

Poultry Outlook

Shrikrishna Gangurde

Managing Director, Avey Broilers, Nashik



Overview of discussion

Fact

World protein requirement

Sources

Asian countries

Animal feed industry

Challenges

Need & forecast

Solution



Protein is most important part of human diet

As population increases, protein demand increases

Soyabean Meal

Increasing livestock population to fulfill protein requirement of human beings

Soymeal important commodity of livestock feed

World protein demand - Fact

- World average food consumption, leaves us protein deficient by 5.5%
- Developed countries are over consuming protein- They should optimize their consumption and spare for rest of world and save their health.
- More than 60% of the countries including 5 ASC countries are protein deficient,
- **Presents huge potential for protein production**
- **Increasing the demand for protein source in livestock industry highly**

Poultry

Pig

Bovine

Ovine

Soyabean Overview

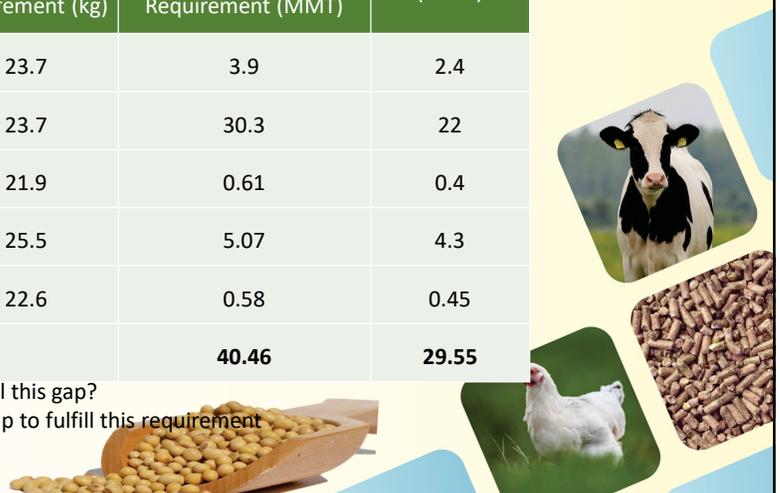
- World Soyabean production will increase by 13 % as compared to 2021-2022,
- Brazil production increased by 18.3 %, 149 mmt over 126 mmt last year
- Argentina production increase by 15.9 %, 51 mmt over 44.1 mmt over last year
- **US production decrease by 1.3 %**
- Brazil leads the export with the growth of 11.3 %
- **US degrow for export in last year by (2.8%)**
- **China is down over last year with 7.8 % for import of soyabean**
- China, India, Bangladesh, Thailand, Pakistan, and Japan are the major producers of soybean meal in the Asian region.
- Soybean meal production in India and China increased from Soybean meal is majorly consumed by the animal feed industry in the Asian region.



Availability of protein in South Asian Countries (MMT)

Country	Population (Million)	Per capita requirement (kg)	Total Digestible Protein Requirement (MMT)	Availability (MMT)
Bangladesh	168	23.7	3.9	2.4
India	1387	23.7	30.3	22
Nepal	28	21.9	0.61	0.4
Pakistan	220	25.5	5.07	4.3
Sri Lanka	26	22.6	0.58	0.45
TOTAL	1829		40.46	29.55

- There is gap of 10.91 (MMT)
- Can Soyabean be produced more to fill this gap?
- Protein source of animal origin can help to fulfill this requirement



World Feed Production Estimations by 2022

Sector	2020 (MMT)	2021 (MMT)	Growth (MMT)	Growth (%)
Broiler	343.098	350.921	7.823	2.3 %
Layer	290.904	310.214	19.310	6.6 %
Pig	161.073	158.789	(2.285)	-1.4 %
Dairy	130.443	132.946	2.513	1.9 %
Beef	117.758	115.486	(2.271)	-1.9 %
Aquaculture	49.530	51.355	1.826	3.7 %
Pet	31.587	34.165	2.578	8.2 %



State wise area under soyabean in India

State	2020-21		2021-22	
	Area (Lakh Ha)	% to Total Area	Area (Lakh Ha)	% to Total Area
Madhya Pradesh	58.54	48.30	55.84	45.86
Maharashtra	43.21	35.65	46.01	37.79
Rajasthan	11.00	9.08	10.62	8.72
Karnataka	3.32	2.74	3.82	3.14
Gujrat	1.49	1.23	2.24	1.84
Telangana	1.60	1.32	1.51	1.24
Others	2.04	1.68	1.72	1.41
All India Total	121.2	100.00	121.76	100.00

There is no significant change in the sowing area for soyabean over the year 2021

Source: Soyabean outlook, February 2022

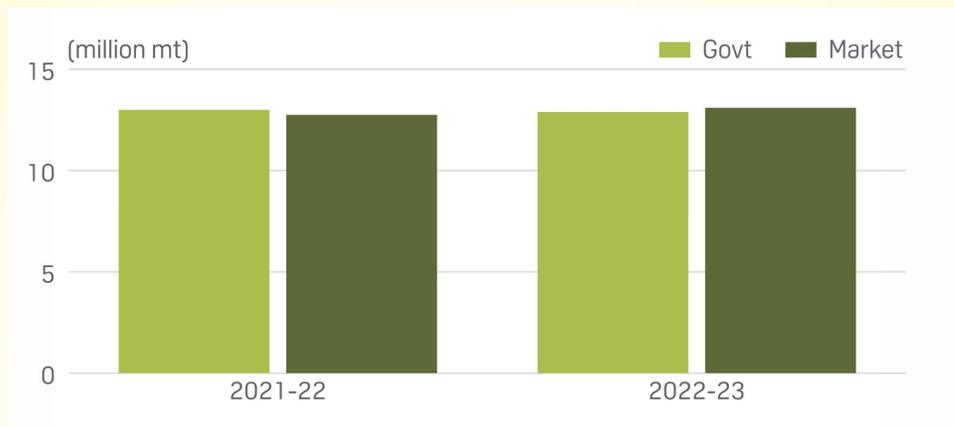


Government V/S Market analysis

- The output is likely to increase on steady acreage under the crop on the year and adequate showers over key growing regions, traders said.
- The government on Sept. 21, however, pegged soybean output in MY 2022-23 at 12.89 million mt, a tad lower than its estimates of 12.99 million mt for MY 2021-22.
- According to agriculture ministry, the area under soybean was at 12.1 million hectares, largely steady over the year.
- "The government may have estimated the output to be smaller due to a sharp decline in area in Madhya Pradesh. But adequate showers are seen to boost yield potential and eventually increase output across states," said an analyst based in Mumbai.
- Soybean areas in Maharashtra, Rajasthan, and Karnataka have increased over the year. However, acreage in Madhya Pradesh, the largest soybean producer, has been lower on the year, the data showed.

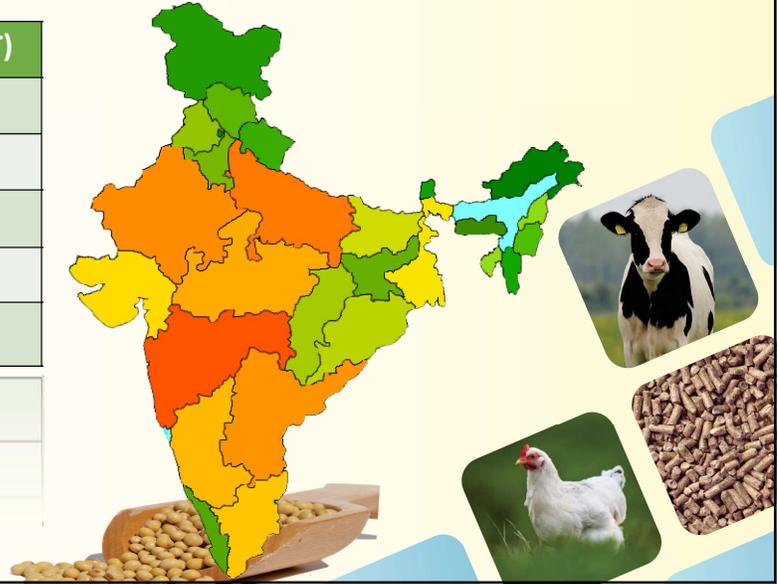


Government V/S Market analysis



India's Soymeal requirement

Species	Quantity (MMT)
Broiler	34,11,692
Layer	17,29,123
Aqua Feed	4,68,000
Breeder	2,80,000
Total	58,88,815



Major Challenges & Soya Forecasting



Uncertainty in climatic conditions

1. Flood
2. Draught
3. Crop diseases



Government policies

1. Export
2. Import
3. MSP



Growth in Livestock Industry

1. Dairy 6 %
2. Aquea 14 %
3. Layer 6 %
4. Broiler 8 %



Processing & Quality

1. Moisture
2. Toxins
3. Protein content



Industrial Expectations

Low Moisture

Normally moisture ranges from 10 to 13 % in soyabean meal
Expected moisture should not be more than 6 to 7 %

Toxins Level

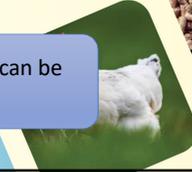
Because of availability of moisture, toxins goes up
If moisture level is low, toxin can be controlled easily

Sand Silica

Normally its more than 3 % in all type of soyabean meal.
We can reduce the same to 1 to 1.5 % level by optimizing processes

High Protein

High protein can reduce the cost of end product and unwanted expenses can be controlled.



Solutions

Increasing cultivating land

Crop diversification from rice & Wheat to Soyabean etc
Industry & Farmers collaboration, or Creating farmers producer co.

New Plant

Big integrator have their own extraction plants
Mid Level integrator should have their own soya extruder plants

Technology adoption

Productivity in the oilseed sector is woefully low and need serious technological attention and interventions

Hybridization

Use of high yielding and disease-free breeds, GMO can be alternative to increase yield per acer.



By improving end-product quality

• Express Meal

- 6 % oil
- 48 % protein
- 6 % moisture

• Benefits

- Toxin free
- Quality protein, digestibility
- Reduce cost of production

- Major cost in a feed is a protein
- Aqua need almost 42% CP in feed
- Quality Soymeal can help to reduce production cost
- Can be good return on investment

