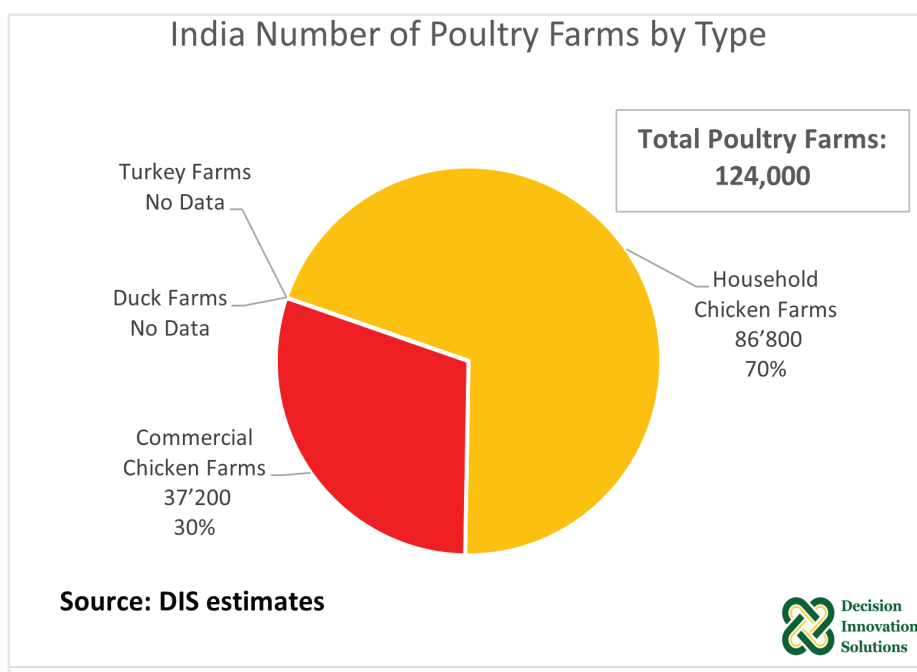


Figure 223. India number of poultry farms by type

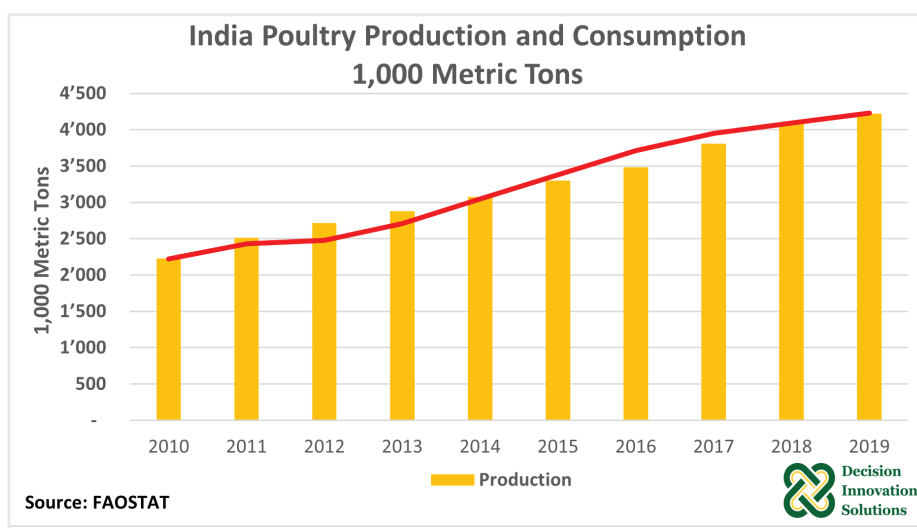


Figure 224. India poultry production & consumption

INDIA POULTRY STOCKS, SLAUGHTER, AND PRODUCTION				
1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	791'032	35'507		826'539
Producing Animals/Slaughtered	2'625'635	35'799		2'661'434
Production (1,000 MT)	3'551	47		3'597

Sources: FAO, 2020

Table 66. India poultry stocks, slaughter & production

<sup>17</sup> LMIS Report on Poultry Sector, Agricultural Skills Council of India

#### 4.6.6.2 GDP and Value of Production

The estimated value of GDP in India was \$2.6 trillion in 2020. Non-agricultural production sectors represented about 84% or \$2.2 billion of the total. An estimated \$301.7 billion or 12% of India's total GDP was derived from the crop production sector. Red meat production was valued at \$105.3 billion and represents about 4% of the total GDP. An estimated \$11.4 billion or 0.4% of total GDP was represented by chicken production. About 0.01% or \$136.1 million of the total GDP in India was represented by duck production (Figure 225).

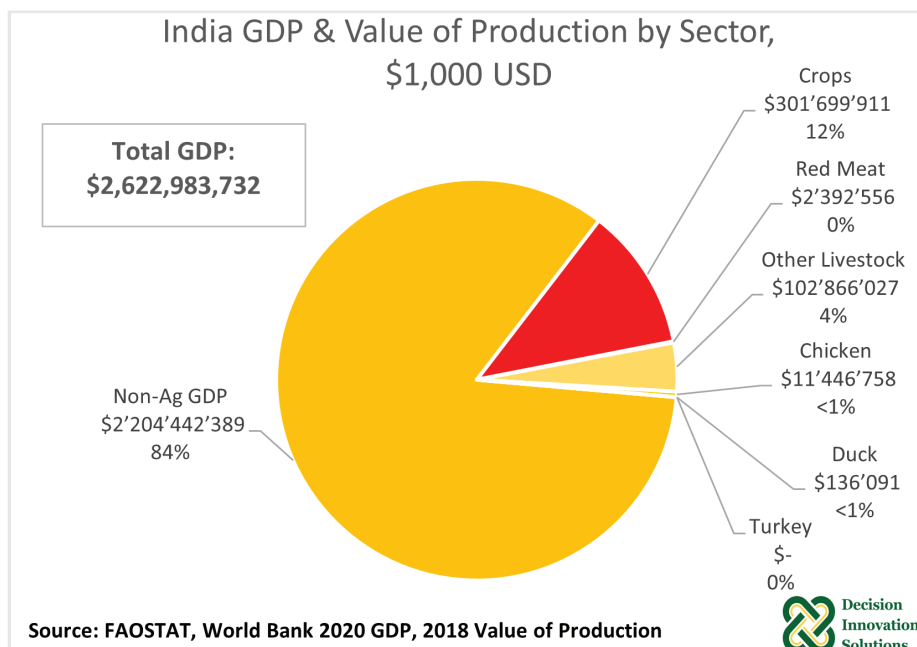


Figure 225. India GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in the India are estimated to be \$680.0 billion. Of this amount, \$27.1 billion comes from the poultry industry, with \$26.8 billion from chicken meat production and \$318 million from duck production. Agriculture pays a net value of \$2.8 billion in taxes, \$43 million of which is estimated to be from the poultry industry (Table 67).

ECONOMIC EFFECTS - INDIA (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$418'541'343	\$261'446'286	\$679'987'629	\$2'838'701
Livestock	\$116'841'432	\$72'986'239	\$189'827'671	\$792'462
Poultry	\$11'582'849	\$15'509'435	\$27'092'284	\$43'636
Chicken	\$11'446'758	\$15'327'209	\$26'773'967	\$43'124
Duck	\$136'091	\$182'226	\$318'317	\$513
Turkey	-	-	-	-

Source: FAOSTAT, OECD Input-Output Tables. \*Taxes is equal to total taxes net of subsidies

Table 68. Economic effects - India

#### 4.6.6.3 Labor

Nearly 457.8 million people were employed in India's labor force in 2020 (see Table 68). Approximately 366.4 million of the total labor force were male and 91.4 million were female. The total number of people working in non-agricultural sectors was 267.4 million compared to the 190.4 million working in the agricultural sector. Approximately 5.4 million people worked in India's poultry production sector in 2020.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - INDIA				
	Total	Female	Male	
Total Country Labor	457'779'812	91'395'433	366'384'379	
Non-Agricultural Labor	267'375'308	35'104'226	232'271'081	
Agricultural Labor	190'404'504	56'291'207	134'113'298	
Total Non-Poultry Agricultural Labor	185'037'500			
Total Poultry Labor	5'367'005			
Chicken Labor	5'303'946			
Turkey Labor	-			
Other Poultry Labor	63'059			
		Wages (\$1,000 USD)		
Total Meat Processing Labor	26'878	\$88'685		
Livestock Processing Labor	4'601	\$15'183		
Poultry Processing Labor	22'277	\$73'502		

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 67. Agricultural labor force characteristics - India

The total number of meat processing jobs in India was 26,878 in 2020. Wages earned in meat processing totaled \$88.7 million. Poultry meat processing dominated the sector with 22,277 jobs and \$73.5 million in wages earned. Livestock meat processing accounted for 4,601 jobs and \$15.2 million in wages earned.

4.6.6.4 Trade

India’s leading export market for poultry meat was Bhutan in 2020. The share of the value of poultry exported to Bhutan represented almost 60% of the total value of poultry meat exported by India. The second largest market for India’s poultry exports was Bahrain with a total value of exports equal to \$1.2 million (Figure 226 and Figure 227).

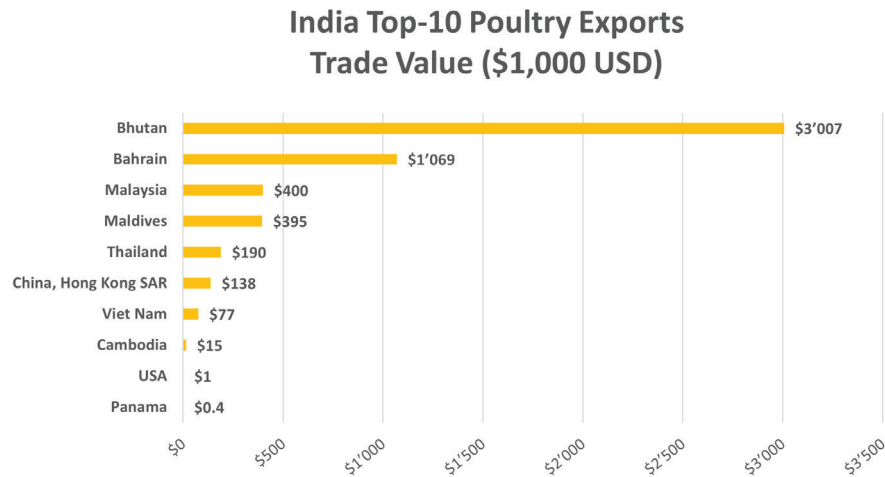


Figure 226. India top 10 poultry exports, trade value

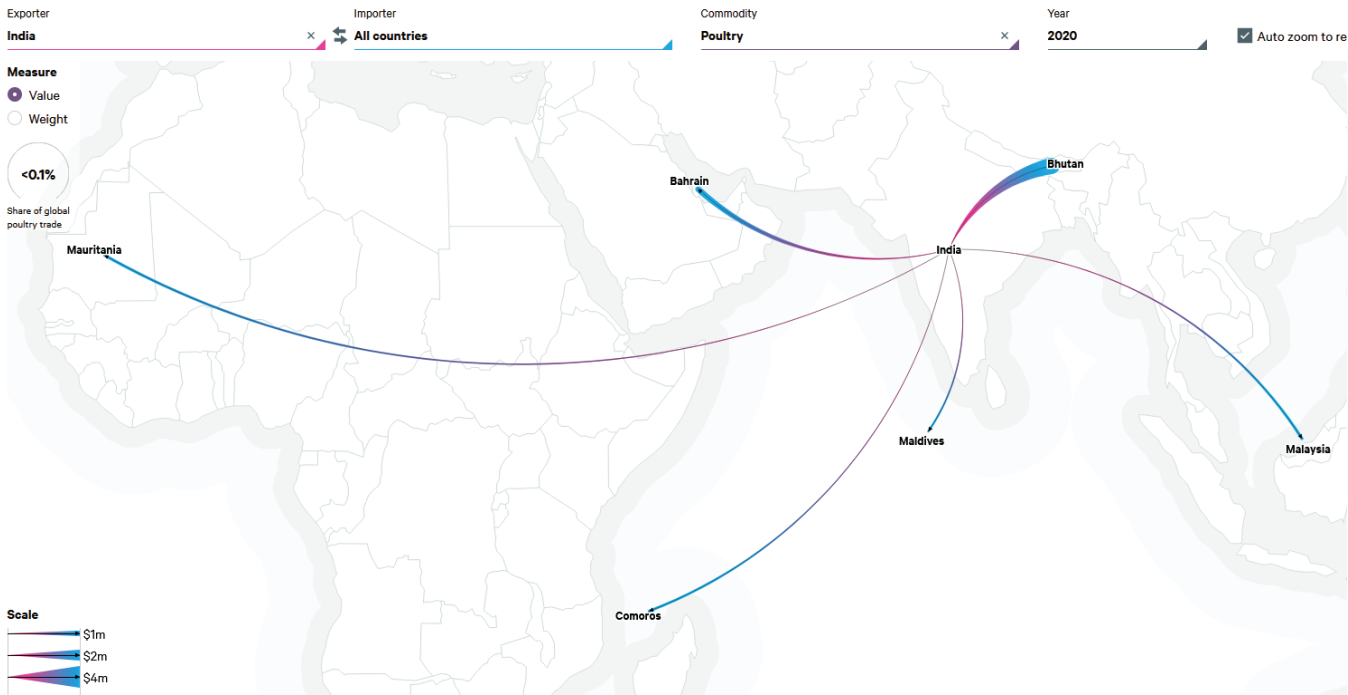


Figure 227. India poultry export flows

India imported \$261,780 of poultry meat in 2020. Almost 40% (\$103,409) of the total value of poultry meat imported by India was shipped by the USA. Imports of Poultry meat from Malaysia and Thailand were assessed at \$56,601 and \$53,447, correspondingly (see Figure 228 and Figure 229). The USDA notes market access is limited due to trade restrictions, high tariffs, and other challenges in regulation<sup>18</sup>.

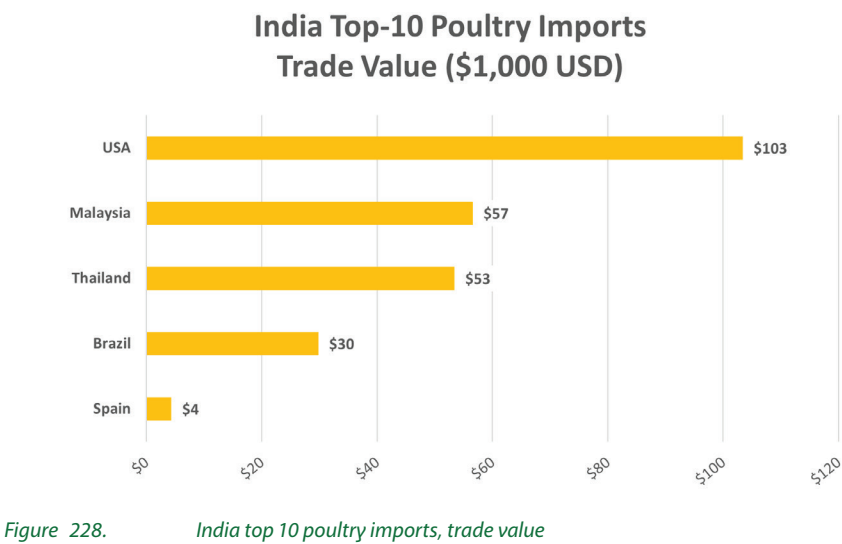


Figure 228. India top 10 poultry imports, trade value

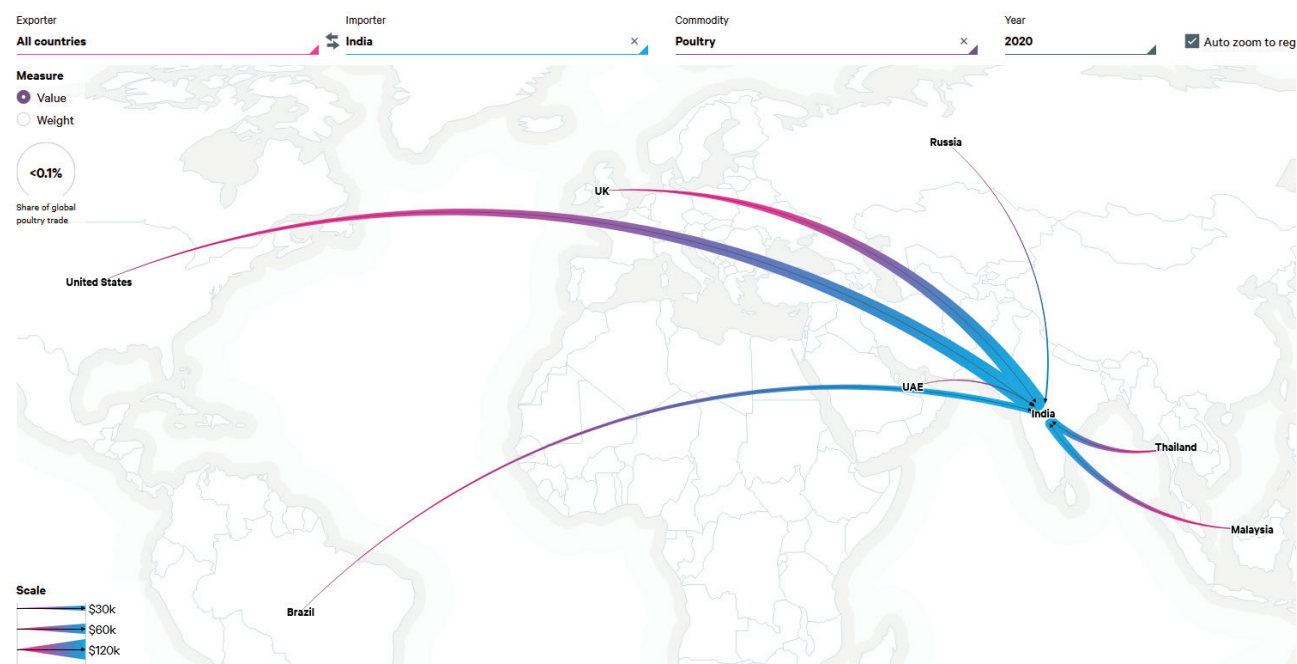


Figure 229. India poultry import flows

18 USDA FAS, Exporter Guide- India, Jan. 4, 2022