

Dairy Multi-State Scoping Assessment Study

Context

International Finance Corporation (IFC) South Asia advisory services and the Gates Foundation has sought assistance of a consulting firm to assess and analyse the variation in performance levels of dairy sector in two clusters with one cluster comprising three milk deficit states and the other cluster comprising three milk surplus states. The focus would be on identifying issues with respect to milk productivity levels, food safety and hygiene for clean milk production and environment impact with a view to identify opportunities for on-ground implementation of pilot projects to address some of these issues. Deloitte in association with consortium partners - Intercooperation and RDI had been contracted to undertake this assignment during February to April, 2014.

Supported

Deloitte Touche Tohmatsu India Private Limited

Objective

The objective of this study was to make an (i) assessment of the Indian Dairy Sector to understand issues and challenges faced by the small holder dairy farmers in terms of production practices, including breeding, livestock nutrition and health, milking practice, compliance with food safety etc., and to (ii) assess environment impact in terms of water use/management practices adopted by farmers in dairy farmers including fodder cultivation along with the assessment of GHG emissions from livestock in the identified States in India, namely, Andhra Pradesh, Bihar, Maharashtra, Odisha, Uttar Pradesh and West Bengal in the two clusters.

Interventions

ICSD as part of this assignment conducted a desk research, reviewed the relevant documents, interacted with stakeholders. The team supported the Deloitte team in analysis of value chain with focus on dairy farmers and their production practices and identify issues related to productivity, food safety and environment.

Achievements

ICSD had shared a draft report to Deloitte on the detailed sector assessment in terms of cattle holding, demand and supply levels of input services viz., Veterinary and AI services, quality feed and fodder available etc. and issues for assessing water usage and GHG emission management practices in dairy farms.

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