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A COMPREHENSIVE SURVEY ON THE EXPORT OF BOVINE MEAT IN INDIA

C. SAI SRUJAN

STUDENT

SCHOOL OF COMPUTING SCIENCE & ENGINEERING

VIT UNIVERSITY

VELLORE

A.L.P MRIDULA

STUDENT

SCHOOL OF COMPUTING SCIENCE & ENGINEERING

VIT UNIVERSITY

VELLORE

ABSTRACT

The ban on cow slaughter in India has created lots of controversy in the recent past. In this paper, we focus on the effect of these political and social disturbances on the export of bovine meat from India. The aftermath of the decline and the subsequent downfall of the bovine meat industry is also discussed and explored in depth. A major misconception is the notion that beef only refers to cows. A majority of the beef that is produced in India is the meat of the animal called Water Buffalo. According to the U.S. Department of Agriculture, buffalo meat is also categorised as beef. We have performed a comprehensive survey on the production, exportation and the challenges faced by the bovine meat export industry in India.

KEYWORDS

beef, bovine, buffalo, carabeef, export.

1. INTRODUCTION

The bovine meat export industry has proven to be very profitable over the past decade in terms of foreign exchange and the employment of people especially in the rural areas. Our major motivation for this paper is the fact that a country wherein consumption of beef is a very sensitive issue is the leading global exporter of the same commodity. Buffalos in India, apart from producing milk, contribute heavily to the nation’s economy in the form of buffalo meat. Hence, after the “White Revolution” we are now poised to achieve the “Pink Revolution”. The volume of buffalo meat produced in the country increased from 5,57,000 tonnes in 2008 to 9,36,000 tonnes in 2011. This increase in the amount of carabeef produced in India is testimony to the fact that this is a booming industry. The domestic consumption is very limited when compared to that of other countries. However, there are many problems which are hindering the export of carabeef from India. The structure of the remaining paper is as follows: The literature survey of the beef industry in India is presented in section 2, Our findings and suggestions are presented in section 3, Section 3 contains the conclusion followed by the references.

2. LITERATURE SURVEY

2.1 BEEF INDUSTRY IN INDIA

Cow-Slaughter in India has traditionally been considered a taboo subject because of the religious beliefs of a majority of the Indian population. This dates back to Ancient India where cows were considered a sign of wealth. Since those times, this topic has been the central point for discussion in many discussions across many political tiers ranging from Panchayats and Gram Sabhas to heated Parliament debates. Post-Independence, numerous bills and resolutions were passed in the Parliament regarding the ban on cattle-slaughter. However, it is interesting to note that till date, there is no nation-wide rule regarding cattle-slaughter. The rules followed in the individual states will be discussed later in the paper. The slaughter of buffaloes is allowed in nearly all the states in India. Socially and politically also, there is not much stigma attached to the slaughter of buffaloes. Moreover, the consumption of bovine meat is very less when compared to the volumes of carabeef that are produced. This leads to a surplus of bovine meat which is then exported to other countries. In the year 2012, India produced a total of 3.643 million metric tons of beef out of which only 1.963 million metric tons were consumed domestically. The remaining 1.680 million metric tons of beef was exported to other countries. India’s carabeef exports have increased dramatically since 2009. Between 2009 and 2015, the export of bovine meat grew more than four-folds to reach a net estimate of 4.78 billion dollars.

FIGURE 1: GRAPHICAL REPRESENTATION OF THE EXPORT PATTERNS OF BUFFALO MEAT SINCE 2009

INDIAN EXPORTS OF BUFFALO MEAT

YEAR	QUANTITY lakh tonnes	VALUE \$ million
2009-10	4.90	1,163.54
2010-11	7.27	1,895.07
2011-12	9.85	2,842.83
2012-13	10.76	3,201.14
2013-14	14.50	4,350.38
2014-15	14.76	4,781.16
2015-16	13.14	4,068.64

Source: Ministry of Commerce

In terms of volume of bovine meat exported, the value nearly trebled from 0.6 million metric tonnes to 2 million metric tons in 2014. This surge in the export and the profitability of bovine meet ensured that beef became the most agriculture-based exported commodity replacing basmati rice in 2014. There are three major

reasons for the sudden increase in the export and the profitability of buffalo meat in India during the last 7 years. The major reason for this sudden boom was the fact that the global prices of bovine meat soared up during this time interval. The Food and Agriculture Organisation’s average bovine meat price index increased by 71 per cent.

FIGURE 2: GRAPH INDICATING THE FLUCTUATIONS OF THE PRICE OF BEEF



In some places like USA, this rise in the price of beef was further enhanced due to the shrinkage of their domestic cattle populations during this period. However, the general reason for the radical rise in the price of beef is attributed to the fact that from 2004 to 2009, the price of cattle feed increased whereas the price of milk and beef remained the same. The price of milk did not increase despite the increase in the cost of feed because of milk-dried milk imports. Hence, the breeders slaughtered the milked animals also apart from the regular slaughter animals. This resulted in a steady decline in the populations of cattle which further resulted in the drastic increase in the prices of beef from 2009-2014. The next major reason is that during this period, the demand for beef in China increased tremendously. It is observed that the per-capita consumption increased from 2011 to 2014. The prices of beef also increased substantially during this period. Rising prices and rising consumption occurred simultaneously during this time interval in China. Moreover, the Chinese cattle slaughter declined by a margin of 8 per cent from 2008 to 2013. As a direct consequence of the rising demands for beef and the incompetency of the local production, China relied heavily on the imported beef during this period. As shown in figure 4, the main benefactor from China’s conundrum during this period was India. If the volume of undocumented beef imported into China from Hong Kong and Vietnam is taken into account, then the total demand adds up to nearly 417,000 tons of beef in 2014. The beef imports were merely 29,000 tons back in 2009. Thus, China’s drastic increase in demand for beef had a global impact on the price of beef.

FIGURE 3: DRAMATIC INCREASE IN CHINESE BEEF IMPORTS

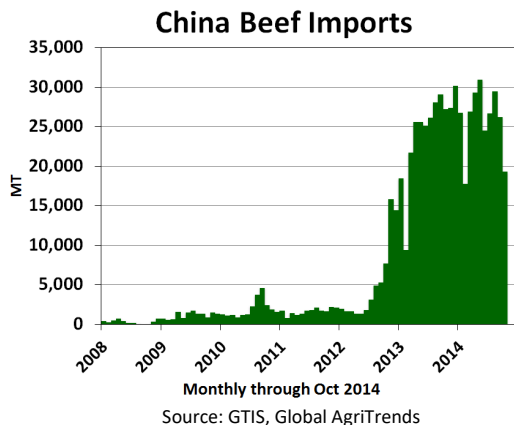
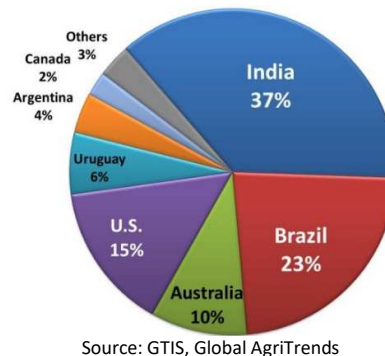


FIGURE 4: COUNTRIES EXPORTING BEEF TO CHINA
Global Beef Exports to the Greater China Region (China+Hong Kong+Vietnam)



The third major reason is the competitiveness and the quality of the buffalo meat produced in India. Due to the fact that buffalo meat is inherently tougher than cow meat, it is used for industrial use rather than direct consumption. Some of the food products that consist buffalo meat are sausages, burgers and other processed food items. It is due to the very same reason that buffalo meat produced in India is cheap compared to the beef produced elsewhere. Beef exporters in India also have the geographic advantage of being closer to the heavy beef consuming markets in West Asia and Southeast Asia.

In 2011, Uttar Pradesh was the major producer of buffalo meat followed by Maharashtra and Andhra Pradesh. The population of buffaloes has steadily increased in India. There has been 8.1 per cent increase in their population during 2003 to 2007.

A major problem which the beef industry faces in India is the presence of several illegal slaughterhouses. As of 2004, there were 3,600 legal and 30,000 illegal slaughterhouses across the country. As a matter of policy, meat exported from India should be sourced from abattoirs and meat processing plants registered with APEDA. However, most of the slaughterhouses do not have any accreditation from a recognised authority. This leads to questionable quality of the produced beef. When any commodity exported to a country is found to be below standard by the importing country, then the commodity will no longer be imported from that particular exporting country. Thus, these illegal slaughterhouses pose a serious threat to the entire beef export industry.

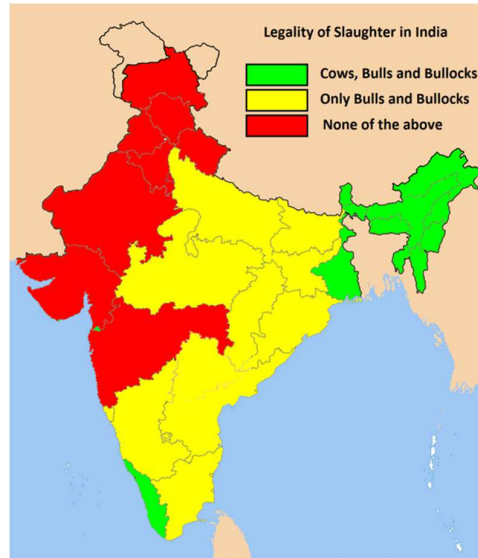
The major exporters of bovine meat from India are: Al-Kabeer Exports Private Ltd.; Arabian Exports Private Ltd.; M.K.R Frozen Food Exports Private Ltd.; P.M.L Industries Private Ltd.

2.2 DOMESTIC CONSUMPTION

Most of the beef consumed in India is produced in Municipal Slaughterhouses. The states in which the maximum consumption of buffalo meat takes place are: Kerala, Andhra Pradesh, Telangana, Uttar Pradesh, West Bengal and Meghalaya. According to the United States Department of Agriculture, in 2011 India produced 3.3 million tonnes of beef out of which 2 million tonnes were consumed locally and the rest were exported. By 2015, the production had increased to 4.2 million tonnes but the domestic consumption was just 2.2 million tonnes. This enabled the export of beef to become a profitable business. However, there is an overall

increase in the demand for buffalo meat in the country. This surge in the demand is more evident in some states than in other states. This is majorly due to the religious and social stigma attached to the consumption of beef in some states.

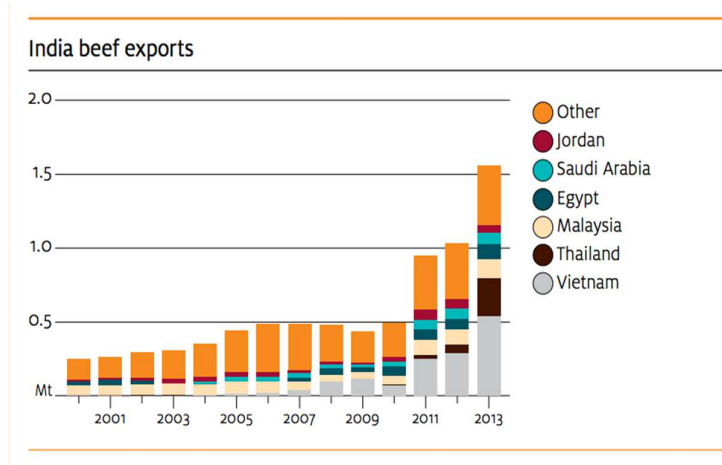
FIGURE 5: THE LAWS IN ALL THE STATES REGARDING SLAUGHTER OF CATTLE



2.3 EXPORT DESTINATION

According to the Centre for Monitoring Indian Economy, a majority of the buffalo meat exports from India end up in Asian countries. Nearly 80 per cent is imported by Asian countries whereas 15 per cent goes to Africa. Vietnam is the top importer of Indian buffalo meat followed by Thailand, Malaysia, Egypt, Saudi Arabia and other key markets. Around 40 per cent is exported to Vietnam. A major portion of this beef makes its way to China.

FIGURE 6: THE EXPORT DESTINATIONS OF BEEF FROM INDIA



Source : www.beefcentral.com

3. FINDINGS AND SUGGESTIONS

The export of bovine meat from India has proved to be very profitable over the last decade. However, the exports have been dropping since the beginning of 2015. There are many reasons for this decline in the exports. One of the major reasons is the confusion related to beef and bovine meat. In India, the trade and export of beef is banned but there are no restrictions on the trade and export of buffalo meat. This confusion is further enhanced by the fact that US Department Of Agriculture defines buffalo meat also as beef. Due to this conundrum, buffalo meat exporters are unnecessarily targeted by social and political activists. This has heavy repercussions on their business. The next major reason is the decline in the demand for beef by some of India’s main importers like Vietnam. The export to Vietnam dropped to Rs 2,305 crores from Rs 2,934 crores in a matter of 3 months. The next major concern is the report by the World Health Organisation that red meat consumption increases the risk of cancer. This will severely dent the export business of buffalo trade in India in the long-term. Apart from these reasons, it is getting increasingly difficult for the Indian exporters to compete with the Brazilian exporters. Vietnam is slowly moving towards the Brazilian exporters despite the freight expenses. Till 2014, there were only 1623 registered slaughterhouses in the country. This implies that an overwhelming majority of them are not registered and hence not administered by the municipal authorities. This is also a major threat to the Bovine meat export industry. The general public and the political activists must be educated about the difference between Beef and Bovine meat. The local authorities must take strict action against illegal slaughterhouses and uphold the laws pertaining to their state regarding the slaughter of animals.

4. CONCLUSION

The decline in the export of bovine meat from India must be looked into seriously. This is because the export of bovine meat generates nearly 30,000 crores annually. According to APEDA (Agricultural and Food Products Export Development Authority), it is the second largest product which is exported from the country after rice. The downfall of this industry will have heavy repercussions on the Indian economy.

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