



Breeding Trust, Growing Together



**POULTRY INDUSTRY:
GROWTH, OPPORTUNITY
& CHALLENGES**



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**INTERNATIONAL
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INDORE, INDIA**

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Breeding Trust, Growing Together



**॥ सर्व हिताय ॥
॥ सर्व सुखाय ॥**

WORKING FOR THE BENEFIT OF ALL

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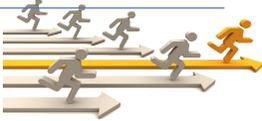


WHERE WE STAND?



Description	Current Rank	FY 2017	FY 10	FY 2010 Rank
Dairy Production	1 st	165.4 MMT	116 MMT	2 nd
Aqua Production	2 nd	10.76 MMT	8.1 MMT	4 th
Broiler Meat Production	3 rd	4.85 MMT	2.65 MMT	6 th
Egg Production	2 nd	71 billion	54 Billion	3 rd

- **Self Sufficient in most of the feed ingredients**
- **All sectors are growing @5-10% per annum.**



Sources: nddb.coop; www.ijirset.com; Director of Fisheries state Government; www.internationalegg.com



INDIAN LIVESTOCK



Broiler

- 1 crore birds/day (Prod)
- 4.85 MMT meat production/year
- @ 3.6 Kg Feed/Bird
- 1,20,000 Crs Industry
- 16 MMT of Broiler Feed Production/annum
- Industry growth at 8-10%
- ~4 MMT of Soya meal consumed

Layer

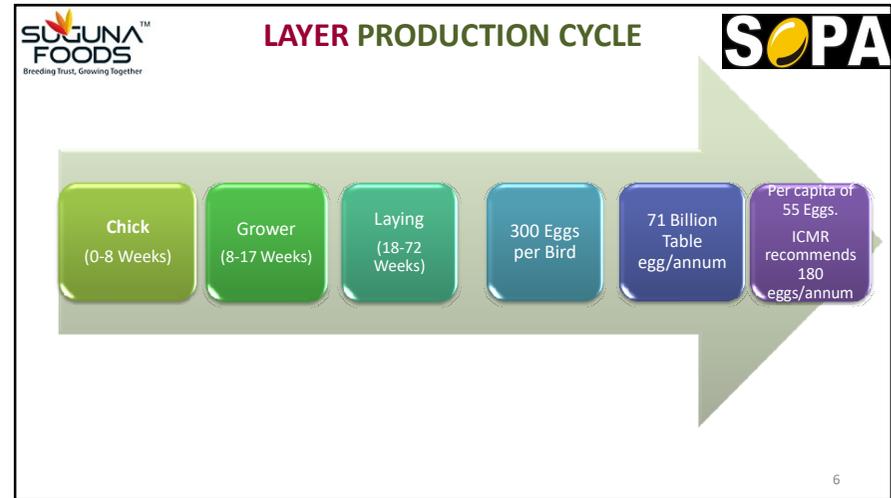
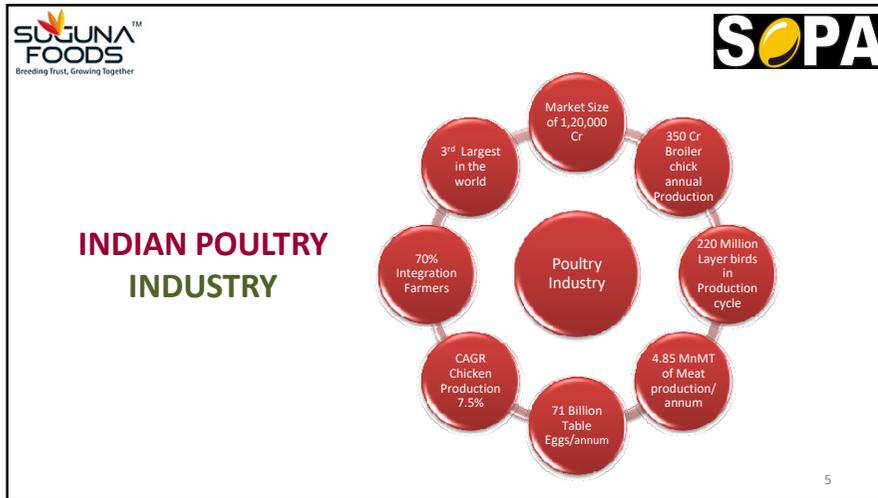
- 20 cr eggs/day
- ~71 Billion table Egg Production/year
- @ 125 grams of layer feed/egg
- 11 MMT of layer Feed Production/annum
- Industry Growth rate at a steady 5% CAGR
- 1.1 MMT of Soya meal

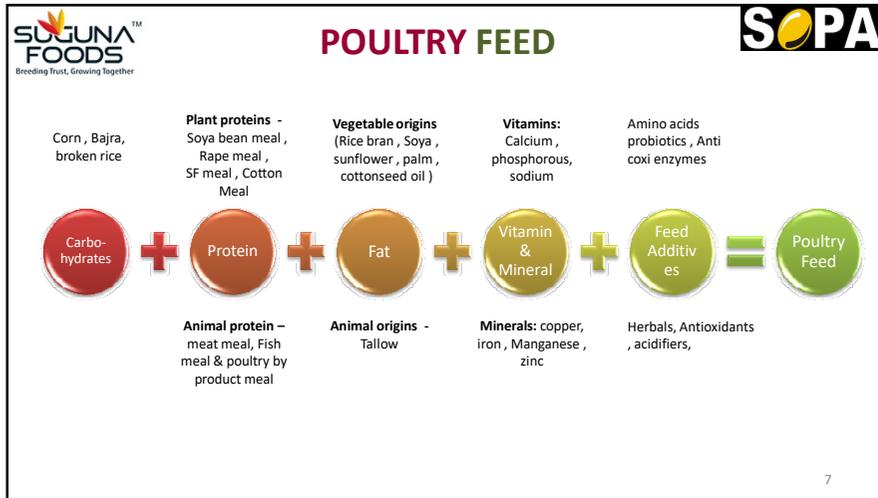
Aqua

- 10.76 MMT Production FY 16
- 2nd largest Producer in the world
- 1,00,000 Crs Industry
- 5.5 lakh MT Shrimp Production FY 17
- ~3 MMT of Aqua Feed production/annum
- ~0.75 MMT Soya meal

Cattle

- 420 million LPD production
- Largest producer and consumer of milk in the world
- 5,75,000 Crs Industry
- Industry growth at 16% CAGR
- 7 MMT feed production
- ~ 1 Lakh MT Soya Meal





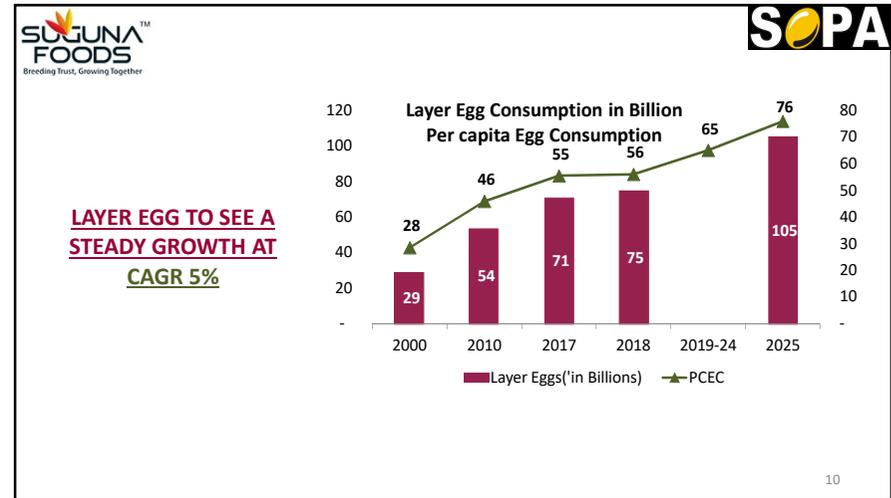
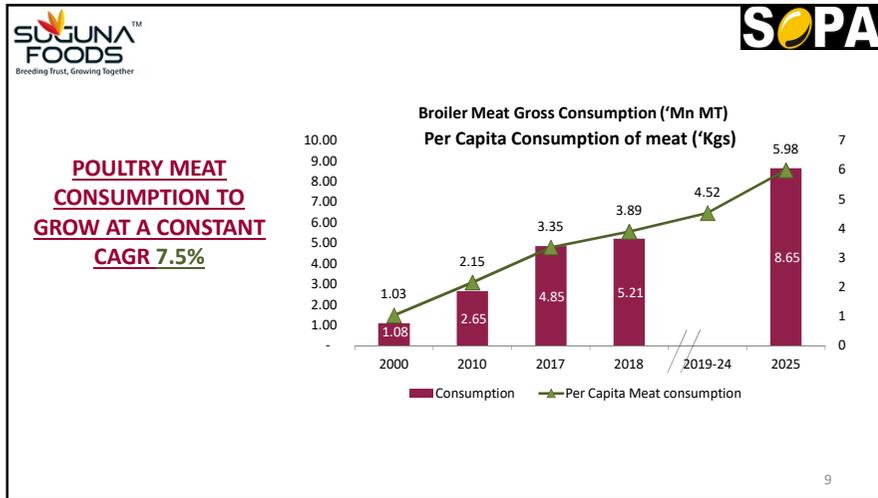
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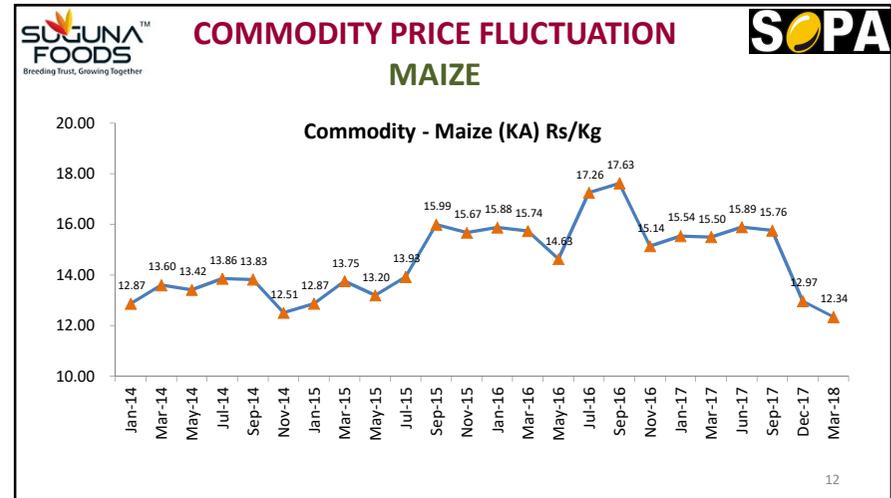
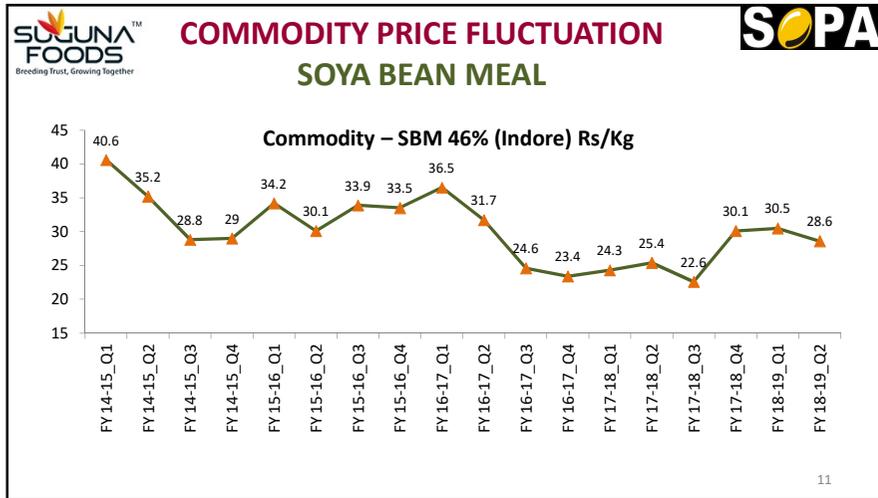
FEED PRODUCTION AT A GLANCE

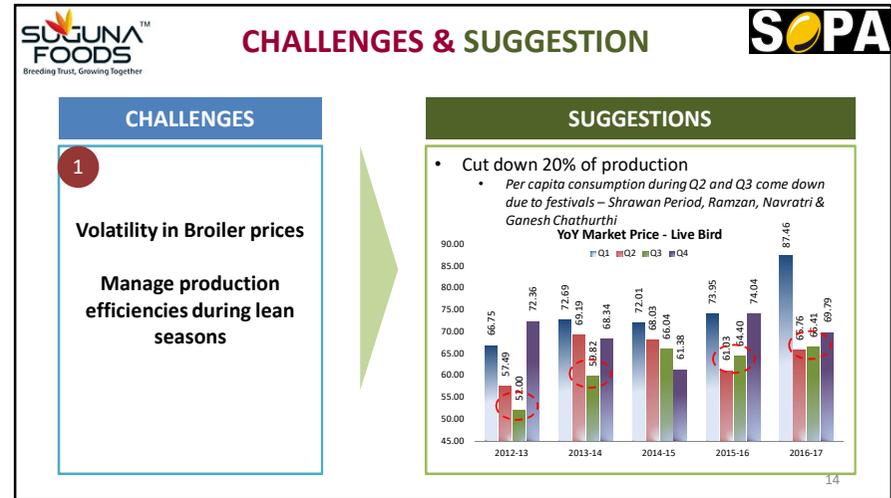
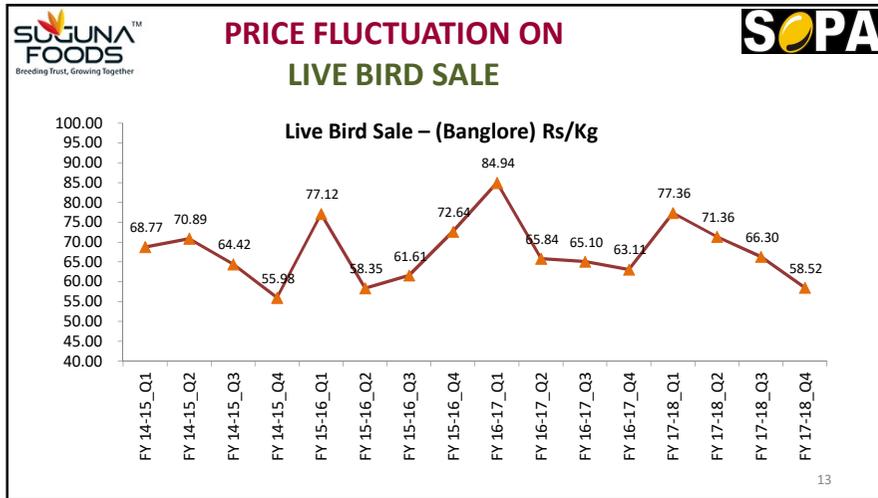
SOPA

Description	Volume/Annum ('MMT)	% of Soya Composition		Soya Volume ('MMT)	
		Min	Max	Min	Max
Broiler	16	20%	25%	3.20	4.00
Layer	11	8%	10%	0.88	1.10
Aqua	3	20%	25%	0.60	0.75
Cattle	7	1 Lakh MT		0.1	0.1
Total	37			4.78	5.95

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CHALLENGES & SUGGESTION



CHALLENGES

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Volatility in Price of Maize and Soya.

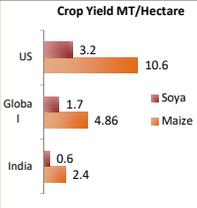
Maize and Soya together constitute 90% of total feed ingredient

Source: OECD.Org

SUGGESTIONS

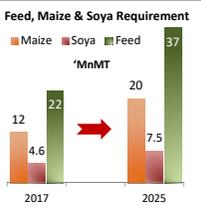
1. Hybrid Maize and Soya production to be popularised
2. Introducing Genetically Modified crops for higher yield and lower cost of production
3. Estimate Crop Yield/Hectare is half the Global average

Crop Yield MT/Hectare



Region	Maize (MT/Hectare)	Soya (MT/Hectare)
US	10.6	3.2
Global	4.86	1.7
India	2.4	0.6

Feed, Maize & Soya Requirement 'MnMT



Year	Maize (MnMT)	Soya (MnMT)	Feed (MnMT)
2017	12	4.6	22
2025	20	7.5	37



CHALLENGES & SUGGESTION



CHALLENGES

3

Dependency on Live Bird Sale over Processed Meat

SUGGESTIONS

1. Customer Awareness on the consumption of Processed Meat
 - a) All the Developed Nation have already shifted to Processed Meat
 - b) Current World trend is on Ready –to-Eat Meat
2. Government Regulatory Changes



CHALLENGES & SUGGESTION



CHALLENGES

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Availability of Trained Manpower

Very limited No. of professionals available for Poultry industry

*Total Placement: 80-90K
Annual Intake is 10,000*

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SUGGESTIONS

1. Suggest all Veterinary colleges to start degree & Diploma courses over Poultry production, Feed Technology, Incubation Technology.
2. Private institutes to be promoted
3. Efficient Recruitment (relevant education needed for the role to play)

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CHALLENGES & SUGGESTION



CHALLENGES

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Government Food Safety Norms

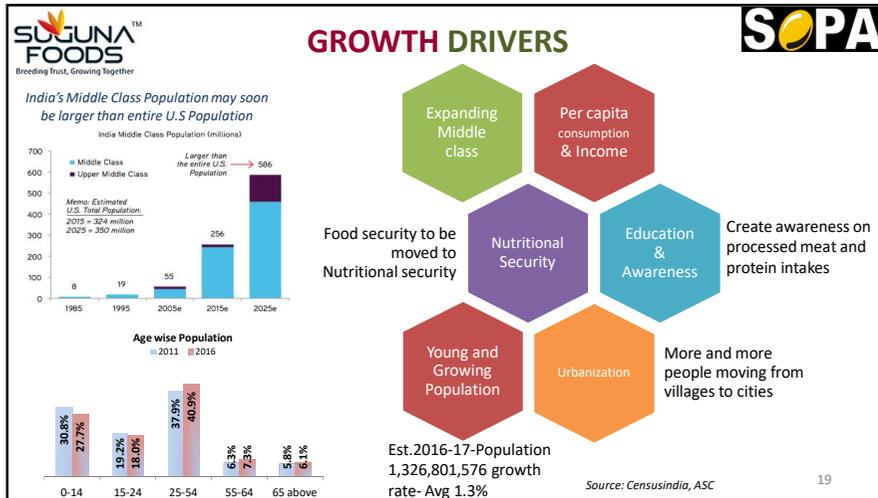
Food safety is high on both Consumers & Government agenda

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SUGGESTIONS

1. Proactive action plan to defend and build trust among customers against Antibiotics usage and other myths
2. Active Industry - Government collaboration is need of the hour

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SOPA

“Together We Bring About Soy Revolution”

- Protecting the interest of Indian soya farmer
- To meet the healthy protein requirement to the country
- Improving Quality of end products
- Agri extension works with new farming methodologies.
- Making India an exporter of meat and egg

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THANK YOU!!!
GLAD TO HAVE YOU ALL IN SOPA !!!