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Report Highlights:

Beef (primarily carabeef, i.e. meat derived from Asian domestic water buffalo) production in 2026 is expected to be driven by domestic needs while export demand is likely to take a back seat. 2026 beef production is forecast at 4.7 million metric tons (MMT), up one percent from 4.6 MMT in 2025. 2026 beef exports are forecast to reach 1.55 MMT, up by one percent over 2025. Expectations of steady exports to Malaysia, Egypt, the United Arab Emirates, and Saudi Arabia, as well as sluggish exports to Indonesia, Vietnam, and Iraq, are behind the weak export growth forecast. Domestic consumption is forecast at 3.2 MMT, up two percent over 2025. A growing population, stable and low inflation, rising household income, and large supply of slaughter-ready cattle are driving production and consumption growth. New Delhi (Post) forecasts India's cattle beginning stock for calendar year (CY) 2026 at 307.5 million head.

EXECUTIVE SUMMARY

New Delhi (Post) forecasts India beef (primarily carabeef, i.e., meat derived from Asian domestic water buffalo) production in calendar year (CY) 2026 to continue to rise steadily in response to various demand and supply side factors. India beef production in 2026 is expected to be driven by domestic consumption, while carabeef export demand is anticipated to be sluggish.

Post forecasts beef production in 2026 to reach 4.7 million metric ton (MMT) carcass weight equivalent (CWE), a one percent year-on-year growth over 4.6 MMT in 2025. Domestic consumption of beef in 2026 is forecast at 3.2 MMT, up nearly two percent over 3.1 MMT in 2025. The demand-side factors such as a growing population, rising household income, low and stable inflation are likely to increase domestic consumption. Additionally, the supply-side factors such as a large inventory of bovine animals, along with the continued supply of animals for slaughter and an increase in slaughter for meat, are expected to drive production up. Correspondingly, bovine slaughter numbers are forecast to increase to 41.8 million head in 2026, up from 41.4 million head in 2025. India's cattle beginning stock, including Asian domestic water buffalo, continues to be large, forecasted at 307.5 million head in 2026, virtually unchanged from 2025. Heightened policy attention by the Government of India towards improving the livestock and dairy sector is sustaining its large cattle stock.

2026 India beef exports are forecast at 1.55 MMT, up one percent over 2025. While the traditional export markets including Malaysia, Egypt, United Arab Emirates, and Saudi Arabia are likely to remain stable in 2026, expectations of lower exports to Indonesia, Vietnam, and Iraq are likely to result in a weak export growth forecast.

ANIMAL NUMBERS, LOSS AND RESIDUAL AND SLAUGHTER

COMMODITIES

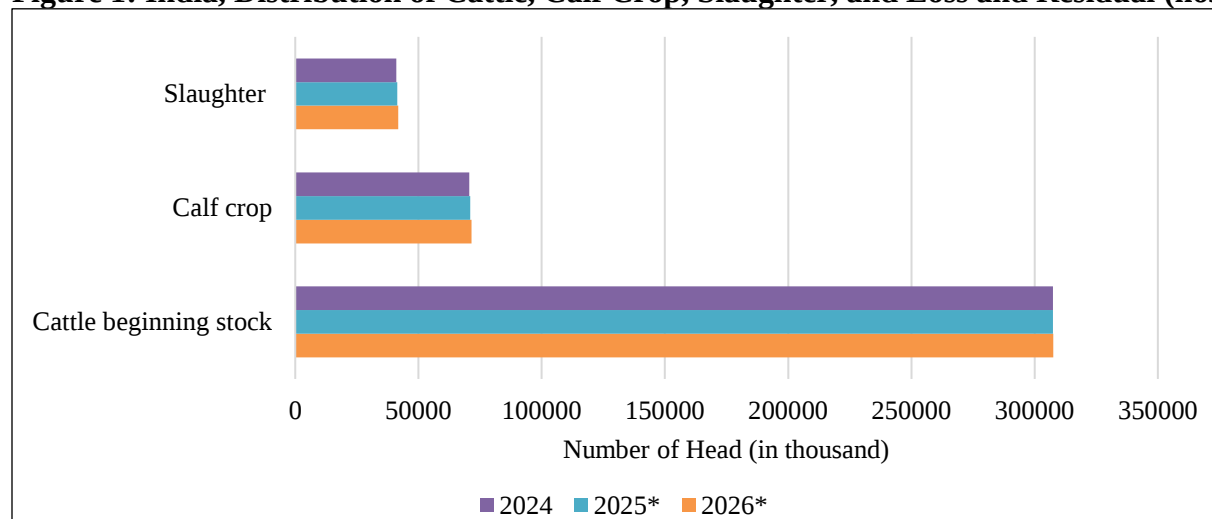
CATTLE

Table 1: India: Cattle – Production, Supply and Distribution (PSD)

Animal Numbers, Cattle Market Year Begins India	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stks (1000 HEAD)	307420	307420	307490	307490	0	307500
Dairy Cows Beg. Stocks (1000 HEAD)	130690	130690	132500	132500	0	133400
Beef Cows Beg. Stocks (1000 HEAD)	0	0	0	0	0	0
Production (Calf Crop) (1000 HEAD)	70580	70580	71030	71030	0	71500
Total Imports (1000 HEAD)	0	0	0	0	0	0
Total Supply (1000 HEAD)	378000	378000	378520	378520	0	379000
Total Exports (1000 HEAD)	0	0	0	0	0	0
Cow Slaughter (1000 HEAD)	0	0	0	0	0	0
Calf Slaughter (1000 HEAD)	0	0	0	0	0	0
Other Slaughter (1000 HEAD)	40960	40960	41410	41410	0	41830
Total Slaughter (1000 HEAD)	40960	40960	41410	41410	0	41830
Loss and Residual (1000 HEAD)	29550	29550	29580	29610	0	29660
Ending Inventories (1000 HEAD)	307490	307490	307530	307500	0	307510
Total Distribution (1000 HEAD)	378000	378000	378520	378520	0	379000

Note: Not Official USDA Data

Figure 1: India, Distribution of Cattle, Calf Crop, Slaughter, and Loss and Residual (nos.)

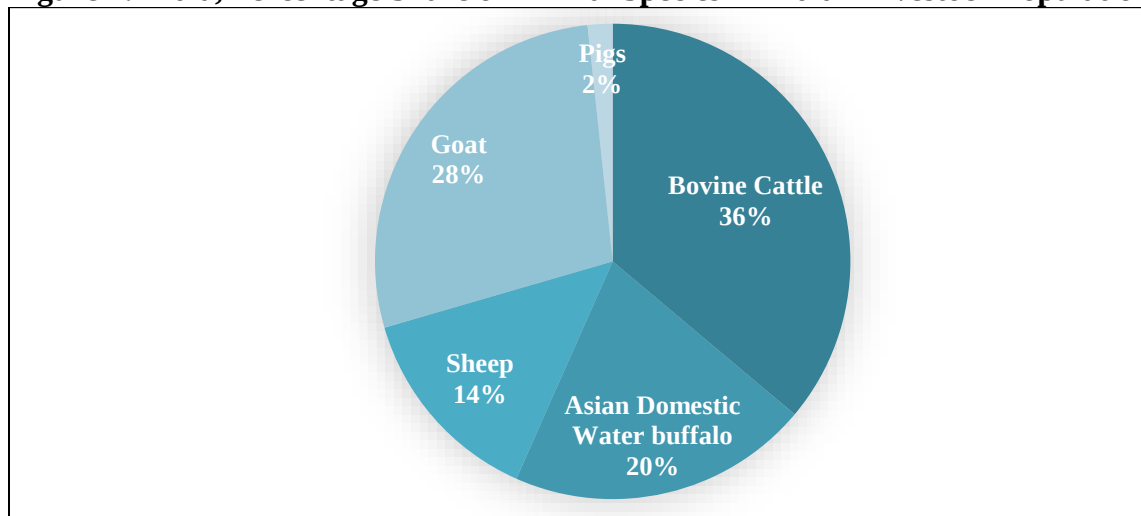


Source: PSD table. Note: cattle number includes both bovine cattle (*Bos taurus* and *Bos indicus*) and Asian domestic water buffalo (*Bubalus bubalis*). Note: *Forecast.

CATTLE BEGINNING STOCK

New Delhi (Post) forecasts the beginning stock of dairy cows, including both bovine cattle (*Bos taurus* and *Bos indicus*) and Asian domestic water buffalo (*Bubalus bubalis*), at 307.5 million for calendar year (CY) 2026, virtually unchanged over 2025.¹ Post forecasts a reduction in the population of unproductive and stray cattle by 2026, and that of indigenous cattle to remain somewhat similar to that in 2025. The population of crossbred cattle and Asian domestic water buffaloes in 2026 is likely to see a miniscule growth over 2025, continuing the trend of years prior. The Indian government's focus and initiatives towards improving milk yields is prompting this slow growth rate.

Figure 2: India, Percentage Share of Animal Species in Indian Livestock Population



Source: FAS New Delhi office research. Government of India, 20th Livestock Census.

CALF CROP

Post forecasts the India calf crop in 2026 at 71.5 million head, up from 71.0 million head in 2025.² The Government of India's growing policy attention and budget allocations towards the crossbreeding, artificial insemination, and preservation of pure and indigenous cattle, and Asian domestic water buffaloes is expected to maintain the steady growth of the calf crop.

SLAUGHTER

Post forecasts the slaughter of bovine cattle and Asian domestic water buffalo to reach 41.8 million head in 2026, up from 41.4 million head in 2025. This is attributable to the continued supply of slaughter-ready animals, an increase in demand for domestic consumption and steady export demand from key markets.

¹ Dairy cows include dairy breed bred heifers and the females that have calved on January 1.

² Calf crop includes number of calves produced during the calendar year 2025-26.

Dairy sector growth underpins beef (mostly carabeef, i.e., the meat derived from Asian domestic water buffalo) production in India. No bovine animals are reared specifically for meat. The dry and male Asian domestic water buffalo are routed to be slaughtered for meat. Bovine cattle slaughter for consumption continues to be prohibited in most parts of the country.³

LOSS AND RESIDUAL

Lumpy skin disease is endemic in India since 2019. In July 2025, over 10 Indian states are facing lumpy skin disease (LSD) outbreak. The LSD outbreak during 2022 and 2023 resulted in over 200 thousand animal fatalities. Industry expects losses to slow in 2026 as extensive vaccination programs implemented by the Government of India during 2022 and 2023 begin to take effect.

TRADE

Post forecasts exports of bovine animals in 2026 to be near zero, and the imports to be negligible, less than 100 head. Specific government agencies, departments and organizations that maintain grade A or B semen stations and have a network of AI technicians in the country are allowed to import bulls for research and development purposes only.

GOVERNMENT POLICY AND SUPPORT

Budget support: The livestock sector in India contributes over 30 percent to the gross value added (GVA) of the agriculture and allied sector in the country, and accounts for nearly 5 percent of the Indian economy's overall GVA. The Indian dairy and livestock sector are pinned as the engines of growth, especially for the rural economy. The Government of India is bullish about the contribution of the Indian dairy and livestock sector in the national economic growth and development. In its 2025-26 fiscal budget, the Government of India allocated INR 48.4 billion (USD\$565 million) for the Department of Animal Husbandry and Dairying, an increase of over seven percent compared to the previous year.

Production support: The Department of Animal Husbandry and Dairying (DAHD) has in place various development programs focused on enhancing animal productivity through breed improvement, feed and fodder availability, supply chain and other infrastructure development, animal health, milk procurement, processing capacity, quality control, market access, and providing better prices and subsidized credit to dairy farmers. Some of these programs include the Rashtriya Gokul Mission, National Livestock Mission National Plan on Dairy Development, Dairy Infrastructure Development Fund, Animal Husbandry Infrastructure Development Fund, and Supporting Dairy Cooperatives and Farmer Producer Organization (see, DAHD). These

³ The slaughter of bovine cattle is permitted only for local consumption in nine out of the 36 states and union territories in the country. There is no federal law prohibiting such slaughter. The states governments individually enforce laws on cow slaughter.

support schemes encourage bovine animal rearing and thus, continued supply of animals for slaughter (mostly carabeef).

Marketing support: The Agricultural and Processed Food Products Exports Development Authority (APEDA) is a statutory body established by the Government of India to provide export promotion assistance both infrastructure, product and quality development, market access and marketing, and financial to the Indian dairy and meat industries (see, [APEDA](#)).

Government publications: In October 2024, the DAHD, Ministry of Fisheries, Animal Husbandry & Dairying, and Government of India, initiated the data collection and enumeration for the quinquennial Livestock Census with a budget layout of nearly INR 2 billion (USD \$24 million).⁴ The livestock census collects breed and gender wise population data of domesticated and stray animals. The document lists animals that produce milk and those that do not, along with details about their ownership. The data is collected from almost every village in the country. The DAHD also publishes the Basic Animal Husbandry Statistics (see, the recent Basic Animal Husbandry Statistics, 2024) presenting annual data collected from 15 percent of all villages over three seasons – summer, rainy, and winter. It offers data primarily on production of milk, meat, eggs, wool, and infrastructure.

⁴ The 21st Livestock Census is expected to be published during the months of September-October 2025. The 20th Livestock Census was published in 2019 (see, <https://dahd.gov.in/sites/default/files/2024-10/LS4449.pdf>).

MEAT, BEEF AND VEAL

COMMODITIES

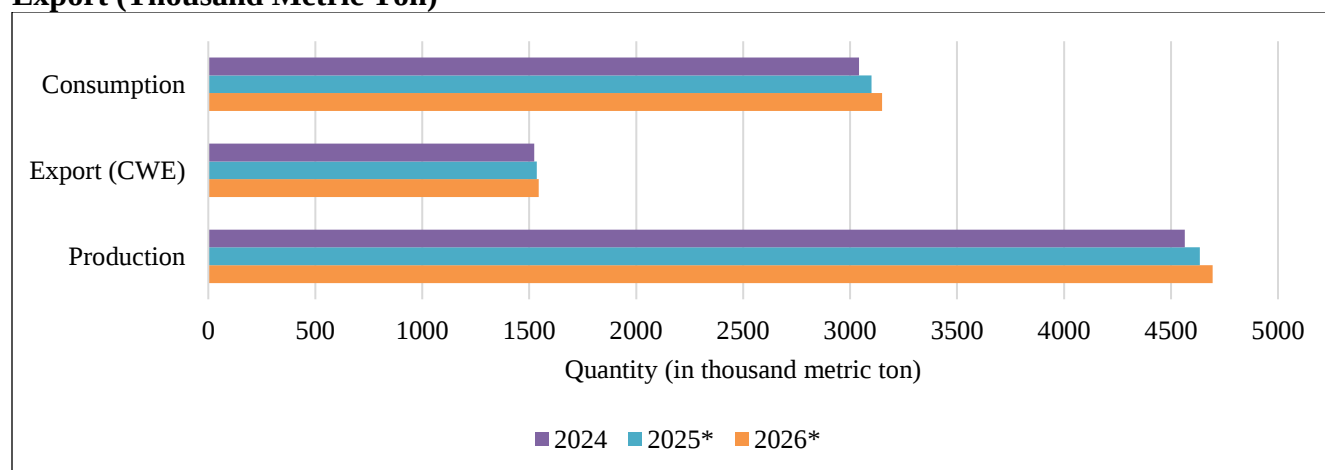
MEAT, BEEF and VEAL

Table 2. India: Meat, Beef and Veal – Production, Supply and Distribution (PSD)

Meat, Beef and Veal Market Year Begins India	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	40960	40960	41410	41410	0	41830
Beginning Stocks (1000 MT CWE)	0	0	0	0	0	0
Production (1000 MT CWE)	4565	4565	4635	4635	0	4695
Total Imports (1000 MT CWE)	0	0	0	0	0	0
Total Supply (1000 MT CWE)	4565	4565	4635	4635	0	4695
Total Exports (1000 MT CWE)	1524	1524	1560	1535	0	1545
Human Dom. Consumption (1000 MT CWE)	3041	3041	3075	3100	0	3150
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	3041	3041	3075	3100	0	3150
Ending Stocks (1000 MT CWE)	0	0	0	0	0	0
Total Distribution (1000 MT CWE)	4565	4565	4635	4635	0	4695

Note: Not Official USDA Data

Figure 3: India, Distribution of Beef (Mostly Carabeef) – Production, Consumption and Export (Thousand Metric Ton)

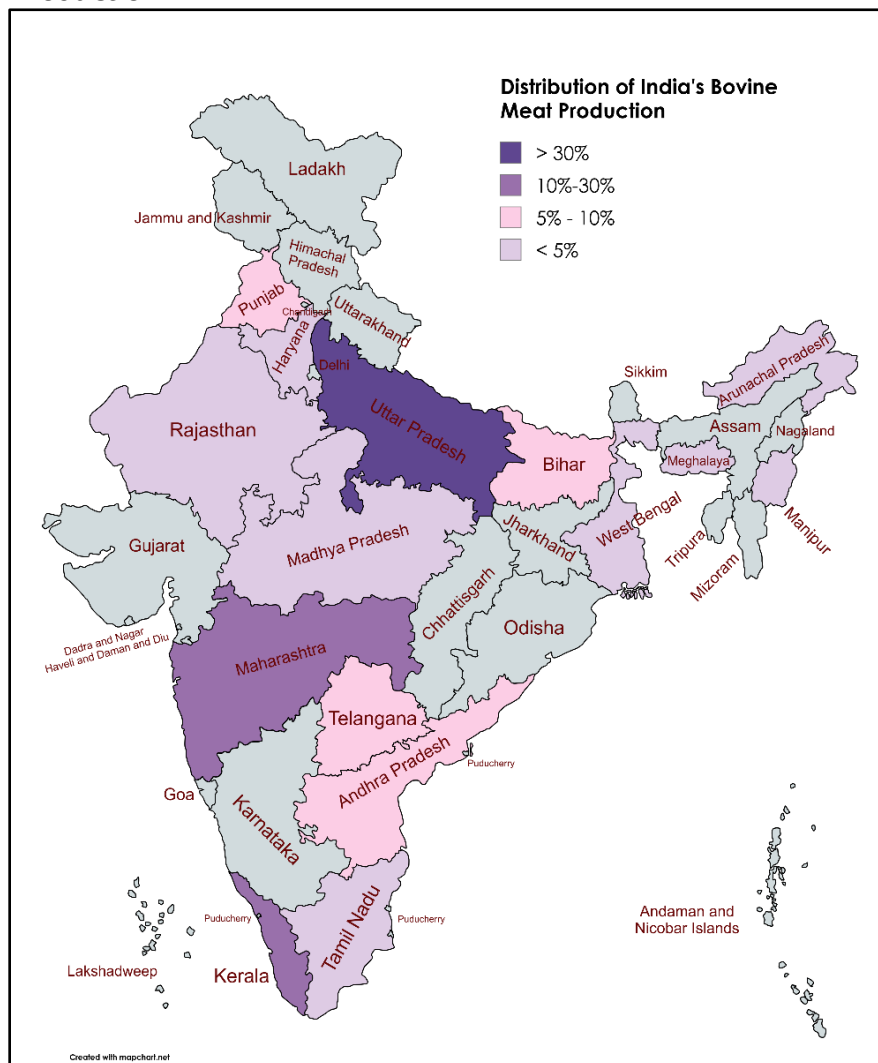


Source: PSD table. Note: *Forecast.

PRODUCTION

Post forecasts India bovine meat production (primarily carabeef, i.e. meat derived from Asian domestic water buffalo) at 4.7 million metric tons (MMT) carcass weight equivalent (CWE) in 2026, up from 4.6 MMT in 2025. The demand-side factors for both domestic consumption and exports are fostering production. Alongside supply-side factors including a steady supply of slaughter-ready animals, increased slaughter, and a large inventory of bovine are steering the increase in production.

Figure 4: India, State-Wise Distribution of Beef (Mostly Carabeef) Production



Source: FAS New Delhi office research. Basic Animal Husbandry Statistics, 2024, DAHD, Government of India.

CONSUMPTION

Post forecasts India beef (mostly carabeef) consumption in 2026 at 3.2 MMT, up by nearly two percent over 2025.⁵ Factors prompting consumption in 2025 are likely to sustain consumption growth in 2026. India beef consumption in 2025 is forecast to be higher than the expectation during the beginning of the year on account of slower inflation and weak export growth during 2025.⁶ While a good monsoon in 2025 is expected to tame the rising food and meat prices driving up demand, bearish exports are likely to make more meat available for domestic consumption. Indian market continues to be price-sensitive, especially for meats which have a high price elasticity of demand. The growing population, improving per capita income and rising middle class are considered enablers of consumption.

- ***Growing Indian population:*** The Indian consumption market continues to grow on account of a surging population. India records a population of over 1.45 billion people in 2025, surpassing China in 2023 to become the most populous country in the world.
- ***Growing per capita income:*** The annual per capita income in India is rising gradually. The International Monetary Fund estimates India's per capita income (at current prices) at \$2.88 thousand, up from \$1.92 thousand in 2020. India records a reduction in extreme poverty (living on less than \$2.15 per capita per day, 2017 PPP) from 16.2 percent in 2011-12 to 2.3 percent in 2022-23. On an average, the rural and urban Indian household spends nearly five percent and four percent of their respective consumption budget on meats, eggs and fish. A two-decade comparison of All-India Household Consumption Expenditure Survey (HCES) data reveals a rise in percentage of household budget expenditure being spent on non-vegetarian diets.⁷
- ***Growing middle class:*** A study by People Research on India's Consumer Economy (PRICE) exhibits that over 30 percent of India's population is formed by upper middle class (INR 500 thousand – 300 thousand), over 50 percent is formed by lower middle class (INR 125 thousand – 500 thousand), and over 13 percent of the population is formed by destitute (< INR 125 thousand). The upper- and middle-income classes are the largest contributor to domestic consumption and are expected to continue this trend in the future.

⁵ Slaughter of cattle (*Bos indicus* and *Bos taurus*) for meat continues to be banned in most parts of the country. There are no national laws on cow slaughter and beef consumption, but individual states implement their own legislation.

⁶ Nearly 20 percent of the Indian population is non-Hindu and generally have no objections to beef consumption. Additionally, not all Hindus abstain from beef consumption.

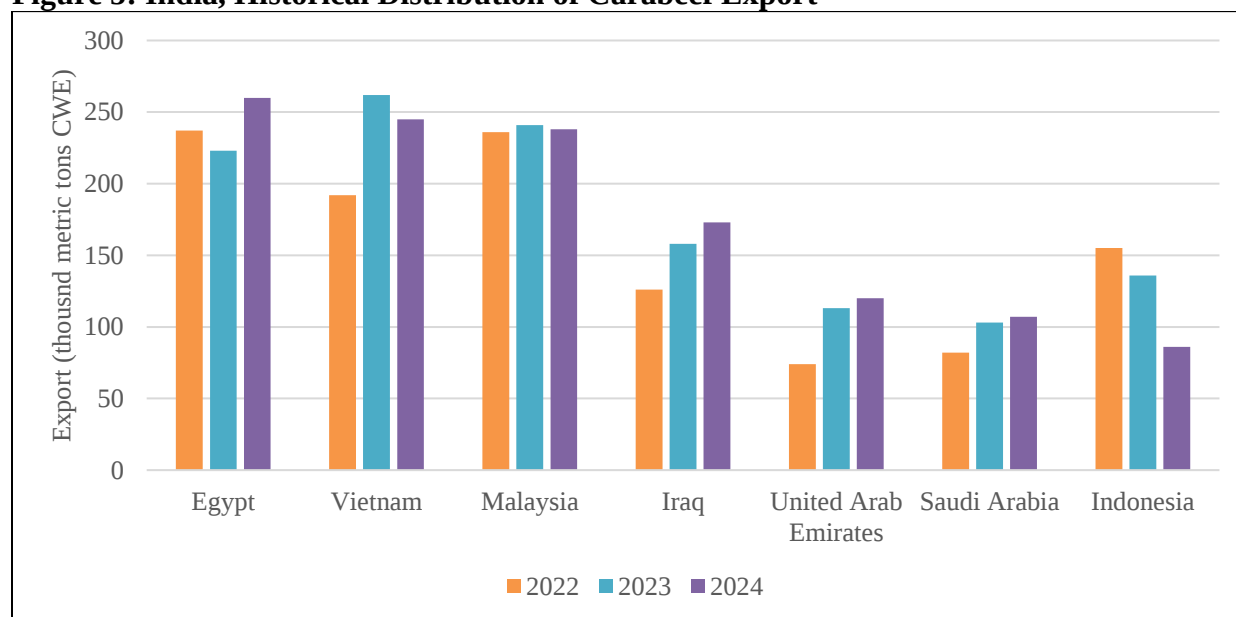
⁷ India's Household Consumption Expenditure Survey (HCES) collects information on consumption and expenditure on goods and services by households.

TRADE

Import: India does not import bovine meat products. There has been no policy change in 2025 for import of beef or carabeef in India. Any potential imports in this category are subject to severe restrictions, effectively banning all bovine meat importation.

Exports: India beef export growth in 2026 is expected to remain weak, similar to 2025. Post forecasts 2026 India bovine meat exports at 1.55 MMT, up one percent from 1.54 MMT in 2025. Exports in 2025 are estimated to be lower than earlier estimates on account of less than expected exports to countries like Indonesia, Vietnam, and Iraq. Indian beef export to other traditionally prominent markets including Malaysia, Egypt, United Arab Emirates, and Saudi Arabia are likely to remain stable.

Figure 5: India, Historical Distribution of Carabeef Export



Source: Trade Data Monitor, FAS New Delhi office research

TRADE POLICY

Import regulations for live animals: The Indian government restricts the import of live animals as per Section 3 of the Livestock Importation Act. Obtaining an import license from the Director General of Foreign Trade (DGFT) is mandatory. The license, which is valid for six months to a year, is issued following a proposal and risk analysis conducted by the DAHD, and receipt of a veterinary certificate issued by a competent authority of the exporting country.

Import regulations for livestock products: There are no changes in the import tariff, policy, regulations and procedure for import of livestock and livestock products in India. Livestock products are categorized under India's Open General License (OGL) and DAHD provides import procedures for these products in notification S.O. 2666(E) of October 2015. Obtaining a DAHD-issued Sanitary Import Permit (SIP), prior to shipping, is a pre-requisite. The SIP is valid for six months a year. Obtaining an import license from the Director General of Foreign Trade (DGFT) is mandatory. The license, which is valid for six months to a year, is issued following a proposal and risk analysis conducted by the DAHD, and receipt of a veterinary certificate issued by a competent authority of the exporting country.

On September 19, 2024, DAHD , published Standard Operating Procedure for SIP Portal - Regarding documents required for examination of SIP applications Office Memorandum L-110111/1/2022 – Trade (E-21390), extending clarifications on the documents required for examination of the online application and subsequent issuance of Sanitary Import Permit (SIP). The memorandum enumerates the required documents along with the respective details.

India's livestock products certification requirements and documentation for livestock are accessible on the DAHD website located at: <https://dahd.gov.in/division/trade>.

Halal Regulations - Exports/Imports: The current Government of India regulations for halal certification were established in 2023. For exports of 'Halal certified' meat and meat products, the producing or processing facilities will require a certificate under the Indian Conformity Assessment Scheme (i-CAS) of the Quality of India (QCI) which is issued by a certification body accredited by the National Accreditation Board for Certification Bodies (NABCB). For exporting to countries with specific 'Halal certificate' requirements, obtaining an i-CAS certificate shall be voluntary (see, GAIN-India | IN2023-0054 | Halal Market - Update July 2023).

Table 3: India: Tariffs for Select Livestock Products

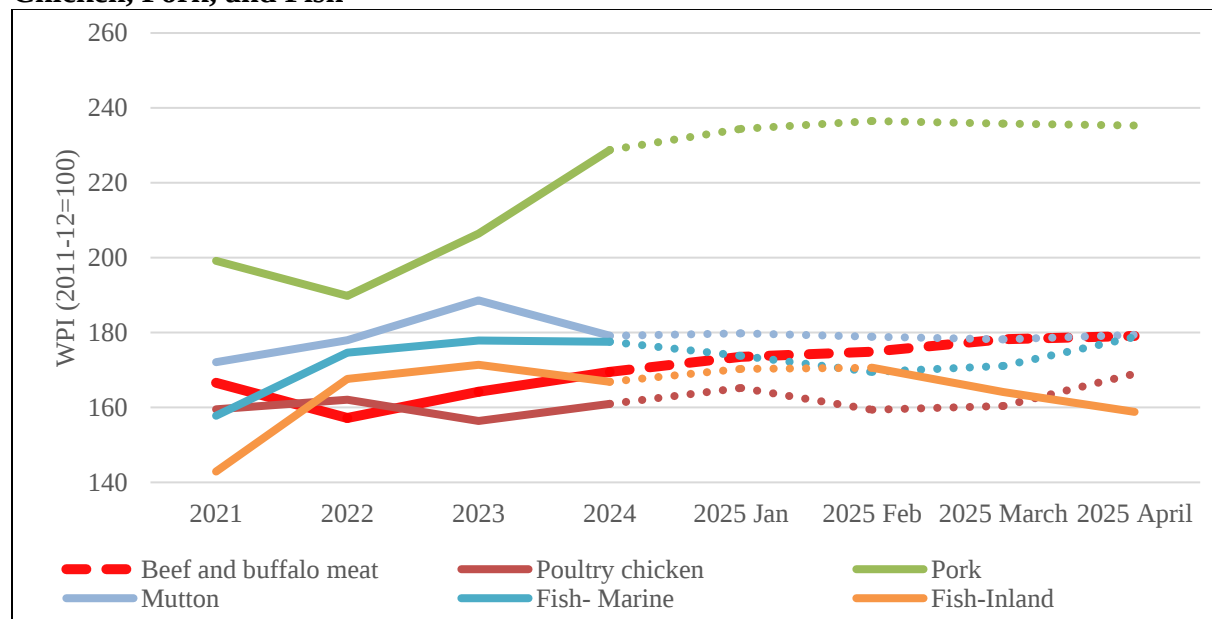
HS Code	Item Description	Basic custom duty (BCD)	IGST	Import policy
0101.2100	Live Horses for pure breeding	Free	12	Restricted
0101.2990	Live horses for polo and other	30	12	Restricted
0101.3010 - 0101.9090	Live Asses, Mules & Hinnies	30	0	Restricted
0102.2100 - 0102.9090	Live Bovine Animals	30	0	Restricted
0103.1000 - 0103.9200	Live Swine	30	0	Restricted
0104.1010 - 0104.2000	Live Sheep and Goats	30	0	Restricted
0106.1100 - 0106.9000	Other live animals: mammals. Birds, insects	30	0	Restricted*
0201.1000 - 0201.3000	Meat of bovine animals, fresh or chilled	30	0	R SanP
0202.1000 - 0202.3000	Meat of bovine animals, frozen, other cuts with/out bone	30	0/5	R SanP
0203.1100 - 0203.2900	Meat of swine, fresh, chilled or frozen	30	0/5	Fr SanP
0204.1000 - 0204.5000	Meat of sheep or goats, fresh chilled or frozen	30	0/5	Fr SanP
0205.0000	Meat of horses, asses, hinnies, fresh chilled or frozen	30	0/5	Fr SanP
0206.2100 - 0206.9090	Edible offal of bovine animals, swine, goats, horses, asses, mules or hinnies, fresh, chilled or frozen	30	0/5	R SanP Fr SanP
*Subject to import license. However, importing wild animals is prohibited.				

PRICE

In India, beef and carabeef continue to be the most affordable of red meat, relative to pork and mutton. In some seasons, domestic prices of carabeef in wet markets are lower than chicken. For beef and carabeef, the supply-side factors exert a greater influence on prices, in contrast to demand. Overall inflation in the economy and seasonality – both climate and religious festivities are some of the supply-side factors. Overall prices of livestock commodities are rising due to increasing costs including labor, fuel, and feed and fodder costs. Figure 6 presents the price

comparison of a commodity price at a point in time to its price in the base year, picturing the trend in overall movement of prices.

Figure 6: India: Beef and Buffalo Meat Wholesale Price Index (WPI) versus Mutton, Chicken, Pork, and Fish



Source: FAS New Delhi office research. Office of Economic Advisor, Government of India.

Note: the dotted line presents Government of India published monthly price index during 2025.

Attachments:

No Attachments