Lessons and experiences from other sectors, and options for the poultry sector.

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- (1) Experiences Wageningen UR Livestock Research in India
- (2) Poultry developments in India
- (3) Challenges for the future.
- (4) "Who is who".







- Wageningen UR Livestock Research:
- Main experiences in India in dairy sector, some involvement in pig sector.
- Partner in National Dairy Plan, with NDDB: doubling milk production in 15 years
- Support activities Netherlands Embassy (Joint Agricultural Action Plan).
- Support to PIB dairy cluster NAFTC.
- Research with ICAR
- Preparation education support: knowledge and trade more interlinked.



- Concluding for WLR:
  - Support function
  - Develop own programme in the dairy sector.



#### **Building up contacts in India:**

- -stepwise, acquisition difficult, longer term collaboration, no quick solutions
- -take time to find real question
- -self reliance main driver for decades, slow change towards more open economy
- -your qualities will be tested (sometimes for a long time......) before your investments will pay off.



#### Opportunity (from presentation Prekash):

- Improved animal housing
- Farm mechanization due to labor shortage
- Improved feeding and feed formulations
- Poultry feed market to grow at a CAGR of around 8% during 2012-13 to 2016-17
- Improved farm management and disease management
- Fast paced shift to meat and egg processing
- Improved marketing infrastructure
- Education and training needs to address skill gap
- 100% FDI in food processing

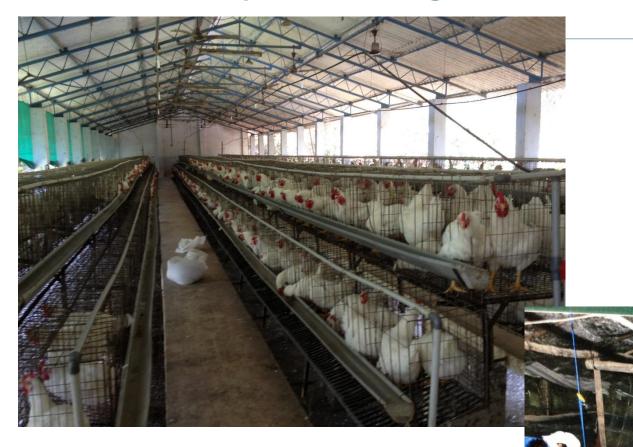


#### Opportunties

- (1)Improved animal housing and farm mechanisation.

  - From several parts of India: migrant labor to Gulf States ———— leading to growth in farm size and mechanisation.

















#### Opportunties:

- Improved feeding and feed formulations
  - From fragmented business into organised industry
  - Approx. 50 % of poultry feed still home-mixed (20 % of broiler feed, 80 % of layer feed).
  - Main ingredients: Corn, Soybean
  - Fragmented market ———
    high logistics costs.







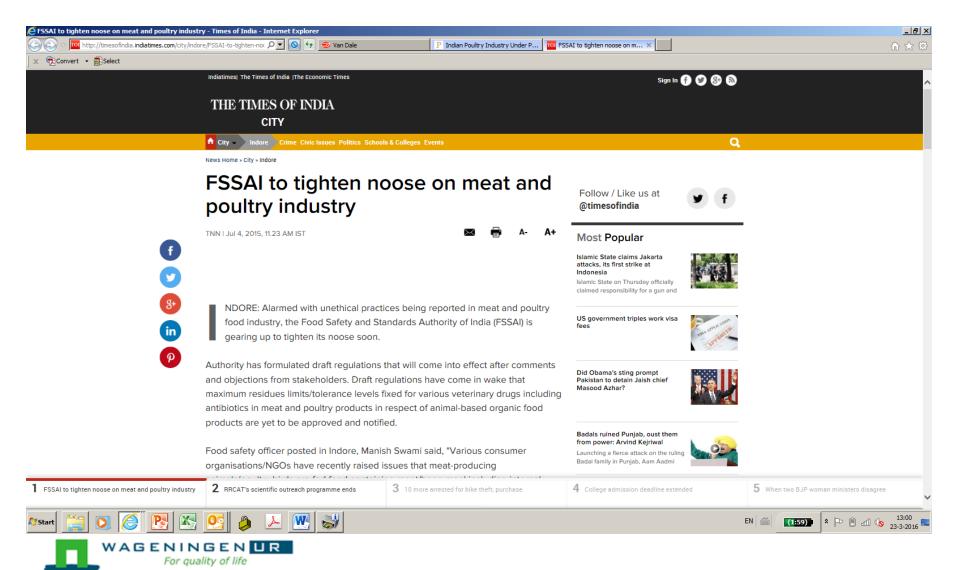
- Opportunities.
- Improved farm management and disease management
- Education and training needs to address skill gap
- First ever Dutch Knowledge Mission was organized to India
- Technical innovations need training and education
- Centers of Excellence
- Joint plans with World Bank on educational activities in agriculture.





- Changing demand patterns:
  - From wet markets to convenience
  - More demand for slaughter facilities, convenience in urban market
  - Food safety issues increasingly becoming important
  - Government rules enforcement stricter: Food Safety and Standards Authority of India
  - http://www.fssai.gov.in/





Main organisations in poultry sector in India:













