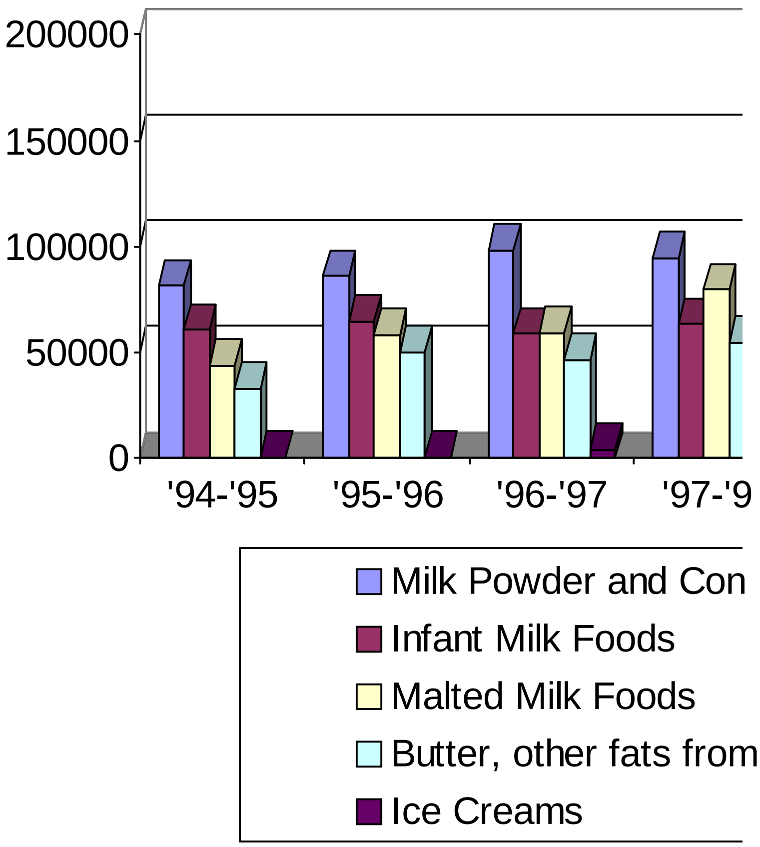
Annexure 1

Trends in Production (Milk Products)



Annexure 2

Livestock Population : India Vs World

	World	India	%
	(No. in million)		
Cattle	1318	209	15.8
Buffalo	162	91	56.1
Sheep	1064	56	5.26
Goat	699	120	17.1

(Source: FAO Production year book'98)

Annexure 3

Milk Production in India

Year	Production (Million Tonnes)
1980-81	31.6
1985-86	44.0
1990-91	53.9
1995-96	66.3
1997-98	70.5
1998-99	73.5

(Source Annual Report of Deptt. of Animal Husbandry and Dairying for 1998-99)

Annexure 4

Growth in Market size of Cheese in India

Year	Rs. Bn
1990-91	0.50
1991-92	0.60
1992-93	0.69
1993-94	0.80
1994-95	0.90
1995-96	1.05
1996-97	1.35
1997-98	1.65
1998-99	2.10
1999-0	2.50
2000-01	3.00
2001-02	3.45

Annexure 5 (a)

Ice Cream : Market Structure & Market Segmentation

Ice Cream :	**Market Size**
Year	Rs. bn
1990-91	3.44
1991-92	3.67
1992-93	3.98
1993-94	4.28
1994-95	4.66
1995-96	5.00
1996-97	5.70
1997-98	6.60
1998-99	7.55
1999-00	8.70
2000-01	10.00
2001-02	11.50

Annexure 5 (b)

Ice Cream : Market Structure & Market Segmentation

Segment	**Share (%)**
North	30
East	10
West	45
South	15
Branded	20
Unbranded	80

Annexure 6 (a)

Chocolates : Market Size

Year	M T
1990-91	10.50
1991-92	11.30
1992-93	12.50
1993-94	11.00
1994-95	13.20
1995-96	16.00
1996-97	19.00
1997-98	22.50
1998-99	27.00
1999-00	31.00
2000-01	35.70
2001-02	40.70

Annexure 6 (b)

Chocolate : Market Structure & Market Segmentation

Segment	Share (%)
2 to 4 years old	25
5 to 24 years old	46
25 to 54 years old	22
Over 55 years old	7
North	35
East	12
West	33
South	20

Annexure 7 (a)

Dairy Whiteners/Creamers : Market Size

Year	Rs. bn
1990-91	1.38
1991-92	1.44
1992-93	1.50
1993-94	1.56
1994-95	1.64
1995-96	1.70
1996-97	1.85
1997-98	2.05
1998-99	2.25
1999-00	2.50
2000-01	2.75
2001-02	3.00

Annexure 7 (b)

Dairy Whiteners : Market Structure & Market Segmentation

Segment	Share (%)
Railways	10
Hotels & Restaurants	14
Airlines	1
Hospitals & nursing Homes	2
Corporate Offices	5
Domestic & Others	68

Annexure 8 (a)

Baby Foods : Market Size

Year	Rs. bn
1990-91	155
1991-92	160
1992-93	165
1993-94	185
1994-95	195
1995-96	212
1996-97	229
1997-98	247
1998-99	266
1999-00	285
2000-01	302
2001-02	320

Annexure 8 (b)

Baby Foods : Market Structure & Market Segmentation

Segment	Share (%)
North	31
East	20
West	25
South	24

Annexure 9 (a)

Biscuits : Market Size

Year	Rs. bn
1990-91	650
1991-92	690
1992-93	735
1993-94	785
1994-95	835
1995-96	850
1996-97	896
1997-98	945
1998-99	996
1999-00	1050
2000-01	1110
2001-02	1177

Annexure 9 (b)

Biscuits : Market Structure & Market Segmentation

Segment	Share (%)
Organised	50
Informal	50
North	36
East	19
West	23
South	22

Annexure 10 (a)

Confectionery : Market Size

Year	Rs. bn
1990-91	155
1991-92	170
1992-93	185
1993-94	210
1994-95	225
1995-96	248
1996-97	272
1997-98	300
1998-99	330
1999-00	360
2000-01	392
2001-02	427

Annexure 10 (b)

Confectionery : Market Structure & Market Segmentation

Segment	Share (%)
Organised	35
Informal	65
North	28
East	17
West	32
South	23
By age groups	
2 to 4 years	75
5 to 24 years	15
25 to 64 years	7
Over 64 years	3

Annexure 11

Export of Dairy Products from India

Item	Year									
	1994-95		1995-96		1996-97		1997-98		1998-99	
	Qty.	Val.	Qty.	Val.	Qty.	Val.	Qty.	Val.	Qty.	Val.
Dairy Products	**8957.06**	**4011.72**	**4712.08**	**3256.96**	**2018.49**	**1536.53**	**2378.24**	**1338.71**	**2325.97**	**1361.26**

Quantity in M.Ts Value in Rs. in Lakhs

Source DGCIS

Annexure 12

Production of Meat and Meat Products

(in thousand tonnes)

S.No	1994	1995	1996	1997	1998
1. Mutton and Goat Meat	637	647	669	670	675
2. Pork Meat	366	420	420	420	420
3. Poultry Meat	422	578	480	580	600
4. Cattle Meat (Beef)	1290	1292	1202	1292	1295
5. Buffalo Meat	1200	1204	1204	1205	1210

Annexure 13

Comparison of livestock population : World & India

	World (No. in million)	India(No.in million)	%
Cattle	1318	209	15.8
Buffalo	162	91	56.1
Sheep	1064	56	5.26
Goat	699	120	17.1
Pigs	953	16	1.67
Poultry	13478	343	2.54

(Source FAO Production year book'98)

Annexure 14

Meat Products : India vs World

	World (Million MT)	India (Million MT)
Beef & Veal	57.69	1.37
Buffaloe Meat	2.95	1.40
Mutton & Lamb	7.52	0.22
Goat Meat	3.67	0.45
Pig Meat	84.18	0.46
Poultry Meat	60.24	0.52
Total	216.25	4.42

Annexure 15

Export of egg products

	Year					
	1996-97		1997-98		1998-99	
	Qty.	Val.	Qty.	Val.	Qty.	Val.
Egg powder	673.86	975.50	609.22	889.25	214.36	289.29
Frozen eggs	462.00	491.12	1660.00	1320.97	4457.00	999.03

Quantity in MT

Value in Rs. Lakhs

Ref. DGCIS

Annexure 16 (a)

Projected demand for eggs and meat in the country (in thousand tonnes)

Year	2000		2015		2030	
	LIG	HIG	LIG	HIG	LIG	HIG
Meat	5335	5918	8196	10396	101181	13534
Eggs	1880	2086	2889	3664	3566	4770

Source: *www. indiainfoline.com*

Note: LIG implies Low-income growth of 3.5% per capita GDP

Annexure 16 (b)

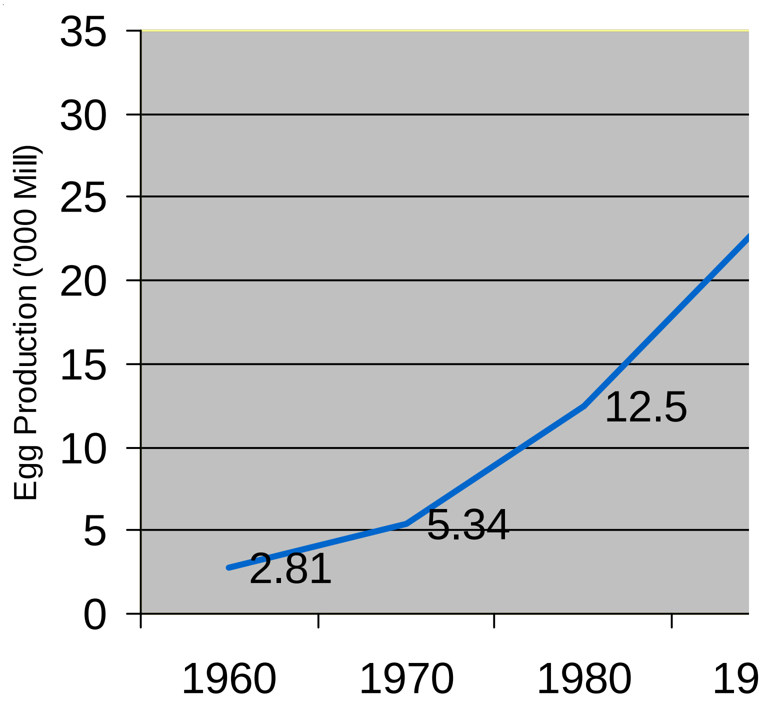
The availability of Indian eggs with the rise in population

Year	Indian Population	Annual per capita availability	
	(in Millions)	Eggs(no's)	Meat(gms)
1961	435	7	188
1971	547	10	220
1981	683	19	270
1986	741*	23	286
1991	843	28	525
1995	921*	31	640
1998	975*	36	850

*Source: The Hindu Survey of Indian Agriculture, 1999. * Rough estimates.*

Annexure 16 (c)

Egg Production in India



Source: The Hindu Survey of Indian Agriculture, 2001.

Annexure 17

Fishery Production

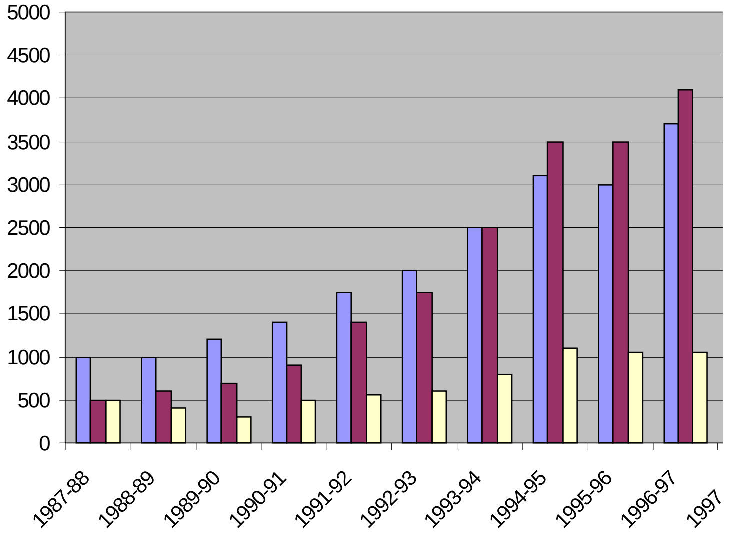
(Qty. in MT)

	1995	1996	1997	1998	1999
China	28418	31897	35838	38025	39300
Peru	8943	9522	7877	4346	8437
Japan	6787	6765	6723	6026	5935
Chile	7591	6909	6084	3558	5325
India	4906	5258	5379	5244	5244
U S A	5638	5395	5422	5154	5154
Others					
World total	116129	120294	122448	117399	124448

Other (Major countries : Indonesia, Russia, Thailand, Norway etc)

Annexure 18

Seafood Exports



Annexure 19

Key Statistics

Milk Powder and Condensed Milk

	Units	1994-95	1995- 96	1996-97	1997-98	1998-99	1999-2000
Production	Tonnes	81586	85809	98379	94431	132928	165880
Export Quality	Tonnes	7924	32 27	728	1597	796	4032
Export Value	Rs Crore	30.9	17.7	4.7	9.5	5.1	26.2
Import Quality	Tonnes	944	4681	293	740	1635	16982
Import Value	Rs Crore	5.7	33.8	2.1	5	9.2	99.2
Sales Value	Rs Crore	350	450	650	650	900	1000
Market Size (Value)	Rs Crore	355.7	483.8	652.1	655	909.2	1099.2
Domestic Consumption (Value)	Rs Crore	324.8	466.1	647.4	645.4	904.1	1073

Annexure 20

Key Statistics

Infant Milk Foods

	Units	1994-95	1995- 96	1996-97	1997-98	1998-99	1999-2000
Production	Tonnes	60572	64808	58718	63496	59648	70330
Export Quantity	Tonnes	3	N A	34		50	26
Export Value	Rs Cr	N A	N A	05		04	0.2
Import Quantity	Tonnes	N A	8	111	11	226	200
Import Value	Rs Cr		0.2	0.4	0.2	3.1	2.8
Sales Value	Rs Cr	461.5	590	563.6	615.6	663	769.1
Market Size (Value)	Rs Cr	461.5	590.2	564.1	615.8	666.1	772
Domestic Consumption (Value)	Rs Cr	461.4	590.2	563.6	615.8	665.6	771.8

Annexure 21

Key Statistics

Malted Milk Foods

	Units	1994-95	1995- 96	1996-97	1997-98	1998-99	1999-2000
Production	Tonnes	43607	58172	59089	79679	94573	106414
Export Quantity	Tonnes	3261	3035	3759	3819	3753	2470
Export Value	Rs Cr	17.3	19.6	24.5	25.6	27.1	20.2
Import Quantity	Tonnes	13	N A	N A	N A	N A	7
Import Value	Rs Cr	N A	N A	N A	N A	N A	1
Sales Value	Rs Cr	368.3	522	612	908	980	1050
Market Size (Value)	Rs Cr	368.4	522	612	908	980	1050.1
Domestic Consumption (Value)	Rs Cr	351.1	502.4	587.5	882.4	952.9	1029.9

Annexure 22

Key Statistics

Butter, Ghee and other Fats from Milk

	Units	1994-95	1995- 96	1996-97	1997-98	1998-99	1999-2000
Production	Tonnes	33044	50046	46315	54506	64367	64468
Export Quantity	Tonnes	632	563	545	298	909	1700
Export Value	Rs Cr	6.6	6.6	5.9	3.3	10.5	18.3
Import Quantity	Tonnes	4389	4010	337	4352	4311	10255
Import Value	Rs Cr	24.6	24.9	1.9	23.9	28.6	69.7
Sales Value	Rs Cr	277.1	428.5	415.5	561.2	695.2	705.4
Market Size (Value)	Rs Cr	301.8	453.4	417.4	585.1	723.8	775.1
Domestic Consumption (Value)	Rs Cr	295.2	446.8	411.5	581.8	713.3	756.7

Annexure 23

Key Statistics

Ice Creams

	Units	1994-95	1995- 96	1996-97	1997-98	1998-99	1999-2000
Export Quantity	Tonnes	1	16	14	21	32	24
Export Value	Rs Cr	N A	1	1	1	3	0.2
Import Quantity	Tonnes	N A	N A	N A	N A	27	291
Import Value	Rs Cr	N A	N A	N A	N A	1	2.4
Sales Value	Rs Cr	160	170	210	250	280	310
Market Size (Value)	Rs Cr	160	170	210	250	280.1	312.4
Domestic Consumption (Value)	Rs Cr	160	169.9	209.9	249.9	279.8	312.3

Annexure 24

Key Statistics

Poultry

	Units	1994-95	1995- 96	1996-97	1997-98	1998-99	1999-2000
Export Quantity	Tonnes	2.8	9.2	8.8	1.5	3.2	4.3
Export Value	Rs Cr	2.2	8.1	6.4	1.3	3.8	3.9
Sales Value	Rs Cr	161.5	174.9	175	247.6	357	365.8
Market Size (Value)	Rs Cr	161.5	174.9	175	247.6	357	365.8
Domestic Consumption (Value)	Rs Cr	159.3	166.8	168.6	246.3	353.2	361.9

Annexure 25

Key Statistics

Marine Products

	Units	1994-95	1995- 96	1996-97	1997-98	1998-99	1999-2000
Production	Tonnes	4786000	4950000	5350000	5360000		
Export Quantity	Tonnes	320907	327368	394548	398201	311257	390738
Export Value	Rs Cr	3536.6	3381.1	4007.6	4486.8	4368.6	5124.6
Sales Value	Rs Cr	12553	14052	16708	22907	25878	26000
Market Size (Value)	Rs Cr	12553	14052	16708	22907	25878	26000
Domestic Consumption (Value)	Rs Cr	9016.4	10670.9	12700.4	18420.2	21509.4	20875.4

Annexure 26

Shrimp production by farming

State	Potential area (ha)	Area under culture (ha)	Developed area (ha)	1998-99 Production (t/yr)
West Bengal	405 000	45 525	42 067	18 326
Orissa	31 600	11 332	8 000	6 000
Andhra Pradesh	150 000	60 249	71 000	44 856
Tamil Nadu	56 000	670	1 087	1 820
Pondicherry	800	22	22	27
Kerala	65 000	14 705	14 705	7 660
Karnataka	8 000	3 540	3 564	2 690
Goa	18 500	650	650	590
Maharashtra	80 000	970	426	409
Gujarat	376 000	997	316	256
TOTAL	**1 190 900**	**135 660**	**141 837**	**82 634**

Source : MPEDA Cochin

Annexure 27

Related Organisations for Fisheries in India

Institution and contact details Mandate	Mandate
Indian Council of Agricultural Research (ICAR)	
Central Marine Fisheries Research Institute (CMFRI) Kochi, Kerala Tel: 00 91 (0) 484 394 798 Fax: 00 91 (0) 484 394 909	Capture fisheries database; assessment and management of marine fishery resources; fishery forecasting; monitoring of fishery environmental characteristics; mariculture technology for finfish and shellfish technology; transfer of technology.
Central Inland Capture Fishery Research Institute (CICFRI) Barrack pore, West Bengal Tel: 00 91 (0)33 - 560 0177 Fax: 00 91 (0)33 - 560 0388	Conservation and sustainable development of open-water ecosystems and study on population dynamics of exploited inland water bodies for developing fishery management systems for their optimum utilization, transfer of technology; and consultancy services.
Central Institute of Fisheries Technology (CIFT) Kochi, Kerala Tel: 00 91 (0)484 - 667 039 Fax: 00 91 (0)484 - 668 212	Development and standardization of harvest and post harvest technologies. Package of practices for extraction of biomedical, pharmaceutical and industrial products from aquatic organisms; transfer of technology and consultancy services; fish inspection and quality control; electronic, instrumentation; design of fishing boats and gear.

Central Institute of Fisheries Education (CIFE) Mumbai, Maharashtra Tel: 00 91 (0)22 - 636 3404 Fax: 00 91 (0)22 - 636 1573	Conduct education and research programmes leading to post graduate (MFSc and PhD) degrees in specialized disciplines of fisheries science and technology. Serve as a repository of information on human resources development in fisheries, including maintaining a database on available manpower resources.
National Bureau of Fish Genetic Resources (NBFGR) Lucknow, U.P. Tel: 00 91 (0)522 - 442 403 Fax: 00 91 (0)522 - 442 403	Management and conservation of the diversity of the vast and diverse genetic resources, and associated quarantine requirements.
Central Institute of Freshwater Aquaculture (CIFA) Bhubaneswar, Orissa Tel: 00 91 (0) 674 - 465 421 Fax: 00 91 (0)674 - 465 407	Basic and applied research on seed production and culture of commercially important finfish and shellfish in freshwater systems; transfer of technology; and consultancy services.
Central Institute of Brackish-water Aquaculture (CIBA) Chennai, Tamil Nadu Tel: 00 91 (0) 44 - 8218126 Fax: 00 91 (0)44 - 8218125	Seed production and Culture of finfish and shellfish, in brackish-water systems; transfer of technology; and consultancy services.
National Research Centre on Coldwater Fisheries (NRCCWF) Bhimtal, U.P. Tel: 00 91 (0)5942 - 47279 Fax: 00 91 (0)5942 - 47279	Assessment of cold-water fishery resources in the upland areas, and formulation of strategies for their sustainable exploitation.
Ministry of Agriculture	
Fishery Survey of India (FSI) Botswana Chambers Sir P.M. Road Mumbai – 400 001, Maharashtra Tel: 00 91 (0)22 - 261 7101/7144/7145 Fax: 00 91 (0)22 - 270 2770	Marine fisheries resources survey in the Indian EEZ. Charting of potential fishing grounds.

Integrated Fisheries Project Foreshore Road P.B. No. 1801 Kochi – 682 016, Kerala Tel: 00 91 (0)484 - 361317 Fax: 00 91 (0)484 - 373516	Development of marine fisheries harvest and post-harvest technologies; and product development with value addition. Marketing infrastructure support to the fishing industry
Central Institute of Fisheries Nautical and Engineering Training (CIFNET) Dewan's Road Kochi – 682 016 Kerala Tel: 00 91 (0)484 - 351107 Fax: 00 91 (0)484 - 370879	Create technical manpower for operation of ocean-going fishing vessels. Support shore-based infrastructure establishment for the effective operation of fishing vessels.
Central Institute of Coastal Engineering for Fishery (CICEF) 64, Palace Road Bangalore – 560 052 Karnataka Tel: 00 91 (0)80 - 226 7841 Fax: 00 91 (0)80 - 225 8945	To conduct engineering & economic investigations and prepare techno-economic feasibility reports for development of fishery harbours and brackishwater shrimp farms.
Aquaculture Authority Shastri Bhavan Annexe, 2nd Floor, 26, Haddows Road, Nungambakkam, Chennai-60006 Tamil Nadu Telephone/fax: yet to be established.	Aquaculture Authority has been set up to regulate shrimp farming activities in the coastal areas in an eco-friendly manner.

Annexure 28

Hazard Analysis & Critical Control Point

Seven Principles of HACCP

- Conduct a hazard analysis
- Identify critical control points
- Establish critical limits for each critical control point
- Establish critical control point monitoring requirements
- Establish corrective actions
- Establish record keeping procedures
- Establish procedures for verifying that HACCP system is working as intended

WHY HACCP ?

As a member of WTO, India is Signatory to the Sanitary and Phytosanitary (SPS) agreement and hence has to adopt for international trade, the standards, guidelines and recommendations issued by the Food Hygiene Committee of the Joint FAO/ WHO Codex Alimentarius Commission which advocates the adoption of HACCP. Industries in the countries exporting to WTO member nations would now have to adopt HACCP, from dates specified by each importing country. The Indian Standard on Food Hygiene - Hazard Analysis and Critical Control Point (HACCP) - System and Guidelines for Its Application, IS 15000:1998 is technically equivalent to the above mentioned Codex document. For food industry in India, adoption of HACCP is becoming imperative to reach global standards, demonstrate compliance to Regulations/Customer requirements besides providing safer food to our millions.

Highlights

- Mandatory for export from certain sectors of food industry to some countries
- Pro-active system for assuring safe production of foods

- Emphasis prevention rather than inspection
- Addresses all types of Hazards - Microbiological, Physical and Chemical
- Can be integrated into a more general quality assurance plan
- Can be implemented in tiny, small, medium and large scale enterprises

Benefits of HACCP

- Reduces contamination
- Reduces recall/product destruction
- Provides market protection
- provides preferred supplier status
- demonstrates conformance to international standards and regulations, and requirements of overseas markets
- Transforms commodities into branded products
- International acceptance

HACCP Certification

BIS offers two Certification schemes to the food industry.

- Food Safety Certification against IS 15000:1998
- HACCP based Quality System Certification provides for two Certification through one audit Certification of Quality System against IS/ISO 9000 and Certification of HACCP against IS 15000:1998

How to Obtain Licence ?

- Establish a documented quality system and/or HACCP implementation plan and ensure its effectiveness
- Submit application on prescribed peroforma along with the questionnaire and necessary fees
- Submit the quality manual and/or concerned documents, when asked for

- Arrange auditing by BIS Assessment Team
- Take corrective actions on non-conformities observed by assessment team and get them verified to obtain the Licence!!!
- The licence will enable the company to compete effectively in national and international markets
- BIS Quality System Certification Scheme is accredited by Road Voor Accreditatie (RvA)

Other Services Offered by BIS

- Awareness Programmes for food industry
- In-house training
  - a) Implementation of HACCP as per is 15000:1998, and
  - b) Operation of Quality System as per ISO 9000 and HACCP as per IS 15000:1998
- Custom-made training programmes for the industry
- Technical Information Services on Standards and Certification matters
- Pre-certification services

Annexure 29

National Egg Coordination Committee

Formed in 1982 to protect the poultry farmers' interests, NECC is performing it's role admirably to this very day. NECC was born in Pune in 1982 when a group of farmers came together to form an association. Membership fees to this day are Rs. 1 only and there are 25,000 members presently. In the days preceding the setting up of NECC, the scenario looked quite bleak. The middlemen controlled the trade and sucked away most of the margin in the business. This left the farmer with unremunerative returns in his business.

There were a host of problems in the 70s and the early '80s: *rises in the primary input costs such as medicines, feed, electricity, taxes etc. coupled with domination by the middlemen. In 1981*, a great crisis took place. The egg prices fell drastically and over 20,000 marginal poultry farmers lost their only source of livelihood. At that point of time, the prices were not even sufficient to recover the costs of production.

Determined to do something, a bunch of farmers, motivated by the late Mr. B V Rao (the father of the poultry industry in India) started a mass movement - they travelled through the length and breadth of the country holding over 300 meetings with traders and farmers. It was during this time that one concept grew very strong - "**My egg, my price, my life**". And, NECC was born on the 31 st of May, 1982. Today, the poultry industry has grown and contributes more than **Rs. 100,000 million** to India's GDP! NECC definitely has a great role to play in this.

Funding of the activities of NECC is very informal - members contribute voluntarily for gathering resources for it's functioning.

Often, farmers give 50 paise per chick to NECC. Between 1981 and 1989, NECC received Rs. 40 million from farmers exclusively through voluntary donations! The simple law of demand and supply determines prices in the poultry market. The important **egg markets** in India are Vijaywada, Hyderabad, Nellore, Ludhiana, Ambala, Ajmer, Kolkata and Delhi.

Activities of NECC

1 Price declaration

2 Market intervention through NAFED and Agro Corpex India Limited –

Egg consumption is seasonal. Religious festivities and summer times are times when the egg consumption falls. NECC arranges for the eggs to be lifted and sent to Agro Corpex to put in cold storages during such times.

3 Advertising, promotion, publicity and consumer education –

The ultimate objective of their promotions is to increase the consumption of eggs. This is achieved through various means: films, exhibitions, poultry melas, exhibitions, van publicity and distribution of boiled eggs. Eggs are included in the mid-day meal scheme in Tamil Nadu. They participate in the Pune International Marathon and provide boiled eggs to the runners. They conduct competitions like “healthy body competition” with the Rotary Club and provide literature to gynecologists. They have come out with brochures and leaflets that contain medical information about the benefits of eating eggs. They get these informations from journals, institutes and scientists. These measures are also to increase the awareness levels and educate the common people. Promotions are carried on at the district and taluka levels. The print and TV ads are meant for the urban masses. The print, TV and radio ads serve mainly as reminders.

4 **Extension activities** - Reviews and publications

5 Market research

6 **Market identification and development**:

Satna project: This was an effort to find out the effect of availability of eggs on the demand in an area. A depot was opened and eggs were brought in from Andhra Pradesh to tide over the unavailability of eggs in the area. After 6 months, the consistent supply was quietly removed and left to the local authorities. It was seen that the natural demand did not fall and traders started making arrangements to procure eggs from other areas.

***Egg cart scheme*:** Under this scheme, NECC designed and sold egg carts to unemployed young men. These people cooked and sold eggs as nutritious mini-meals. It was later found out that each cart was selling upto 300 eggs every day on average. The scheme has been very successful in Madhya Pradesh and is being extended elsewhere. The beauty of this scheme is that it opens up new channels of selling of eggs and makes eggs more accessible to the common man. Banks provide 90% of the funding and the rest is by the operator.

7. Preparation and submission of papers to the government

NECC is organised in this manner: there are 113 local committee, 24 zonal committees in all the important poultry markets and an executive committee at the apex level. The members are elected democratically every two years. It is through these structures that prices are declared and maintained.

To enforce the price declarations more effectively, NECC promoted **Agro Corpex India Limited**. This is managed and owned entirely by farmers. To encourage exports, NECC gives subsidies. Earlier, the amount was Rs. 25 per 360 eggs, which has since come down to Rs. 10 due to paucity of funds. **Today, approximately 1-2% of the egg production in the country is exported.**

Today, 75% of eggs and meat are consumed in the urban areas. NECC understands that it is the rural markets that are going to be the key to the future of the egg industry in India. Recently, NECC has been instrumental in setting up egg powder plants in Hyderabad for the production of white & yellow egg powders. These are basically for the export markets.

The target that NECC has set for the year 2015 is to increase the per capita consumption of eggs from **36/year now to 180/year**, which is the level recommended by the **National Institute Of Nutrition, ICMR**. They also want to increase the **meat consumption to 10.8 kg per year**.

NECC is a pioneer in it's own right. The poultry industry in India is what it is because of it's concerted efforts. However, all is not well for the poultry industry. Not all states have been contributing to the effort. The four southern states and Maharashtra together contribute a mammoth 55.9% to the production of eggs. There are many states where the enthusiasm seems missing. There are shortcomings in NECC's price stabilization efforts. The egg powder plants are not working to their full capacity.

However, it is undeniable that NECC is a force to reckon with and that it is the voice and the soul of the Indian egg industry.

Annexure 30

Potential for Trade i

(C

Country	Dried / Preserved Veg.	Pickles / Ethnic foods	Processed F and Vegetal
European Union			
Belgium	✓	✓	
France	✓		
Germany	✓		
Netherlands	✓	✓	✓
Poland			
Spain	✓	✓	
Switzerland	✓		
Africa			
Congo			
Ethiopia	✓		
Kenya	✓		
South Africa	✓		✓
Tanzania	✓		
Uganda			✓
Middle East			
Bahrain			
Oman			
Saudi Arabia	✓		✓
UAE			✓

Yamen	✓		
Asia			
Bangladesh			
China			
Philippines			✓
SriLanka	✓		✓
Singapore	✓		✓
Thailand			
LAC			
Argentina	✓		
Brazil	✓		
Mexico			
Russia			✓
Canada	✓	✓	
Mauritius			

*CII Study

** Other than Dried and Preserved Fruit and Vegetables

*** Includes Buffalo Meat only

Annexure 31

India's Exports : Agro-

Values in Rs. lakhs

Country	Dried / Preserved Veg.	Pickles / Ethnic foods	Processed Fru and Vegetabl
Argentina	210.82	10.53	--
Austria	61.75	13.88	6.44
Bahrain	384.23	58.60	13.71
Bangladesh	**8395.82**	6.18	148.8
Belgium	**1131.07**	**1177.3**	19.31
Brazil	143.76	7.61	--
Canada	**1843.43**	726.62	224.29
Chile	15.4	18.9	--
China	62.3	10.85	4.1
Colombia	--	--	5.4
Congo	--	--	--
Denmark	72.4	117.65	--
Finland	116.25	10	94.6
France	**1212**	831.3	53.93
Germany	**2304.3**	855.6	670.5
Mauritius	122.3	1.83	89.3
Mexico	--	--	--
Netherlands	**1322.82**	**111.9**	**1528.6**
Oman	61.65	112.9	96.63
Pakistan	343.79	1.4	17.8

Poland	293.9	36.7	85.5
Philippines	75.5	46.4	**1348.3**
Russia	314	25.9	**379.53**
Saudi Arabia	**1432.5**	589.5	**1142**
Singapore	754.46	104.57	431.4
South Africa	343	52.63	87.4
Spain	960	661	--
Sri Lanka	12310.5	27.3	598
Switzerland	1336.8	44.35	155.32
Tanzania	4.7	6.13	0.13
Thailand	34.3	128.8	54.3
UAE	--	--	2192.5
Yamen	780	--	83.5

* Only prominent product categories included
** Other than Dried and Preserved Fruit and Vegetables
*** Includes Buffalo Meat only