



The Rise of Indian Carabeef Exports: From Buffalo to a Global Meat Commodity

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India's livestock sector occupies a central position in the country's agricultural economy, rural livelihoods and food security, with buffaloes playing a particularly important role in the dairy and meat sectors. For generations, the Indian buffalo has primarily been valued as a major source of milk, particularly because of its high milk yield and comparatively high milk-fat content. However, buffaloes are also an important source of quality meat. Meat obtained from buffaloes is commonly referred to as carabeef in international trade and has emerged as one of India's most important animal-product exports. The development of the carabeef sector represents an important transformation in India's livestock economy, where buffaloes contribute not only to milk production but also to meat, leather, manure, employment and foreign-exchange earnings. The importance of buffalo in India's food and agricultural system is further strengthened by the country's large buffalo population and the changing pattern of buffalo utilization. Historically, male buffaloes had a role in draught power, while females were primarily retained for milk production. However, increasing mechanization of agriculture has substantially reduced the demand for male buffaloes for draught purposes. At the same time, only a relatively small proportion of males is required for breeding. This changing scenario has increased the importance of scientifically rearing and utilizing male buffaloes for meat production. The reference material emphasizes that buffalo should be viewed not only as a milk-producing animal but also as an important source of quality meat, particularly through the productive utilization of male buffalo calves and spent animals.

The emergence of carabeef as an export commodity is closely linked with the modernization of India's meat industry. Over the last few decades, traditional slaughter and meat-handling systems have increasingly been complemented by modern mechanized slaughterhouses, integrated abattoirs, meat-processing facilities, refrigeration and cold-chain infrastructure. These developments have enabled Indian buffalo meat to enter international markets and compete with meat-producing countries on the basis of price, availability and product characteristics. The reference material notes that India possesses a competitive advantage in buffalo-meat exports because of its large livestock base, relatively competitive production costs and access to major markets in Southeast Asia, the Middle East and North Africa. The importance of this transformation becomes clear from recent export statistics. According to the latest APEDA data, India exported approximately 1.42 million tonnes of buffalo meat valued at US\$5.10 billion during 2025–26. This represents a substantial increase over the approximately 1.25 million tonnes valued at US\$4.06 billion exported during 2024–25. The growth in export value has been particularly impressive, indicating that carabeef has developed into a major contributor to India's animal-product export earnings. The latest figures therefore provide a strong basis for examining how buffalo meat has evolved from a relatively underutilized livestock resource into a globally traded commodity.

The rise of carabeef exports, however, is not simply an export story. It is closely connected with the livelihoods of livestock farmers, the utilization of male buffalo calves, the

development of rural employment, the meat-processing industry, leather production, food security and India's foreign-exchange earnings. Scientific rearing of male buffalo calves could provide an additional income-generating activity for small and marginal farmers, while organized procurement and processing could strengthen the link between rural livestock production and international markets. The reference material identifies several potential benefits of male buffalo calf utilization, including improved buffalo productivity, increased quality meat production, employment generation, better farmer livelihoods, leather-sector development and sustained growth of meat exports. Against this background, the rise of Indian carabeef exports deserves attention not only from an international trade perspective but also from the viewpoint of livestock production, farmer economics, food safety, meat science, processing technology and rural development. The future of the sector will depend on India's ability to move beyond bulk commodity exports towards a scientifically managed, traceable, hygienic and value-added buffalo-meat supply chain.

From a predominantly dairy animal to a US\$5-billion export commodity

India's buffalo has traditionally been associated with milk production, rural livelihoods and agricultural prosperity. However, over the past few decades, another important dimension of the buffalo economy has emerged: the production and export of buffalo meat, popularly known in international trade as **carabeef**. What was once largely considered a secondary product of the buffalo sector has gradually developed into an important component of India's animal-product export industry. The transformation of the Indian meat sector, the establishment of modern mechanized slaughter and meat-processing facilities, growing international demand and India's competitive production costs have collectively contributed to the rise of Indian carabeef in the global market. The literature material also highlights that buffalo has a dual significance in India, with milk being its primary economic contribution and meat representing an important secondary source of food, income and foreign exchange.

India's Buffalo Wealth: The Foundation of the Carabeef Industry

The scale of India's buffalo resource provides a strong foundation for this industry. According to the 20th Livestock Census, India's buffalo population increased marginally from 108.70 million in 2012 to 109.85 million in 2019. Interestingly, this overall stability in buffalo numbers was accompanied by a major change in population structure. The female buffalo population increased by 8.61%, whereas the male buffalo population declined by 42.35%. This changing demographic pattern is particularly important because the traditional utilization of male buffaloes for draught purposes has declined considerably with the increasing mechanization of Indian agriculture. At the same time, only a relatively small proportion of males is required for breeding purposes. Consequently, the potential of male buffaloes for organized meat production has become increasingly important. The utilization of these animals through scientific rearing and fattening could convert an underutilized livestock resource into an important source of income for farmers.

From Traditional Slaughter to a Modern Meat Industry

The growth of India's carabeef industry has also been closely associated with the changing structure of the country's meat-processing sector. The Indian meat industry has undergone considerable modernization, with the development of mechanized slaughterhouses, integrated abattoirs, meat-processing plants, cold-chain infrastructure and export-oriented processing facilities. This transition has enabled Indian buffalo meat to move from traditional local markets into highly regulated international supply chains. The literature material identifies several factors contributing to India's competitive advantage, including the availability of livestock under predominantly crop-residue and pasture-based production systems, competitive prices, the absence of growth-promoting hormones, disease-related advantages and the proximity of major importing countries in Southeast Asia and the Middle East.

Why Indian Carabeef is Competitive in the Global Market

Price competitiveness remains one of the strongest drivers of India's position in the international buffalo-meat market. Buffalo meat is generally cheaper than several other red-meat alternatives and can therefore meet the demand of price-sensitive consumers and food-processing industries. Its comparatively favourable price, combined with suitable meat characteristics, has helped Indian carabeef find markets in countries where affordability is an important consideration. Historically, countries such as Vietnam, Malaysia, Egypt, Jordan and the United Arab Emirates have been important destinations for Indian buffalo meat because of their geographical proximity and market demand.

The Carabeef Export Boom: India's US\$5-Billion Story

The growth of exports has been particularly impressive in recent years. According to the latest Agricultural and Processed Food Products Export Development Authority (APEDA) data, India exported approximately **1.42 million tonnes of buffalo meat during financial year 2025–26**, generating an export value of approximately **USD\$5.10 billion**. This represents a substantial increase compared with 2024–25, when approximately **1.25 million tonnes** of buffalo meat worth about **US\$4.06 billion** were exported. Thus, in just one year, export volume increased by approximately **13%**, while export value increased by more than **25%**. The faster growth in export value compared with volume is particularly noteworthy because it indicates improving value realization in the international market. These figures demonstrate that Indian carabeef is no longer a marginal component of the country's livestock economy but has developed into a major export-oriented commodity.

Global Markets: Where Does Indian Carabeef Go?

The international demand for Indian buffalo meat has developed because of a combination of economic and market factors. India's relatively large buffalo population provides a substantial raw-material base, while lower production costs allow exporters to remain competitive in international markets. The industry has also benefited from comparatively low domestic consumption of buffalo meat, leaving a significant proportion of production available for export. The literature material notes that the buffalo-meat export industry gained considerable momentum during the previous decade, supported by demand from developing countries in Southeast Asia, the Middle East and North Africa, competitive pricing and the availability of buffalo meat at relatively lower prices than conventional beef.

The Hidden Opportunity: Scientific Rearing of Male Buffalo Calves

One of the most important opportunities associated with the growth of the carabeef industry is the scientific utilization of male buffalo calves. Traditionally, many male calves born in dairy-oriented buffalo production systems have been considered economically less useful because they do not produce milk and their usefulness for draught purposes has declined. The literature material points out that large numbers of male buffalo calves have historically been removed from production systems because farmers were unable or unwilling to bear the cost of rearing them. This represents a major economic loss because these animals could potentially be raised under scientifically managed systems and subsequently utilized for meat production.

Scientific male buffalo calf rearing can create benefits at several levels. Proper feeding, disease prevention, housing and management can improve growth performance and generate an additional source of income for farmers. The reference estimates that organized calf rearing can provide an economic margin for farmers while simultaneously creating rural employment and improving the utilization of crop residues. Such systems could be particularly beneficial for small and marginal farmers because buffalo calves can be integrated into household-level livestock enterprises. Rural women can also participate in feeding, cleaning and routine management activities, thereby creating additional employment opportunities within farming households.

A Vision Dating Back to the National Commission on Agriculture

The idea of utilizing buffaloes for meat production is not new. The National Commission on Agriculture recognized the importance of buffalo meat several decades ago and recommended that buffalo development should focus not only on milk production but also on the production of quality meat. It also emphasized research on early weaning, low-cost calf starters, feeding and fattening practices, promotion of buffalo meat consumption and development of buffalo-meat exports. The rapid expansion of India's carabeef exports indicates that several of these recommendations have gradually become relevant to the modern livestock economy.

Carabeef and Rural Economic Development

The economic importance of carabeef extends beyond the meat industry itself. A well-developed buffalo-meat value chain can generate employment in animal rearing, feed production, transportation, veterinary services, slaughtering, meat processing, packaging, cold-chain management and international trade. The leather industry also benefits because hides obtained during slaughter provide raw material for leather manufacturing. Thus, the buffalo contributes simultaneously to milk, meat, hides, manure and rural employment, making it an important component of India's circular livestock economy. It leads to employment generation, improved farmer livelihoods, increased animal-protein availability, leather-sector development and foreign-exchange earnings among the potential benefits of better utilization of male buffalo calves.

Beyond Bulk Meat: The Opportunity for Value Addition

The rise of carabeef exports also has implications for India's foreign-exchange earnings. The export value of approximately US\$5.10 billion recorded during 2025–26 demonstrates the scale that the sector has achieved. However, the future growth of the industry should not be measured solely by the quantity of meat exported. India now has an opportunity to move from bulk frozen meat exports towards greater value addition. Vacuum-packed chilled meat, portion-controlled products, marinated products, ready-to-cook foods, burgers, kebabs and other processed buffalo-meat products could potentially generate greater value per kilogram than conventional bulk commodity exports. The future challenge is therefore not simply to export more tonnes of carabeef, but to obtain more value from every kilogram exported.

Food Safety, Quality and Traceability: The Next Competitive Advantage

Food safety and quality will become increasingly important as the industry expands. International buyers are no longer concerned only with price; they increasingly demand information regarding animal health, hygienic slaughter, microbiological safety, residue control, traceability, cold-chain maintenance and consistency of product quality. India's future competitiveness in the carabeef market will therefore depend on its ability to combine price competitiveness with food safety, quality assurance and reliable supply. The literature material also highlights that the industry remains vulnerable to disease outbreaks, international competition, infrastructure limitations and social and political sensitivities.

Strengthening the Farm-to-Export Value Chain

Modern infrastructure will play a central role in the next phase of India's buffalo-meat industry. The development of integrated abattoirs, scientifically designed meat-processing plants, modern cold chains, accredited laboratories and traceability systems can help India meet the increasingly stringent requirements of international markets. Another major opportunity lies in establishing stronger linkages between farmers and export-oriented meat-processing companies. Organized procurement systems, farmer producer organizations, contract-based rearing and buy-back arrangements could provide farmers with a predictable market for finished animals. Such systems would also allow exporters and processors to obtain animals of more uniform age, weight and quality. Most importantly, traceability could be established from the farm to the processing plant and ultimately to the export market. The literature material specifically suggests linking male buffalo calf-rearing schemes with APEDA-registered export

houses so that farmers can receive technical support, market linkages and potentially assured procurement.

Challenges on the Road Ahead

Despite its impressive growth, the Indian carabeef industry faces several challenges. International competition remains intense, particularly from countries with large-scale bovine-meat production systems. Changes in currency values, international prices, disease outbreaks, trade restrictions and non-tariff barriers can rapidly influence India's competitiveness. The industry must also address concerns related to animal welfare, environmental sustainability, slaughterhouse modernization and the fragmented nature of livestock production. The experience of previous years has shown that international meat markets can change rapidly, making diversification of export destinations and development of value-added products increasingly important.

The Road Ahead: From Quantity to Quality

The future of Indian carabeef exports depends on creating an integrated and scientifically managed value chain. The journey should begin with the systematic identification and rearing of suitable buffalo calves, followed by balanced nutrition, preventive healthcare, proper housing and welfare-oriented management. This should be connected with organized procurement, hygienic slaughter, scientific carcass handling, rapid chilling, quality testing, packaging, cold-chain transportation and traceability. Such integration can transform carabeef from a predominantly commodity-oriented export into a high-quality, internationally trusted livestock product.

Conclusion: From Indian Buffalo to Global Carabeef

India's recent export performance demonstrates that the potential of buffalo meat is enormous. From approximately 1.25 million tonnes of exports in 2024–25 to nearly 1.42 million tonnes in 2025–26, the sector has shown strong momentum. More importantly, export earnings have crossed the **US\$5-billion mark**, demonstrating the growing international value of Indian carabeef. The Indian buffalo is therefore no longer simply a dairy animal. It represents a multipurpose livestock resource capable of contributing to milk production, meat production, leather, manure, employment and foreign-exchange earnings. The next stage of India's buffalo-meat journey should focus not merely on exporting more meat, but on producing **safer, higher-quality, traceable and value-added carabeef**. With appropriate policies, scientific calf rearing, farmer–industry linkages, modern slaughter and processing infrastructure, strong food-safety systems and diversification into value-added products, India has the potential to further strengthen its position in the global buffalo-meat market. The story of Indian carabeef is therefore not merely a story of rising exports. **It is the story of how India's buffalo economy is evolving from a traditional livestock system into an increasingly integrated global value chain.**