



IndiaLive

LIVESTOCK, DAIRY, MEAT, POULTRY & AQUACULTURE DIGEST

October / November 2013



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End of Road for IndiaLive

This is the 20th issue of IndiaLive. For past forty months, we have been trying to bring you a glimpse of India's livestock, dairy, meat, poultry and aquaculture industry and markets along with a glance on the macro-environment in India. We have received letters of appreciation from many of you. We are thankful to all of you who encouraged us through this journey.

While the journey has indeed been most enjoyable and educative, there is no denying that every journey must come to an end. We are sad to announce the end of publication of IndiaLive. This issue of IndiaLive will be the last one.

While IndiaLive will cease, our efforts at understanding and making our clients' understand India's markets, economy, politics, laws and industry will continue. **Hindustan Studies and Services Ltd.** has been providing strategic market research services related to India and other Asian countries for the past two decades. It will be our pleasure to assist you with our strategic inputs based on hard-nosed in-depth research and analysis.

Our law firm, **Anil Chawla Law Associates LLP**, is active in working on business relationships of our corporate clients. Our focus is to add value to our clients' businesses. Business relationships go through various stages - courtship, engagement, marriage, stress and also divorce. We can be your trusted aide at every stage of a relationship.

Though we shall stop getting in touch with you on a regular basis through IndiaLive, we hope that the relationship that has been built over the past few years will continue to grow and prosper. We look forward to hearing from you for all your strategic market research needs as well as for strategic advice on legal matters.

The year 2013 was a turbulent one for many businesses in India and for many parts of the world economy. We hope that you were able to go through 2013 without any shocks and disturbances. We also hope and wish that you are entering the New Year with optimism and enthusiasm.

As a gift on the eve of New Year, we have released our report "**Milk and Dairy Products in India – Production, Consumption and Exports**" for FREE DOWNLOAD. The original price for the 140-page report was EUR 900. Now, you may download it free by clicking on <http://hindustanstudies.com/files/dairysept09report.pdf>

Wish you, your company and all your stakeholders the Best for year 2014!

May the New Year be better than any that you have ever seen!

With Best Wishes and Regards,

Anil Chawla

Food Industry Overview

- Ernst & Young has ranked India as the most attractive investment destination with relaxation in FDI norms followed by Brazil and China at second and third positions respectively to boost investor sentiments.
- According to an analysis by McKinsey Global Institute, India hosts about 158 large global companies having revenues of USD 1 bio or more, making the country the 11 most favored destination for setting up of a multinational corporation headquarters.
- Barclays lowered India's FY2014 GDP forecast to 4.7 per cent, saying the growth and fiscal health of the country were likely to remain under pressure, with 2014 election dynamics adding to uncertainties.
- Prime Minister Manmohan Singh has said GDP will improve in the second half of fiscal 2013—14 and that the government is committed to get back to a sustainable growth rate of 8—9 per cent.
- Economists are expecting agriculture to grow by five per cent in FY2014 from the two per cent seen in the previous fiscal. According to CLSA, area sown is up seven per cent year-on-year and foodgrain production is likely to reach a record 259 mio ton in FY14.
- According to Finance Ministry Indian economy will grow by over 5 per cent in the current fiscal on back of high farm productivity and investments and promised more steps to boost growth.
- Asian Development Bank has cut the country's economic growth forecast for 2013-14 to 4.7 per cent, way below its earlier projection of six per cent.
- The Confederation of Indian Industry (CII) said that its survey of CEOs indicated the economy was moving towards stagflation.
- World Bank scaled down India's economic growth projections to 4.7 per cent from its earlier estimate of 5.7 per cent for 2013-14. With this, it joined a host of other agencies to peg India's GDP expansion at sub-5 per cent, after economic growth fell to a four-year low of 4.4 per cent in the first quarter of 2013-14.
- Prime Minister's Economic Advisory Council in its Economic Outlook report had cut India's GDP growth projection to 5.3 per cent for the current financial year from earlier 6.4 per cent. However, many brokerages firms banks had forecast the GDP growth below 5 per cent for 2013-14.
- Bank of America Merrill Lynch lowered its current account deficit (CAD) target for India for the current financial year to 3.2 per cent of the GDP from 4 per cent earlier.
- International Monetary Fund has cut down the country's growth forecast to an abysmally low 3.8 per cent in FY14. The projection was based on market prices and not on the factor cost which is being used by the government and analysts.
- The finance ministry and the RBI have unleashed a series of measures to contain CAD at USD 70 bio. Higher gold imports and slowdown in exports were among the main factors in pushing CAD to a record high of 4.8 per cent of GDP or USD 88.2 bio in 2012-13.

(Food Industry Overview continued on next page)

Food Industry Overview (Continued)

- **Projections of India's economic growth for 2013-14**

IMF	4.25 per cent
World Bank	5.7 per cent
ADB	4.7 per cent
HSBC	4 per cent
Nomura	4.2 per cent
JP Morgan	4.1 per cent
CLSA	4.2 per cent
CRISIL	4.8 per cent
Fitch Ratings	4.8 per cent
BNP Paribas	3.7 per cent

- **Official projections:**

Prime Minister's Economic Advisory Council	5.3 per cent
Finance Ministry	More than 5 per cent
Reserve Bank of India	4.8 per cent

- HSBC lowered India's current account deficit (CAD) forecast for this financial year to 3.4 per cent of GDP from 4.1 per cent earlier.
- India has signed four agreements with Peru, including one on defense cooperation and another on establishment of a joint commission. Indian Chambers of Commerce (INCHAM) was also launched which will facilitate Indian trade and industry to do business in Peru and other countries of Latin America.
- Government of India said it has cleared 13 FDI proposals totaling Rs. 12.58 bio.
- Reserve Bank of India said retail inflation would remain above 9 per cent during the course of this financial year. Retail inflation measured by the consumer price index had risen sharply across food and non-food constituents, including services, keeping inflation expectations high, RBI said in its Second Quarter Review of Monetary Policy 2013-14.

(Food Industry Overview continued on next page)

Food Industry Overview (Continued)

- According to the government data, rate of price rise in food articles was at 18.19 per cent in October. Costlier food items, including vegetables, pushed the October wholesale inflation to 7 per cent, the highest in current financial year. The inflation measured on the wholesale price index (WPI) was 6.46 per cent in the previous month and 7.32 per cent in the October 2012. The jump in WPI inflation comes after the October retail inflation increased to 10.1 per cent, the highest in the past seven months. Protein rich items like egg, meat and fish became dearer by 17.47 per cent in October as against 13.37 per cent in the previous month. The Reserve Bank had increased its key rate (repo rate) twice in its last two monetary policy reviews with an aim to check high inflation.
- According to a survey by Regus, business confidence in the country has dropped from 137 points in April to 129 in September 2013, but still well above the global average of 113 points, while globally it has risen by 5 points to 109 in mature economies, and had dropped 9 points to 117 in emerging economies.
- The Finance Ministry has approved 15 foreign investment proposals totaling Rs. 20 billion.
- Bharti Enterprises and Wal-Mart Stores, Inc. have decided to go separate ways for operations in the Indian retail sector. Subsequently, the US retail major will buy out the Indian partner from their 50:50 joint venture – Bharti Walmart, giving Wal-Mart 100 per cent ownership of the Best Price Modern Wholesale cash and carry business.
- Commerce & Industry Ministry has indicated to Walmart that it cannot go for another policy amendment in the latter's attempts to press for further relaxation in the existing Foreign Direct Investment (FDI) rules especially those related to sourcing inputs locally. While the policy allows 51 per cent FDI in multi-brand retail, it is subject to the condition of sourcing 30 per cent inputs from local small and medium industry.
- India has pitched for early conclusion of the preferential trade pact with African nations, which is expected to help enhance business ties between India and minerals rich countries of the continent. The Southern African Customs Union consists of Botswana, Lesotho, Namibia, South Africa and Swaziland. Bilateral trade targeted is of USD 100 bio by 2015 and USD 200 bio by 2020.
- India, China and South Africa have signed two separate Memoranda of Understanding (MoUs) to boost trade, investment and capacity-building initiatives amongst cooperatives in three countries.
- Prime Minister has said that India was ready to sign a Free Trade Agreement with ASEAN on services and investment to boost their bilateral trade to USD 100 bio by 2015, from USD 76 bio last year. India announced a separate Mission for ASEAN region to be set up in Jakarta with a full-time resident Ambassador.
- Indonesia has agreed to address the concerns of Indian companies investing there and is willing to set up a joint high-level task force in this regard. Indian companies have made some big investments in Indonesia in sectors like coal, mining and infrastructure. However, some of them have been facing some problems.
- Having invested close to USD 15 bio in Indonesia, Indian firms have lined up further USD 15-16 bio investments for the South East Asian nation and the two countries have agreed to cooperate in new sectors like film production.

(Food Industry Overview continued on next page)

Food Industry Overview (Continued)

- India's trade liberalization with Pakistan will only move after Islamabad honours its commitment to open up border trade and grant most-favoured nation (MFN) status to India.
- According to Ficci-KPMG report Food Processing industry may touch Rs. 4000 billion next fiscal from Rs. 3300 billion in FY'12. The domestic food processing industry requires about 0.53 mio persons in the unorganized sector and about 0.1 mio in the organized sector to handle various food resources from the farm to consumers.
- According to Commerce and Industry Ministry, India's exports gained from regional and bilateral free trade pacts. ASEAN exports have more than doubled after signing of Indo-ASEAN Trade in Goods Agreement in 2009, though imports have also grown as is natural in any trade agreement.
- Federation of Indian Chambers of Commerce and Industry said that India's annualized wholesale price index-based inflation for the financial year 2014 could be between 6 and 6.5 per cent. The annualized consumer price index-based inflation could touch 9 or 9.5 per cent at the end of the fiscal. Domestic currency was likely to end the financial year at a level between Rs. 62 and 64 to a dollar.
- Planning Commission said the economy will get back on the targeted growth trajectory of 8 per cent after two years. The Indian economy expanded at a decade-low rate of 5 per cent in the first year of the 12th Plan (2012-17) period, during which the government has targeted an annual average growth rate of 8 per cent.
- Japanese retail giant and Asia's largest player, Aeon Corporation, is planning to enter the multi-brand retail sector in India. The company is scouting for potential partners, and a small team working out of Mumbai is finalizing the strategy in terms of investments and store formats.
- The European Union is keen on concluding long-pending negotiations for Free Trade Pact with India by 2014.
- According to Organization for Economic Co-operation and Development, Indian economy is expected to improve marginally in the current financial year, with GDP at market prices projected to expand by 3.4 per cent, from 3.3 per cent in the previous financial year.
- The Asian Development Bank is carrying out analytical work on the East Coast economic corridor, which presents a potential window for boosting economic relations between India and the Mekong countries, as well as other South-East Asian countries.
- India is the eighth fastest growing source of FDIs in the United States. The US was attracting a total of USD 300 bio FDIs a year and India's investments were to the tune of USD 9 bio in 2012. In 2011, Indian FDIs in the US accounted for just over USD 7 bio. At the same, the US FDI in India last year increased to USD 28.38 bio from USD 24.66 bio in 2011.

Dairy

- Retail price of milk has risen 60-70 per cent in four to five years, and sources say prices will only go up. Dairies are planning to offset the increasing cost of production, by moving to more value-added, higher-margin products. Demand for value-added products is growing at 20-24 per cent. While margins in milk are four per cent, for curd, margins are 15-20 per cent. India's per capita availability of milk has touched 290g a day, against world per capita availability of 289. Rising consumption is drawing foreign players into the market. Their entry could open the market for value-added products further.
- According to a report by Investor Relations Society, the size of Indian dairy industry in both organized and unorganized sectors is expected to double to USD 140 bio by 2020 on the back of growing demand and rising disposable income. While the dairy industry is growing at a compounded annual growth rate of 15-17 per cent, the value-added products alone are growing way beyond 24 per cent. Milk is the country's biggest agricultural produce, contributing 22 per cent to agricultural GDP. India overtook the US in 1998 to become the world's leading milk producer, accounting for over 15 per cent of the global output.
- According to an Assocham report, the Indian dairy industry is now the world's largest market accounting for 20 per cent share in milk production. The domestic market with 123 mio ton of milk production in 2011 is projected to reach 190 mio ton by 2015.
- Government of India has launched a national dairy plan to boost milk production. Under the dairy plan, about Rs. 30 bio has already been invested and further Rs. 170 bio will be invested in the next 10 years.
- Gujarat Co-operative Milk Marketing Federation (GCMMF), which owns the Amul brand, has increased prices of pouched milk by 5-7 per cent. This is the second time that Amul has increased prices this year, after the one in April. Amul had hiked prices of products such as butter, paneer and cheese among others by an average of 10 per cent in the past one-to-two months.
- Karnataka Milk Federation, which owns the Nandini brand, had raised prices in September 2013 by Rs. 2 a liter.
- Amul has promoted its ice creams as a healthy option, or as the 'real ice cream'. The brand focus is on how health comes first, though taste is also of prime importance.
- Amul chairman Vipul Chaudhary, facing dismissal by his board, got a breather from the Gujarat High Court, which stayed the no-confidence resolution which the directors were scheduled to consider in October 2013.
- Amul Dairy has procured 10 acres land in Singur and is investing Rs. 2 bio to set up state-of-the-art dairy unit to cater to the need of Kolkata city in West Bengal.
- Amul Dairy has installed rapid milk chillers at its newly formed village societies in Maharashtra. The milk chillers have been developed in association with Massachusetts Institute of Technology of USA which can run on batteries and on grid power.
- The Appointments Committee of Cabinet is considering giving extension of three months to Amrita Patel, Chairman at the National Dairy Development Board (NDDB), who retires in November, even as the search and selection committee has been unable to find the successor for the post. The extension will be for maximum of three month or until the next successor, whichever is the earliest.

(Dairy continued on next page)

Dairy (Continued)

- Maharashtra government has decided to sign a memorandum of understanding with Mother Dairy for increasing milk production in Vidarbha and Marathwada. National Dairy Development Board will set up a milk production company to procure 0.35 mio liters of milk in the first phase. Mother Dairy will get 19.49 acre land of the existing government milk scheme on lease basis for a 30 year period for setting up a plant with daily capacity of 0.5 mio liter. Mother Dairy will invest Rs. 1.50 bio for this project.
- Mother Dairy has entered the North Eastern region with the launch of its ice creams in Guwahati and plans to expand its reach to over 1,000 outlets besides 300 street vendors within next one year. The company is aiming to sell 1.5-2.0 mio liters of ice creams every year in Guwahati. The products will be sourced from its facilities in Kolkata and Delhi. The company has already set up two cold storage units for the purpose. The New Delhi-based firm is a wholly-owned subsidiary of National Dairy Development Board.
- Mother Dairy is planning to tap South Indian markets with its variety of curds and yogurts. Plans are afoot to enter cities such as Bangalore, Hyderabad and Chennai by May 2015. The company's offerings - Misti Doi and Dahi — are available in the West, North and East at present. The company will leverage its existing milk processing facility at Tirupathi to include a line of "freshly fermented products". These include curd-based offerings like yogurt, dahi, butter-milk and lassi. The new facility at Tirupathi is expected to come up at an investment of Rs. 250-300 mio, by May 2014.
- Mother Dairy's fresh dairy products are expected to account for nearly Rs. 8 bio out of Mother Dairy's Rs. 60-bio turnover in FY13. Nearly 60 per cent of its annual product requirements are produced from its own resources, while the remaining 40 per cent is outsourced from 15 vendors. The company is eyeing new launches in product segments that have a longer shelf-life. These include milk powders, dairy whiteners, tetra packs and dairy beverages. Plans are also afoot to set up another facility at Etawah in Uttar Pradesh, which will go on stream by September 2015.
- Maharashtra Government has invited Amul dairy to set up its operations in Vidarbha and Marathwada region of the State. It wants to enhance the milk collection in these regions from 0.9 to 4.0 mio liters a day. Both the regions are drought-prone and farmers are perpetually under debt due to the agro-climatic conditions. Amul has already invested Rs. 1.80 bio for the Virar dairy with milk procurement from local villages. The plant has 50,000 liters per hour integrated milk reception, processing and on-line pasteurization, standardization and homogenization facility, which is first of its kind in India. Besides, the new plant has ice cream making facility with a capacity of 0.2 mio liters per day. It has dedicated facility for fermented products, first of its kind in India, to produce and pack 0.15 mio liters butter milk and 50,000 liters curd among fermented products.
- The Baroda Dairy has launched an online service portal to bring transparency in governance and to connect the cooperative with village-level member societies to improve various services. The 'Dairy Service Delivery System' covering its various departments on the dairy premises located in Makarpura on the outskirts of the city. It would act as a link between the 1,400 village-level milk cooperative societies (that are members of the dairy) and the customers. The registered customers can send SMS to the dairy's head office to avail various services, like veterinary service and procurement of cattle feed, among others.
- Parag Milk Foods and ice cream maker Vadilal have launched flavoured milk under 'Topp Up' and 'Power Sip' brands, respectively.

(Dairy continued on next page)

Dairy (Continued)

- Dabur will soon enter the packaged milkshake market by extending its juice brand Real into the Rs. 5 bio flavoured milk category. It will be Dabur's second dairy product after yoghurt, launched earlier in 2013. The company has test launched single variant, Mango Shake in select markets of Delhi and Punjab and plans to roll out in other parts of the country soon. It will be offered to consumers in two packings, 200 ml for Rs. 25 and 1 liter for Rs. 105. A report by IMARC Group, expects the segment to grow at a CAGR of around 21 per cent during 2012-2016.
- Diversified firm Dharampal Satyapal Group is eyeing over seven-fold rise in revenue from its dairy vertical to Rs. 3 bio in the next three years i.e. by 2016 on the back of product portfolio expansion. The Noida-based company, known for its consumer goods brands like 'Catch' and 'Pass Pass', is also looking to invest Rs. 500 mio on brand building and capacity expansion of the dairy business in the current year. The company's sales from the dairy vertical last year were at Rs. 400 mio and it is targeting revenue of Rs. 1 bio in the current financial year.
- Hatsun Agro Products has acquired Jyothi Dairy for up to Rs. 650 mio as part of its plans to expand in Andhra Pradesh. Jyothi Milk has a turnover of Rs. 1 bio and production facilities in Hyderabad and Chittoor. It also has milk collection centers at 10 different locations in Andhra Pradesh. Jyothi has a capacity of 0.13 mio liter and this will be scaled up to 0.2 mio liter. Hatsun's total capacity will reach 3.34 mio liters after the Jyothi acquisition and a new 0.2 mio liter capacity in Tirunelveli, which is to be commissioned shortly.
- The National Bank for Agriculture and Rural Development has issued a paper, suggesting 615 projects for dairy infrastructure costing Rs. 1.04 bio to be developed in Punjab. It is the second highest milk producing state in India at 9.4 mio tons per annum (25.8 mio liters a day). Milk production in the state is about nine per cent of the country's total of 108.5 mio tons. However, the installed capacity of milk processing in the state is about 8.1 mio liters only 31 per cent of production. Capacity utilization of the milk plants is 75-80 per cent. Average milk production per lactation per animal is relatively low, at 1,300 liters. Efforts are being made in the state to enhance this to about 3,000 liters per lactation. To increase milk production among cows, semen and embryos of high genetic potential is being procured from different countries.
- Tirumala Milk Products is in talks to divest 70 per cent stake to the French company, Lactalis Group for USD 300 mio. The deal would value the dairy company at over Rs. 18.95 bio. The Carlyle Group which owns 20 per cent stake would sell its holding while the four promoters would divest another 50 per cent, resulting in Lactalis owning 70 per cent. Tirumala has seven processing and packaging units with a processing capacity of 1.5 mio liters per day. The company reported sales of Rs. 15 bio and a net profit of Rs. 1.26 mio for the fiscal ended March 2013.
- Prabhat Dairy received an investment of Rs. 1.40 bio from India Agribusiness Fund, a PE fund sponsored by Rabobank Group and French development finance institution Proparco.
- Rajkot Dairy has increased milk procurement price by Rs. 10 to Rs. 515 per kg fat. Per day milk supply in Rajkot dairy has declined from 450,000 liters to 300,000 liters. This kind of situation will continue for next couple of months.
- Yum Creamy and Yum Chuski, the two variations of Fundooz, the dairy snack for children from the house of Danone, are set to make their way across rural India. The company is unwilling to market its fortified milk Fundooz in urban India. Yum Creamy, a creamy and nutritional fresh dairy treat is priced at Rs. 10 for 80 grams. Yum Chuski is priced at Rs. 5 for 70 grams. Yum Creamy is available in cups and has two flavours, strawberry and vanilla; Yum Chuski is available in a 'squeeze and munch' pack and comes in chocolate and Kulfi flavours.

Poultry & Meat

- Indians prefer chicken to mutton and beef. According to co-founder of restaurant having 6 chains in Mumbai chicken dishes outsell their mutton counterparts by four times. At each of the six restaurants, use of chicken in a day is about 50-60 kg whereas mutton is about just 2 kg. Besides mutton being more expensive, many people are not comfortable eating mutton outside their homes. They fear they are served beef. It is not hard to come by people who don't eat any meat besides chicken. Chicken is considered a much healthier source of animal protein than mutton, beef and pork, the last two of which are avoided by Hindus, and Muslims, respectively, for religious reasons.
- Production of poultry meat, of which chicken accounts for 90 per cent in India, is rising at a faster clip than other meats like mutton, beef and pork. According to the Ministry of Statistics and Programme Implementation, between 2007-08 and 2010-11 poultry meat production grew at a compound annual growth rate of 7.7 per cent compared with 4.9 per cent for mutton and 2.8 per cent for pork. Beef (including buffalo meat) production grew at 8.8 per cent, primarily driven by exports.
- The value of poultry meat produced in 2010-11 was nearly Rs. 303 bio or under USD5 bio in current terms, as per official data, and industry experts say the figure has risen to nearly Rs. 400 bio, or USD 6.5 bio, now. The rise in demand is reflected in the growth of quick service restaurants (QSR). Crisil expects the QSR market to double in size by 2015 from Rs. 34 bio in 2012-13.
- KFC came to India in the mid-1990s but was re-launched in 2004, has 300 outlets. It has been growing at 40 per cent annually and plan to add 80-100 outlets every year.
- Farmers in India have moved from rearing country birds in the past to rearing hybrids which ensure faster growth of chicks, higher eggs per bird, increased hatchability, low mortality rates, excellent feed conversion and consequently sustainable profits for the poultry farmers.
- Poultry wholesale price index has grown at 12 per cent year-on-year over 2008-2013 against 21 per cent for the overall meat products basket.
- The Indian poultry industry is heading in the same direction as in the US and China - where a few companies control most of the market, and small poultry farmers end up as contract farmers with these companies.

Aquaculture

- Indian seafood sector appears to be well on course to achieve USD 4.3 billion worth exports, spurred by high demand for cultured shrimps from the US and South East Asia. Recent US ruling not to impose countervailing duty on Indian shrimps has provided further impetus to the seafood exports. Prices of shrimps particularly vannamei have jumped by 10 to 15 per cent. It had reached around 0.25 mio tons last year and the farms are expecting the production to touch 0.3 mio tons.

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Our primary business is Strategic Business Research. During the past one and a half decades, we have done significant work in the field of meat and dairy markets of India and other Asian countries. We also work in other fields.

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