

Livestock & Feed Trends



VOLUME - 20 • NUMBER - 2 • JULY - SEPTEMBER 2022



**55th Annual General Meeting (AGM)
&
63rd National Symposium 2022**

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From the Chairman's Desk.....

Dear Friends,

Greetings!

It's been almost two years since I started communicating with you through this platform. In the second quarter, Jul'22 to Sep'22, CLFMA fully focused on conducting Workshops, Seminars and the CLFMA's grand annual event – 63rd National Symposium 2022 - for the betterment of Livestock Sector as a whole.

I would like to take this opportunity to brief you on CLFMA Activities for the second quarter, which is mentioned in detail in our Magazine under the Heading– “CLFMA Activity Updates”.

Giving below a brief about the important activities conducted by us.

– CLFMA & KPFBA, ANSI, and BCIL had jointly organized a knowledge sharing “Workshop on GM Crops and Animal Nutrition” on 11th July 2022, at Hilton and Hilton Garden Inn, Bengaluru.

– **“Conclave on Animal Husbandry Infrastructure Development Fund”** Department of Animal Husbandry and Dairying was conducted on 14th July 2022 at New Delhi. Both these initiatives were well appreciated and attended by members. In the AHIDF conclave CLFMA was well recognized by the government, as we were given an exclusive area in the seminar hall, establishing CLFMA's responsibility in promoting the Government Initiative – AHIDF among the members

– Mr. Kiran Karamil, Counsellor (Agriculture), Australian High Commission, Department of Agriculture, Fisheries and Forestry, New Delhi, had a meeting with CLFMA of India on 19th July 2022.

– We conducted an Aqua Seminar on **“Trends and Challenges in Indian Aquaculture”** for the benefit of the Aqua Sector in Hotel Ananda Inn (Adurs Restaurants & Banquets) Bhimavaram, Andhra Pradesh on 27th July, 2022. The Aqua seminar was



conducted after many years, showing CLFMA's initiative in focusing all the sectors of livestock. This seminar was well attended by more than 200 participants and was well appreciated.

– Mr. Pravash Pradhan, Chief Editor of Smart Agripost & Aquapost, Northeast – Livestock-Aqua-Poultry Expo 2022, New Delhi requested to extend support to the said Expo dated 08-10 December 2022, Guwahati, Assam. In response to that CLFMA Extended its logo Support on 30th July 2022.

– High Commission of Canada in India in association with CLFMA of India conducted a virtual webinar on Sharing Canadian Knowhow and Animal Nutrition excellence with Canola Meal on 26th September, 2022 from 10:00 am to 12:00 noon. The guest speaker was from Canada Dr. Rex Newkirk (University of Saskatchewan). From CLFMA of India Mr. Divya Kumar Gulati, Dy. Chairman, Dr. Vijay Makhija, Mr. Nissar Mohammed, Mr. Somu Kumar Ambat, Mr. Neeraj Verma, and other CLFMA Members attended the said webinar.

CLFMA successfully conducted its annual flagship event, 63rd National Symposium 2022 in a grand manner on 30th September & 1st October, 2022 at Hotel The Leela Mumbai with all your best wishes and grand support as always. The event was focused

From the Chairman's Desk.....

on the Theme “**Changing Dynamics of Animal Agriculture in India**” CLFMA Symposium enriched our visibility & recognition among the wider Industry Stakeholders and the Government of India. Industry Stakeholders interacted with each other for deliberating livestock sector-related issues. In that connection, we had meetings with Government Representatives in the state as well as with Central Government. To make this Symposium successful, CLFMA staff and the office bearers worked proactively. It was a very successful event, around 450 participants representing all stakeholders in the animal value chain viz. academicians, feed manufacturers, aqua farmers, animal health and nutrition experts etc. attended the event and appreciated the same. The symposium was graced by our Honourable Minister **Shri. Parshottam Rupala**, Minister of Fisheries, Animal Husbandry and Dairying (AHD), Govt. of India.

A detailed Symposium Report was presented in the magazine under the Heading-“63rd National Symposium Report”.

Your words of appreciation and encouragement from time to time has been the source of inspiration and driving force for me to lead CLFMA OF INDIA.

Before closing, we would be grateful for your feedback or inputs anytime for our improvement.

With warm regards,

For **CLFMA OF INDIA**,



Neeraj Kumar Srivastava
Chairman



05CHAIRMAN'S DESK

COMMODITY UPDATES.....08



23CLFMA UPDATES

SYMPOSIUM REPORT..... 25



96-97POULTRY

GENERAL..... 98-99



100CALENDAR OF EVENTS

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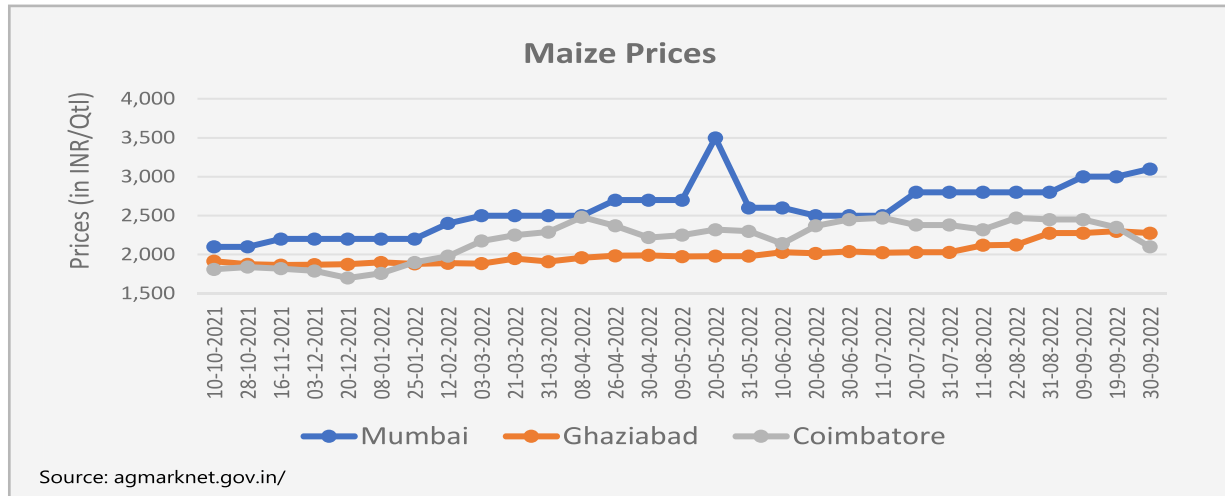
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Commodity Updates

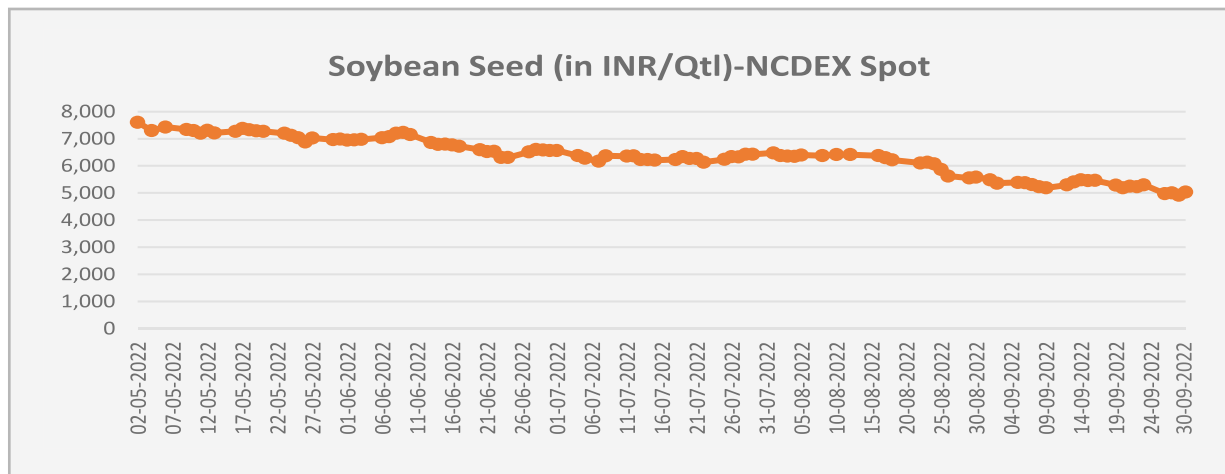
1. Domestic Prices

I. Maize



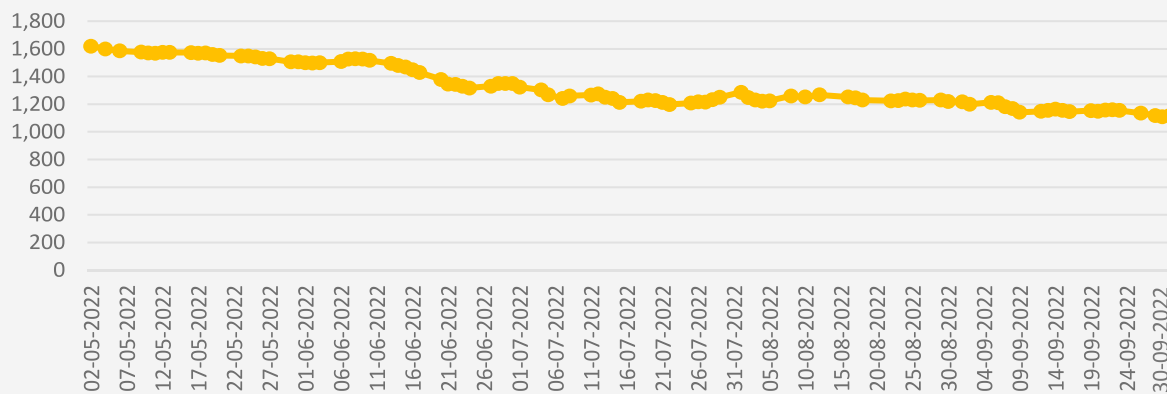
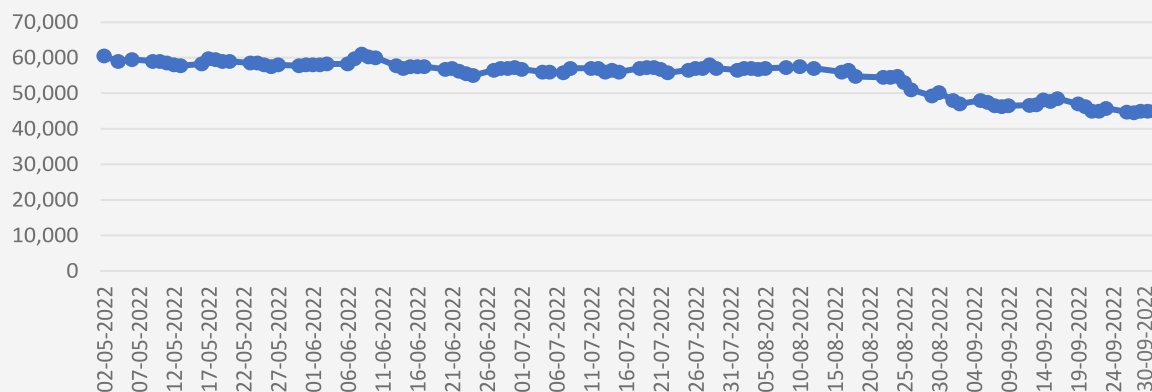
Maize Prices (INR/Quintal)		
City	30/09/2022	31/08/2022
Mumbai	3,100	2,800
Ghaziabad	2,275	2,275
Coimbatore	2,100	2,450

II. Soybean

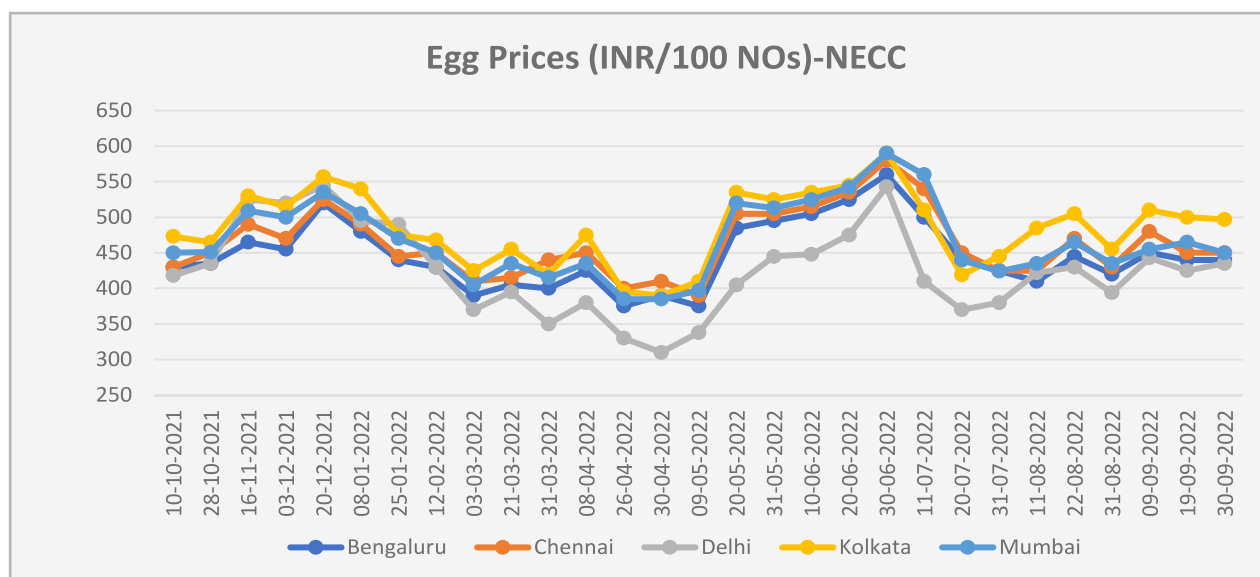


Soybean Complex Prices-NCDEX Spot

Commodity (Unit)	30/09/2022	31/08/2022
Soybean Seed (in INR/Qtl)	5,036	5,586
Ref. Soya Oil (in INR/10kg)	1,117	1,220
Soymeal (in INR/MT)	45,000	50,250

Ref Soya Oil**Ref. Soya Oil (in INR/10kg)-NCDEX Spot****Soymeal****Soymeal (in INR/MT) -NCDEX Spot**

III. Egg Rates



EGG PRICES (INR/100 NOs)

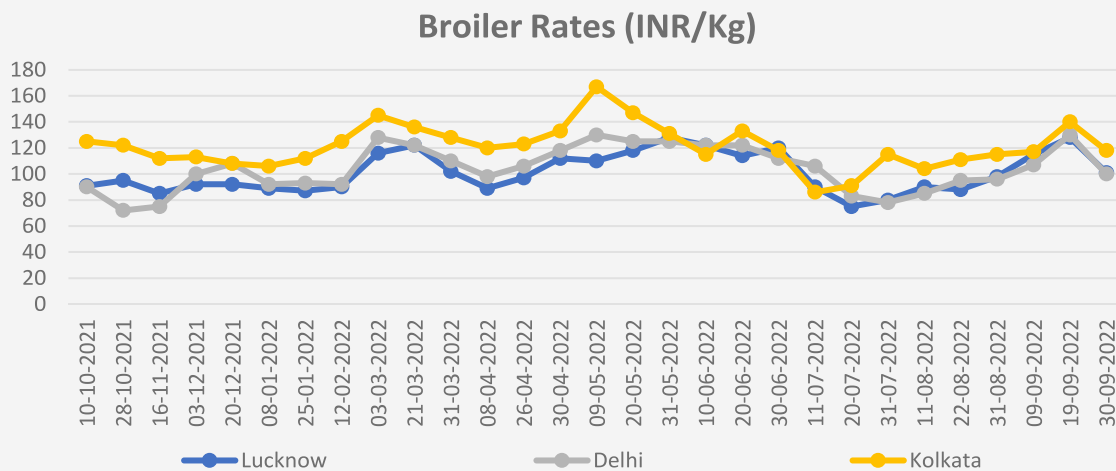
Name of Zone	30/09/2022	31/08/2022
NECC Prices		
Ahmedabad	460	435
Ajmer	423	390
Barwala	420	385
Bengaluru (CC)	440	420
Brahmapur (OD)	451	423
Chennai (CC)	450	430
Chittoor	443	423
Delhi (CC)	435	394
E.Godavari	425	405
Hyderabad	394	380
Ludhiana	417	381
Mumbai (CC)	450	435
Muzaffarpur (CC)	480	443
Mysuru	442	422
Nagpur	440	410
Namakkal	430	415
Patna	480	443
Pune	445	440
Ranchi (CC)	476	452
Vijayawada	425	405
Vizag	425	425
W.Godavari	425	405
Warangal	396	382

III. Egg Rates

EGG PRICES (INR/100 NOs)		
Name of Zone	30/09/2022	31/08/2022
Prevailing Prices		
Allahabad (CC)	457	429
Bhopal	425	415
Hospet	400	380
Indore (CC)	430	410
Jabalpur	424	397
Kanpur (CC)	443	419
Kolkata (WB)	497	461
Luknow (CC)	480	457
Raipur	425	420
Surat	465	440
Varanasi (CC)	473	450

Source: NECC

IV. Broiler Rates



BROILER RATES (INR/Kg)

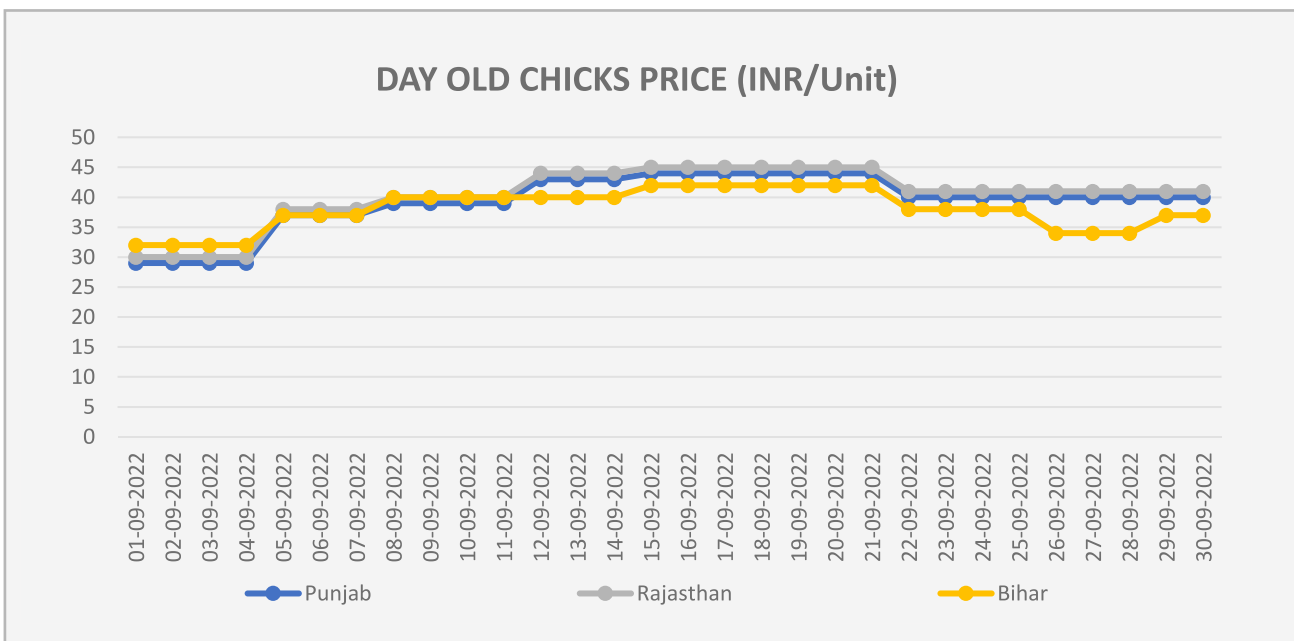
Location	30/09/2022	31/08/2022
Delhi	100	96
Punjab	112	95
Raipur	105	80
Pune	106	91
Bengaluru	82	73
Hyderabad	105	99
Guwahati	90	75
Kolkata	118	115
Bihar	118	105
Madhya Pradesh	89	74
Lucknow	101	98

Source: SRP (Wholesale Rates)

V. Day old Chicks Price

DAY OLD CHICKS PRICE (INR/Unit)		
State	30/09/2022	31/08/2022
Punjab	40	27
Dehradun	38	28
Haryana	40	27
Himachal Pradesh	41	28
Rajasthan	41	28
Jammu	41	28
Andhra Pradesh	35	22
Uttar Pradesh	37	30
Madhya Pradesh	32	16
Telangana	35	22
Bihar	37	30
Jharkhand	37	31
Gujarat	34	30

Source: Poultry India TV



VI. Fish Prices

Fish Prices Average Price (INR/Quintal)		
Fish Type	30/09/2022	31/08/2022
Bata Putti	6,000	7,000
Black Dom	7,000	8,000
Blue Dom	8,000	9,000
Chilwa	8,000	9,000
Halwa	20,000	22,000
Hilsa	80,000	1,00,000
Katla (Small)	9,000	8,500
Katla (Big)	12,000	13,500
Malli (Big)	11,500	11,000
Malli (Small)	8,500	7,500
Pangass	8,000	7,500
Rahu (Andhra)	10,000	10,000
Singhra (Big)	16,000	28,000
Singhra (Small)	8,000	11,000
Sol	14,000	13,000
Soli	24,000	18,000
Surmai (Big)	45,000	44,000
Surmali (Small)	25,000	18,000
White Dom	7,500	8,000
Zinga (Zambo-A)	43,000	45,000
Zinga (Zambo-B)	32,500	35,000
Zinga (Zambo-C)	23,000	25,000

Source: www.commodityonline.com
The Prices are of Delhi (Gazipur Mandi)

2. Global Commodity Prices

Commodity (Unit)	PRICE (30/09/2022)
Milk (USD/CWT)	19.85
Rapeseed (Euro/Ton)	633.0
Soybean Meal (USD/Ton)	403.20
Soybean Oil (USD/lb)	0.65
Live Cattle (USD/Lbs)	1.43
Poultry (USD/Kgs)	1.53
Eggs US (USD/Dozen)	3.60

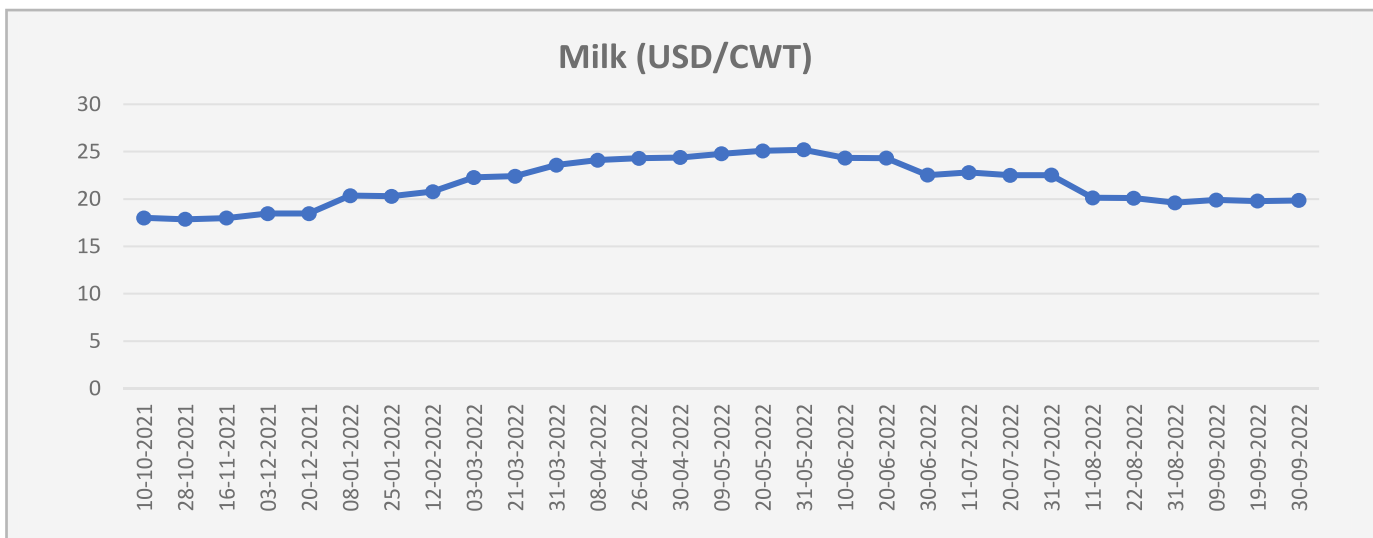
Source: tradingeconomics; markets.businessinsider

USD: United States Dollar

CWT: Short Hundredweight

Lbs: Pounds

1 BRL (Brazilian Real) = 0.19 USD





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Balancing nutrition-economics remains a prominent challenge whether you raise poultry, aqua, swine or ruminants. Being one of the world's leading vertically integrated manufacturers of food/feed ingredients, Camlin Fine Sciences (CFS) is dedicated to give producers and farmers an informed decision on feed purchases. Regardless of the species reared, CFS helps you to master feed conversion ratio and return on investments for a profitable farming.

We offer a comprehensive range of products, feed sanitization services and other holistic healthcare approaches including antibiotic alternatives. These help improve your overall farm health. **Through our work we promote nutrition, health and hygiene to influence animal performance. Keeping you proud of your farms is our mission.**

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Improved Nutrition. Improved Health.
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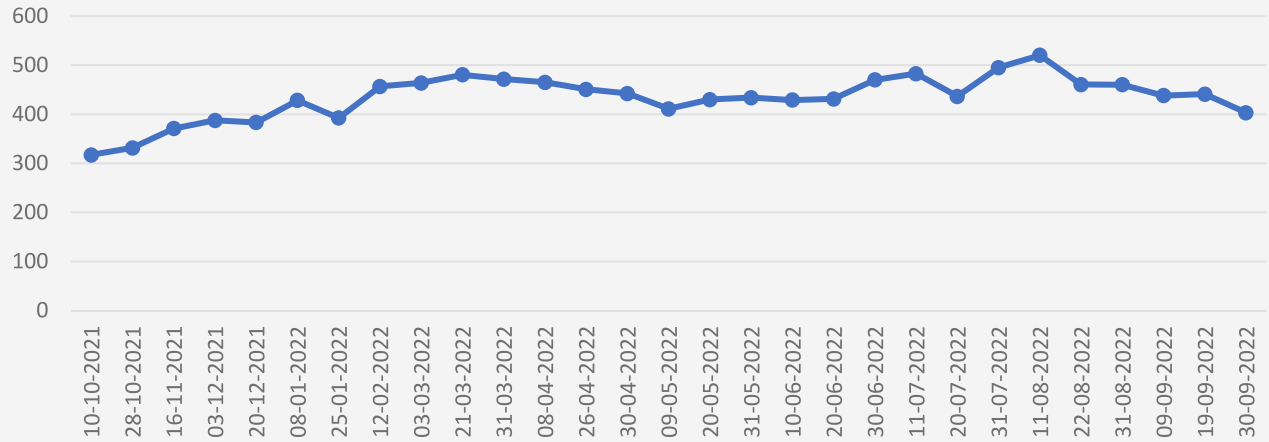
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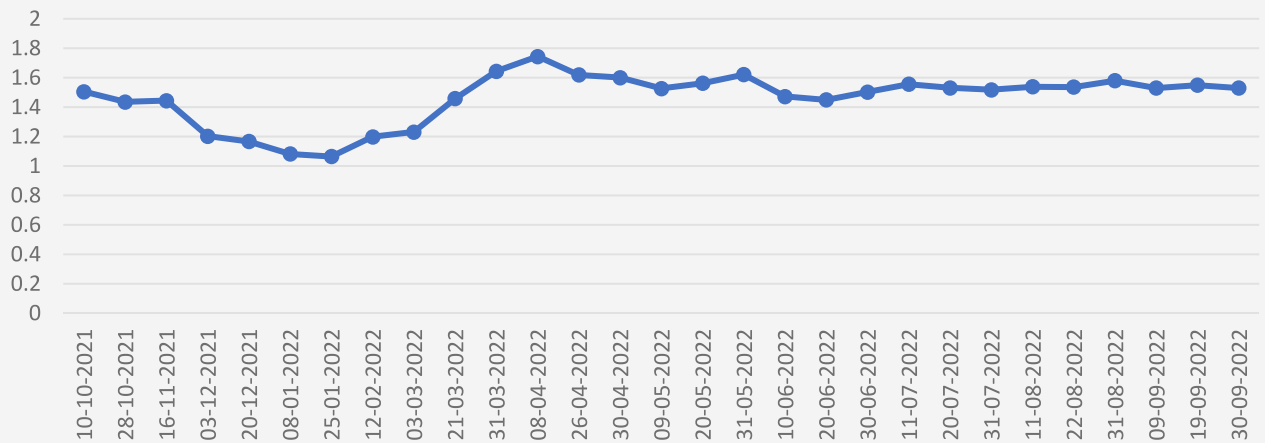
The key to total gut integrity

2. Global Commodity Prices

Soybean Meal (USD/Ton)

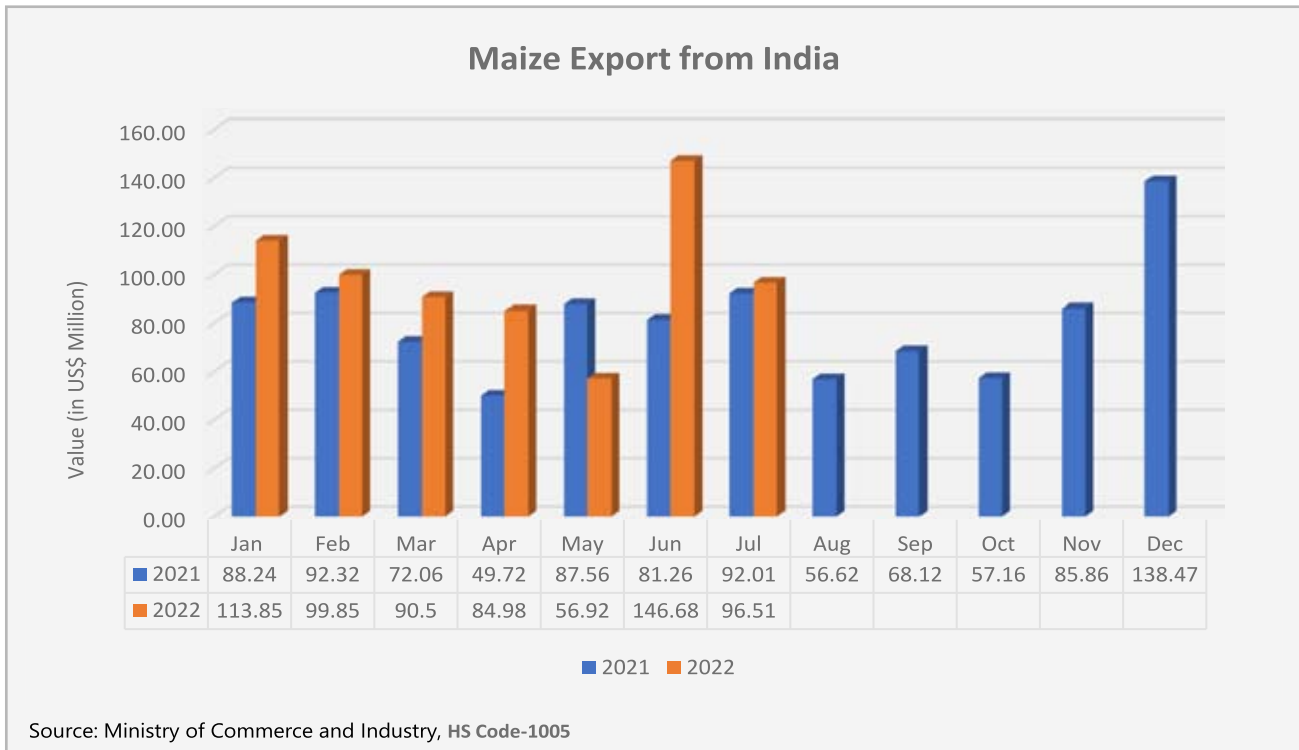


Poultry (USD/Kg)

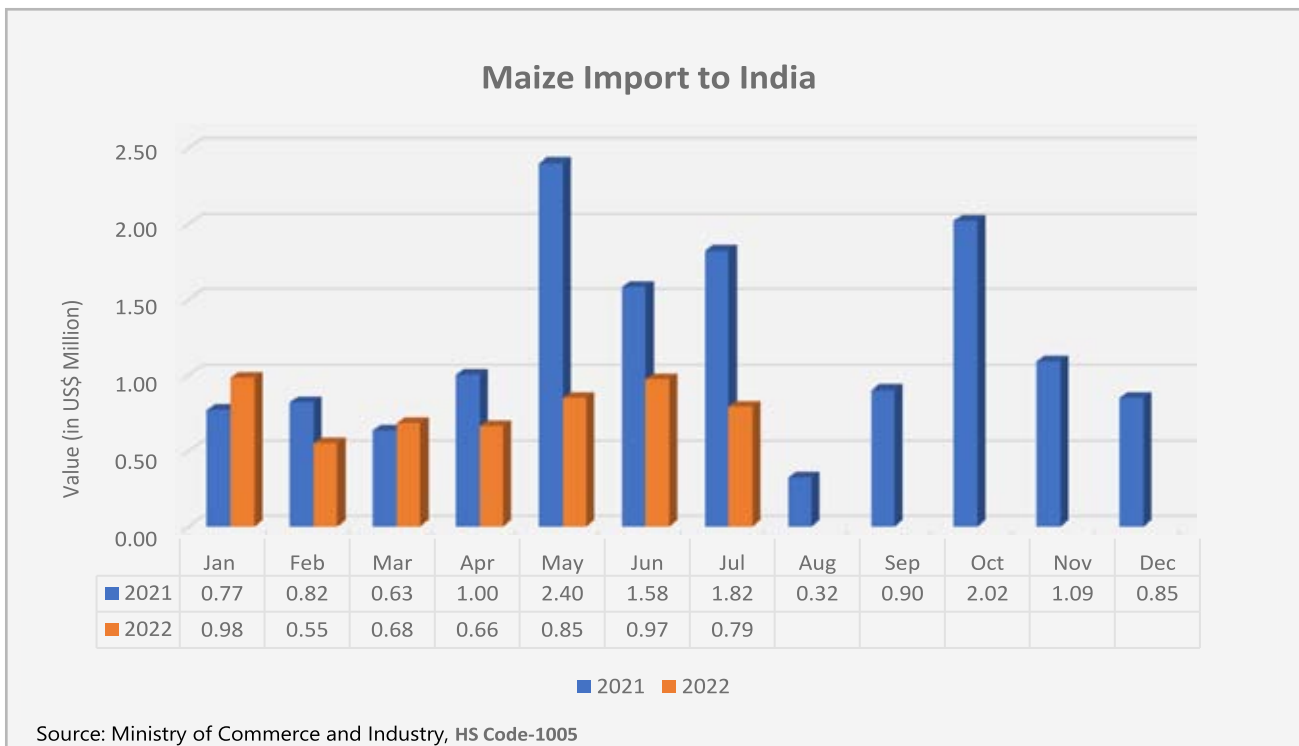


3. Trade Details

India: Maize Export

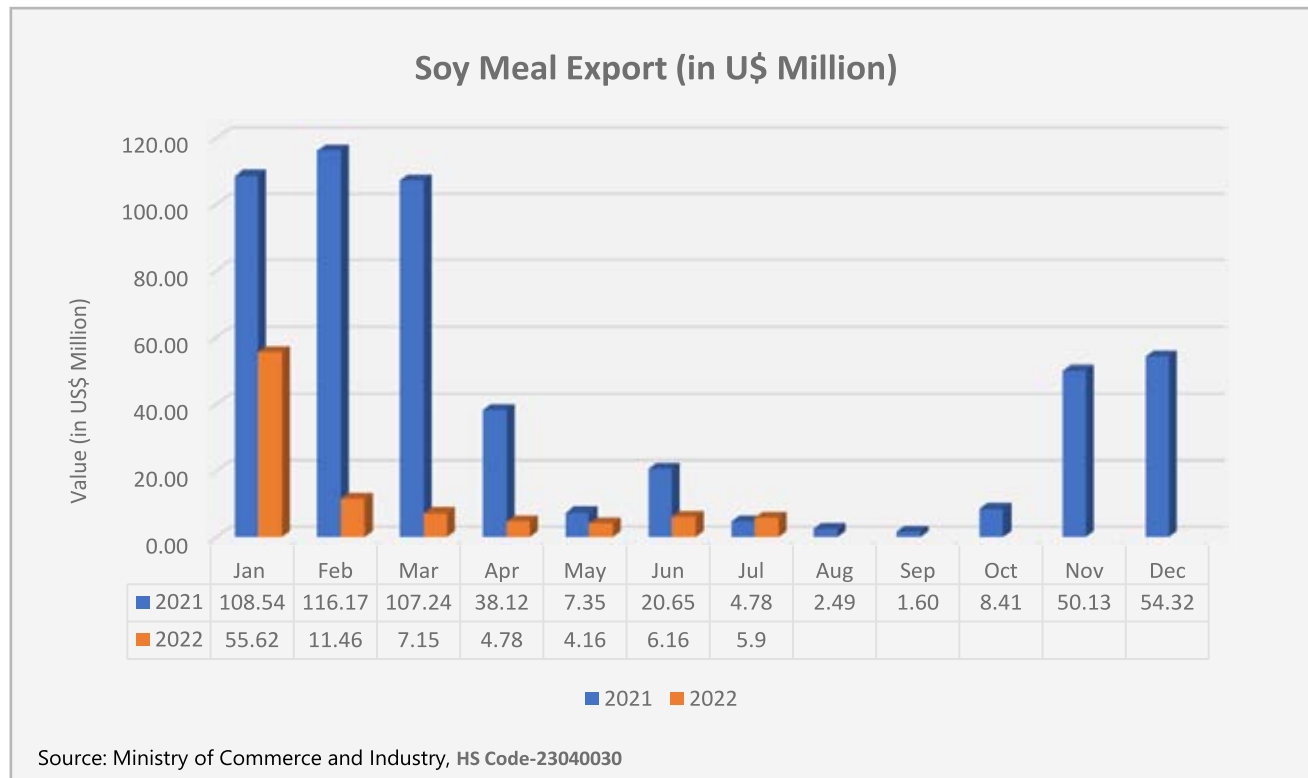


India: Maize Import

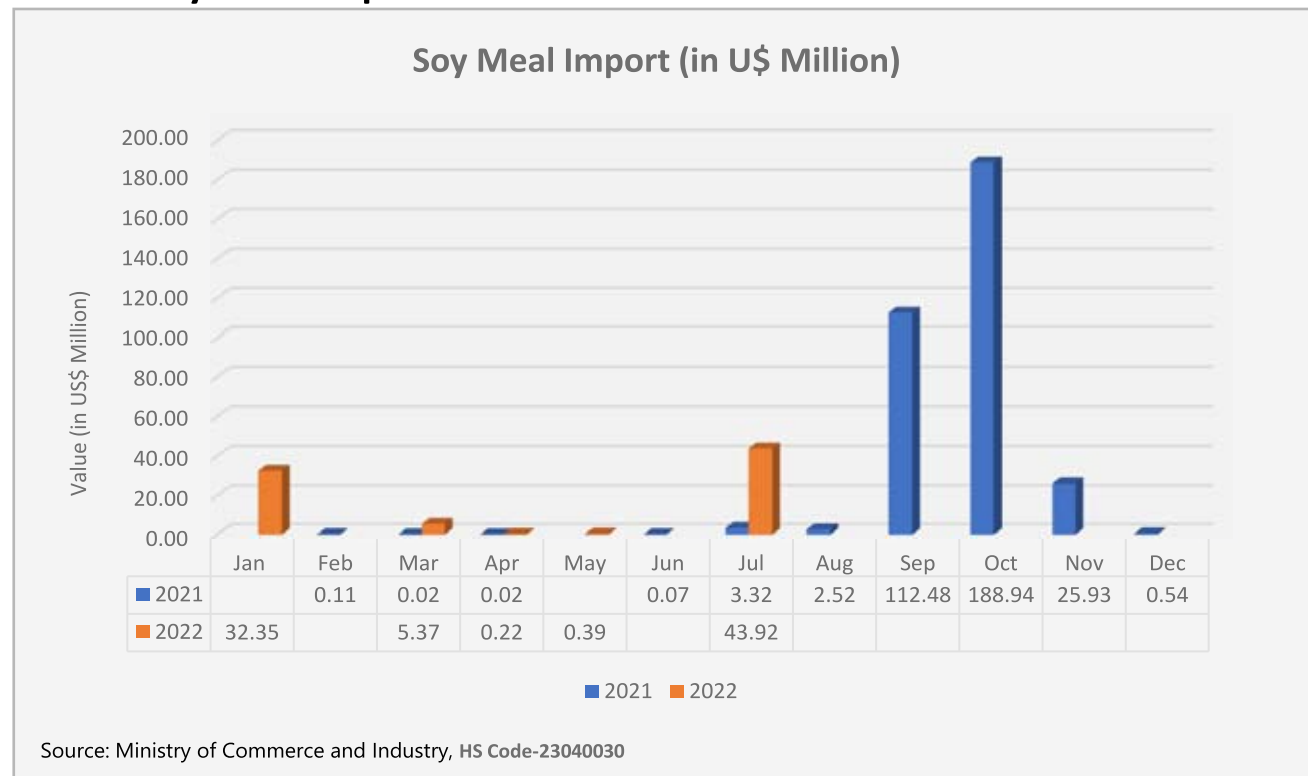


Note: This Data is sourced from the Ministry of Commerce and Industry, which was last updated in July.

India: Soy Meal Export



India: Soy Meal Import



Note: This Data is sourced from the Ministry of Commerce and Industry, which was last updated in July.

5. Market Drivers

Maize

Market Drivers	Monthly Outlook
Growing Demand for Poultry and Livestock Feed	Bullish
Rising Utilization of Starch in Food Processing Industry	Bearish
Increasing Demand as a Wheat Substitute due to Wheat Export Ban	Bullish
Increasing Food Inflation	Bearish
Adoption of Genetic Modified Maize Crop	Bullish
Increasing demand for Coarse Cereals	Bullish

Poultry

Market Drivers	Monthly Outlook
Rapid Growth in Consumer Demand for Livestock Products	Bullish
Expansion of Players across various Regions	Bullish
Increasing Broiler Chicken Price Increases Due to Higher Feed Cost	Bearish
Increasing Food and Feed Inflation	Bearish
Rising Market Acceptability of Frozen Chicken	Bearish
Increasing the Demand of Organic Poultry Farming	Bullish

Regards,
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Our relentless effort to make the world a safer and healthier place has led us to create Xcelsio. After years of cutting-edge research in Korea, we have come up with an advanced formulation to make Xcelsio more potent than before.

Xcelsio comes with a more concentrated cocktail of bacteriophage and is fortified with more *Bacillus subtilis*. This new and improved formulation, created specifically for use in

poultry, is simply unmatched in controlling pathogenic bacteria—giving you Total Gut Control.

Each of our bacteriophages is painstakingly selected using our proprietary Bacterophage F technology to target and eliminate specific bacteria; leaving other beneficial bacteria completely unharmed. This natural surgical strike on disease-causing bacteria is the safest, non-toxic, and most effective prophylactic alternative to antibiotic growth promoters.

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Natural:

No Toxins, No Residues, No Side-effects,
No Withdrawal Time

Surgical:

Targets and eliminates specific bacteria,
even those resistant to antibiotics

Protective:

Maintains gut bio-balance by retaining
beneficial bacteria

Probiotic:

Enriched with *Bacillus Subtilis*

Flexible:

Compatible with all Performance
Enhancers, Growth Promoters, Acidifiers,
Anti-Oxidants, Minerals & Enzymes

BACTERIA IT CONTROLS

Salmonella

Typhimurium, Gallinarum, Choleraesuis,
Derby, Dublin, Enteritidis, Pullorum

E. Coli

F4 (K88), F5 (K99), F6 (987P), F18, F41

Clostridium Perfringens

Type A, C, B, D, E

Staphylococcus Aureus

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CLFMA ACTIVITY UPDATES

Workshop on GM Crops and Animal Nutrition, which was earlier scheduled on 13th July 2022 preponed to 11th July, 2022:

The Compound Livestock Feed Manufacturers' Association (CLFMA OF INDIA), Karnataka Poultry Farmers & Breeders Association (KPFBA), Animal Nutrition Society of India (ANSI) and Biotech Consortium India Limited (BCIL) have jointly organized a knowledge-sharing **"Workshop on GM Crops and Animal Nutrition"** on 11th July 2022, at Hilton and Hilton Garden Inn, Embassy Manyata Business Park, Hebbal Outer Ring Road, Bengaluru. Its' objective was to deliberate on the said subject with the concerned stakeholders. Speakers from Government, Research Institutions and Industry shared their views on relevant topics. The workshop provided an opportunity to bring together the concerned stakeholders viz. industry, scientists from crop and animal research institutions, nutritionists, etc. from the agriculture and livestock sectors. Mr. Neeraj Kumar Srivastava, Chairman of CLFMA spoke on the **"Growth of Livestock Industry: Feed, Demand and availability"**. Mr. Naveen Pasuparth, Treasurer of CLFMA also actively participated in the Panel Discussion.

CLFMA Participation in Conclave organized by GOI:

Mr. Neeraj Kumar Srivastava, Chairman, Mr. Divya Kumar Gulati, Mr. Suresh Deora, Mr. Naveen Pasuparth, Mr. Sumit Sureka, Ms. Chandrika Venkatesh, and some of the CLFMA Managing Committee Members and CLFMA Members attended **"Conclave on Animal Husbandry Infrastructure Development Fund"** Department of Animal Husbandry and Dairying on 14th July 2022 at Bhim Hall, Dr. Ambedkar International Centre, 15, Janpath Road, New Delhi, The Chief Guest of the Conclave was Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, Animal Husbandry and Dairying, Guest of Honour Dr. Sanjeev Kumar Balyan, Hon'ble Minister of State of Fisheries, Animal Husbandry and Dairies.

Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, Animal Husbandry and Dairying felicitated the first 75 entrepreneurs who took benefit of AHIDF and addressed the **"Conclave on Animal Husbandry Infrastructure Development Fund"**. Dr. Sanjeev Kumar Balyan, Hon'ble MOS was the second speaker followed by Shri. Sivasubramanian Raman, Chairman & Managing Director SIDBI and Dr. G.R. Chintala, Chairman, NABARD.

CLFMA SEMINAR:

CLFMA OF INDIA conducted Aqua Seminar on **"Trends and Challenges in Indian Aquaculture"** for the benefit of the Aqua Sector in Hotel Ananda Inn (Adurs Restaurants & Banquets) Bhimavaram, Andhra Pradesh on 27th July, 2022. The event was conducted at Bhimavaram, Andhra Pradesh, as it is the prominent coastal belt of shrimp and fish in Andhra Pradesh. The perspective of the Seminar was to bring the Aqua Industry, fish and shrimp farmers and other related stakeholders into a single networking platform for the welfare of all the stakeholders. CLFMA's "Aqua Seminar Objective", was to develop, manage and promote fisheries to increase the farmers' income and contribute to our economy.

The event was started by Dr. Saikat Saha, CLFMA Managing Committee Member, CLFMA Executive Director Ms. Chandrika Venkatesh greeted the speakers with a bouquet. Mr. Neeraj Kumar Srivastava, Chairman of CLFMA delivered Welcome Address, First Speaker for the Seminar was Dr. Albert Tacon, Aqua Culture Specialist, who spoke on the topic "Recent Trends and issues in feed formulation and on-farm feed management". He spoke on the following points:

1. Recent trends in Nutrition for Shrimp and fish farming
2. Importance of balancing diet in the current challenging scenario of high raw material prices
3. Importance of shrimp in combating malnutrition and in meeting the challenges of malnutrition in developing countries

The second Speaker Mr. Ravi Kumar Yellanki, Aqua Consultant, spoke on the following:

1. Current Challenges of Shrimp farming in India
2. Most Prominent or emerging diseases
3. Export potential, How India can be compared to Ecuador
4. Importance of the Domestic market

The Vote of thanks was delivered by Dr. Saikat Saha, CLFMA Managing Committee Member. The target audience was 60 to 70 Nos and surprisingly the event was well participated by around 200 delegates comprising of all the relevant stakeholders from the Aqua sector viz. fish and shrimp farmers, fish and shrimp industry stakeholders, traders,

other related aqua stakeholders, distributors, local government officials, press etc.

Meeting:

Mr. Kiran Karamil, Counsellor (Agriculture), Australian High Commission, Department of Agriculture, Fisheries and Forestry, New Delhi, had a meeting with CLFMA OF INDIA on 19th July 2022, along with his team member Ms. Sweta Prabhakar, Senior Research Officer, Department of Agriculture, Fisheries and Forestry, Australian High Commission, New Delhi, Ms. Kriti Khurana, Agriculture Researcher, Australian High Commission, New Delhi, wherein, Mr. Neeraj Kumar Srivastava, Chairman of CLFMA OF India, Mr. Suresh Deora, Hon. Secretary and Ms. Chandrika Venkatesh, Executive Director participated and had a fruitful discussion about the relationship between India and Australia & promotion of business related to the livestock Sector.

Mr. Pravash Pradhan, Chief Editor of Smart Agripost & Aquapost, Northeast – Livestock-Aqua-Poultry Expo 2022, New Delhi requested to extend support to the said Expo dated 08-10 December 2022, Guwahati, Assam. In response to that CLFMA Extended its logo Support on 30th July 2022.

High Commission of Canada in India in association with CLFMA of India conducted a virtual webinar on Sharing Canadian Knowhow and Animal Nutrition excellence with Canola Meal on 26th September, 2022 from 10:00 am to 12:00 noon. The guest speaker from Canada Dr. Rex Newkirk (University of Saskatchewan). During his detailed presentation, Dr. Rex presented the use cases, technical, versatility and commercials of canola meal as a protein source. In times when we are witnessing uncertainties on

account of both price and availability for some of the major feed ingredients like Soya, it has become more important to explore alternative feed ingredients. The use of Canola meal as less expensive protein and amino acid source could be one of the ways to reduce the feed costs in the country. Dr. Rex also highlighted that, although it is from the same mustard family, Canola meal offers advantages over Indian mustard meal. It is low in glucosinolates so it can be incorporated into feed rations at higher levels than mustard meal, which has a bitter taste and can cause liver and thyroid problems when used at high levels. Dr. Rex highlighted that, Indian feed manufacturer could use up to 40 percent canola meal in its aquaculture rations compared to a 20 percent maximum for Indian mustard meal that many feed manufacturers now use. Post the presentation, Dr. Rex also hosted an open discussion where all the technical questions from participants were addressed. For the participant who would like to seek additional information, a lot of good information available online regarding the efficacy of Canola meal at: <https://www.canolacouncil.org/canolamazing/>. Not only is there a feed guide, but specific pages on each livestock sector and how Canola Meal can be used. Canada Consulate highly appreciated the contribution of CLFMA for the overall development of the livestock Industry in India at large and requested to team up with them in its efforts of developing this sector further. Given the interest, High Commission would like to stay engaged with CLFMA members sharing the best of Canadian know-how and innovation on Animal nutrition and feed. From CLFMA OF INDIA Mr. Divya Kumar Gulati, Dy. Chairman, Dr. Vijay Makhija, Mr. Nissar Mohammed, Mr. Somu Kumar Ambat, Mr. Neeraj Verma, Shilpa Utekar, Manager and other CLFMA Members attended the said webinar.



CLFMA OF INDIA's 55th AGM 2022

The Compound Livestock Feed Manufacturers Association of India's (CLFMA OF INDIA) day 1 featured the 55th Annual General Meeting and the inaugural session of the 63rd National Symposium 2022 at Hotel The Leela Mumbai, Andheri Kurla Road, Near Mumbai International Airport, Andheri East, Mumbai on Friday, 30th September, 2022.

The 55th Annual General Meeting (AGM) was held under the Chairmanship of Mr. Neeraj Kumar Srivastava.

The Minutes of the 54th Annual General Meeting, which was held on 24th September, 2021 were read by CLFMA Hon. Secretary Mr. Suresh Deora and the same was approved by all the members present. Annual Report for the year 2021-2022 was presented by CLFMA Hon. Secretary Mr. Suresh Deora to the members and the same was approved by all the members present. Treasurer Mr. Naveen Pasuparth presented the Audited Statement of Accounts and Audit Report for the year ended 31st March, 2022 and the same was approved by all the members present. It was decided during the meeting that M/s Naveen Dedhia & Company, Chartered Accountants will continue to be CLFMA's Auditors for the year 2022-2023. Any other matter was discussed in detail with the permission of the Chair. Almost 63 members attended CLFMA OF INDIA's 55th Annual General Meeting.

63rd National Symposium 2022

"Changing Dynamics of Animal Agriculture in India"

REPORT : CLFMA OF INDIA conducted the two-day Symposium and has brought about the report consisting of the details of deliberations and outcomes of the Symposium.

Presented by: Neeraj Kumar Srivastava Chairman, CLFMA OF INDIA

Inaugural Session

The Compound Livestock Feed Manufacturers Association of India (CLFMA) conducted its 55th Annual General Meeting and 63rd national symposium in Mumbai on September 30 and October 1 at Hotel Leela, Mumbai. The theme of the event was 'Changing Dynamics of Indian Animal Agriculture' which aimed to assimilate and evaluate industry trends, identify key challenges and plan the future for the sector.

Over 450 participants representing all stakeholders in the animal value chain - academicians, feed manufacturers, aqua farmers, animal health and nutrition experts attended the forum.

The Famous CLFMA awards were given to two leaders, who had diligently worked and contributed to the development of the livestock sector. The Life Time Achievement awards were presented to Er. Anand Menon, FIE, who had contributed a lot to the livestock sector; during his glorious forty years of service as CGM, KSEL, Kerala & CLFMA Award was presented to Dr. Rudra Nath Chatterjee, Director ICAR - Directorate of Poultry Research, Hyderabad for his marvellous contribution to the Indian Livestock Sector. CLFMA Chairman congratulated all the CLFMA award winners.

The inaugural Session was started with welcoming the dignitaries, speakers and members by **Suresh Deora**, Convenor and Secretary, who extended a warm welcome to CLFMA **Chief Guest Shri. Parshottam Rupala**, Hon'ble Minister of Fisheries, Animal Husbandry and Dairying (AHD) department, Govt. of India.

The Welcome Address was delivered by **Neeraj Kumar Srivastava**, Chairman CLFMA OF INDIA. Introducing the session, Neeraj Srivastava, Chairman, CLFMA, said that, dynamics of the livestock industry being constant, the current emphasis should be given to the adoption of modern solutions to mitigate present and future challenges. He appreciated the government's openness, which has led to expedite the growth of the industry.

Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, Animal Husbandry and Dairying (AHD) department, Govt. of India, in his address as the Chief Guest at the symposium said that, India is heading towards a novel path to success and the government will be happy to collaborate with the industry. He emphasized that, all innovative ideas which comes up in the two-day symposium will be considered for discussion. He also emphasized on the waste to wealth strategies for disposing dead animals and considering the PPP Model for animal health.

Balram Singh Yadav, Managing Director of Godrej Agrovet, presented the journey of the industry, highlighting data on growth in production and efficiency over the last two decades. The Thematic address discussion points are given below in this report.

Shri. Jatindra Nath Swain (Secretary, Department of Fisheries, Govt. of India) said that, the consumer demand is shifting to animal proteins, with a projected 4x rise in consumption by 2047. He urged the participants to adopt sustainable solutions to water and electricity consumption. The Keynote address discussion points are given below in this report.

An industry survey report was also released on the occasion, followed by a vote of thanks by **Divya Kumar Gulati**, Deputy Chairman, CLFMA of India.

A. Thematic Address Major Discussion Points by Balram Singh Yadav, Managing Director of Godrej Agrovet

1. At the outset he thanked the government's positive approach towards the Livestock industry.
2. **A Game Changer:** - The creation of National Advisory Committee with the government and other industry stake holders will give an opportunity to discuss all the problems and work for the solutions, look into available opportunities and claim them.
3. Government Schemes are playing wonders: The schemes highlighted were AHIDF, Interest subvention scheme, pradhanmantri Matsya Sampada yojana(because of this government scheme, north states like UP, Bihar, Haryana, Chattisgarh are growing in the inland fish culture and some shrimp production also).
4. Inclusion of Animal Agriculture in kisan credit card has definitely helped the farmers.
5. These schemes have led to the employment generation.
6. Other decisions like import of Soymeal have saved the industry by bringing down the price hike of the soymeal.
7. Bird flu hit the industry in a very bad way and the decision by the government to make the vaccine in the country by Aatmanirbhar technology has helped us a lot.
8. He talked about Rashtriya gokul mission and other schemes related to milk processing, which has helped to double the milk processing now and reach close to 108 million tonnes per year by 2025.
9. The National Livestock mission breed improvement program is also progressing.
10. Government is providing unprecedented support in terms of the schemes and the industry to make the best out of it.
11. A glimpse of the last 75 years scenario and what needs to be done in the future 10 years was discussed.
12. Crops husbandry are growing at a trajectory of 1.4%, Animal husbandry is growing at 7.5 % and said that this sector is responsible for the increase GDP. Also, Animal husbandry can be done in waste lands.
13. In Animal husbandry the cash cycle for the farmers is good as he gets paid 12 to 15 times and in crops the cash cycle is two-time payment, hence from the sustainability point of view animal husbandry helps the farmers.

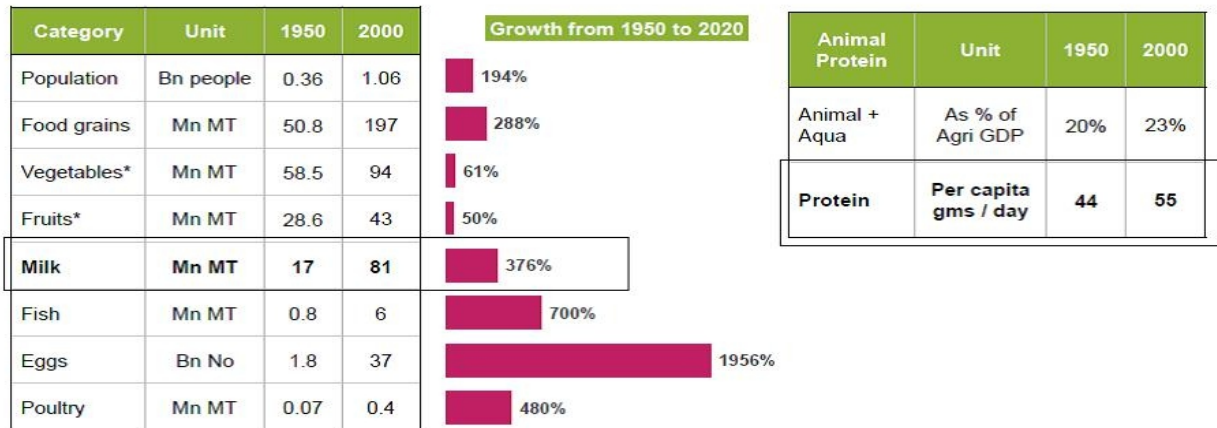
Animal Husbandry Past & Future Growth Analysis

14. The growth of the Animal husbandry industry was 1% in the year 1950-2000 and the growth was due to set up of co-operatives in milk, MPEDA doing a marvellous work in terms of making India an Aqua Exporter, National Co-ordination Committee started by Venkys has done wonders for Egg production business, All India Co-ordinated Veterinary Projects brought about increase in veterinary colleges and Aquaculture colleges, which led to lot of support in terms of trained manpower.
15. Animal Husbandry took a lead in Nutritional Security. The following table-1 reveals the same.

Table -1

ANIMAL HUSBANDRY TOOK A LEAD IN NUTRITIONAL SECURITY

ANIMAL PROTEIN OUTPERFORMED THE PLANT PROTEIN SOURCES



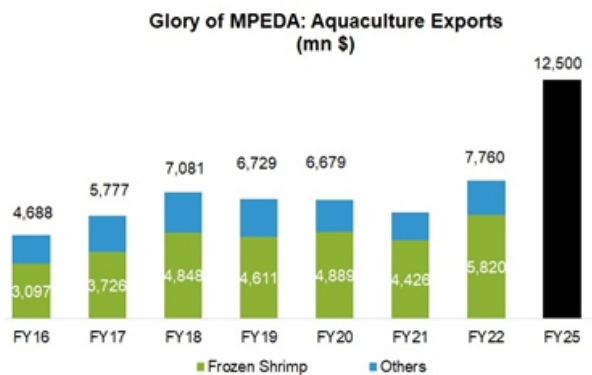
Source: World Bank Database | Ministry of Agriculture and Farmers Welfare | Basic Animal Husbandry Statistic | Horticulture Board of India | Dept. of Fisheries, Note: * data is for 1991

2

16. The growth of Animal Husbandry Industry in the period 2000-2020 was 2% and was mainly due to private sector led value addition efficiencies, rise of aquaculture. Also, private sector in dairy created capacity and product innovation.
17. Rise of aquaculture: There is a testimony of India's ability to handle sensitive species. In the last decade, India has become the 2nd largest exporter of shrimp in the world. Figure-1 below shows the same.

Figure-1

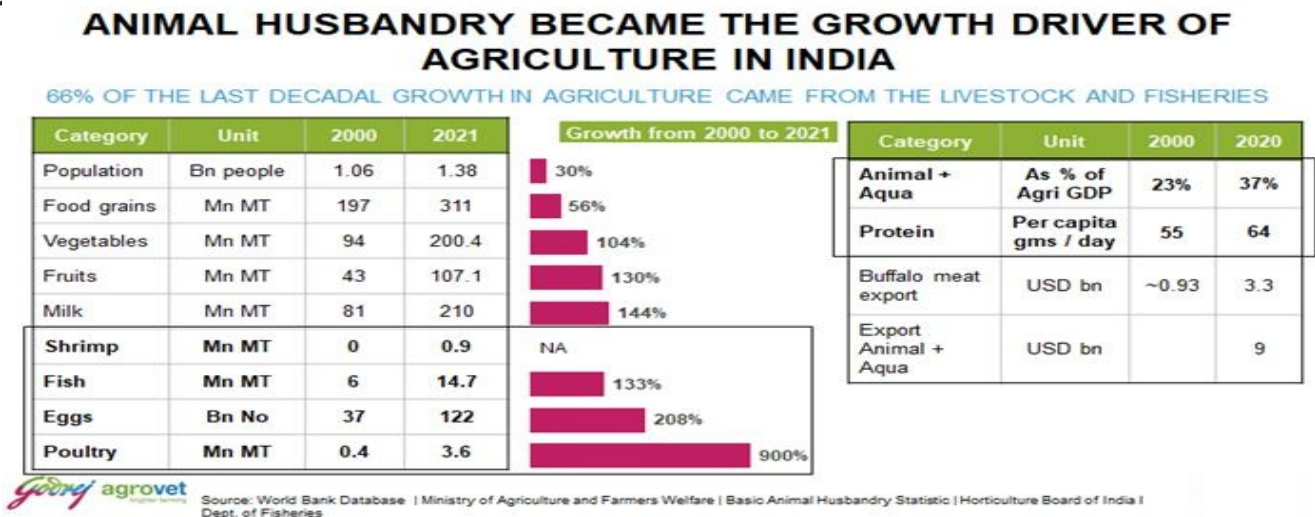
Private sector operating across the value chain



Hatchery
Feed
Processing

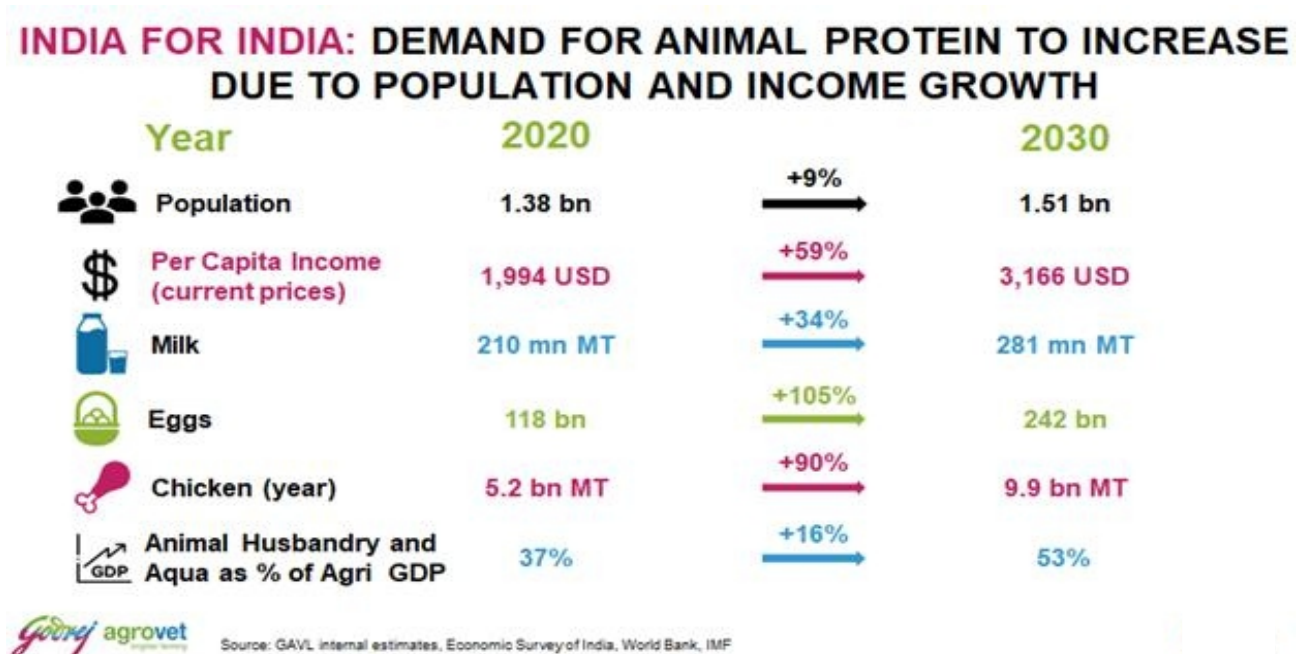
18. World class efficiency in poultry driven by integration of feed-breed-management. The production, productivity and per-capita income has galloped.
19. Animal husbandry became the growth driver of agriculture in India. 66% of the last decadal growth in agriculture came from the livestock and fisheries-Refer Table -2 below:

Table-2



20. **India for India:** Demand for animal protein to increase due to population and income growth. Table -3 data supports this statement:

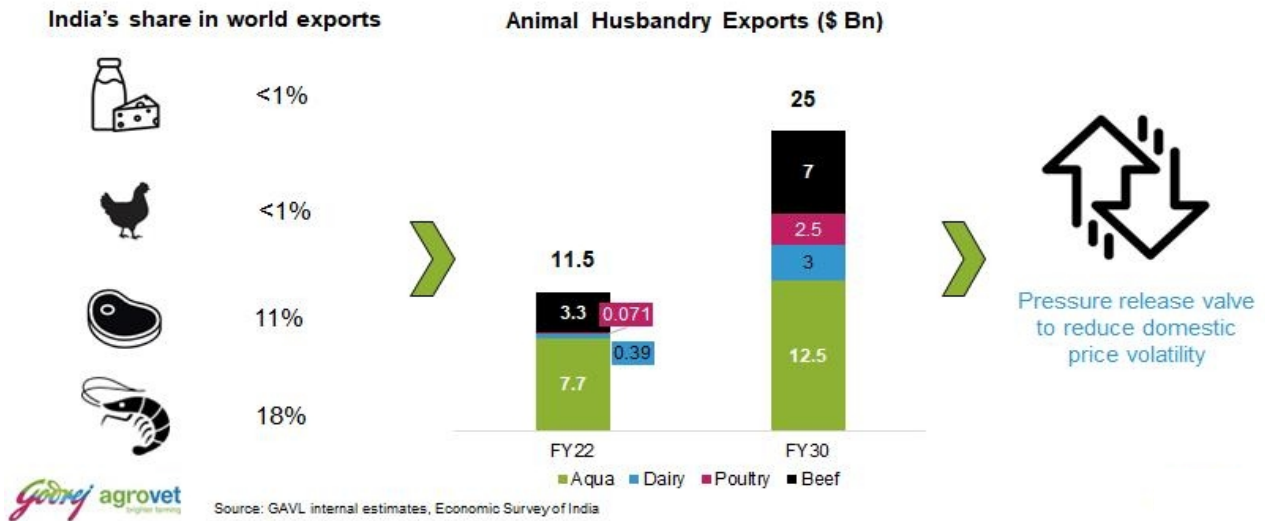
Table-3



21. **India For World:** Animal Husbandry and livestock to drive exports. Opening for World opportunities to India are given in Figure-2:

Figure-2

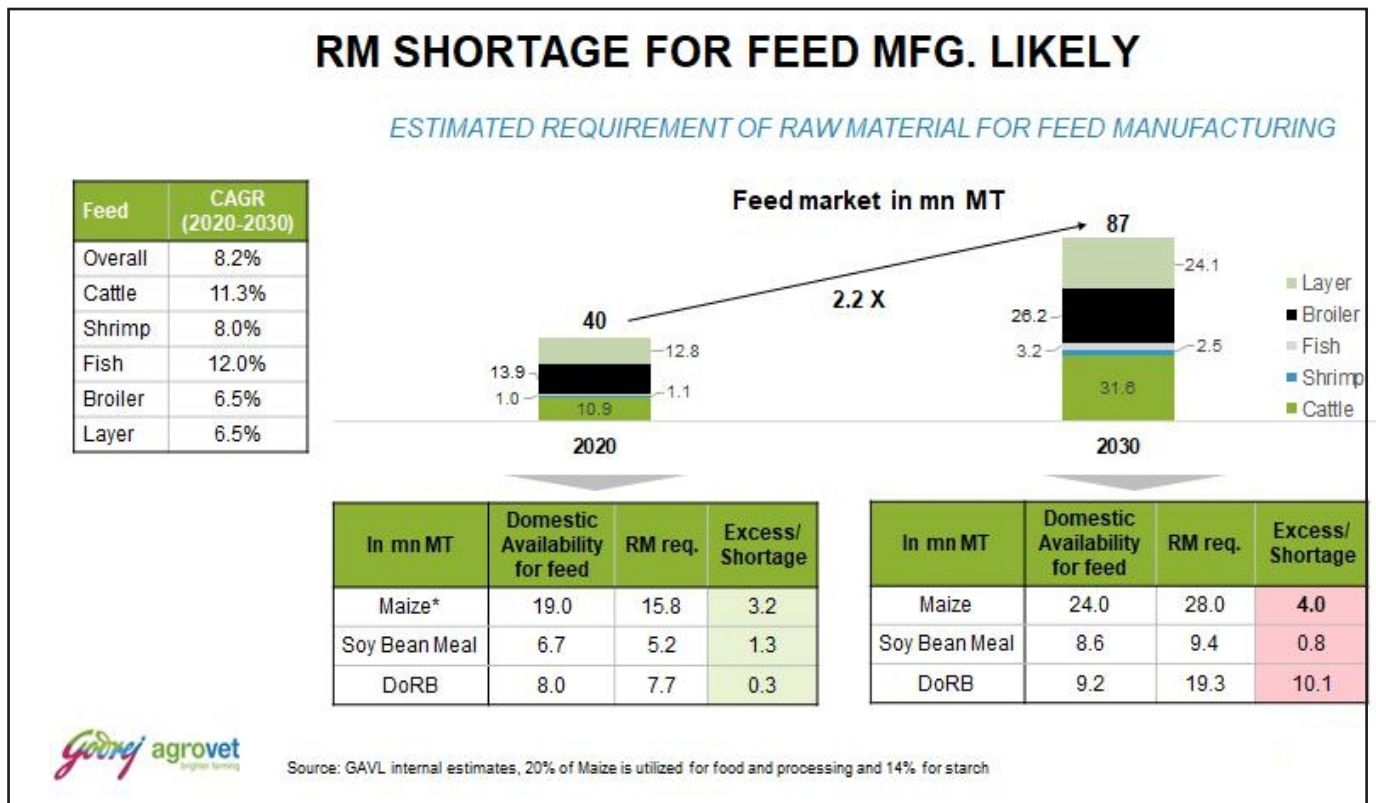
INDIA FOR WORLD: ANIMAL HUSBANDRY AND LIVESTOCK TO DRIVE EXPORTS



22. **Government Support Required to Overcome Challenges:**

a. RM shortage for feed MFG. LIKELY- Refer Table -4

Table-4



- b. Import in Short Term, Introduce Gm Soybean in Long Term.

Short Term:

- Allow import of Soybean
- Industry to set-up port based crushing capacities to cater to domestic oil and cake demand

Long Term:

- Allow GM Soybean production
- Improve Farmer Income by improving crop yields
 - India current yield: 0.91 – 0.95 MT / Ha
 - Global average yield: 2.7 MT / Ha
 - US current yield: 3.5 MT / Ha
- c. Fodder Supply: Allow wasteland for fodder and brackish water development for aquaculture.
- d. Progressive vaccine policy as Every year poultry industry loses Rs 20,000 cr. due to diseases.

Current Status

- Dairy: 100% Animals to be vaccinated against FMD by 2025
- Poultry: Indigenous vaccine for LPAI by NIHSAD

Future

- Pan India vaccination for Lumpy skin disease
- Fast-track mfg. of LPAI vaccine
- Vaccine for HPAI
- Cooperation between Government & Pvt. sector
- Swift approval for import of vaccine
- To Re-look at biosecurity / quarantine rules
- e. Replicate the success story of shrimp exports:
 - Export Authority for Poultry and Dairy
 - Limited use of chemical and drugs: Control antimicrobial resistance
 - Trade Agreement: Target Middle East for poultry and milk exports
 - Control on Diseases: Allow vaccines in India
 - Cluster of Excellence: Promote exports due to locational advantages
- f. Introduce new aqua species to diversify portfolio: Potential species for commercial introduction is Asian Seabass, Cobia and Grouper.
- g. To work on the holy trinity - quality | cost | value addition to enhance exports.
- h. Re-route the budgetary support from crops to animal husbandry.

23. Focus Areas:

- Address the consumer buying behavior pattern in animal protein.
- Disruption in the animal protein space. Examples in protein distribution are Licious, Milk basket, Country Delight, Aqua Connect & Examples for supply-chain and big data.
- for livestock sector are Tessol(Provides cold chain, cold storage and last mile delivery logistic solutions) and Stellapps(End-to-end dairy technology solutions company).



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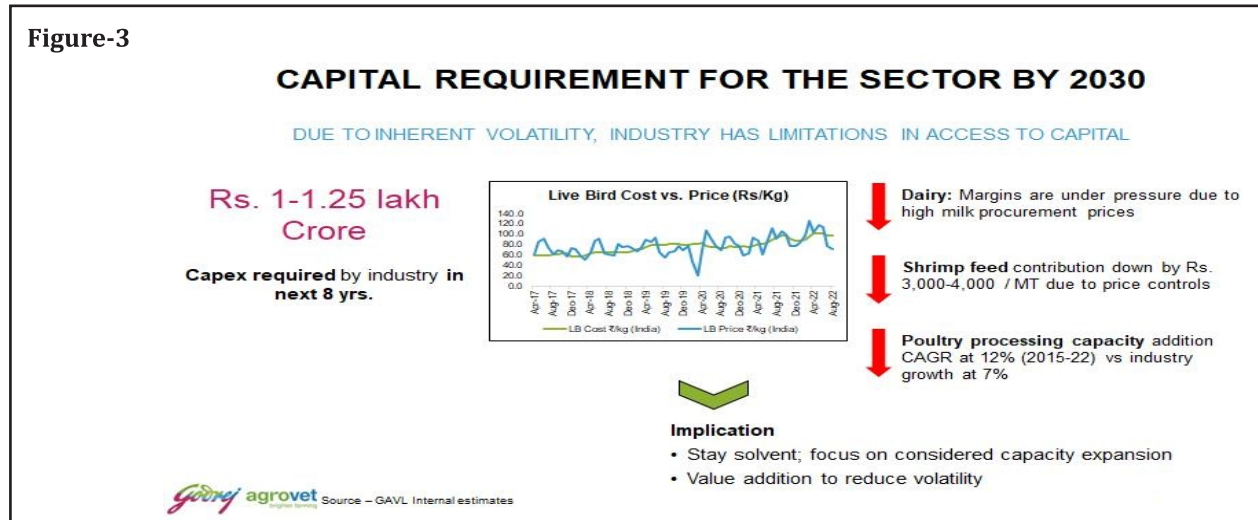
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- d. Vegetarian Meat is an alternative protein market which is gaining importance.
- e. The Animal industry has to cope-up with the the battle of environmental racism.
24. **The below table gives the capital requirement for the sector by 2030 - Due to inherent volatility, industry has limitations in access to capital:**



B. Keynote Address Major Discussion Points by Shri. Jatindra Nath Swain, IAS, Secretary (Fy), Department of Fisheries, Ministry of Fisheries, AH&D, Government of India.

1. Talked about the change in consumer behaviour and shift to preferring consuming "Animal Protein" and hence in future there will be greater demand for animal protein and some value-added products which takes less cooking time.
2. Production has to increase with increase in demand and in case of Aqua industry, the fish available from the natural sources are limited, hence the production has to come from culture and hence there will be more requirement of feed and the feed requirement needs to be addressed on priority.
3. Animal agriculture will be the main industry to cater to the government's slogan of doubling the farmer's income.
4. The Schemes related to animal husbandry will increase investments in this sector to a larger extent.
5. The Pradhana Mantri Matsya Sampada Yojana has an increase in production target from 15 million tons to 22 million tons, by 2047 i.e., 100 years of independence, it also emphasizes to bring the consumption level of fish to 25 kgs /per annum/per-capita as against the present consumption of 5-6 kgs per annum per capita, after which there will be a tremendous potential for the feed industry.
6. We have to be very efficient in terms of production, when we get into Aquaculture, the feed cost has to be kept at a competitive level to hold the feed manufacturers.
7. India has a varied Agro-climatic regions and the human food consumption is varied and similarly animals also require feed as per the Agro-climatic regions, hence we need to focus on standardization of the feed based on the Agro-climatic regions.
8. We have farmers, who take very huge risks by producing more e.g., in shrimps' sector and few other takes very less risk, and feed is 50-60% of cost of production in Aqua culture and 70% in dairy, the challenge is whether we maximize per unit of feed i.e., our output of the feed, and how the industry will respond to it is a challenge.
9. The major raw material supply will come from agriculture and from others, we are already a water scarce country, and hence should use raw materials which are less water intensive.
10. Create better water efficient systems to optimise the water use and to increase the use of renewable energy in the feed production system.

11. Fish meal is one of the essential ingredients in most of the aquatic feeds and since demand of seafood has shot up, our fishermen are catching the juvenile fish and feed fishmeal to shrimps and this is the major issue, we need to find an alternative to fish meal.
12. As discussed earlier, our exports are going to double and our production is going to be up by 70% and hence an alternative source, like some kind of protein should be found out to replace the fish meal as feed.

Day 2 Symposium Proceedings

The Second day Symposium started with the Welcome Address by Neeraj Kumar Srivastava, Chairman, CLFMA OF INDIA.

Session-1

The First session was titled "**Mitigating the Challenges of Price Escalations of Feed Ingredients**"

Moderator: Amit Saraogi, Managing Director, Sarawagi Agrovet Pvt. Ltd.

The first session brought up technology solutions with a focus on data and analytics.

The first speaker Kumarjit Mazumder, Head – Sales & Strategy, RMSI Cropalytics Pvt. Ltd. presented on the topic "**Crop Map, a tech solution to optimize business across Livestock Agriculture value chain**". The main discussion points were as follows: -

1. Suggested to bring a lot of automation to Indian agriculture, as in India 50% of the population is associated with agriculture and 90% of water is used for agriculture, but the agriculture contribution to Indian GDP is about 20%, this will encourage us to think of getting more efficiency in the Indian agriculture system.
2. There was a discussion about how the technology can help the members of CLFMA.
3. About 50 to 60% of cost of production in the animal rearing is animal feed, nutrition is extremely important as it powers growth and quality of the product produced.

Challenges/ Problems:

4. In India there is no agriculture crop map available at sub-district/village/plot level, and India has 6 lakhs 60 thousand villages and 700 districts and it is a vast geography and it is the major challenge which creates volatility in the market. This essentially brings us the problem of crop procurement, cost, pricing, quality etc.
5. No credible data and hence Go to Market decision making, becomes difficult, also we are unable to make a comparative study of the cropping pattern, price volatility visa-viz the previous years.
6. To solve these challenges, we need to have credible estimates of the crops at the granular level.
7. RMSI has introduced a crop map for Maize, soyabean etc which is updated every 4 months i.e., presently we can understand the acreage, crop health and production estimates at district and village level at quarterly intervals.
8. The crop map uses digital satellite images for:-
 - a. Creating & updating the agriculture map for maize & soybean for Kharif & Rabi and other crops
 - b. Making the data available at a click of a button (while the crop is standing in the field)
 - c. Analysis and aggregation based on client requirements (tehsil/ district)
 - d. Data democratization and availability to multiple stakeholders across the value chain

Methodology

9. Procure satellite images and superimpose boundaries (Cadastral, Village, State, District) on top of it, then the spectral value tells us exactly the crop type and its location and by this, the exact estimation of the crop and its acreage can be established.
10. There are several indices e.g., NDVI indice, determines the chlorophyll content of the crop and thus the crop health and by putting all the relevant required indices into the AIML system it gives the likely output of the crop

production numbers.

11. RMSI Cropalytics has a **large Dataset, Technology, Skills Set and Talent.**
12. **A Sneak Peak about the Soybean Kharif 2022 estimation was presented.**

The Second Speaker of Session-1 was Prerana Desai, Head of Research, Samunnati Agri., who spoke about the **“Outlook of Corn”**. The Major points discussed were as follows: -

1. Problem area recognized during last year was the gap between production and availability of soya and it was like a black box.
2. It is essential to capture supply as well as the demand of the corn and it is the combination of both which will indicate the price direction.
3. **Recent scenario of the soymeal and the Feed Substitution scenario was presented:**
 - a. April to September 2022, the supply was depleting very fast and people started looking for alternatives and how the use of alternatives has affected the feed ingredients, whether these changes are going to be permanent was discussed in detail. The speaker said that, recently the soymeal prices continued to be high and hence prompted players to continue with the trend of substitution.
 - b. In FY21-22, soymeal substitution was widely observed in Commercial broiler and layer farms though not in breeder farms.
 - c. For Broiler, Soymeal percentage in feed was reduced to 18% (Average) from 22% - 24% norm.
 - d. For Layers Soymeal percentage in feed was reduced to 8% (Average) from the norm of 18%.
 - e. The substitution was very prominent in case of Unorganized players.
 - f. The most widely used replacements were Groundnut DOC, Rapeseed meal, Sunflower meal, DORB, Bone Meat Meal, Maize Gluten, Rice DDGS, synthetic proteins etc.
 - g. In case of Country birds' soymeal was completely replaced.
- h. **Other Observation regarding feed substitution:**
 - i. Occasional presence of aflatoxin in groundnut meal limited its use in feed.
 - ii. Higher usage of DDGS resulted in lower shelf life of eggs.
 - iii. Lysine had no effect in layers but worked well for broilers.
 - iv. The bird excreta turned liquid if rapeseed meal is used in higher quantities.
 - v. Higher bone meal usage in layers resulted in infertility whereas in broilers it turned out to be a good alternative.
 - vi. Higher usage of Methionine resulted in increased egg size and also worked well for broilers.
 - vii. If the content of maize is less than 200 kgs per ton, then yolk is diffused into albumin with pale colour.
 - viii. If it is less than 300 kgs per ton, then colour of the yolk is faded.
4. **Current Scenario:**
 - a. As the feed raw material prices have cooled down to 2018-19 levels, the farmers have gone back to previous norms of feed ratios.
 - b. Yet if soymeal rallies above the Rs.41,000 /MT – Rs.45,000/MT range, farmers may again switch to alternatives.
 - c. While the raw material prices have cooled the sectoral difficulties may not have. The same is reflected in the stagnant Egg and Broiler prices since 2018. General inflation and rising interest will increase the cost of doing business.
5. **Competition from ethanol on cards:**
 - a. About 98% of the fuel requirement in the road transportation sector is currently met by fossil fuels and the remaining 2% by biofuel. Currently, Ethanol makes up 10% of the petrol we use in our vehicles.

- b. The National Policy on Biofuels 2018, provides an indicative target of 20% ethanol blending under the Ethanol Blended Petrol (EBP) Programme by 2025.
- c. India intends to produce 350 Cr Litres of ethanol in 2022-23, up by around 17%. For this 17 million tons of grains is required.

6. Grain Based Distilleries in India:

- a. Maharashtra, Uttar Pradesh and Chhattisgarh have emerged as the top three destinations for grain-based ethanol plants attracting over 40 per cent of the total projects approved in the past year after the government announced a scheme for the sector.
- b. So far, 196 projects with a combined capacity to produce 859 crore liters of ethanol per annum have been approved by Union Food Ministry since January 2021.
- c. Current actual Installed capacity: 270 crore litre.
- d. At current prices, the ethanol players have good profitability when they use broken rice, wheat and maize as raw material.
- e. In years to come poultry sector might have to compete with ethanol industry to get their share of maize.

7. Current Global Economic Trends:

- a. Interest rate hikes by central banks around the world. The trend could last for next 2-4 years.
- b. Russia – Ukraine War.
- c. Energy crisis in Europe.
- d. Slowing Chinese economy.
- e. High inflation, central banks are trying demand destruction to counter the same.
- f. Climate crisis could derail the process.
- g. While uncertain supply scenario is price positive, certain demand destruction is price negative.
- h. Good Crop prospects from the ongoing season in northern hemisphere and higher projected crop in South America.
- i. World Metrological Organization has predicted the continuation of the current La Nina over the next 6 months. There is a 70% chance in September-November 2022 but gradually decreasing to 55% in December-February 2022/2023. It started in September 2020.

8. Maize Supply and Demand:

Table-5

Indian Maize Balance Sheet-Lakh MT					
	20-21	21-22 E	2022-23(F)	Change 2021-22	Change 22-23
Beginning Stocks	40.7	26.7	11.8	-34%	-56%
Production	240.7	245.8	240.7	2%	-2%
Marketable Surplus	201.7	206.3	201.2	2%	-0.0
Total Supply	242.4	233.7	213.0	-4%	-9%
Total Domestic Demand	179.4	186.9	190.4	4%	2%
EXPORT	36.3	35.0	11.0	-4%	-69%
Total Demand	215.7	221.9	201.4	3%	-9%
C/O Free Market	26.7	11.8	11.6	-56%	-2%
Total C/O	26.7	11.8	11.6	-56%	-2%
Total Stocks to Use Ratio (SUR)	12.39%	5.31%	5.75%		
Source: SAR & Govt Estimates, E-Estimated, F-Forecasted					

- a. Key deviation from previous year.
- b. Q1 balance sheet is second tightest in 15 years, Q1 of 2018-19 was tighter.
- c. SamAgr has the balance sheets since 2004-05, The Kharif balance sheet is the third tightest ever. Tighter than 2022-23 was record in 2015-16 (draught year) and 2018-19 (lower production).
- d. Full impact of Limpy disease is yet to be fully factored in the Maize demand.
- e. Season 2022-23 will open with a carry forward that is smallest in three years.
- f. Erratic monsoon has impacted the new season crop. SamAgr is of the view that, the government acreage is not reflecting a true scenario that has seen acreage losses due to excess rainfall as well as a migration to better remunerative crops.
- g. The base case scenario is that of marginally lower crop y/y.
- h. Total supply as a result will decline by 9% y/y.
- i. Poultry sector demand is expected to revive in next year due to the very high prices of the competing feed materials. Wheat prices are at all time high and the prices of broken rice will also remain alleviated due to the lower Kharif paddy crop.

9. Crop Outlook:

Table-6

COMMODITY	MARKET	CMP (RS/Q)	OUTLOOK
Soymeal	Indore	3887	Soybean is expected to trade weak during the month. The prices are expected to move towards Rs.4,800/Quintal. If breached the prices could decline towards Rs.4,500/Quintal which was last seen in January 2021.
Mustard Cake	Jaipur	24,000	Mustard cake is trading at Rs.24,000/MT. Higher mustard seed availability coupled with projections of record production in the upcoming rabi season is also expected to put pressure on prices. Higher oil availability within the system will result in lower crushing in the near term which will in turn support the prices. Given the above, the prices are expected to move firm to rangebound in the near term. SamAgr expects the prices to move in the range of Rs.23,000/MT to Rs.26,000/MT.
Cottonseed Oil Cake	Akola	2695	Cottonseed crop is expected to be 9% higher Y/y. Higher availability coupled with fall in other oil cake prices will put pressure on cotton seed oil cake prices as well. SamAgr expects the prices to move towards Rs.23,500/MT in the next few months.
Wheat	Delhi	2510	Wheat prices in Delhi is currently trading at ₹2550/Quintal and prices have sustained at this level over the month. As the stocks with the Government is lower, FCI will not be able to sell in the open market and the consuming industries will need to purchase from the stockiest. At the same time stocks in the free markets are at highest as of now and this will cap any sharp rally in prices.
Bajra	Delhi	1850	Bajra prices in Jaipur are trading at INR 1850/qtl. Prices are expected to trade lower because of higher acreage and demand destruction from cattle feed industry due to recent effect of lumpy disease. SamAgr expects Bajra to trade at ₹1500/quintal in the near term as the new crop arrival pickup.
Maize	Nizamabad	2350	Maize prices in Nizamabad market is currently trading at ₹2350/Quintal. SamAgr expects maize to trade at ₹2000/Quintal over the next couple of month as the new crop arrival picks up. However, downside is limited considering the higher prices of other feed ingredients.

The Third Speaker of Session- 1 was Kevin M Roepke, Regional Director-South Asia & Sub-Sahara Africa (SAASSA), USSEC. He presented about the “Insights on Soymeal Demand & Availability”. The highlights of the discussion are given below: -

1. The comparison was made between per capita GDP world, China and India and found that China had more per capita GDP than India, but in terms of PPP they are at parity and right now the per-capita meat consumption of China is 60 kgs and India is around 4 - 5 kgs. The Figure - 4 & 5 below shows the details of Meat Consumption vs. GDP per Capita for 2017 & 2006 for China & India.

Figure-4

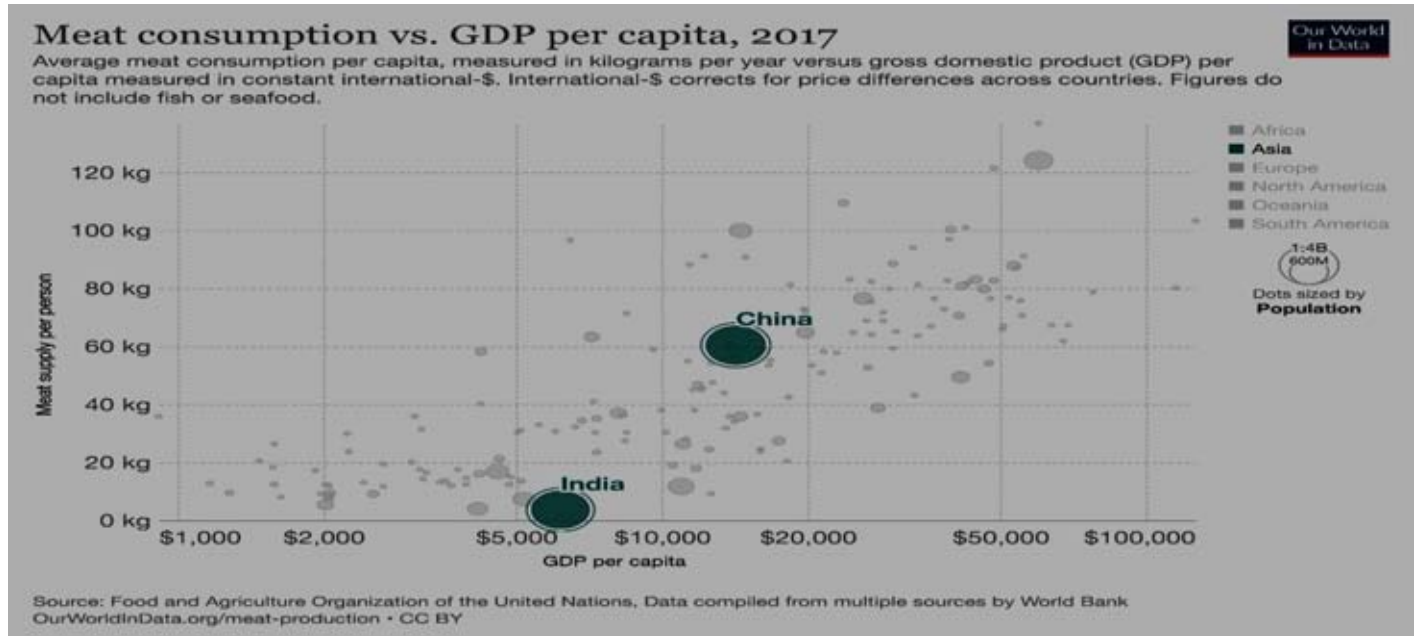
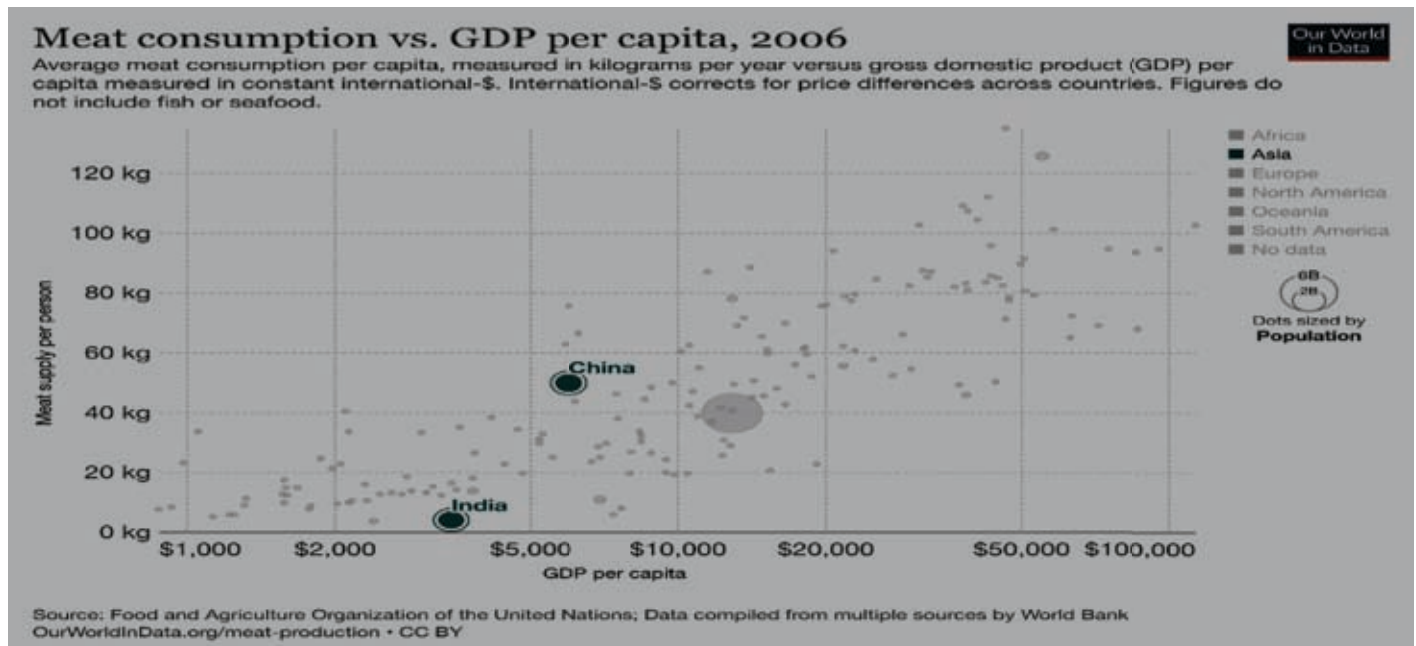


Figure-5



FAT-O-LIP LS

Rumen bypass fat alone is not enough, Milch Animals require rumen bypass phosphatidyl choline (PC) together.

Today's high yielding dairy animals requires more than rumen bypass fat to meet energy demand along with critical nutrients.

Micro- Encapsulation or Matrix Technology is superior to standard encapsulation technology to deliver PC at the intestine without getting leached in the rumen.

One of those nutrients is Phosphatidyl choline (PC), which around 112-487 mg/litre gets excreted through milk on daily basis (Artegoitia et al., 2014).

95% of choline pool in the animal body is only in the form of phosphatidyl choline - It means, in animal body dietary choline, gets converted in the form of phosphatidyl choline (PC) (Li and Vance, 2008).

Only 10 to 12 % of dietary rumen protected choline chloride gets converted in to phosphatidylcholine- Rest is waste.

PC
Essential nutrient
for
dairy animals



The information provided is to best of our knowledge.

For more details please contact Dr. Amit Sharma on 9673998176

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SPECIFICATIONS		BIO-A-PRO
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Crude Protein	Min.	45.0%
Crude Fat	Min.	6.0 - 7.0%
Total Ash	Max.	32 - 35.0%
Crude Fibre	Max.	2.0%
Calcium	Min.	9.0 - 10.0%
Phosphorous	Min.	4.5 - 5.0%
Sand & Silica	Max.	2.5 - 3.0%
Lysine	Min.	2.0%
Methionine	Min.	0.6%
Pepsin Digestibility	Min.	85.0%
ME Value		2000 - 2200Kcal/Kg

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BIO-A-PRO is free from ***E.Coli, Clostridium & Salmonella Species***

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- Figure 6 & Figure 7 shows the Meat Consumption vs GDP per capita of India and Sri Lanka in the year 2017 and 2006 and in both the years India's meat consumption is less than Sri-Lanka.

Figure-6

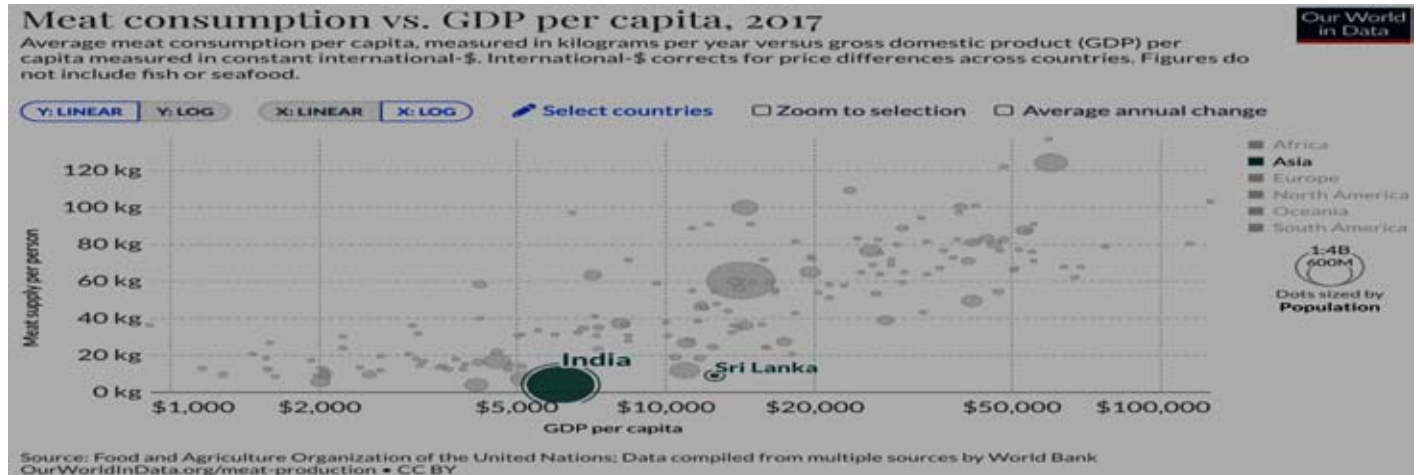
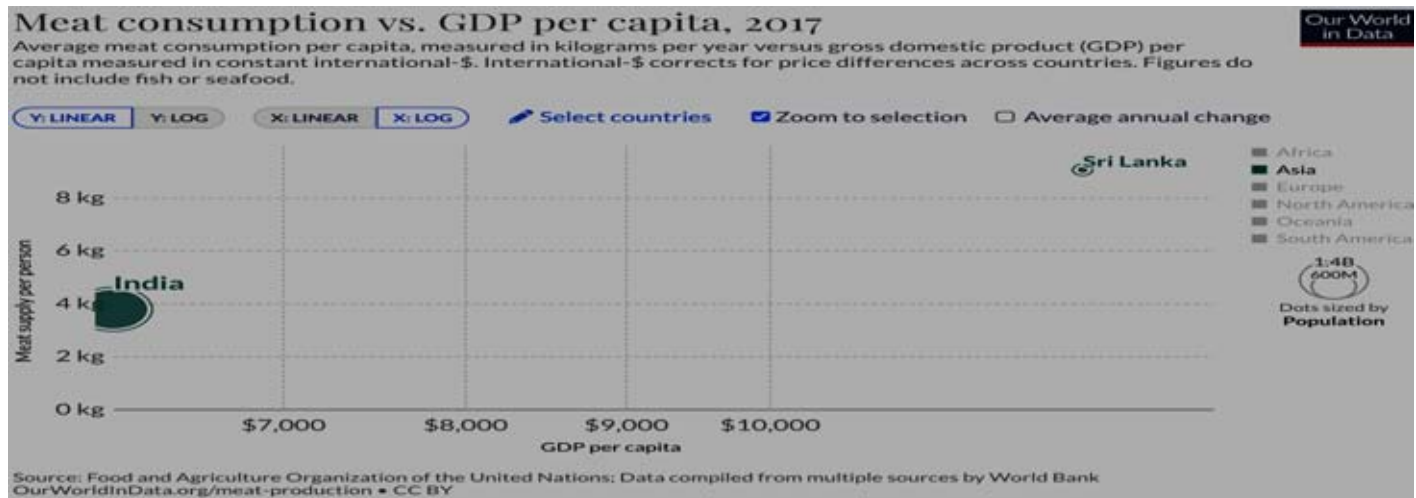
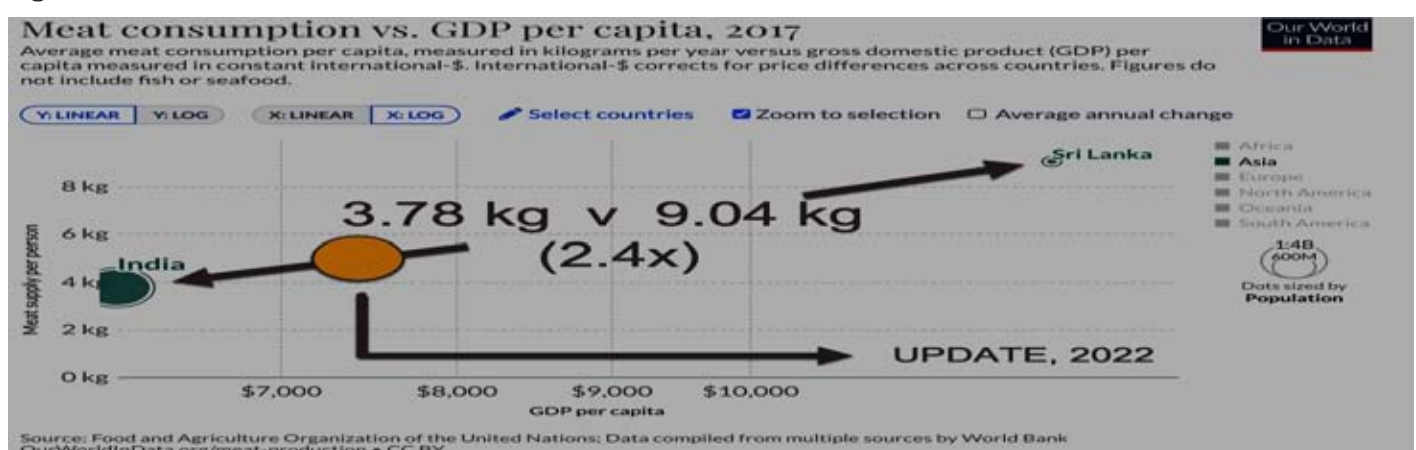


Figure-7



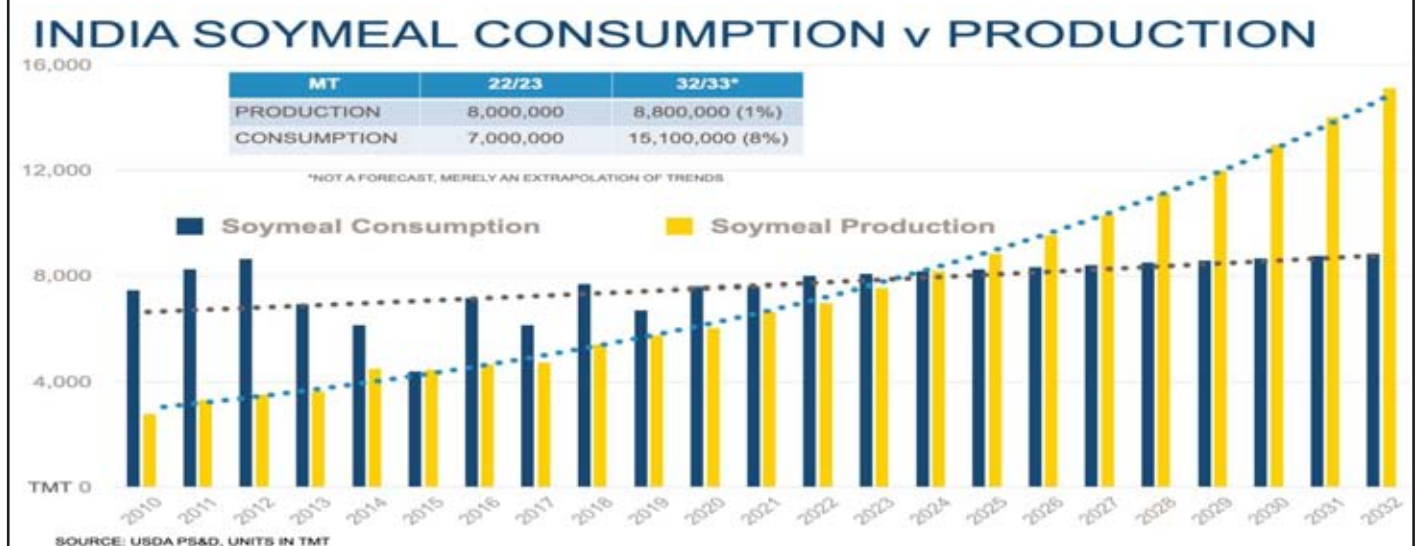
- Figure 8 gives the details of the Meat Consumption vs GDP per Capita 2017 for India & Sri Lanka. India the value is 3.78 kg vs Sri Lanka 9.04 kg which is 2.4x compared to India.

Figure-8



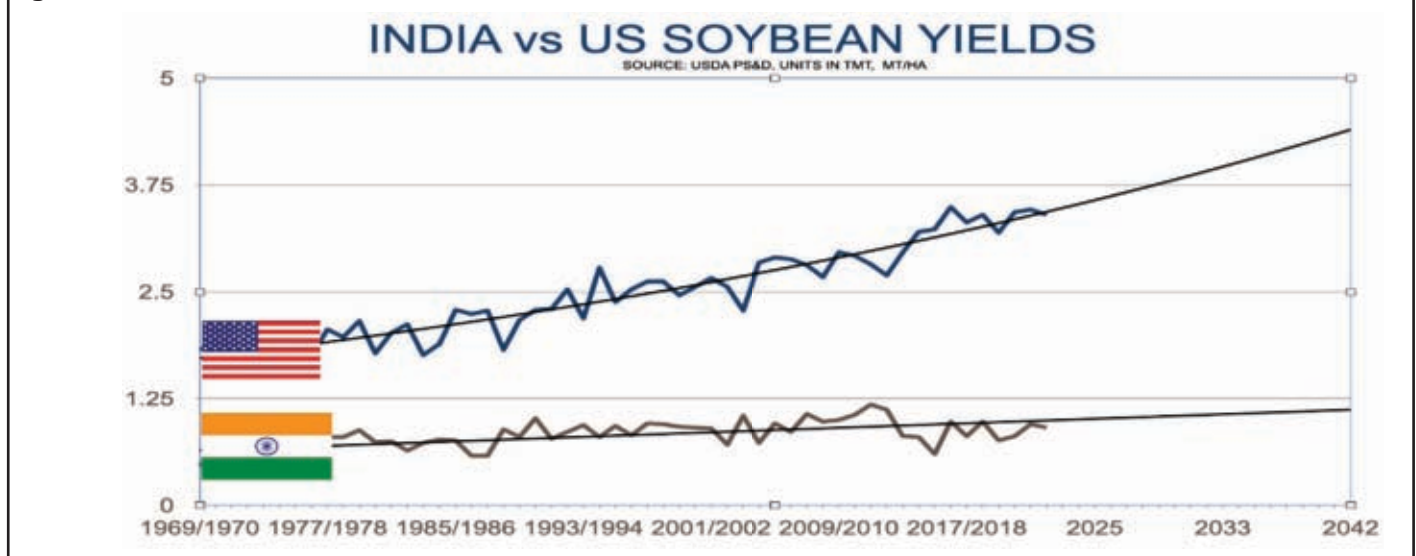
4. The inferences drawn for Indian Poultry consumption were as follows:-
 - a. India could expect to be at the PPP that Sri Lanka is now within the next 5-10 years.
 - b. If this assumption is true then commensurate increase in poultry consumption in India would be 2x i.e., 10 kg per capita consumption.
 - i. X factor – India has 200 million Muslims who occasionally substitute Poultry for Beef.
 - ii. Y Factor – India's, but disorganized dairy sector provides a tremendous opportunity for Animal Feed.
5. Economics of Poultry Production:
 - a. Post Covid , US vs Indian Food Inflation was compared and found that US is around 11% inflation which is high and Indian inflation is around 6-7% and is also high.
6. Indian Soymeal Consumption VS Production, and the India soymeal consumption was at 11.7%, when soymeal production is considered, overall, it is less than 1% growth and the value of consumption is 2x the value of production. Figure -9 shows Production and consumption values in MT for 2022-23 and expected growth in 2032-33:

Figure-9



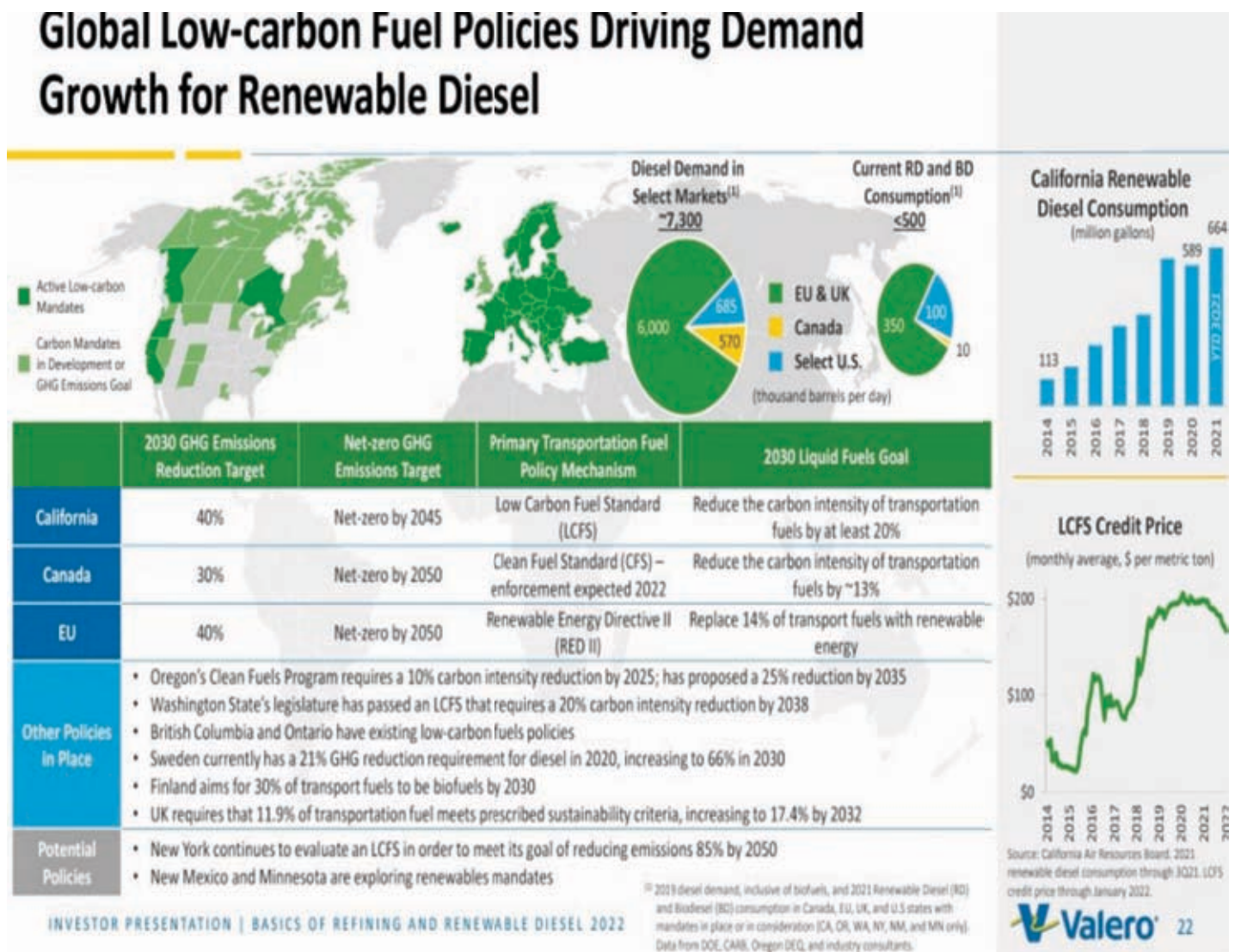
7. The Soymeal yields were compared between US & India and found that US was around 3.5 MT per ha and India was about 1MT per ha:

Figure-10



8. The inferences drawn for soymeal Production & Consumption are as follows:
- India's impressive Poultry & Aqua Sectors continue to grow at remarkable rates, driving soymeal consumption.
 - Meanwhile Stagnant growth yields have resulted in much slower growth for Indian Soymeal Production.
 - Therefore, current trend lines suggest India's Soymeal Shortage to become more and more prominent.
9. Annual CO2 Emissions from Fossil fuels by world regions were discussed and, in the future, the Global Low carbon Fuel Policies is driving a demand growth for renewable Diesel:

Figure-11



10. The US crush capacity is going to increase to 18 MT in the next 5 years due to renewable diesel. The Bio-Fuel Policies, along with blending restrictions are driving the usage of renewable diesel, fuelling an era of crush capacity expansion never seen before, resulting in much more exportable Soymeal in the years to come.

The Fourth Speaker of Session-1 was **Hemant Bansal**, Vice President, Ruchi Soya Ind. Ltd., Vice President Indian Vegetable Oil Processors Association. He spoke about **"Soybean Meal Access for Animal Feed Sector"**. The speaker enumerated the following points:-

1. Introduced "Indian Vanaspathi Producers Association (IVPA).
2. Kharif Oilseed Sowing Status-2022 was discussed. Table 7 shows the same.

Table-7

(Crop Figure in Lakh Ha)	Normal Area	2022*	2021	% Change
Ground Nut	44.37	45.49	49.08	-7.3%
Soybean	115.51	120.70	120.78	-0.1%
Sunflower	1.30	2.01	1.53	31.4%
Sesamum	12.60	13.12	13.07	0.4%
Niger	1.72	0.98	0.86	14.0%
Castor	8.61	8.49	6.79	25.0%
Other Oilseeds	-	0.12	0.13	-7.7%
Total Oilseeds	184.11	190.91	192.24	-0.7%

The total sown area of oilseed crops last year was 192.2 lakh ha by the second week of September.

This time, 190.9 lakh ha have been sown.

Soybean area is almost same as last year.

Ground Nut crops have seen the biggest impact apart from other oilseeds.

Last year, groundnut was sown on 4.90 million ha, but it is only 4.54 million ha this time.

3. Other Crop Sowing Status-2022

Table-8

(Crop Figure in Lakh Ha)	Normal Area	2022*	2021	% Change
Rice	397.06	399.03	417.93	-4.5%
Pulses	140.18	131.92	137.50	-4.1%
Sugarcane	47.38	55.65	54.97	1.2%
Jute & Mesta	7.09	6.95	6.96	-0.1%
Cotton	125.57	127.15	118.24	7.5%
Coarse-Cum-Nutri Cereals	183.57	181.31	174.05	4.2%
Maize	74.68	82.99	81.26	2.1%
Total Kharif Crop Status	1084.96	1092.92	1101.89	-0.8%

Maize has reported an increase in sowing compared to last year

The area under maize last year was 81.2 lakh ha, which has reached 82.9 lakh ha this year

Acreage for paddy and pulses is lagging far behind last year's levels even as the 2022 Kharif sowing period draws close.

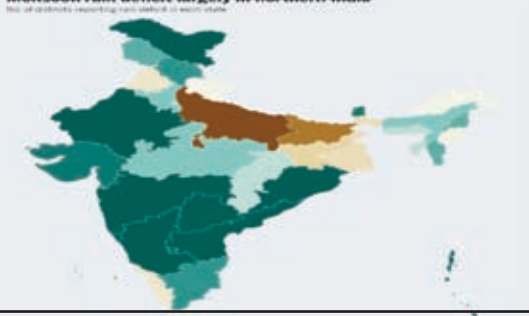
Paddy plantation is over 20 lakh hectares less than last year's.

Sowing of coarse cereals and cotton in the current Kharif season has increased.

4. Discussed about uneven distribution of rainfall and deficit regions:

Figure-12

Monsoon rain deficit largely in northern India



This year, however, 12% of the geographical area- -mainly Telangana, Tamil Nadu, and Karnataka received large excess rainfall resulting in flood and crop damage.

Around 4% of the country, especially Uttar Pradesh, Bihar, and Jharkhand witnessed large deficient rainfall

The cumulative deficiency is in the range of 36-45 %.

Poor rainfall in this region has affected Kharif sowing, particularly Rice

5. Government MSP for Select Kharif Oilseeds:

Table-9

Rs/Quintal	2022/23	2021/22	2020/21	2019/20
Soybean (Yellow)	4,300	3,950	3,880	3,710
Ground Nut	5,850	5,500	5,275	5,090
Sunflower Seed	6,400	6,015	5,885	5,650
Maize	1,962	1,870	1,850	1,760

6. Soybean Supply & Demand was discussed:

- Due to lower export, crushing has been reduced from last year.
- The ending stock of Soybean S&D for the MY 21-22 is quite high. It is in the range of 12-15 Lakh MT.
- Plant & Stockiest are expected to have 5-6 Lakh MT. Farmers are expected to have 7-9 Lakh MT.
- Meal stock as on Sep 22 is 2-3 Lakh MT.
- We expect the crop to be higher.

7. Expected Soybean Crop & Prices:

Table-10

States	Area (21-22) (Lakh Ha)	Area (22-23) (Lakh Ha)	% Change	Expected Yield (MT/Ha) (22-23)	Total Estimated Production (Lakh MT)
Madhya Pradesh	55.14	50.18	-9%	1.05	52.69
Maharashtra	46.02	48.76	6%	1.17	57.05
Rajasthan	10.63	11.51	8%	0.73	8.41
Other	8.99	10.24	14%	0.82	8.40
Total	120.77	120.70	0%	0.94	113.76

8. Soybean Supply & Demand was discussed:

- Mustard arrival and crushing have been highest in the first six months.
- Due to festival demand, arrival and crushing are expected to be higher than average in the coming months.
- KGMO demand is expected to be higher in the winter session.
- Meal export is expected to reach 15 Lakh MT which is one of the highest in the last five years.

9. Export Parity – Soybean Meal:

- Conventional markets don't pay a premium on Non-GM Soybean Meal.
- At FOB 470-480 \$/MT level, the Indian soybean meal export will start.
- This is considering the current CBOT level and the South American meal prices being offered at the destination.
- Depreciated rupee is expected to support export.

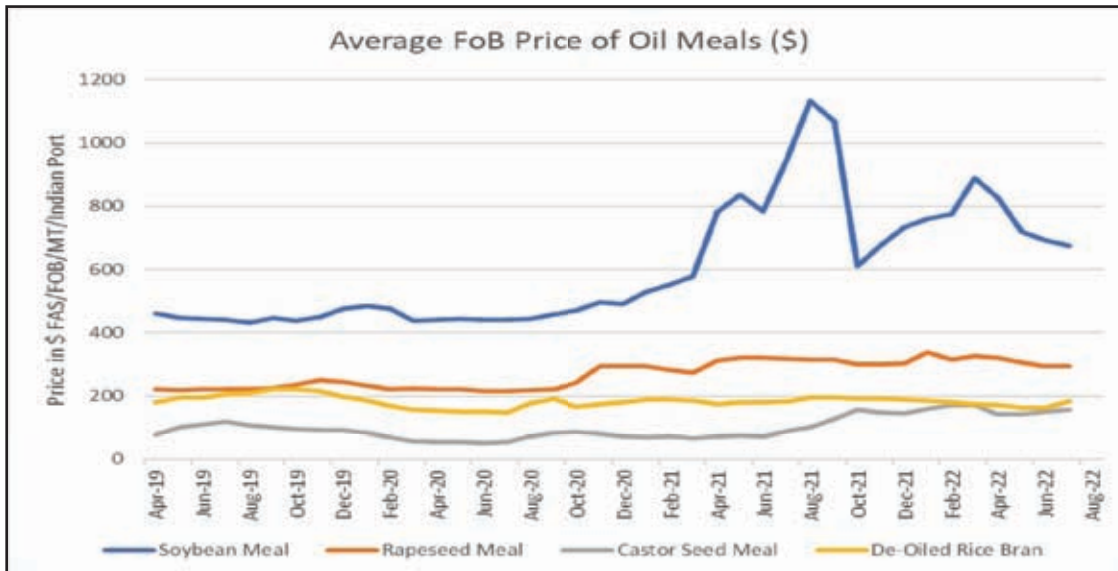
10. Oilseed Meal Export Quantity (MT):

Table-11

	Soybean Meal	Rapeseed Meal	GroundNut Meal	Rice Bran Extraction	Castor Seed Meal	Total Qty (MT)
2022-23(FY) (April -July 22)	90,711	8,51,212	2,077	1,98,832	1,05,680	12,48,512
2021-22 (FY)	3,72,740	8,66,407	2,363	7,49,810	3,82,424	23,73,744
2020-21 (FY)	15,64,833	11,13,021	15,995	5,75,770	4,19,864	36,89,483
2019-20 (FY)	6,92,883	9,61,312	3,877	2,36,589	5,38,956	24,33,617
2018-19(FY)	13,58,083	10,94,015	8,803	4,87,968	3,75,954	33,24,823
2017-18(FY)	11,87,818	6,63,988	7,558	5,94,129	5,72,762	30,26,255

11. Average Meal Prices:

Figure-13



12. International Scenario of Soya Seed:

- High Chance of La-Lina in South America during Sep-Dec 22.
- U.S Soybean production is expected to be good, and harvesting is currently going on in USA.
- Argentina's new policy on the exchange rate is expected to ease the crushing of the Soybean Seed which is likely to end on 30th Sep 22.
- Soybean demand is expected to decline due to Covid-19 lockdown in China.
- US Fed is expected to raise the interest rate further, which might affect demand.

- Oil Seed Ecosystem:** In this ecosystem there are Farmers, Soybean Processors, Feed Manufacturers and consumers. The Prices should be in a reasonable range so that sustainability of all the players can be maintained. All of us are integral part of this ecosystem and can't stay without each other.

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14. Policy Imperative for India: India needs to adopt the below policy to increase productivity.

- Increase in Domestic Production: Oilseed cultivation in the country needs massive thrust and a targeted approach.
- Crop Diversification: India is producing far too much wheat and rice which strains our storage systems, increases food subsidy bills etc.
- MSP: It has been used to incentivize production. MSP may be used both for incentivizing and disincentivizing.
- Technological Push: Productivity in the oilseed sector is woefully low and needs serious technological attention and intervention.
- PPP: Industry and Farmer organizations should be involved in all Government programs.

15. Steps To Reduce Dependence: - The following seems to be the way forward.

- Full Thrust be given to National Mission on Oilseeds with target achievement.
- Soybean, Mustard, Groundnut, and Sunflower seed can significantly reduce our dependence.
- Crop Diversification in Punjab/Haryana.
- High import duties for edible oils.
- Involve the private sector in this National Mission.

Session-2

During the second session, the topic “Go To Market Strategies: Dairy, Poultry & Aqua Products” was discussed in detail.

The Session was started by **Dr. Manoj M. Sharma**, Aquaculture Expert, Mayank Aquaculture Pvt. Ltd. and he discussed about Domestic Marketing of Shrimp: Need of the hour in India. The main discussion points were as follows: -

1. Discussed about Shrimp Farming in India: -

- India is one of the largest shrimp producer/exporters in the world.
- Foreign earning is largely dependent on shrimp production and export.
- Shrimp farming area approx. 200,000 ha.
- Shrimp production per ha +/- 5000 kg/ha.
- 90 percent shrimp farmers are below 5 ha culture area.

2. Species Cultured are *Litopenaeus vannamei* and *Penaeus monodon*.

3. Shrimp Farming Scenario in India: - Figure-14 gives details of shrimp farming in different states and Figure 15 below gives yearly shrimp production details in MT.

Figure-14

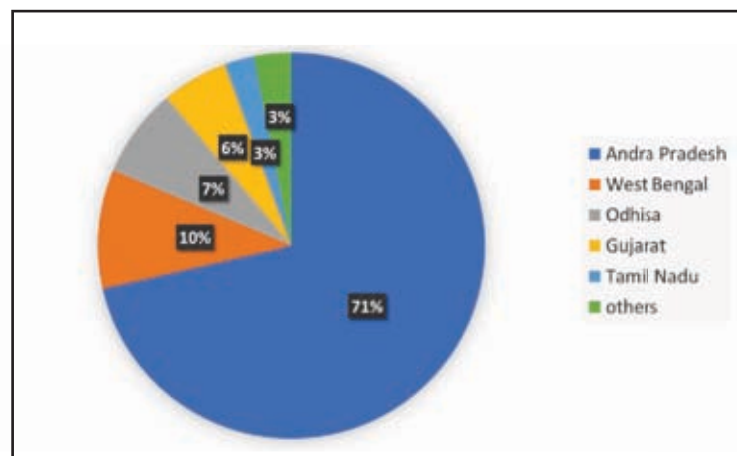
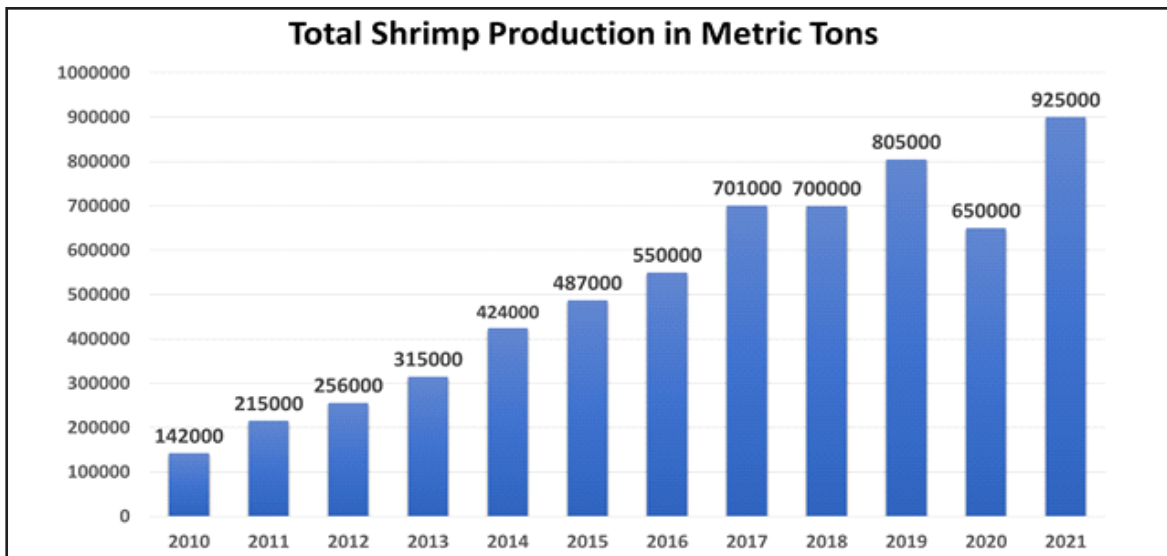
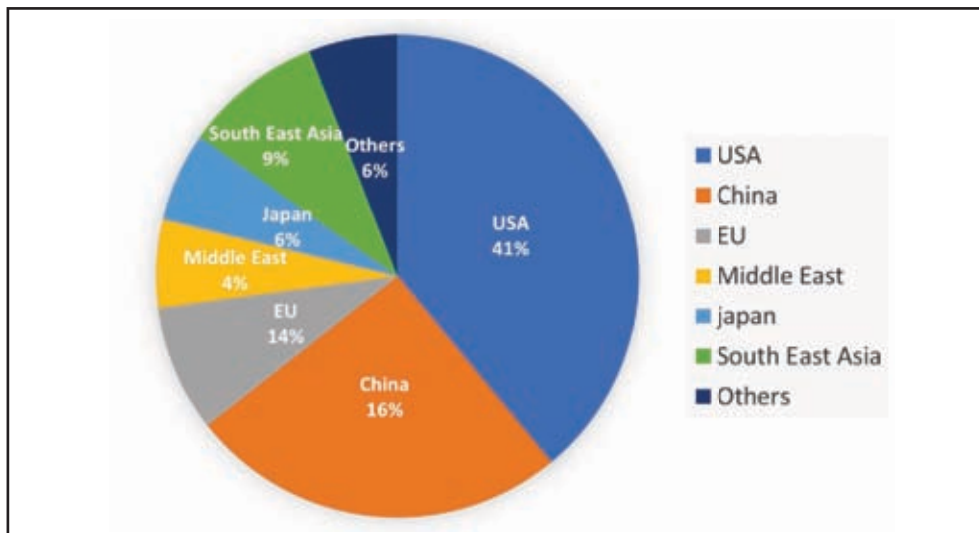


Figure-15



4. Shrimp Export Market for India: Figure-16 shows the same

Figure-16



5. Challenges

- Production issues due to disease challenge which has decreased the farming survival rates.
- Decrease in profitability due to increase in the cost of production by 25%.
- Decrease in the farm-gate price.
- Giant leap by Ecuador in terms of shrimp production who is offering cheaper shrimps. Ecuador expected to reach 25 MMT 2025.
- Overdependency on the export market.

6. "Our own country is our biggest potential Market".

- India has a population of 1.3 billion.
- If every individual consumes 1 Kg = 1.3 MMT is required.

- c. Even with 50% domestic market support, it can change the game.
- d. If 150 lakh tons of fish are easily consumed in our country, then consumption of 10 lakh tons of shrimps should not be a problem.
- e. Cumulative effort must be brought by the industry players, farmer unions, various organizations in order to develop a sustainable shrimp domestic market.

7. Benefits of a sizeable domestic market: -

- a. Farmers will have the following benefits:
 - i. Better price realization for their produce.
 - ii. Cost of production will be optimized – Enabling good profit.
 - iii. They will not have to worry to reach larger sizes of shrimps (Below 40 count).
- b. Hatchery, Feed and Medicine and others aquaculture inputs-based companies will also have stability as their earnings are directly related to the shrimp farmers success.
- c. Processors will not have to worry about catering to the export demand as they will have more flexibility to cater to the domestic market in hassle free manner.

8. Food For Thought: -

- a. Many experts say that India has very low shrimp domestic market mainly due to acceptance, supply and logistics (Cold Chain).
- b. NFDB figures indicates that India produces 15 MMT Fish and 100% is consumed locally. It is well distributed all across India through fresh chill market.
- c. Milk and Ice-cream is another good example of our cold chain network.
- d. When costliest fish ranging 800 to 2000 INR / Kg can be consumed. Lamb Meat with 650 to 800 INR / Kg can be consumed. SHRIMP RANGING 350– 750 INR / Kg !!! can be consumed.

9. My Vision is “Aatmanirbhar Shrimp Industry”.

- a. For the entire shrimp industry to survive it is important that the farmers survive.
- b. Domestic market is not about creating a business leader in the shrimp domestic market it is all about safeguarding the shrimp produce of the farmers.

10. Aquaculture has the power to transform the lives of millions in our country giving “Employment, Food and Profit for all.”

The second speaker Dan Meagher, President & CEO, Novus International, Inc. discussed on the topic “**Global Experiences of Go To Market Approaches**”. The main discussion points were as follows: -

- 1. Over the years processed food is becoming popular, contract growers are becoming large entrepreneurs/Integrators and they became companies and are building brands, he gave the example of poultry industry and how the transition happened.
- 2. Innovation came into the industry and there was a creation of an efficient cost structure with manufacturing of value-added products at the consumer level.
- 3. In US 95% of the 9 billion chickens processed are sold under the brand.
- 4. **Development in the Dynamics of the Poultry Industry:** There has been a remarkable development in the infrastructure, genetic improvement, nutrition, automation processing facilities, packaging etc. There have been immense feed conversions, birds' weights have risen over the time, better market strategies for marketing was created.

5. The integrators were creating their own feed mills and this affected the feed business, hence from feed company it was needed to go into the food system, and a company with a brand name “**Smart Chicken**” was needed to be created, which was supported by the grower network.
6. Smart Chicken entered into the retail system by the creation of the product differentiation and were able to sell at a premium price.
7. There is lot of opportunity in the future as convenience buying will pick up and product should be made in the lines of convenience buying for the consumer.
8. The industry is moving from fresh into processed food, there has been a boom in the retail and food service. Focus on supplying the products to restaurants, ready to eat market is developing.
9. Over time, brands build loyalty and value with the consumers.
10. The system from efficiency stand point, we need to think about GM Crops, technologies (Air Chilled Technology), which will lower the cost competitively, whether it is exports or profitability of business depends on, how we create value to the products for the customers and expand the protein consumption.

There were **two speakers** in the Sub-Session of Session-2 “**Direct to Consumer Approaches**”.

- **B. Soundararajan**, Chairman, Suguna Group discussed about **Poultry Products and his experience in his company**.
 1. Initially Suguna's built a brand for live chickens and franchisee stores were developed, but franchisee model failed, as other products were sold under the same brand and live birds were difficult to differentiate.
 2. Under the brand of Suguna's, other chicken brands were also sold and hence got good visibility, but it was not translated into business.
 3. Over the years a new breed was established which gave a very good yield and in earlier days, chicken was sold as a whole chicken, hence we created the strategy of portion selling (½ kg chicken) and was promoted all over India, which became a successful model.
- **Bhupendra Suri**, CEO, Creamline Dairy discussed about “**Dairy Products**”.
 1. In the milk industry the scale of the business and value additions are very important.
 2. In India value addition to milk industry is about 28 to 30% vs the global value addition is 55 to 60% and this is where the private players will have a role. Also, there is a range in the value-added category viz well accepted categories like Ghee, Paneer and innovative products like Whey drinks and there is a massive scope in both these categories for investments.

Q & A Discussion:

1. *Q: - Moderator to Dr. Manoj M. Sharma – Shrimps is a very high profitable Industry, how will you cater to the domestic sector?*

Ans- Till *Litopenaeus.vannamei* came from 1988 to 2010, the production was very low of about 75,000 tonnes as only *Penaeus.monodon* species was cultivated and all stakeholders catering to this sector were hovering around the same production. After the introduction of the exotic species - *Litopenaeu.vannamei*, the production got doubled in 2011 and the shrimps were thrown on the road due to lack of infrastructure, ice plants. The importance was given to backward integration; hence production was increasing, focus was given to hatcheries, feed mills, but after covid there was a sharp fall in the business in terms of exports and from this learning we need to start focussing on the domestic market with a better strategy.

2. *Q: - Moderator to Dan Meagher – We are at a cusp of change in India, if we put the data together from 2000 to 2015 the growth in processing industry was 5% to 6% and suddenly from 2015 onwards there was a plethora of processing plants, which has come and the basic premise of the processing plant is not driven by consumers, it was driven by escaping volatility of the live birds market, seeing the evolution of the markets in the west, beyond a certain point everything starts becoming a commodity, wanted your views on, are we escaping the volatility and margin pressures and getting into processing and what we should do more to make sure that this also does not become a no go space in 5 to 10 years?*

Ans- The value is created by processing plants, branding is extremely important and gave an example of the eggs which, was developed for the health-conscious persons and integrators became a customer for this brand and in case of poultry also we

need to focus on customer specific production in terms of packaging, nutrition etc, as convenience buying is very important in the present era. Also, quality is also an important factor. Presently organic growing of the animals are also given importance and the processed value added products are certainly going to create a change at the customer level.

3. *Q: - Moderator to B. Soundararajan – You were the first person to get into the joint venture space with processing with a Saudi Arabian Company called “Supreme Food Processing Company” and this was a very bold step at that time, as processing plant was not a successful business, please take us through your journey and pit falls?*

Ans – In the year 2000-2001 we started to start a processing unit, as middle east was one of the biggest Market, but 300 dollars was the transportation cost from other countries to middle east, but from Middle east to India the transport cost was only 80 dollars which was a cost advantage. Secondly, Dollar Rupee duplication earnings was around 5.5 %. After establishment of the processing unit in the first 3 years all the processed chicken were exported and the quality was well accepted and after this, there was a competition from Brazil, as the cost of production in Brazil was much lower, after this the profitability came down and the joint venture was also not working. Later the strategy to sell 80% export and 20% domestic market was tried, after this the only solution was food service within the Indian market and hence started supplying to KFC etc.

Later on, to cater to the modern consumers, cold chain storages/freezers were introduced in the departmental stores, after which exclusive chicken stores were started. The future is their only for processing.

4. *Q: - Moderator to Bhupendra Suri – Dairy business from outside looks very attractive, from inside it has many challenges. 210 MT of milk is produced and half is the marketable surplus and less than half of the marketable surplus is processed and less than 1/4th gets into value addition. With so much of stiff competition from co-operatives on pricing, what are the go-to market strategies, which players are adopting to protect their margin in liquid milk, what are the strategies adopted by different distribution channels for developing the value-added market and what needs to be focused in the future?*

Ans – In dairy industry today, there is a huge volume of liquid milk and the margins are very variable and there are different players playing differently, as a result it affects the consumers. This year the raw material cost was higher and there was an inflation on fuel and increase in prices were very low compared to what was happening in the market, hence judgement of the milk margins was itself difficult for 5 months down the line. In the milk business we should see that, the volume keeps increasing in the channels as we get efficiencies of the scale through volume, with regard to the value-added part curd, paneer and ghee is the most profitable ones. The strategies which are succeeding like the company- Hatsun, which has done pretty well as, they have separate business like ice-cream business, which is again a milk product. We need to segregate the short and long shelf life products, In milk, we are only focusing on southern part of India, but in other products it is pan India and in long shelf life products, we need to go through the FMCG route, in liquids, we need to focus on niche markets and premium products and it is all about branding, as we will be able to sell a value to a customer and will be setting up a whole supply chain for the premium products.

5. *Q. Moderator To all Panelists – From the last few years servings/offerings of the consumers has changed, what are the new formats in your industry, which we will be seeing, what is the startup ecosystem and hits and misses, which will be seen in your area of business?*

Ans: -

Dr. Manoj M. Sharma – In Fisheries & Shrimp farming, we have a huge potential, we have 1.2 million litres of brackish water in India, we have hardly explored only 8% of that, the new statistics and data shows that, especially in the in-land saline soil of Rajasthan, Haryana, Punjab, we have a huge potential and it has not been explored, After the introduction of Pradhan Mantri Matsya Sampada Yojana in 2018 with Twenty Thousand Fifty Crores, lot of money investments was motivated, but we talk about resources, but we don't have a unified policy to allot that resources to the entrepreneurs, but in case of start-ups many companies like Licious, Farm to Fork etc. has shown success stories, but the real ground implementation reality is that, enough success stories are not there, but there is great ray of hope with innovative technologies like AI, IOT etc, but the parameters keep differing year on year like the age of the pond taken for analysis will change few years down the line.

Dan Meagher – This area has a huge quantum of investments say about 25 to 30 billion dollar has been invested in Food and Egg new innovations and technology. The transparency which the consumers want to know about their food and where it comes from, is becoming very important and it is the opportunity and in future there will be a lot of investments in digital technologies that will be able to manage these transparencies, recipes that goes along with the products and the innovations will continue in the nutrition side and how we communicate with the world is important.

B. Soundararajan – As on today, out of 20 companies 4 companies have taken the lead in 70 to 80% of the volumes, but these companies are burning lot of cash, their material cost accounts for about 75% , but the money lost is 300 crores and this loss is happening since 3-4 years, to manage this ,the material cost has to shrink to 60% level , but they are working on it, as in 25% of the products, they are focusing on value added products ,but generation of free cash flows is still a question mark., but in this customer acquisition cost is good and there is an opportunity to transform the market.

Bhupendra Suri – Largely the home delivery model which is referred to in milk for its delivery at 6 in the morning is an un-organised mechanism of working, but it works well, examples are companies like big basket, super daily etc, but the question is, how long the companies can bear their losses, but still these companies will be in the market hanging around experimenting, innovating and will get to scale someday. Apart from this, the subscription-based models were developed, some came to the premium milk space like Akshaya Kalpa, Pride of Cows and they charged 2x the price and obviously we have to sell this value to the consumers, but the Indian consumers are very conservative in their approach and in such cases building scale is the problem, but they will be making a break even.

Large part of the milk channel is through unorganized multi brand agents, but company like Hatsun started setting up their own parlours with a delivery system, but this system is still 10 to 15 % of the industry, but the best part is, this is giving a good consumer experience.

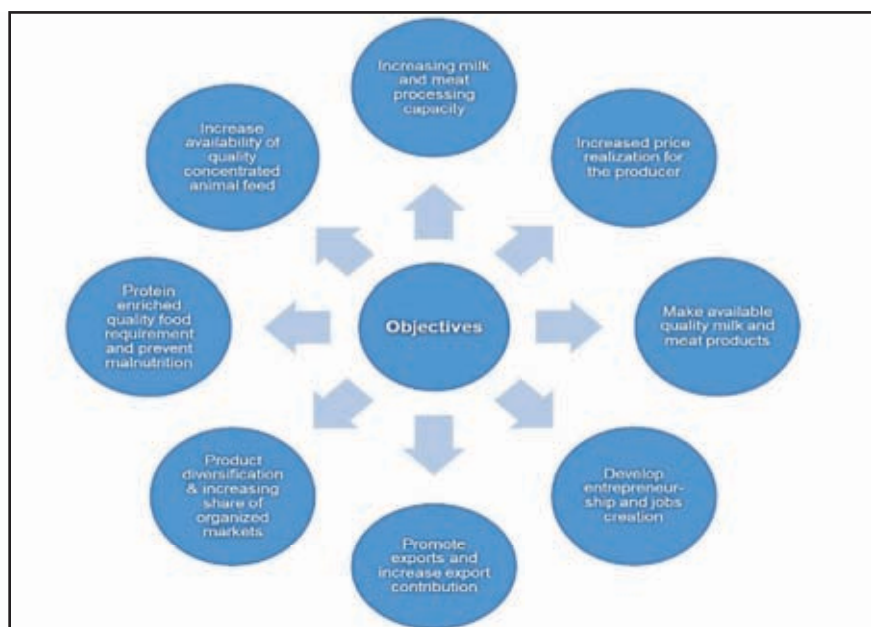
Before the third Session, There was a presentation given by Dr. Lipi Saiirwal, Assistant Commissioner (AHIDF), DAHD, she presented about the Animal Husbandry Infrastructure Development Fund (AHIDF) and the following points of the discussion are given in brief, for more details, please visit AHIDF online portal address given below:-

1. Overview of the AHIDF -

- a. During covid times, to strengthen the infrastructure of livestock sector cabinet approved Central Sector Scheme under the Prime Minister's AtmaNirbhar Bharat Abhiyan stimulus package on 24.06.2020.
- b. Fund of **Rs. 15000 crores** for incentivizing investments to establish projects under eligible activities.

2. Objectives of AHIDF:

Figure-17

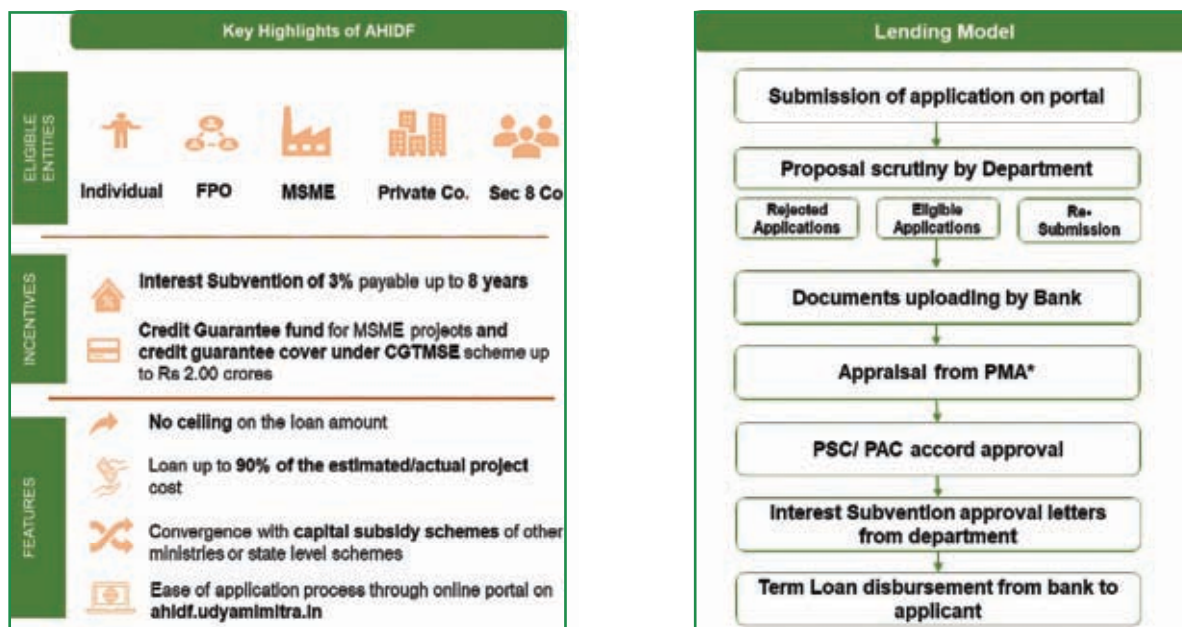


3. Eligible Categories under AHIDF was discussed.

- a. Dairy processing and Animal Feed Manufacturing.
- b. Meat processing and Breed improvement.
- c. Veterinary vaccines and Animal waste to wealth.

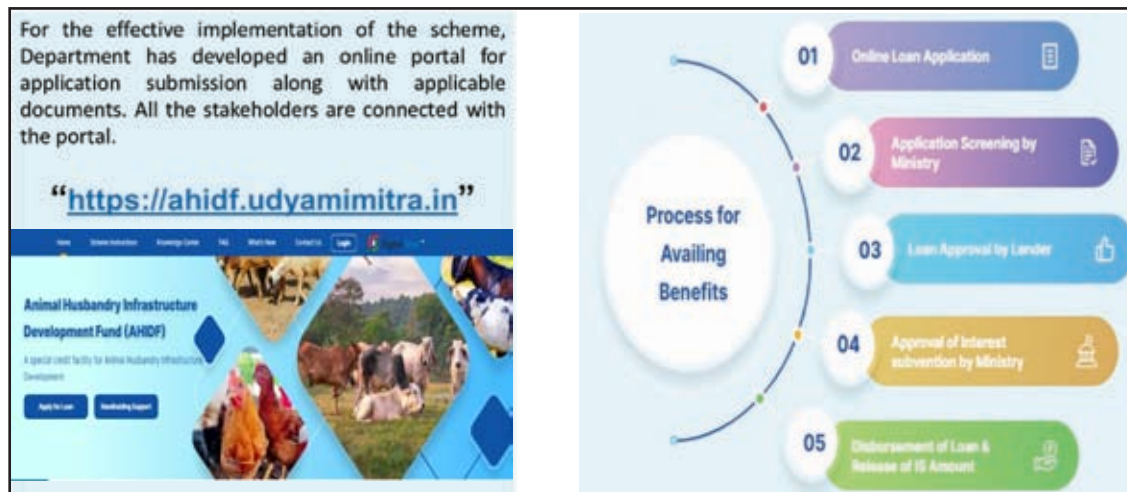
4. Scheme Highlights and Progress under AHIDF were discussed.

Figure-18



5. For more details refer online portal –

Figure-19



Session-3

The Third session was titled as “**Regulations (FSSAI, BIS) & Potential Impact on Animal Agriculture**” and was Moderated by **Dr. P. S. Mahesh, Joint Commissioner and Director CPDO&TI, Govt. of India.**

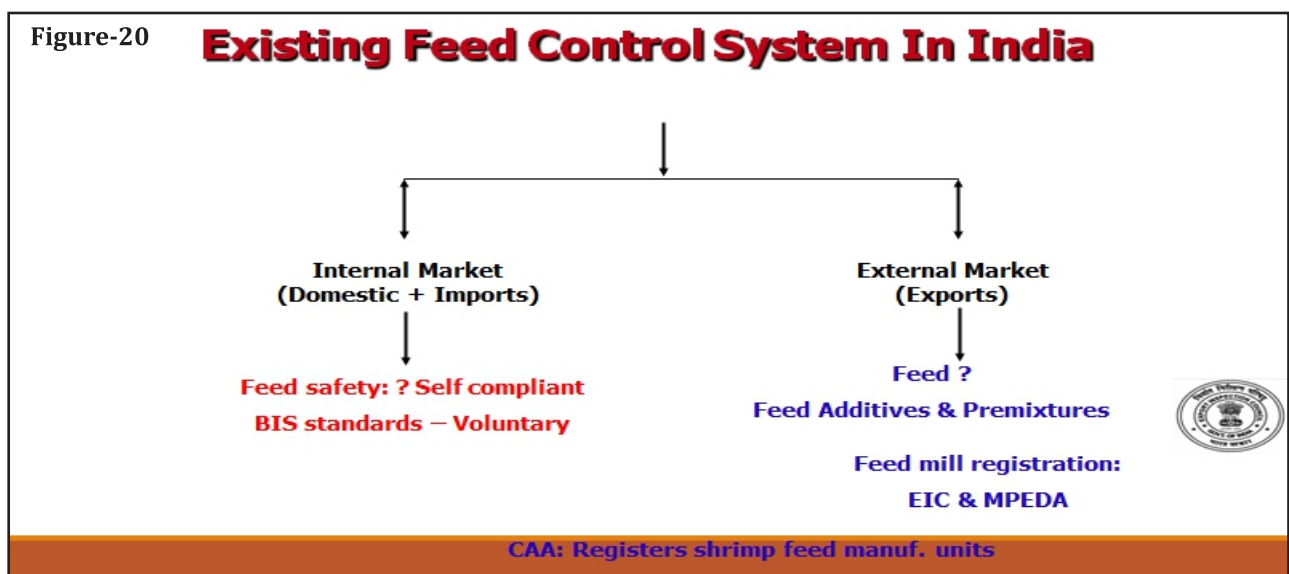
At first the moderator set the tone of the session by explaining the meaning of regulations and how we need to adapt ourselves to the regulations for our own betterment and since now India is becoming Digital India to adapt these regulations will be easier.

The highlights of the discussions are given below: -

First Speaker was Dr. Amit Sharma, Director, Trade and International Cooperation, Food Safety and Standards Authority of India (FSSAI), Govt. of India, and the brief of the points presented by him are as follows:

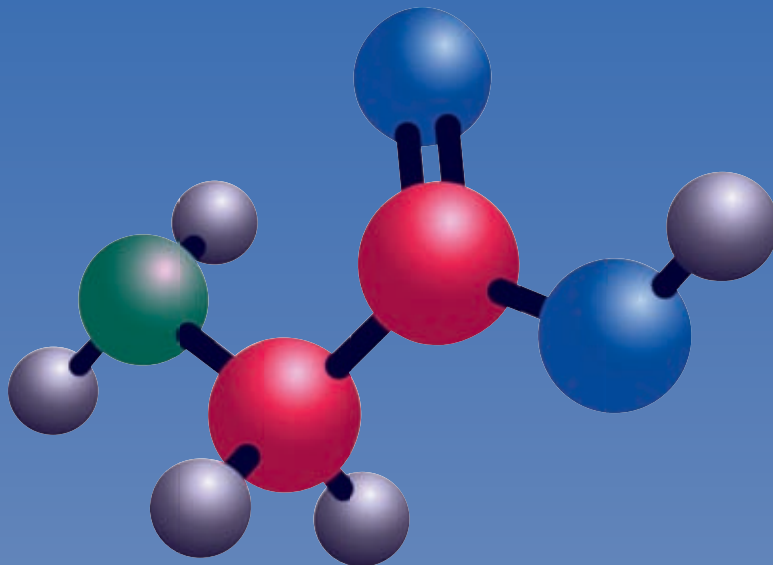
1. Implementable regulations need to be enacted.
2. Previously animal feed sector was self-controlling themselves and food safety authority did not cover the animal feed sector.
3. DG SANTE mission recently visited India from 12-29 Sept. 2022 to evaluate the control of residues (Aquaculture, Poultry and Milk) and contaminants in live animals and animal products including controls on veterinary medicinal products. They put up a serious alert to Indian authorities that there has been repeated interceptions of the presence of the prohibited antibiotics or presence of antibiotics beyond permissible limit in the food of animal origin, for EU it was for aquaculture products and for some other countries like Egypt it was aflatoxins in the dairy product.
4. After which FSSAI conducted National Milk Quality Survey, very selective meat product survey, dairy product survey in north India was done and the results were very poor and DG SANTE has increased the sampling and testing of the Aquaculture products of Indian origin from 10% - 20% to 50% frequency, the more it is tested the more non-compliance report may arise and have advised that we should control the animal feed to achieve the said parameter level compliance so that the products can be exported to EU and other countries.
5. The tests carried out for the Liquid milk in India was non-Compliance to Aflatoxins and due to this Indian dairy product could not enter EU markets.
6. The residue tests of Indian Meat products showed the presence of certain non-prescribed antibiotics.
7. **Global Status of feed regulations**
 - a. Globally, the food and feed safety are under official control of same authority. EU, CU, USA, Canada, China, Japan, Australia, New Zealand are having a very comprehensive feed control system which included regulation for exercising official control on feed manufacturing establishments, its standards, GM feed, undesirable substances, market authorization, packaging & labeling and retail sale.
 - b. Countries like Malaysia, Bhutan, Bangladesh, Indonesia, Egypt, Saudi Arabia etc. have also specified their requirements for domestic manufacturing and import of feed.
 - c. In EU & USA, the feed prepared for own use at the farm i.e., vertically integrated feed mills for captive use are exempted from registration but still they cannot use any prohibited or unauthorized feed material and have to maintain the withdrawal period in case medicated feed is used.
 - d. Pet food is regulated by food authority in EU & USA but in Canada, its regulated under Health of Animals Regulations and not by CFIA. Further, its noted that regulatory requirements are more stringent for feed than the food considering its impact on food safety.
8. **Existing Feed Control System in India**

Figure-20

Existing Feed Control System In India

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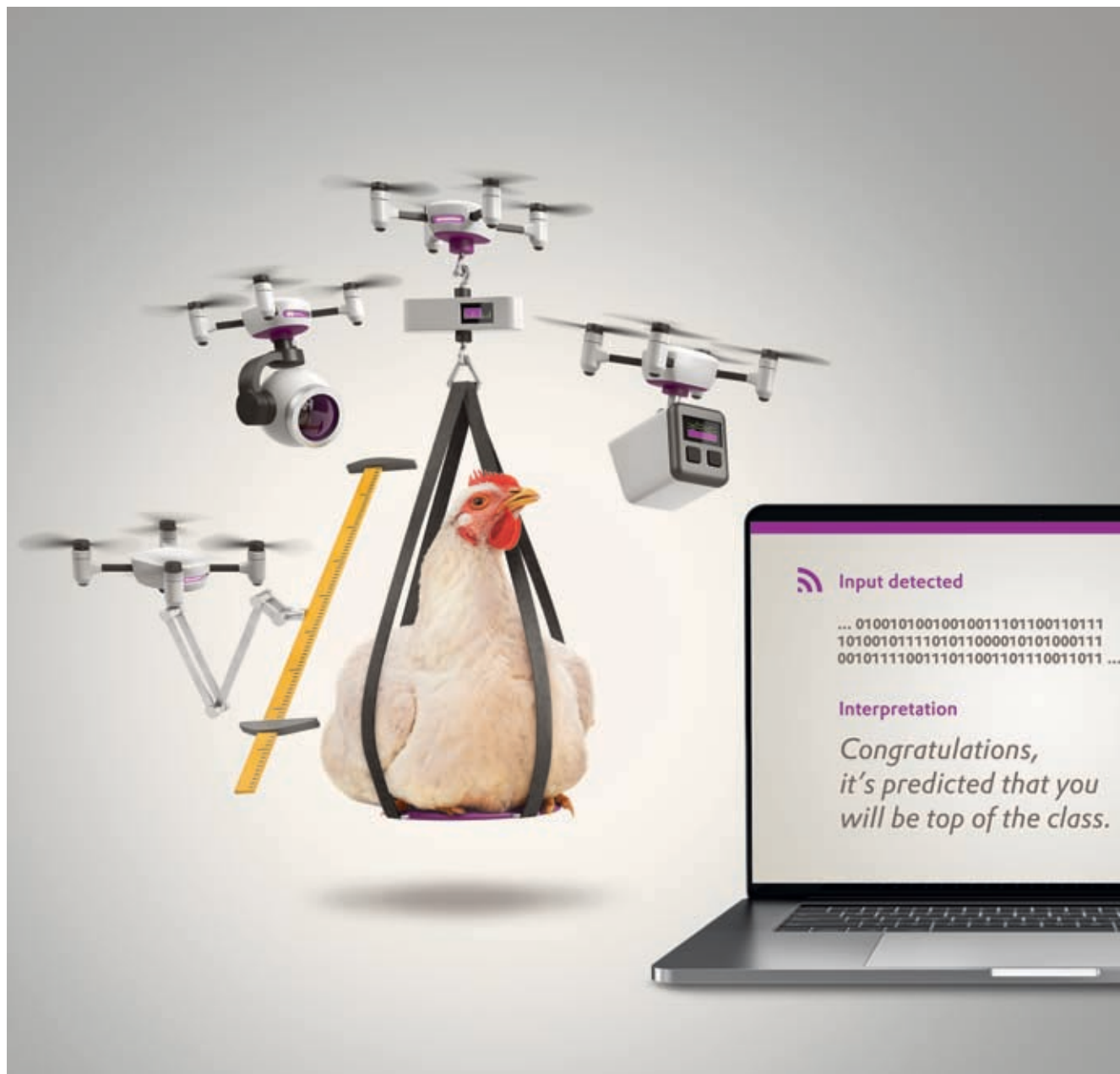
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9. Food Safety and Standards (Food Products Standards and Food Additives)

Fifth Amendment Regulations, 2021 dated 1st June, 2022.

- a. Commercial feeds shall comply with the relevant BIS standards, as may be specified by the Food Authority from time to time, and carry BIS certification mark on the label of the product.
- b. Milk and meat producing animals except poultry, pig and fish shall not be fed with feed containing meat or bone meal including internal organs, blood meal and tissues of bovine or porcine origin materials except milk and milk products.

10. Proposed Regulation– Purpose & Scope:

a. Purpose –

- i. To **improve the quality of animal feeds** used in animal production purposes; and, **pet foods used** for domesticated animals.
- ii. To improve the **quality of raw materials** used for animal feed manufacture and **regulate the use of feed additives including antibiotics** in animal feeds.

b. Scope –

- i. **Regulate, supervise and control** the **manufacture, sale and distribution** of animal feeds (including all aquaculture feeds and pet foods), **raw materials and feed additives**; and, to provide for **matters related or incidental to these activities**.

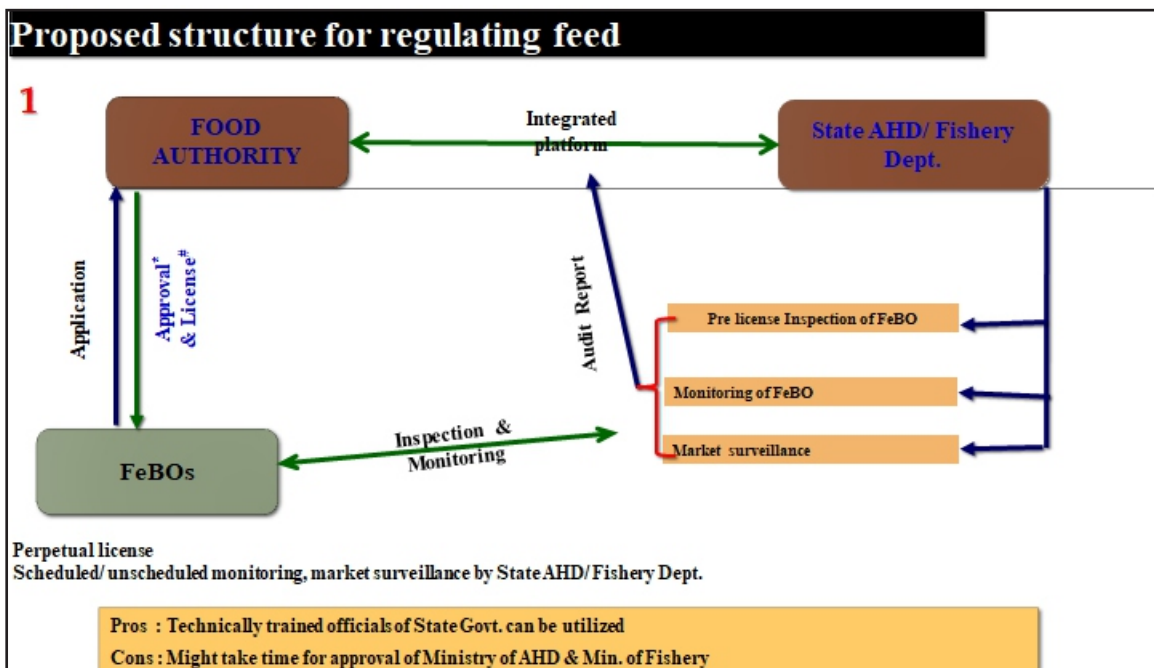
11. What & Who will be covered?

Figure-21

What?	Who?
1. Animal Feed-I (Cattle / Poultry)	1. Manufacturers
2. Animal Feed-II (Fish / Shrimp)	2. Points of sale
3. Customer (farm) made animal feed*	3. Storage & Distribution channels
4. Pet foods (Canine / Feline)	4. Transportation
5. Raw materials to any of the above	5. AF/RM/FA – Importers / Suppliers
6. Feed additives	
May primarily notify horizontal standards	

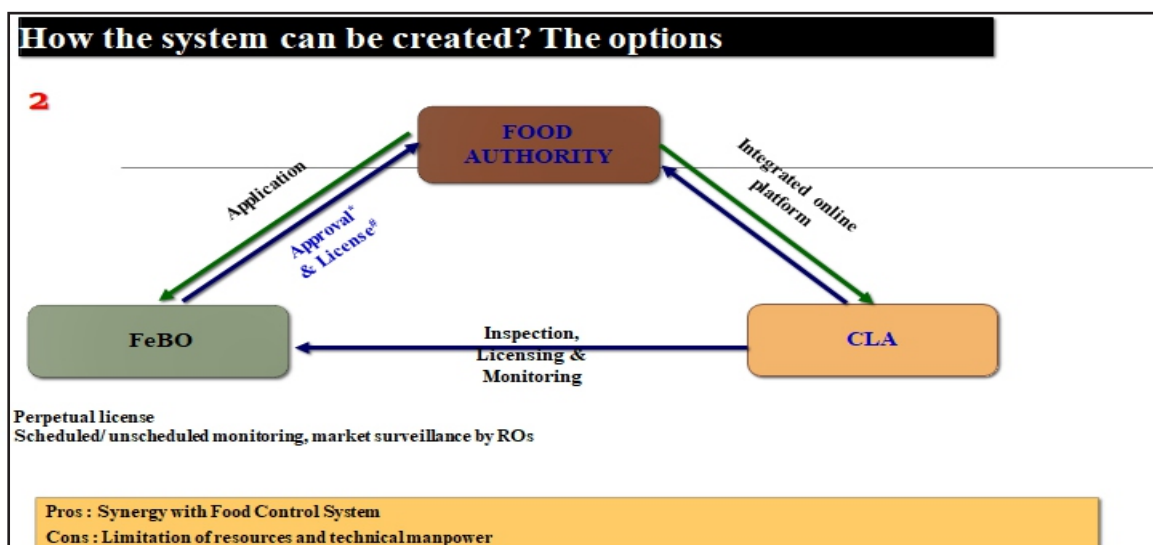
12. Proposed structure for regulating feed –

Figure-22



13. How the system can be created? The options -

Figure-23



14. Way forward -

- Amendment in FSS Act, 2006 to include feed is under process.
- Any other notification by State Govt. regarding feed shall be superseded by FSS Regulation made for feed in accordance with Section 89 of FSSA, 2006:

“Overriding effect of this Act over all other food related laws. -The provisions of this Act shall have effect notwithstanding anything inconsistent therewith contained in any other law for the time being in force or in any instrument having effect by virtue of any law other than this Act”.

Second speaker was dairy expert, Dr. Parminder Singh, Professor Animal Nutrition (Extension), Dept. of Veterinary & Animal Husbandry Extension Education, College of Veterinary Science, Guru Angad Dev Veterinary and Animal Sciences University (GADVASU.) and the brief of the points presented by him are as follows:

- Problems of Aflatoxin levels in animal feed were discussed. The speaker said that, the Feed industry does not come under the ministry of industry and hence checking is difficult in terms of residues, as feed miller is buying raw materials grinding it and mixing it and giving it to consumers within 1-2 months. The level of toxins found in the raw materials starts from the farm itself.
- Comments about the law – IS: 2052:2009 (4th Revision) (Reaffirmed 2014)** proposed in 2009 are given in the Table 12 below –

Table-12

IS: 2052:2009 (4th Revision) (Reaffirmed 2014)				
Sr.	DETAIL	I	II	III
1	MOISTURE%	11	11	11
2	PROTEIN % (min.)	22	20	18
3	OIL% (min.)	4	2.5	2.0
4	FIBRE % (max.)	10	12	15
5	ALA % (max.)	3	4	5
6	SALT % (max.)	1	1	1
7	CALCIUM % (min.)	0.8	0.8	0.8
8	TOTAL PHOSPHORUS % (min.)	0.5	0.5	0.5
9	AV. P % (min.)	0.25	0.25	0.20
10	UREA % (max.)	1	1	1
11	CALCITE % (max.)	1	1	1
12	VITA IU/Kg (min.)	7000	7000	7000
13	VIT. D IU/Kg (min.)	1200	1200	1200
14	VITE IU/Kg (min.)	30	30	30
15	AFLATOXINS(PPB) (max.)	20	20	20
16.	Cadmium (mg/kg) (max.)	0.5	0.5	0.5

- a. 4 revisions of the parameters had taken place and it was said that type 3 Feeds are also coming under regulations.
- b. The 11% moisture in Feed is difficult to achieve, especially during the monsoon season and in April, May, June the moisture level drops below 11%.
- c. The salt content of 1% in Feed is less as the animal needs more salt.
- d. The estimation of Available phosphorus by feed millers is difficult.
- e. 1% Urea specified is also difficult to achieve, as there is lack of availability of urea.
- f. Use of DORB increases the aflatoxin values.
- g. Specification of 1% calcite is also difficult to achieve as calcium has 35% Calcite.
- h. ICAR specifies 4.5 gms calcium per litre of buffalo milk and cattle should give 3.5 to 3.8 gms calcium per litre of milk, in case of large farms with 20-30 litres of milk and to get 100 gms of calcium even 2kg Mineral mixture is not sufficient for animal and hence calcium powder needs to be added and it is again a challenging situation.
- i. With regard to vitamin level estimation of pantothenic acid in poultry is difficult and in dairy estimation of Vitamin A, D, E is difficult.
- j. Specification of 20ppb aflatoxin is also difficult to achieve.
- k. **As per IS: 2052:2009 -**
 - i. N : S = 10: 1, it means we need to add rape and mustard in the feed
 - ii. Milk & milk products can be used, but this will make the feed costlier and will attract aflatoxins
- l. **Few challenging figures which need rectification are as follows:**
 - i. Plant materials ---- 20 ppb, but in
 - ii. DORB (IS: 3593), Rice Polish (IS:3163) & Whole Grains ---- 50 ppb (IS: 13427)
 - iii. **List of Ingredients:**
 - Maize ---- 9 % CP, 4 % EE
 - DORB ---- 15 % CP, 5 % AIA
 - Soy DOC ---- 45 %
 - CSC ---- 22 % C Fiber
 - iv. **IS 2052:2009 Annexure D (4.2.3):**
 - Formulas---
 - Salt --- 1.5%
 - GNE --- 15%
 - Mineral Mixture --- 2 %
 - Molasses --- 10%
 - Rice Polish --- 15%
 - DORB ---- 20 – 30%

3. In the figure below of Young Stock the values have to be relooked and revised as per modern technology like pre starters and milk replacers:

Table-13

Young Stock (IS 5560:1970)		
Nutrients	Calf Starter Meal	Calf Grower Meal
CP %	23 – 26	22 – 25
EE %	4.0	-
C. Fiber %	7.0	10.0
Ash %	5.0	5.0
AIA %	2.5	3.5

Calf Starter Meal – 8 wks to 26 wks
Calf Grower Meal – 26 wks to 108 wks
Reaffirmed : 1980, 2004, 2014, 2019

Pre Starter, Dry, Transitional, Bull, Therapeutic Feed

4. **IS 1374:2007 (Poultry)** – In poultry the law was reaffirmed of the years 2011, 2016, 2021. The law says that, if we add amino acids like AA Lysine, Methionine then Crude Protein(CP) can be reduced, but in case of dairy if lysine, methionine needs to be added then the Crude Protein(CP) content should also be reduced, but the laws specifies 20% Crude Protein(CP). There are farmers who have maintained 14% CP and getting 35 litres of milk, Also, in the 20% specification of CP, all the excess nitrogen is becoming a waste and is causing water pollution.
5. **IS 11968:2019 (Pet Foods)**: The law says, that the feed must be boiled to 110° C for 40 minutes & 120° C for 6 minutes, by this the vitamin levels will be reduced.
6. **BIS** has listed 34 ingredients, but in this there is no mention of Soybean, DDGS, **Rice, +Maize, +Bajra, +Jowar- Mix, Sal seed Meal, Bakery Waste and Noodle Waste.**
7. **FSSAI** has said requirement of Laboratory Equipment, Records, Documentations, Flow Charts, Quality Controls, Certificates, NLM, but to run a laboratory it costs around Rs 5 lakhs and it is not feasible for small feed millers.
8. For AHIDF from Punjab only 2 applications have been registered to utilize this scheme as problems are there in sanctioning the fund.
9. Silage Bales are coming in the market and there is no BIS specification for this. As lot of Aflatoxins are coming from wheat and rice straw, this should also be included in the BIS.
10. When govt says the residue management program – it is only implementable in the 15% branded Feed produced, but it is difficult to check the aflatoxin in the 85% feed used by small and marginal farmers, as they use the cut straw which is full of toxins and hence is very difficult to control, especially in humid conditions in India, Also, 85% of Indian milk is produced by small and marginal farmers and the share of branded feed is 15% and the govt is concerned about the 15% and the other 85% (small & Marginal Farmers) is out of the regulation compliance.

After this a free-range discussion took place in this session wherein various doubts and issues were raised by the industry representatives and necessary clarifications were given by the officers of the government and the moderator said that, the laws can be amended based on the valid discussions and decisions can be taken together by the industry and govt for the betterment of the livestock sector.

1. *Question From Moderator to Shri. Amit Choudhary, Joint Director, Bureau of Indian Standards (BIS), Mumbai Branch, Ministry of Consumer Affairs, Food and Public Distribution, Govt of India. How to create a disciplined and achievable ecosystem with regard to Feed regulations?*

Ans –The standards that BIS formulates, it is not a one-person job, we have a committee for that and in that we have representatives from Industry, Academicians, Research Organizations, who debate and contemplate on the issues and we make a draft of this and send it for comments to all the relevant stake holders and he said that, the issues can be taken up debated and amended if necessary. The motive of BIS being in the feed arena is that, we have been given the responsibility of formulating the standards and standards are there not made for harassment but to foster to the development of a concrete system. BIS has 11,00 standards covered in the product certification and 40,000 licenses under different product categories to help to inculcate the concern of quality with all the stake holders including the consumers.

2. *Dr. Raghavendra Bhatta, Director, National Institute of Animal Nutrition & Physiology (ICAR) commented on the following points:*

- a. He has been in most of the BIS, FSSAI committees and new Quality committee constituted by GOI.
- b. He said involvement of the experts with rich experience will only solve the problem while setting standards and upgradation and amendments is a part and parcel of the game.
- c. Example of Indo-German project was given- Trials were conducted in 49 farms in highly polluted areas of Bengaluru, collected about 170 samples from feed, milk, water, dung and urine for 16 recognized pesticides, chlorpyrifos was found in 110 feed samples, 18% of samples contained Malathion and in 154 milk samples, the pesticides were absent, hence the sampling should be done in a NABL accredited lab, the procedure followed is important, the other important factors to be considered are No. of samples taken, was it a pooled sample, was it a diluted sample, was it a fresh sample to get proper results.
- d. Suggested to have more discussion between the govt. and the relevant stake holders.
- e. Govt should set up district wise highly advanced NABL accredited laboratories.

3. *Q & A with Audience:*

- a. *Dr. Sujit Kulkarni, Director Feed Additives, Adisseo to Shri. Amit Choudhary, BIS. Where to approach for method of analysis approved by BIS in case of reduction of crude protein and inclusion of Methionine in feed?*

Ans – In BIS standards itself the test methods are written, but for suggested new method of analysis, it needs to be validated, we need to go to branch office and give representation or raise issue in the dynamic portal.

- b. *Dr. Sujit Kulkarni, Director Feed Additives, Adisseo to Dr. Amit Sharma, FSSAI Regarding the feed standards the 20 ppp of Aflatoxin in feed is difficult to achieve as mycotoxins are irreversible contaminants and control on storage is difficult, what is the solution for this?*

Ans – Right now the food safety authorities have not notified the standards for the feed and from authority side there is no limitation on the aflatoxin limits in the feed, the aflatoxin level has been specified in the liquid milk. We are here to interact with all stake holders, that if aflatoxin in feed is 50ppb how much of this will enter the liquid milk so that it does not cross the limit specified for the milk.

Valedictory Session

The Valedictory Session was conducted by **Shri. Tarun Shridhar, IAS(Retd.) Former Secretary**, Department of Animal Husbandry and Dairying (AH & D), Ministry of Fisheries, AH&D followed by Felicitation to all Sponsors, Media, Guests and Invitees.

Symposium Summation & Conclusion –

Concluding the symposium, **Shri. Tarun Shridhar, former Secretary, AHD**, advised, “Rather than offering subsidies, an enabling policy environment and infrastructure support will nurture entrepreneurs and promote growth. We need to capitalize on our vast land resources, address our productivity issues and plan for changing consumer demands. We must also guard against misleading advertisements. Digitalizing, and having a consolidated voice for the industry will be vital going forward.”

Summation Brief Details –

1. *The industry should be United for the following reasons –*

- a. The industry always should work with optimism and pragmatism.
- b. The speaker quoted the example of the success story of the *Litopenaeus vannamai* for being united and work towards the holistic development of the livestock industry on the whole.

country and the world and we have now moved from food security to nutritional security.

- d. By 2050, we will have an additional 2.5 billion people to feed and hence the production and productivity has to be increased by nearly 70% and the importance of animal nutritional protein is growing exponentially.
 - e. Neutral platform like CLFMA should focus on the development of the entire livestock industry and should not see themselves separately as animal health, Feed manufacturers, dairy, Poultry, etc.
2. **Ministry to have Clear Focus & Paradigm Shift in the approach** – The ministry has started National Advisory Committee so as to have a strong, structured institutionalized consultative process by involving all the stakeholders before making any decisions, and CLFMA should capitalize this approach of the government, as CLFMA have been actively involving in the betterment of the Livestock industry with the government, in the future also, CLFMA needs to guard this identity and work neutrally towards the focus of the development of the livestock industry as a whole.
 3. Presently the Ministry and the government are working in sync with each other and any issues can be discussed with each other and unnecessary conflicts can be ironed out.
 4. Another dynamic change which has happened in the last year is in terms of the entire policy environment and the governance of this sector, which was also repeatedly highlighted by the minister and the secretary, is that the mindset of the government has changed and animal sector has a separate ministry and a minister, which also needs to be capitalized by CLFMA for the betterment of the industry.
 5. To capitalize on resources which is presently not utilized like waste lands of railways can be used for growing fodder.
 6. Clear definition of backward linkages and forward linkages in terms of domestic vs international markets.
 7. There should be good robust, involving ground truth, reliable and authentic data from a valid source to consider it in the policy decision making process, The digitalization process is also very important, to choose the necessary important data.
 8. **Productivity** – To focus on factors required for enhancing the productivity, and a plan to properly handle the productivity.
 9. When we say x quantity of production, we should also focus on the value of the product for e.g. Instead of focusing on Milk per cattle we need to focus of the value in terms of money generated per cattle.
 10. **Brand building:** CLFMA should be very careful while supporting and building food and nutrition brand, as human population is involved and the brand should not become bigger than the product and due respect has to be given to organizations like FSSAI and BIS. We should not support mis-leading labelling and branding.
 11. The AHIDE, Dairy Infrastructure Development Fund, Fisheries Infra structure development fund, Pradhan Mantri Matsya Sampada Yojana, which infers that, the entire gamut of the policy is going to undergo changes and we are moving away from direct infusion of subsidy to investment models.
 12. Lastly the speaker suggested that all the stakeholders to work together towards the development of the food and nutrition security without getting disjointed.

CLFMA offered Mementos, to Sponsors, Government Officials, Special Invitees, Moderators, Speakers, Associations, Press, Event Management Company, etc. as a token of appreciation for their continual support as always.

Suresh Deora, Hon. Secretary, CLFMA, proposed the vote of thanks, sharing gratitude to the government representatives, speakers, sponsors, industry stakeholders, special invitees and attendees for their active participation.

The networking Dinner was enjoyed by all participants.

Overall, CLFMA interacted with various stakeholders in the industry and government on the topic “Changing Dynamics of Animal Agriculture in India”. The association has diverse membership from across the animal protein value chain including feed manufacturing; poultry, dairy, and aquaculture business; animal nutrition and health, veterinary services, machinery and equipment; processing, distribution, and retailing of meat.

The program was well appreciated.

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Registration of Delegates



Registration of Delegates



CLFMA Executive Director Ms. Chandrika Venkatesh welcomed CLFMA Members for 55th Annual General Meeting



CLFMA OF INDIA 55th AGM - Office Bearers on Dias



CLFMA AV was played, during the 55th Annual General Meeting and appreciated by all



Mr. Neeraj Kumar Srivastava, Chairman, CLFMA OF INDIA started AGM Proceedings and presented all CLFMA Activities throughout his tenure 2020-2022



Minutes of the 54th Annual General Meeting read & Annual Report for the year 2021-2022 presented by CLFMA's Hon. Secretary Mr. Suresh Deora



Audit Report & Audited Statement & Accounts for the year 31st March, 2022 presented by CLFMA's Treasurer Mr. Naveen Pasuparth

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



L-R Mr. Sumit Sureka - Dy. Chairman, Mr. Divya Kumar Gulati- Dy. Chairman, Mr. Neeraj Kumar Srivastava - Chairman, Mr. Suresh Deora - Hon. Secretary, Mr. Vijay Bhandare, Dy. Chairman, Mr. Naveen Pasuparth, Treasurer of CLFMA OF INDIA



CLFMA Members at 55th Annual General Meeting



Q & A Session at 55th Annual General Meeting



Q & A Session at 55th Annual General Meeting



Q & A Session at 55th Annual General Meeting



Q & A Session at 55th Annual General Meeting



Q & A Session at 55th Annual General Meeting



CLFMA Office Bearers at 55th Annual General Meeting

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Arrival of Chief Guest Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, Animal Husbandry & Dairying, GOI.



Chief Guest Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, Animal Husbandry & Dairying, GOI. at selfie point I Love CLFMA along with Office Bearers



L-R Mr. Suresh Deora, Hon. Secretary, Shri. Jatindra Nath Swain, Secretary, Department of Fisheries, GOI., Mr. Neeraj Kumar Srivastava, Chairman, Chief Guest Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, AH&D, GOI., Mr. B. S. Yadav, Past Chairman, Mr. Divya Kumar Gulati, Dy. Chairman



Inauguration & Lighting of Lamp by Chief Guest Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, AH&D, GOI.



Inauguration & Lighting of Lamp by Shri. Jatindra Nath Swain, Secretary, Department of Fisheries, GOI.



Inauguration & Lighting of Lamp by Mr. Neeraj Kumar Srivastava, Chairman of CLFMA



Chairman Mr. Neeraj Kumar Srivastava Felicitating, Hon'ble Union Minister of Fisheries, AH & D Shri. Parshottam Rupala



Chairman Mr. Neeraj Kumar Srivastava Felicitating Hon'ble Union Minister of Fisheries, AH & D Shri. Parshottam Rupala

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Chairman Mr. Neeraj Kumar Srivastava Felicitating Hon'ble Union Minister of Fisheries, AH & D Shri. Parshottam Rupala



Hon. Secretary Mr. Suresh Deora Felicitating Shri. Jatindra Nath Swain, Secretary, Department of Fisheries, GOI.



Hon. Secretary Mr. Suresh Deora Felicitating Shri. Jatindra Nath Swain, Secretary, Department of Fisheries, GOI.



Dy. Chairman, Mr. Divya Kumar Gulati Felicitating Shri. B. S. Yadav, MD, Godrej Agrovat Ltd.



Dy. Chairman, Mr. Divya Kumar Gulati Felicitating Shri. B. S. Yadav, MD, Godrej Agrovat Ltd.



Welcome Address by Mr. Suresh Deora, Convenor & Hon. Secretary, CLFMA OF INDIA.



Chairman Address by Chairman, CLFMA OF INDIA Mr. Neeraj Kumar Srivastava



Thematic Address by Mr. B. S. Yadav, MD, Godrej Agrovat Ltd.

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Shri. Jatindra Nath Swain, Secretary, Department of Fisheries, GOI delivering Key Note Address



The Life Time Achievement awardee - Er. Anand Menon, FIE



The Life Time Achievement award presented to Er. Anand Menon, FIE by Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, AH&D, GOI.



L-R Hon. Secretary Mr. Suresh Deora, Shri. Jatindra Nath Swain, Secretary, Department of Fisheries, GOI, Mr. Neeraj Kumar Srivastava, CLFMA Chairman, Chief Guest Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, AH&D, Mr. B. S. Yadav, MD, Godrej Agrovet Ltd., Mr. Divya Kumar Gulati, Dy. Chairman CLFMA



CLFMA Awardee - Dr. Rudra Nath Chatterjee, Director ICAR - Directorate of Poultry Research, Hyderabad



CLFMA Award was presented to Dr. Rudra Nath Chatterjee, Director ICAR - Directorate of Poultry Research, Hyderabad presented by Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, AH&D, GOI.



Chief Guest Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, AH&D, GOI. address at the 63rd National Symposium 2022



Chief Guest Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, AH&D, GOI. address to audience of Symposium 2022

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Release of Livestock Survey Report in the presence of Chief Guest Shri. Parshottam Rupala, Hon'ble Minister of Fisheries, AH&D, GOI.



Vote of Thanks by Mr. Divya Kumar Gulati, Dy. Chairman



Cultural Programme



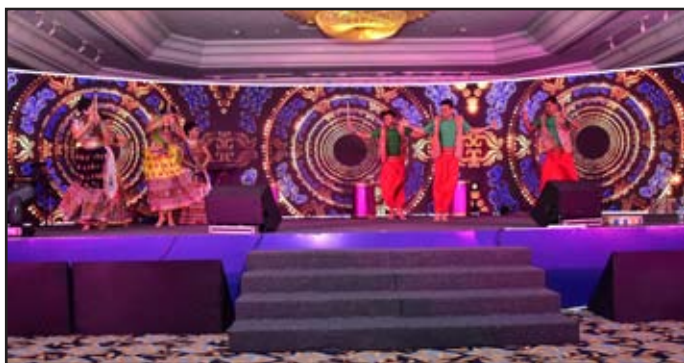
Cultural Programme



Cultural Programme



Cultural Programme



Cultural Programme



Cultural Programme

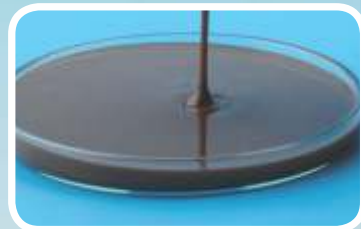
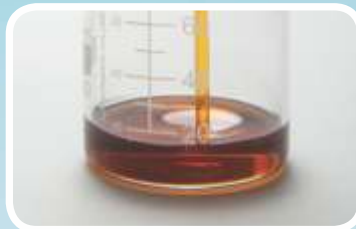
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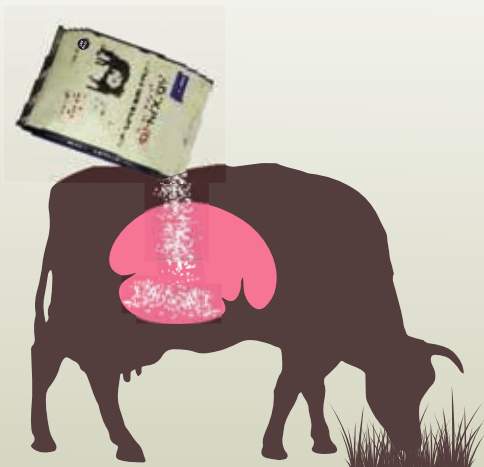
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CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Welcome Address by Mr. Neeraj Kumar Srivastava, Chairman CLFMA



Mr. B. S. Yadav, MD, Godrej Agrovet Ltd. felicitating Shri. Tarun Shridhar, IAS(Retd.) Former Secretary



Symposium Audience



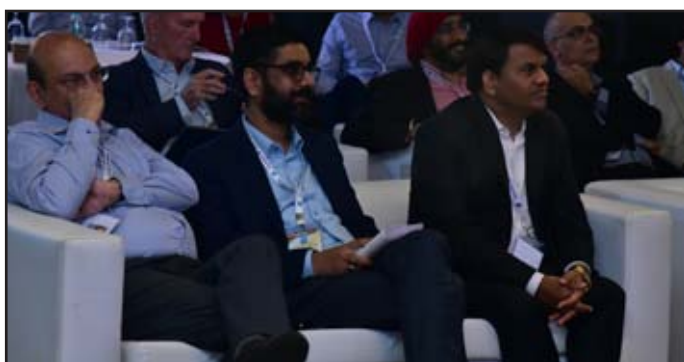
Symposium Audience



Dr. Vijay Makhija, CLFMA Managing Committee Member introducing 1st Session Moderator Mr. Amit Saraogi, MD, Sarawagi Agrovet Pvt. Ltd.



Mr. Neeraj Kumar Srivastava, Chairman felicitating Mr. Amit Saraogi, MD, Sarawagi Agrovet Pvt. Ltd.



Symposium Audience



Symposium Audience

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Introduction of 1st Session Speaker Mr. Kumarjit Mazumder, Head – Sales & Strategy, RMSI Cropalytics Pvt. Ltd. by CLFMA Treasurer, Mr. Naveen Pasuparth



Mr. Vaibhav Nagpal, VP & MD – Asia of Novus International felicitating Mr. Kumarjit Mazumder, Head – Sales & Strategy, RMSI Cropalytics Pvt. Ltd.



Introduction of 1st Session Speaker Ms. Prerana Desai, Head of Research, Samunnati Agri by Dr. Manish Kumar Singh, Director Strategic Marketing (APEC), Novus



Dr. Sandeep Karkhanis, MD of Noveltech Feeds Pvt. Ltd. felicitating Ms. Prerana Desai, Head of Research, Samunnati Agri



Dr. Suresh Kumar, President of Kemin felicitating Mr. Kevin M Roepke, Regional Director South Asia & Sub Sahara Africa (SAASSA) USSEC



Mr. S. V. Bhav, Immediate Past Chairman felicitating Mr. Hemant Bansal, VP, Ruchi Soya Ind. Ltd. & VP, IVOPA



1st Session Moderator & Speakers on Dias



1st Session Speaker - Mr. Kumarjit Mazumder, Head – Sales & Strategy, RMSI Cropalytics Pvt. Ltd.

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



1st Session Speaker - Ms. Prerana Desai, Head of Research, Samunnati Agri



1st Session Speaker - Mr. Kevin M Roepke, Regional Director South Asia & Sub Sahara Africa (SAASSA) USSEC



1st Session Speaker - Mr. Hemant Bansal, VP, Ruchi Soya Ind. Ltd. & VP, IVOPA



1st Session - Q & A



1st Session - Q & A



Mr. Neeraj Kumar Srivastava, Chairman felicitating 1st Session Moderator Mr. Amit Saraogi, MD, Sarawagi Agrovet Pvt. Ltd.



Mr. Sumit Sureka, Dy. Chairman felicitating 1st Session Speaker Mr. Kumarjit Mazumder, Head - Sales & Strategy, RMSI Cropalytics Pvt. Ltd.



Mr. Sumit Sureka, Dy. Chairman felicitating 1st Session Speaker Ms. Prerana Desai, Head of Research, Samunnati Agri

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Mr. Divya Kumar Gulati, Dy. Chairman felicitating 1st Session Speaker
Mr. Kevin M Roepke, Regional Director South Asia &
Sub Sahara Africa (SAASSA) USSEC



Mr. Divya Kumar Gulati, Dy. Chairman felicitating 1st Session Speaker
Mr. Hemant Bansal, VP, Ruchi Soya Ind. Ltd. & VP, IVOPA



Mr. Neeraj Kumar Srivastava, Chairman of CLFMA felicitating
1st Session Moderator Mr. B. S. Yadav, MD, Godrej Agrovet Ltd.



Mr. B. S. Yadav, MD, Godrej Agrovet Ltd. felicitating Mr. Sudhakar Desai,
MD of Emami Agrotech Ltd. and President of
Indian Oil Processors Association



Mr. Abhay Shah, Jt. MD of Spectoms introducing 2nd Session Speaker
Mr. Dan Meagher, President and CEO, Novus International Inc.



Mr. Naveen Pasuparth, Treasurer of CLFMA felicitating
Mr. Dan Meagher, President and CEO, Novus International Inc.



Mr. Naveen Pasuparth, Treasurer of CLFMA felicitating Mr. B. Soundararajan,
Chairman Suguna Group



Mr. Neeraj Kumar Srivastava, Chairman of CLFMA felicitating
Mr. Bhupendra Suri, CEO, Creamline Dairy

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Mr. Abhay Shah, Jt. MD of Spectoms felicitating Dr. Manoj M. Sharma, Aquaculture Expert, Mayank Aquaculture Pvt. Ltd.



2nd Session Moderator & Speakers on Dias



2nd Session Speaker - Dr. Manoj M. Sharma, Aquaculture Expert, Mayank Aquaculture Pvt. Ltd.



2nd Session Speaker - Mr. B. Soundararajan, Chairman Suguna Group



2nd Session Speaker - Mr. Bhupendra Suri, CEO, Creamline Dairy



2nd Session Speaker - Mr. Dan Meagher, President and CEO, Novus International Inc.



2nd Session Moderator Mr. B. S. Yadav



2nd Session Speakers - Q & A Session

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



2nd Session Speakers – Q & A Session



2nd Session Speakers – Q & A Session



2nd Session Speakers – Q & A Session



Mr. Neeraj Kumar Srivastava, Chairman of CLFMA felicitating 2nd Session Moderator Mr. B. S. Yadav, MD, Godrej Agrovet Ltd.



Hon. Secretary & Convenor Mr. Suresh Deora felicitating 2nd Session Speaker Mr. Dan Meagher, President and CEO, Novus International Inc.



Mr. R. Ramkuttu, CLFMA Managing Committee Member felicitating 2nd Session Speaker Mr. B. Soundararajan, Chairman Suguna Group



Dr. Devender Hooda, Zonal President – North felicitating 2nd Session Speaker Mr. Bhupendra Suri, CEO, Creamline Dairy



Mr. Divya Kumar Gulati, Dy. Chairman felicitating 2nd Session Speaker Dr. Manoj M. Sharma, Aquaculture Expert, Mayank Aquaculture Pvt. Ltd.

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Mr. Nissar F. Mohammed introducing all the panelists of the 3rd Session



Dr. Vijay Makhija, CLFMA Managing Committee Member welcomes 3rd Session Panelist Dr. Lipi Saiirwal, Assistant Commissioner (AHIDF), DAHD with floral bouquet.



3rd Session Panelist Dr. Lipi Saiirwal



Symposium Audience at 3rd Session



Symposium Audience at 3rd Session



Mr. Neeraj Kumar Srivastava, Chairman of CLFMA felicitating Dr. Lipi Saiirwal, Assistant Commissioner (AHIDF), DAHD



Mr. Neeraj Kumar Srivastava, Chairman of CLFMA felicitating - 3rd Session Moderator Dr. P. S. Mahesh, Joint Commissioner and Director CPDO&TI, Govt. of India.



Dr. Saikat Saha, Managing Committee Member Welcoming Dr. Raghavendra Bhatta, Director, NIANP (ICAR)

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Mr. Vijay Bhandare, Dy. Chairman welcoming Dr. Raghavendra Bhatta, Director, NIANP (ICAR) 3rd Session Panelist



Dr. Sandeep Kumar Singh, CEO of Godrej Agrovet Ltd. welcoming Dr. Parminder Singh, Professor Animal Nutrition (Extension), GADVASU 3rd Session Panelist



Dr. Arun Atrey, MD of Zenex welcoming Dr. Amit Sharma, Director, Trade and International Cooperation, FSSAI, GOI, 3rd Session Panelist.



Dr. Prashant Shinde, CLFMA Managing Committee Member welcoming Mr. Amit Choudhary, Joint Director, Bureau of Indian Standards (BIS), Mumbai 3rd Session Panelist



3rd Session Panelists on Stage



3rd Session Panelist - Dr. Amit Sharma, Director, Trade and International Cooperation, FSSAI



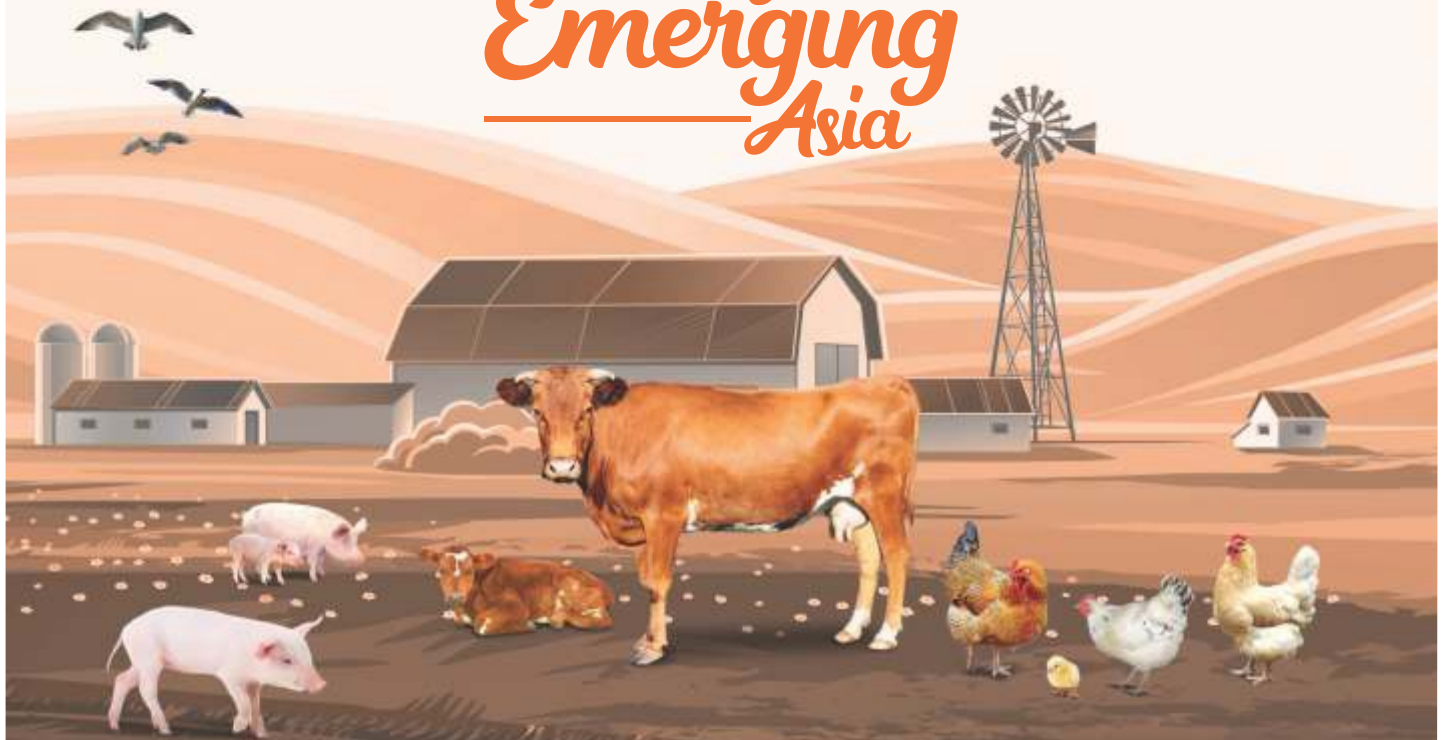
3rd Session Panelist - Dr. Parminder Singh, Professor Animal Nutrition (Extension), GADVASU



3rd Session Panelist - Mr. Amit Choudhary, Joint Director, Bureau of Indian Standards (BIS)



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3rd Session Panelist - Dr. Raghavendra Bhatta, Director, NIANP (ICAR)



3rd Session Speakers – Q & A Session



3rd Session Speakers – Q & A Session



3rd Session Speakers – Q & A Session



3rd Session Speakers – Q & A Session



Mr. Neeraj Kumar Srivastava, Chairman of CLFMA felicitating - 3rd Session Moderator Dr. P. S. Mahesh, Joint Commissioner and Director CPDO&TI, Govt. of India.



Mr. Sanjeev, Vice President-Head Quarter of PFI felicitating Dr. Raghavendra Bhatta, Director, NIANP (ICAR) – 3rd Session Panelist.



Mr. Vijay Bhandare, Dy. Chairman felicitating Dr. Parminder Singh, Professor Animal Nutrition (Extension), GADVASU - 3rd Session Panelist.

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Mr. Divya Kumar Gulati, Dy. Chairman felicitating Dr. Amit Sharma, Director, Trade and International Cooperation, FSSAI - 3rd Session Panelist.



Mr. Suresh Deora, Hon. Secretary and Convenor felicitating Mr. Amit Choudhary, Joint Director, Bureau of Indian Standards (BIS) - 3rd Session Panelist.



3rd Session Panelists



Summation of Symposium by Shri. Tarun Shridhar, IAS(Retd.) Former Secretary, Department of AH & D, GOI



Mr. Neeraj Kumar Srivastava, Chairman along with Hon. Secretary Mr. Suresh Deora of CLFMA felicitating Shri. Tarun Shridhar, IAS(Retd.) Former Secretary, Department of AH & D, GOI - Valedictory Session



L-R Mr. Suresh Deora, Hon. Secretary and Convenor, Shri. Tarun Shridhar, IAS(Retd.) Former Secretary, Department of AH & D, Mr. Neeraj Kumar Srivastava, Chairman of CLFMA



Mr. Neeraj Kumar Srivastava, Chairman along with Hon. Secretary Mr. Suresh Deora of CLFMA felicitating Dr. H. R. Khanna, Joint Commissioner from DAHD, New Delhi (Special Invitee)



Mr. Neeraj Kumar Srivastava, Chairman along with Hon. Secretary Mr. Suresh Deora of CLFMA felicitating Dr. A. S. Ranade, Associate Dean, Mumbai Veterinary College (Special Invitee)

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary Mr. Suresh Deora of CLFMA felicitating Dr. S. V. Ramarao (Special Invitee)



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary Mr. Suresh Deora of CLFMA felicitating Mr. S. Sathyanarayan (Special Invitee)



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary Mr. Suresh Deora of CLFMA felicitating Ms. Deepashree N. Desai (Special Invitee)



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary Mr. Suresh Deora of CLFMA felicitating Dr. A K Rajput, All India Poultry Breeders Association (Special Invitee)



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary Mr. Suresh Deora of CLFMA felicitating Dr. Raghavendra Bhatta, Director, NIANP (Special Invitee)



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary Mr. Suresh Deora of CLFMA felicitating PFI Team



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary Mr. Suresh Deora of CLFMA felicitating Dr. P. S. Mahesh, Joint Commissioner, and Director CPDO&TI, Govt. of India.



Mr. Neeraj Kumar Srivastava, Chairman alongwith Mr. Vijay Bhandare, Dy. Chairman Hon. Secretary Mr. Suresh Deora of CLFMA felicitating Mr. Pankaj Pathak, Member APEDA (Special Invitee)

CLFMA OF INDIA's 55th AGM & 63rd National Symposium 2022



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Dr. Sujit Kulkarni
& Dr. A. S. Ranade of Vets in Poultry (VIP)



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating KPFBA



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Dr. Shirish Nigam,
Dr. Vijay Makhija, Dr. Jitendra Verma of INFAH



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Mr. Shivshankar of
Tejaswini Publication



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Mr. Rakesh Bharadwaj of
Poultry Express



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Mr. Dinesh Kumar of S.R. Publication



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Mr. Gaurav Chander of Mr. Benison Media



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Mr. M.N. Rao, Poultry Voice of India

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Mr. Suresh Deora of CLFMA felicitating HyBiz



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Mr. M. A. Nazeer, Poultry Fortune



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Mr. Jaydeep Mazoomdar,
Real Show (Event Company)



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Mr. N.S.N. Murthy, Poultry Herald



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora felicitating Godrej Agrovet Team (Platinum Sponsor)



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
Mr. Suresh Deora of CLFMA felicitating Hindu Business Line



Mr. Neeraj Kumar Srivastava, Chairman alongwith Hon. Secretary
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Mr. Suresh Deora of CLFMA felicitating Pixie Publication

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Vote of Thanks by Mr. Suresh Deora, CLFMA Hon. Secretary and Convenor



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Kashmir Valley Poultry Sector: Challenges And Opportunities

* Dr Mukhtar Ahmad

Poultry farming is an important sector of agriculture economy. It plays a vital role in household nutritional security and employment generation in country. Poultry sector, a largely backyard venture before the 1960s has been transformed into a vibrant agribusiness. Today, India is one of the leading nation in both broiler and egg production. Undoubtedly, this impressive growth is a result of several factors, such as active developmental support from the state and central government, research and development support from research institutions, international collaboration and private sector participation. Indian poultry is self-sufficient, supported by strong genetic base in which the productivity levels of broilers and layers are equal to those achieved elsewhere (e.g. in the United States of America and the European Union).

Jammu and Kashmir had also witnessed tremendous growth of poultry in last few decades. Poultry farming has come up in a big way in Jammu, Kathua, Udhampur, Pulwama, Srinagar and Budgam districts with large number of educated unemployed youth taking poultry farming as a sustainable means of earning their livelihood. The production of poultry and consumption is predicted to grow in valley attributed to shift in food habits, high speed urbanization, increase in awareness of balanced nutrition, low cost and complete source of protein, increased income etcetra. Jammu and Kashmir has an enormous potential and conducive environment for poultry development on commercial lines as well as backyard poultry still there is significant gap between requirement and production of poultry and poultry products. The growth of poultry in Jammu and Kashmir is limited to broiler farming only. The exposure of farmers to modern Poultry rearing is least. The reason may be due to least investment of private businesses in union territory especially in valley. The poultry sector investment by private companies not only make the resources easily available to poultry farmers but also provide diagnostic and other technical facilities at their door steps (flow of knowledge from lab to field is very fast). Broiler farming which requires least

technical skills and investment in comparison to other subsections of poultry industry (Layer farming ,Breeder, Hatchery, Feed manufacturing) is at par with other states (FCR 1.45-1.5). There are many undiscovered areas of poultry industry in J & K specifically Kashmir where Kashmiri poultry farmers can invest. Poultry being white meat and comparatively less expensive is having highest market among all type of meats in Kashmir, yet poultry farmers are always in danger of loss. Poultry farmers of valley are always facing pressure on their profit margins due to increased feed costs and proper marketing of their produce. This results in high cost of production as compared to nearby states due to which poultry dealers are importing broilers from nearby states and hampering the growth of poultry sector. None of the poultry farmers are preparing their own feed unlike outside farmers which adds to production costs. This may be due to lack of education and access to technology. This is substantiated by the fact that there is not a single poultry feed manufacturing unit and commercial hatchery in valley. The added increased cost of feed, DOCs (due to transportation charges and the ensuing mortality during long-distance transport) and instability of broiler rates make Poultry Farmers of valley always at risk of loss. In Order to secure poultry farmers from losses, farmers need to decrease production cost. Production cost can be curtailed by local production of DOCs, poultry feed and adoption of managerial skills to reduce the medicine costs. Locally manufactured feed is need of hour as feed cost contributes about 75% of the total production cost. But High capital cost and unreliable power supply restricts installation of Poultry feed plants in valley. Automatic and semiautomatic feed plants need huge investments and technical knowledge. Besides automatic and semi-automatic feed plants, we can manufacture poultry mesh feed by use of simple Grinder and mixer from locally available Maize, Soybean, mustard Oil Cakes, Wheat Bran, Rice Bran, Rice Polish, Oats etc. Maize contributes more than 50% to poultry ration and with Jammu and Kashmir being the leading producer of Maize will definitely be positive for local manufacture of Poultry feed.

Local Production of broiler chicks is a huge challenge to poultry industry in valley. For that, we need to invest in breeder farming and establishment of hatcheries. Breeder farm management is totally different than broiler farming. A simple managerial mistake in Breeder farming can significantly impact the feasibility/profitability of the farm. In case of Breeder farming we need to be more vigilant on different parameters like health, weight, egg production, fertility, hatchability, etc unlike broiler farming where the main concern is body weight (FCR). At the same time the agro-climatic conditions of the Valley are to a larger extent very much conducive for breeder and layer farming. Heat stress during summers in other states result in drop of production and also makes birds susceptible to different infectious and metabolic diseases. Breeder farm establishment will not only make locally available DOCs, but will also ensure quality chicks to farmers in all seasons, especially in winter. Breeder and layer farming are same in terms of management and investment. Both types of farming are having tremendous scope but huge experience and technical skills are important. To boost the Poultry sector in Valley, the need of the hour is the active participation of Private companies and state should sponsor and actively encourage the poultry farmers of the valley by providing them the necessary infrastructure, financial support and technical training.

Regarding table purpose eggs, we are importing all the required supply from other states. According to official report of Department of Animal husbandry, Jammu and Kashmir the import data for past few years is below:

Year	Eggs(crore)	Broilers(lakhs)	Doc(Crores)
2016-2017	78.04	93	5.33
2017-2018	87.75	96	5.44
2018-2019	94.69	92	5.74

Efforts are also needed to improve supply and distribution of poultry meat in valley. Poultry dressing facilities are usually manual and mostly lack sanitary measures. This does not ensure hygienic slaughter and proper utilization of by-products. Value addition to Poultry products in valley is also non-existent. The scope of value addition is in terms of deboning of chicken for bone less Kanti, Chicken Kebabs and Patties is one avenue. In addition to meat value addition entrepreneurs are also unaware of value addition of discarded byproducts by poultry retailers which includes shanks, skin, feathers, etc. The Department of Animal Husbandry is also trying to encourage Poultry industry

related beneficiaries by providing them subsidies and technical support for the establishment of poultry farms. Currently, the department is running a very good scheme called Integrated Poultry Development Project (IPDP). In this scheme department is providing 50% subsidy to establish different poultry business. The Different components of scheme include Establishment of new broiler farm, establishment of poultry processing and dressing unit (small to fully automatic), accessory machinery, mobile processing cum dressing unit, transportation vehicle, etcetera. There is also another component in IPDP for value addition of the byproducts called Establishment of Rendering plant in which the beneficiary can get upto Rs 2 lac Subsidy. Rendering of poultry by products will also help in the control of environmental pollution, and will indirectly put a check on rising stray dog population cities and towns. It's very unfortunate that poultry industry in Kashmir is limited to marketing of DOCs by Poultry dealers and farm rearing of these birds till market weight. The value addition of Poultry need to be explored by poultry farmers of valley in order to sustain in a growing and competitive national market. In addition to Value addition, there is also great opportunities in layer farming, Hatchery establishment and poultry feed manufacturing. These business opportunities are the interests of big entrepreneurs due to huge investment. Those who are interested in these businesses in future need very good technical skills cum exposure to these businesses. Layer and breeder farming is having huge challenges in terms of management and technical skills. Small mistakes in these businesses result in failure of enterprises.

- 1) Growth of poultry in Kashmir valley is limited to broiler farming only, layer and breeder farming need to be explored.**
- 2) Manufacturing of poultry feed from locally available feed ingredients is need of hour to reduce production cost.**
- 3) To Boost the Poultry sector in Valley active participation of Private companies with Government support is needed.**
- 4) Value addition of poultry meat and other discarded byproducts need to be explored to sustain in poultry industry of nation.**
- 5) Farmers need to come out from cocoon to get benefits from State sponsored schemes like IPDP and explore new opportunities in sector.**

Veterinarian in Poultry • ahmadmukhtar854@gmail.com

Rethinking Livestock Production in India

Dr Biradar Satish Chandra, Dr Ratnaprabha, Dr Vidayasagar,
Dr Pallavi B and Dr Meenaxi Balure

Twentieth Livestock Census report was recently released by Govt of India which is a compilation report of all the departments of Animal Husbandry of state governments working in coordination with centre, to figure out the national livestock wealth of the country. The basic data for 20th census report was collected in the year 2018-19, and released in 2022 after analysis. For the first time use of computers and tablets were made to get accurate figure from 6.6 lakh villages and 89,062 urban wards. The first livestock census was conducted in the year 1919-1920, and thereafter every five years it is updated. The purpose of doing the exercise is to take up improvement programmes for optimum production and introduce latest technology developed in the laboratory. There are altogether 19 species enumerated in this census covering 26.5 Crore household and 0.42 Crore trust and societies, There are 41 well defined breeds of cattle, 13 buffalo breeds, 42 sheep, 28 goats, 07 horse and ponies, one donkey breed, 09 camel breeds, 07 pig breeds, 19 fowl breeds enumerated. Exotic breeds are imported regularly by both government and private agencies to introduce exotic inheritance for reducing inbreeding traits and also for enhancing of livestock production.



Indian cattle owners use bullocks for draught and cows for milk



The traditional sheep and goat rearing is by extensive grazing

The highest population is of cattle amongst the enumeration in our country and is due to the special place held by this species, wide acceptance, religious belief and role of milk and milk products in the diet and health of the nation. The total population of cattle is 193.45 million, and constitute 36.04 % of total livestock population, out of which 51.35 million (26.5 %) have exotic inheritance of Jersey and Holstein Friesian, and rest 142.10 (73.5 %) have indigenous inheritance of Gir, Sahiwal, Deoni and Khillar etc. Buffaloes are the natives of this land and constitute 20.47 % of livestock population, with a total strength of 109.85 million, and have well defined breed characters with good ability to thrive under meagre feed resources and harsh environment conditions. Uttar Pradesh and Rajasthan being predominantly milk consumers' states have highest number of cattle and buffaloes.

Sheep and goats fall under small ruminants' category, with a population of 74.26 million and 148.88 million respectively, and constitute 13.83 % and 27.74 % of total livestock population. This species is easy to rear, and liked by people who cannot afford to keep large ruminants due to high cost of rearing and has higher profit margin due to good demand for its meat. Among sheep 5 % of the total sheep population has exotic inheritance.

Pigs constitute 1.7 % of total livestock population and 18.96 million (20 %) have exotic inheritance and rest

71.58 million have indigenous inheritance. There are 3.42 lakh Horses and Ponies, 84,261 Mules and 1.23 lakh Donkeys in our country. There are 2.52 lakh Camels found mostly in desert region of Rajasthan and Gujarat, 3.86 lakh Mithun in Arunachal Pradesh, 57,570 Yak in JK and Arunachal Pradesh, 807.85 Million poultry. Among the poultry 280.77 Million close to 34.75 % are backyard or free ranging birds kept by rural farmers, rest 527.07 million are kept in organised farms. There are 33.50 million ducks, 4.48 lakh Turkey and 99.55 lakhs other poultry birds such as quails, pheasants, emu, ostrich, etc. used for egg and meat purpose. The pet and street dogs are 9.4 million in number, 0.55 million rabbit's and 1767 elephants in our country.

Animals have since time immemorial companions of human being, contributing to human welfare by using the crop residue not used by any other species to convert them into valuable milk, meat and eggs. It also provides the valuable manure for soil enrichment, carbon sequestration, draft power. So in a way agriculture production is complimented by keeping animal husbandry, provides regular income by selling excess milk, meat and egg by the farmer to the whole world, animal products have bio available nutrients to the family members and popularly considered as the backbone of Indian agriculture. Without animal husbandry, agriculture is incomplete and meaningless. All the waste production of agriculture such as pulse chunni, cereal bran, oil seed cakes, brewers waste, kitchen and hotel waste which is almost 50 % of the total agriculture production finds its use in animal rearing and in turn producing food to the human beings, and all the maize and soya production is used by the poultry sector for producing meat and eggs for the Indian population.

The total annual milk, meat and egg produced in India is 209.96 million tonnes, 68 lakh tonnes, 122.11 billion and per capita availability of the same is 427 g/d, 5 kg per annum and 91 eggs per annum respectively. If we calculate the protein availability from all sources, every Indian gets approximately, 25-30 g/d high quality protein as against the requirement of 50-80 g/d. Now this is one third available to the requirement, and it is well known world over that the deficiency of protein causes stunting, weakness, loss of productivity and increased burden on the medical infrastructure of the country leading to vicious cycle of ill health, poverty and ignorance. The average milk produced by the cows is 3 litres per day, which has a genetic potential to produce 10 litres per day. Any intervention made in the dairy sector alone can increase the protein availability to the required level thereby reducing the disease burden on the country and increase the efficiency of the citizens, thereby making this nation a developed nation.

The biggest hindrance in developing the livestock sector is availability of feed and fodder, price for milk, meat and egg, and certain religious beliefs and ignorance. The perishable nature of the good makes it to fall to the vagaries of the marketing forces, thereby preventing its growth and development. Hence, what is needed is the intervention of government to educate the citizens for right choice of nutrients while consuming and accordingly encouraging and producing those nutrients which make the country healthy and efficient. The introduction of eggs and milk in mid day meal in all the schools of the country is a good move in the long run.

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DECEMBER 2022

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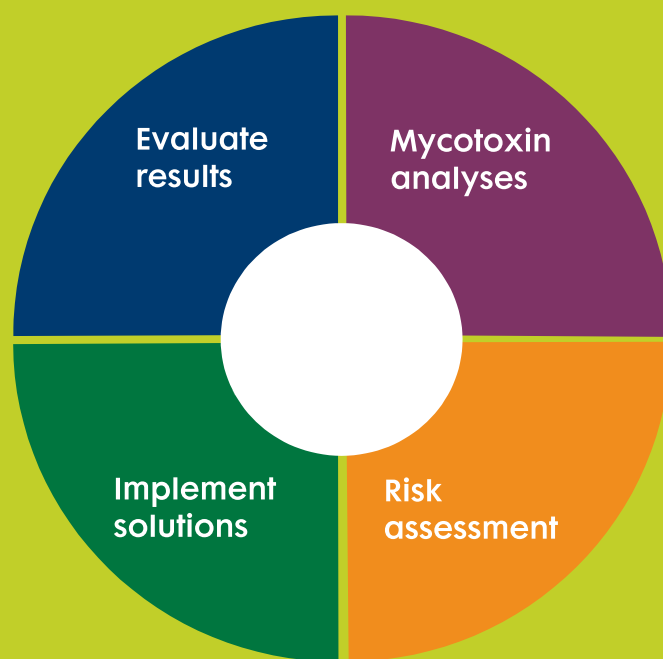
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