



IndiaLive

LIVESTOCK, DAIRY, MEAT, POULTRY & AQUACULTURE DIGEST

August / September 2012



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Food Industry Overview

- Business information and knowledge provider Dun & Bradstreet has forecasted that India's GDP will still cross the USD 5 trillion mark by 2020 despite the economy slowdown, in its second edition of its publication, India 2020 - economy outlook.
- Asia's third-largest economy is growing at its slowest pace in nine years and sluggish consumer spending is forcing mall developers to scale back plans. It will take years for the glut of retail space conceived during headier times to be absorbed by tenants, even as India fine-tunes rules to make it easier for foreign shops to enter the country on their own, analysts say.
- India's economy is likely to grow by 6-6.2 per cent in the current fiscal, lower than 6.5 per cent in 2011-12 which itself was the slowest in nine years. Continuing slowdown in the industrial growth and its spillover effect on the service sector, deficit monsoon and worsening global environment are expected to drag the GDP (Gross Domestic Product) lower in the fiscal 2012-13, an ASSOCHAM survey of economists and industry leaders indicated. The ASSOCHAM projections are lower than the outlook of 6.5 per cent by the Reserve Bank.
- Rating agency CRISIL has cut the economic growth forecast for the current fiscal to 5.5 per cent, from 6.5 per cent estimated in June, in view of deficient rainfall and worsening global situation. CRISIL also expects the average Wholesale Price Index (WPI) inflation to be higher at around 8 per cent as against 7 per cent estimated earlier.
- Two more institutions joined the growing list of analysts expecting sub-6 per cent economic growth for India this fiscal, with American banking major Citi and global brokerage CLSA cutting their estimates to 5.4 and 5.5 per cent respectively.
- Morgan Stanley has cut India's economic growth forecast to 5.1 percent, the lowest among most private forecasters for the 2012/13 fiscal year, citing a combination of weak external demand, low private investment and poor government finances.
- The IMF has cut its 2012 growth estimate for the Indian economy by 0.7 percentage points to 6.1 per cent, the sharpest revision for any of the countries included in the report. This translates into 10.3 per cent reduction in the growth estimate.
- Reflecting the general gloom in the economy, rating agency Fitch today downgraded the domestic retail sector to "negative" from "stable". "Outlook on the retail sector is revised to negative from stable. This is due to a sustained deterioration in discretionary spending, which is unlikely to improve over the short-term. The funding requirements of most retailers are likely to increase, driven by store expansions and possibly higher inventory-holding periods," the report said.
- Despite the current slowdown, the retail industry is poised to touch USD 1.3 trillion in the next eight years, driven largely by modern trade, which will jump seven-fold by then to touch USD 220 bio. "The estimated value of the retail sector at the present juncture is about USD 500 bio. Penetration level of modern retail, which currently stands at 5 per cent, will grow about six times from the current USD 27 bio to USD 220 bio in 2020," says a Ficci- Tata Consultancy Services report.

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Food Industry Overview (Continued)

- India has asked EU to amend its definition of small and medium enterprises to accommodate the country's labour intensive small units, so that they qualify for fee concessions under the region's environment legislation, popularly known as REACH. It has also asked the EU to allow Indian exporters of chemicals and other products, who have to comply with REACH regulations, to go in for direct registration of their products with the authorities instead of appointing EU-based 'only representative' to save on costs.
- Belgium has expressed hope that the ongoing negotiations for India-EU free trade agreement will conclude by end of this year, as it sought access to the country's public procurement market. The two-way trade stood between India and the EU at USD 91.3 bio in 2010-11. A Ficci report said that trade between the two sides is likely to more than double to exceed USD 207 bio by 2015, if the trade pact is formalized. The country and its largest trading partner, the 27-nation EU, aim to slash duties on over 90 per cent of the trade under the proposed pact.
- India and the European Union are facing "difficulties" relating to the Services sector in signing the Free Trade Agreement (FTA) between the two sides, Belgian Deputy Prime Minister Didier Reynders said here today. Under the FTA in the Services sector, India wants the EU to ensure free mobility of professionals without restrictions such as experience whereas the EU wants greater commitment by India to allow foreign investment in services such as retail, legal and postal.
- India will host its first dialogue with foreign ministers of Latin America and the Caribbean (LAC) countries in September. External affairs minister SM Krishna is expected to inaugurate the dialogue in which the foreign ministers of Chile, Cuba and Venezuela are expected to participate in the troika format. The dialogue may lead to India signing up free trade agreements (FTAs) with these countries going forward.
- India's trade with Latin American countries is expected to touch USD 50 bio by 2014 on account of healthy economic growth in both the regions.
- Indo-Swiss Free Trade Agreement is expected to be in place within the current financial year, the Swiss Ambassador to India Linus von Castelmur said. The bilateral trade, which is close to USD 4.8 bio now, is expected to increase to USD 7 bio by 2015.
- Indo-Israeli Free Trade Agreement is likely to be completed by the second quarter of 2013, paving the way for doubling of bilateral trade between the two countries.
- India's exports to European countries increased by about 16 per cent to USD 57.7 bio in 2011-12, while imports rose by about 29 per cent year-on-year to USD 91.5 bio. In 2010-11, the exports to Europe stood at USD 49.86 bio, while imports were at USD 71 bio. The US and Europe account for about 30 per cent of the country's total exports.
- India's exports to Kenya during January to May 2012 have touched USD 893 mio. India has also emerged as the largest exporter to the African nation, with exports constituting 13 per cent of that country's total imports so far. The main products are pharmaceuticals, steel, machinery, yarn, vehicles and power transmission equipment.

(Food Industry Overview continued on next page)

Food Industry Overview (Continued)

- The proposed free trade agreement between India and New Zealand has hit a speed breaker due to the Centre's silence on opening the country's dairy and farm goods sector to imports. The broad-based free trade agreement that proposes to cover goods, services and investment was supposed to be concluded by March.
- India is set to achieve significant milestone in trade facilitation with 24 X 7 customs clearances of export and imports. The facility will be available at identified sea-ports and airports at Delhi, Bangalore, Chennai, and Mumbai. The four ports where this facility would be available are Chennai, Kolkata, Kandla and JNPT, Mumbai, a statement from Prime Minister's Office said.
- The export of agricultural items monitored by APEDA rose by 88 per cent to about Rs. 820 bio in the last fiscal, a top official said. The growth was achieved on the back of increased export of processed foods, basmati, non-basmati rice, guar (gum and seed), buffalo meat and groundnut. India's agri exports under Agricultural and Processed Food Products Export Development Authority (APEDA) stood at Rs. 436.269 bio in the 2010-11 financial year. The export earnings from processed food, which includes processed fruits and vegetables, meat and poultry products, etc., rose to Rs. 389.50 bio in 2011—12 fiscal from around Rs. 158.16 bio in the year—ago period. Similarly, earnings from shipment of buffalo meat rose to around Rs. 140 bio in 2011—12 compared to Rs. 84.13 bio in 2010—11 fiscal.
- A 3,200-km trilateral highway linking India, Myanmar and Thailand will become a reality by 2016. India has given a USD 500 mio loan to Myanmar, some of which will be used to fund the highway. The trilateral highway, which is also being funded by the Asian Development Bank and the World Bank, will open up India's northeastern states to Southeast Asia.
- The Reserve Bank has notified the decision to allow foreign direct investment from Pakistan. "It has now been decided that...a person who is a citizen of Pakistan or an entity incorporated in Pakistan may, with the prior approval of the Foreign Investment Promotion Board, purchase shares and convertible debentures of an Indian company under FDI Scheme, subject to the terms and conditions specified..." the RBI said.
- The market for organic food products in India is growing at 20-22 per cent a year, a top official from Yes Bank has said. With rising spending power of the growing middle class in the country and increased awareness towards chemical free food, organic and natural products sector will grow significantly in the coming years, he added. Indian market for organic food including exports is currently valued at Rs. 10 bio. The report added that the country produced around 3.88 mio tons of certified organic products that include basmati, pulses, tea, coffee, spices and oilseeds. Organic foods industry presently is metro-based, with about 95 per cent of the brands existing in top 10 metros like Delhi (NCR), Kolkata, Mumbai, Pune, Chennai, Bengaluru and other tier II cities. The states doing well in organic farming are Madhya Pradesh (440,000 hectares), Maharashtra (150,000 hectares) and Orissa (95,000 hectare).
- Packs containing genetically modified food will come with 'GM' label from January 1, 2013. The government has made it mandatory to mention on every package, containing GM food, at the top of its principal display, the words 'GM'.
- The Food Safety and Standards Authority of India (FSSAI) is planning bring fresh standardization norms for food items across categories, in order to harmonize Indian foods with international standards.
- DuPont is expanding its food and nutrition business in India and plans to set up a food application centre to develop local solutions.

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Food Industry Overview (Continued)

- According to a report released at Indian Restaurant Congress, the Indian food services industry is worth nearly Rs. 750 bio now and is growing at a healthy compounded annual growth rate of 17 per cent. It is likely to reach Rs. 1370 bio by 2015. Even though 70 per cent of the market is currently dominated by unorganized players, the organized segment has witnessed double-digit growth across formats, especially quick service restaurants driven by international chains, and casual and fine dining outlets dominated by Indian and private equity majors. In the future, the organized market is expected to grow even faster — at around 20 to 25 per cent per annum.
- Opting for big-bang reforms, the government has allowed politically-risky 51 per cent FDI (Foreign Direct Investment) in multi-brand retail, 49 per cent investment by foreign airlines in aviation sector and sale of equity in four PSUs. For single brand, the Cabinet decided that any firm seeking waiver of the mandatory 30 per cent local sourcing norms would have to set up a manufacturing facility in the country, the minister added.

Dairy

- Diversified conglomerate ITC Ltd will enter the dairy sector for manufacturing milk and milk-based products. Over a certain period, the company will spend nearly Rs. 4 bio to Rs. 5 bio in the dairy business.
- Ahmedabad-headquartered Vimal Group will launch dairy alternatives for Indians who are choosing to be vegans or are simply lactose intolerant. Vimal Oil and Foods Ltd will launch an entire portfolio of dairy alternative products in 2013. The company will launch tofu to substitute paneer, soya cheese and rice cheese to replace cheese, margarine to replace butter, soya cheese spreads against cheese spread and soya mozzarella against mozzarella. Plant milk that goes into making of dairy alternative products could be derived from soy, oats, nuts, seeds, legumes, hemp, rice, et al. The Indian market for dairy alternatives is below Rs. 1 bio against the dairy industry that the industry chamber ASSOCHAM pegs at Rs. 5000 bio by 2015.
- The prevailing drought-like situation in parts of the country has led to farmers selling more milk in the market. This is reflected from the 10-25 per cent rise in milk procurement that co-operatives and companies have registered largely from the dry-spell hit areas. The Gujarat Co-operative Milk Marketing Federation (GCMMF), the largest milk co-operative that owns the Amul brand, has registered an average increase of 16 per cent in daily milk procurement, said R.S. Sodhi, Managing Director. Large parts of Gujarat, where the GCMMF operates, have been hit by dry spell this year. Hatsun, which operates from parts of Karnataka – another drought hit state – has registered a 23 per cent rise in milk procurement in July to over 2 mio litres from 1.625 mio litres in corresponding month last year.
- Mehsana District Cooperative Milk Producers' Union Ltd, popularly known as Doodhsagar Dairy, will introduce ultra heat treated milk on August 15. Branded as 'Sagar Moti', the milk will be packaged in five-layered pouches that will keep the milk fresh for three months even if it is stored at room temperature. The price of the UHT milk will be higher by about Rs. 4 per litre to cover the cost of the pouch. But it will be safer and cheaper to transport, deliver and store it as refrigeration costs will be eliminated. The new milk packaging will soon be introduced in Delhi, NCR and Manesar in Haryana where Doodhsagar sells about 1 mio litres of milk and its products daily.

(Dairy continued on next page)

Dairy (Continued)

- Sangam Dairy run by the milk producers' cooperative in Guntur, Andhra Pradesh, has sought the Government's permission to export its value-added products to the Gulf countries. The dairy, which registered a turnover of Rs. 3.2 bio in 2011-12, said it is planning to come out with an ice cream product this year.
- Frozen yoghurt-maker Yogen Früz is planning to open 100 outlets across the country over the next seven years at an estimated investment of nearly Rs. 500 mio. Yogen Früz also owns Subway, the chain of fast food joints. Launching its first outlet in Kolkata, Rishi Bajoria, franchisee owner for South and East India, Yogen Früz, said the expansion would be aided by the growing acceptance of frozen yogurt as a healthy dessert among Indians.
- Milk production in the country is estimated to have increased to 127 mio tons during 2011-12 fiscal and the compounded annual growth rate of milk production was higher compared to growth of population in the past one decade, the government has said. According to reports, seeing the rate of population growth, the country is estimated to require 150 mio tons of milk by the end of 12th Five Year Plan period (2012-17).
- Doodhsagar Dairy (Mehasana) chairman Vipul Chaudhary was unanimously elected the chairman of the Rs. 116.60-bio Gujarat Cooperative Milk Marketing Federation (GCMMF). GCMMF markets country's most powerful dairy brand Amul. Mehsana is one of GCMMF's 17 district milk procurement and processing arms.
- Even though the domestic probiotic market is at a nascent stage now, it is expected to grow at 11 per cent till 2016, mainly on the back of awareness campaigns promoting its benefits. "The domestic probiotic market, which is comparatively nascent now, valued at USD 12 mio in 2011, is expected to witness a compound annual growth rate (CAGR) of 11 per cent by 2016", says a Frost & Sullivan report.
- Parag Milk Foods launched its premium milk brand 'Pride of Cows' in Pune. Priced at Rs. 75/litre, the milk is delivered at home only by order. The company claims that the milk is more hygienic because it is untouched by humans at any point and cold chain is maintained right from the farm gate. Parag launched Pride of Cows in Mumbai last year. The company claims that it sells 5000 litres of the milk every day in Mumbai.
- Parag Milk Foods, private dairy player and manufacturer of brands such as Go Cheese and Gowardhan Milk, has launched Go-Milk, starting Rs. 45 per litre. Available in two variants — Go-Milk (which is double toned and priced at Rs. 45 per litre) and Go-Slim (which is skimmed milk and priced at Rs. 50 per litre), the tetra pack milk would be available in 2 mio retail stores pan-India. The product has a shelf-life of 180 days.
- The Pune-headquartered Rs. 10-bio dairy company, Parag Milk Foods, plans to scale up its production capacity by setting up milk processing plants, one each, in east and north India. The units are likely to come up in West Bengal and either in Haryana or Delhi. The company will invest close to Rs. 1 bio on these two plants, which are likely to come up within the next two years. The company aims to achieve a 25 per cent growth in its turnover to Rs. 12.50 bio in 2012-13. Nearly, 70 per cent of its turnover comes from value-added milk products like ghee, cheese, paneer, yoghurt etc.

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Dairy (Continued)

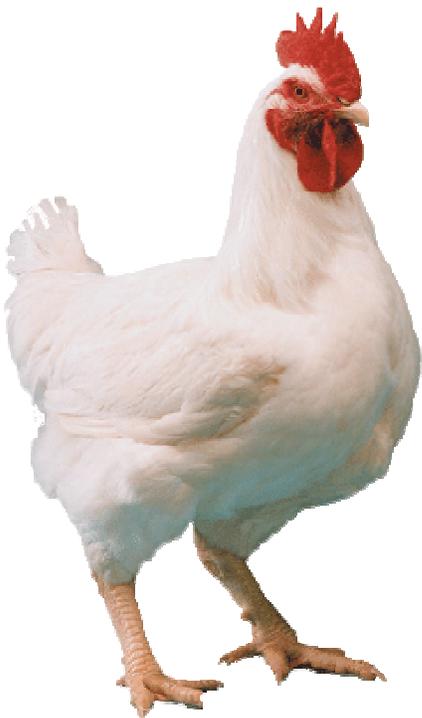
- In an effort to pick up "substantial minority stake" in Pune-based Parag Milk Foods Private Limited, IDFC Private Equity Fund III, managed and advised by the Private Equity (PE) group of IDFC Alternatives Limited has invested Rs. 1.55 bio through compulsory convertible debentures. The erstwhile IDFC Private Equity is eyeing a 25 per cent internal rate of return (IRR) from the investment which is its second in rural infrastructure and first in the dairy sector.
- Gujarat Cooperative Milk Marketing Federation (GCMMF), makers of Amul dairy products, is drawing up a three-pronged growth strategy that includes a packaging revamp, expanding production capacity and extending distribution network to reach out to smaller towns and villages across the country. To start with, the federation is expanding its production capacity by 25 per cent to meet the growing consumer demands. GCMMF is setting up nine new production facilities across the country, of which five will be in Gujarat and four in northern India. Currently, Amul has 40 production facilities in India. According to a company official, with the economic slowdown and rising prices, consumers are now shifting to smaller economy packs to cut costs. "We have seen an increase of 15 per cent in sales in our small packs for milk powder available at Rs. 5 and Rs. 10. Also, the demand for our Amul butter packs (20 gm at Rs. 50) has increased by 15 per cent". It started selling economy packs in milk powder and butter a few months ago. Amul is also adding 1,000 outlets to its existing 6,500 distributors to reach out to new towns.
- Gujarat Co-operative Milk Marketing Federation Ltd, which owns the Amul brand, has expressed its willingness to acquire the Delhi Milk Scheme (DMS). DMS, under the Ministry of Agriculture, is a loss making entity and has about 5 per cent share in the pouched milk segment in the national Capital. Amul has a processing capacity of 1.2 mio litres per day in Delhi, while it expects to add capacity of another 5 mio per day as it is under process of setting up two dairies in Delhi and Rohtak.
- Amul has launched UHT treated homogenised milk in aseptic poly-packs under the Moti brand. The milk remains fresh for three months even if stored at room temperature. Moti will be available in 500-ml pack priced at Rs. 20 and in a 200-ml pouch at Rs. 9 a pack. Amul Moti will be initially available in Jammu and Kashmir, Delhi and Chhattisgarh.
- Mother Dairy's move to hike milk prices by four per cent has caught everyone by surprise. The hike comes at a time when skimmed milk powder (SMP) prices have crashed and the monsoon deficit has shrunk. SMP itself is today available at Rs. 140-150 a kg against Rs. 185-190 a year ago. Dairies in North paid up to Rs. 31 a litre to farmers during the peak season, which has now fallen to Rs. 26 in case of full cream milk containing six per cent fat. Mother Dairy retails full cream milk now at Rs. 39 a litre. (9 Sep)
- Top biscuits and dairy products maker Britannia Industries has expanded its portfolio by launching fortified flavoured yogurt. The yogurt — fortified with iron, iodine, calcium, zinc and vitamin A — will be offered in three flavours — mango, vanilla and strawberry.
- Alarmed over Amul and Mother Dairy getting a foothold in the Uttar Pradesh market, the state government has decided to improve the marketing of the state's Parag dairy products and make their packaging more attractive. For this purpose, the government has engaged Indian Institute of Management, Lucknow, to submit a plan to improve the marketing of UP Pradeshik Cooperative Dairy Federation Limited (UPPCDF), which makes Parag products. Ahmedabad-based National Institute of Design (NID) has been engaged to redesign the packaging of Parag products.

(Dairy continued on next page)

Dairy (Continued)

- Come October and major milk producers are either expected to trim their procurement from farmers or stop it completely because of excess stocks of skimmed milk powder (SMP) lying within the country. According to industry officials as on date the country has around 128,000 tons of SMP stocks, while the annual demand is around 88,000 tons, a surplus of around 40,000 tons. In other words, the country's entire requirement of SMP is already available with milk companies before even the main procurement season has started. One kilogram of SMP is made from 11 litres of fresh milk.
- Father of the white revolution and doyen of the dairy cooperative movement Dr. Varghese Kurien, architect of the Operation Flood, passed away at the age of 90 at 1.15 a.m. on Sunday, 9th September. Legend has it that when a delegation of farmers from his native Kheda district narrated their woes in 1949 to Sardar Vallabh Bhai Patel, who was extremely busy with the myriad matters post-Independence, the then Deputy Prime Minister and Home Minister directed a young engineer to go to Gujarat: 'Don't return until you've solved their problems'. Nobody knew then that the Iron Man of India was sending a man who will be fondly known as the Milkman of India.

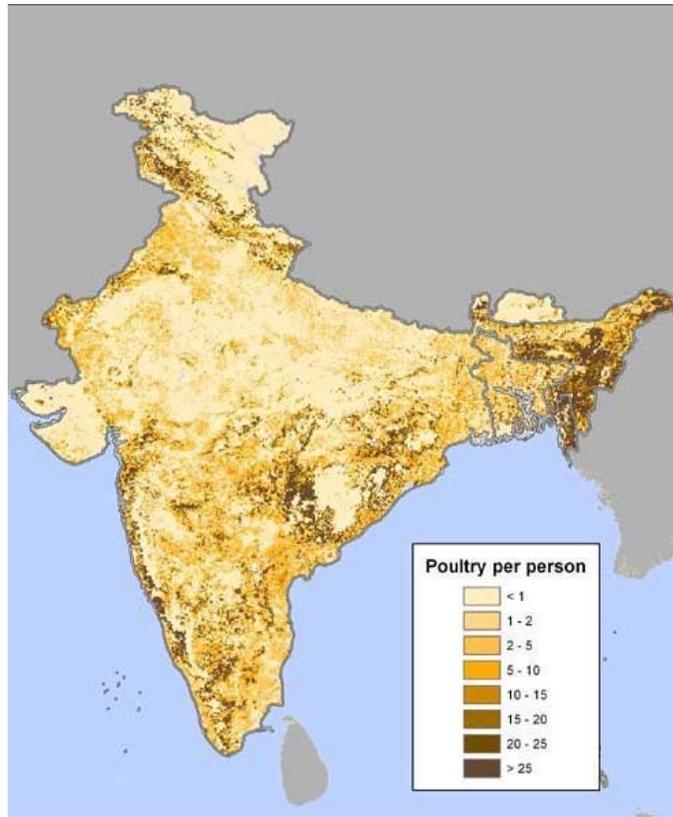
Poultry



- Following an unprecedented increase in the prices of maize and soya meal, the National Egg Coordination Committee (NECC) has appealed to the government to ban exports and forward trading in these two commodities. This would help curb speculation and hoarding of soya meal and maize, which are the essential feed ingredients of the poultry industry. The committee has also appealed to the government for allocation of at least 1 mio tons of wheat by the Food Corporation of India to minimize the pressure on the price of maize in the domestic market. A NECC release says that the soya meal prices have increased from Rs. 2,000 per quintal to Rs. 4,200 per and Rs. 950 to Rs. 1,400 for maize. As a result of the steep increase in the prices of input costs, the breakeven level for egg production, which was Rs. 2.25 per egg two months ago, has gone up to Rs. 3. And for broiler production, it has increased from Rs. 45 per kg live weight to Rs. 65 per kg in the last two months.

- India's poultry industry is growing rapidly. Within a decade, output has jumped 370 per cent. Farms make profits in the years when chicken are healthy and their feed is cheap. But that is nothing compared to the money retailers are making, with margins as high as 40 per cent.

Distribution of Poultry in India



Source - FAO (2007)

<http://sapplpp.org/statistics-and-rearing-practices/distribution-of-poultry-per-person-in-india>



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Meat

- India's buffalo meat exports are expected to jump by 30 per cent to 2.15 million ton in the 2013 calendar year due to better prices following lower cost of production, according to a latest USDA report. The exports are estimated at over 1.66 million ton this year. Given its tremendous export growth, India is likely to become the world's largest buffalo meat exporter by next year, if not sooner, it said. Indian buffalo meat exports have grown to record levels in the last two years, making India the fourth country in the world to export more than one million ton of bovine meat annually. The country's growing exports are the result of its low cost of production (relative to international competitors).
- Goat farming, once very popular in Punjab, is witnessing a revival after a lull that lasted a decade and a half. This has been due largely to efforts to arrest the reversal by Ludhiana's Guru Angad Dev Veterinary and Animal Sciences University (GADVASU). The demand for both goat meat and milk is high in Punjab. GADVASU's count for goats in the state, 0.45 mio till 1998, had fallen to 0.12 mio by 2008, a drop attributed to shrinking of grazing facilities, before the fresh efforts raised it to 0.192 mio by the first half of 2012. To make up for the lost grazing options, a 'stall-fed' technique is being promoted. Feeding goats in the sheds, however, costs more than it would have cost if they had been allowed to graze in the open. Punjab is short by 70 per cent of its goat meat demand, with around 9,000 quintals available out of 30,000, with the remaining 21,000 being met from other states.
- A team of veterinary and para-veterinarians have been rushed to remote Kurung Kumey district of Arunachal Pradesh following outbreak of Foot and Mouth Disease (FMD), which affects cattle and gaurs. Outbreak of FMD was also reported from other parts of Kurung-Kumey, East and West Kameng Districts.

Aquaculture

- The marine products exports touched 862,021 tons valued at Rs. 165.9723 bio (USD 3508.45 mio) in 2011-12. The quantity has gone up by 6.02 per cent, while the value in rupee terms jumped by 28.65 per cent over the previous year. In US dollars, the value showed a growth of 22.81 per cent. The unit value increased to USD 4.07 from USD 3.51 in the previous year. In 2010-11 seafood exports stood at 813,091 tons valued at Rs. 129.0147 bio. Frozen shrimp was the major export value item accounting for 49.63 per cent of the total dollar earnings. In quantity terms shrimp exports increased by nearly 25 per cent. The share of vannamei shrimp in the total shrimp exports has shot up from 14 per cent to 35 per cent while the share of black tiger shrimp has declined from 82 per cent to 61 per cent. South East Asia has become the largest buyer of Indian marine products with a share of 40 per cent in volume and 25 per cent in value in dollars. European Union came second with a share of 23 per cent followed by the US with 18 per cent in volumes. Exports to China recorded a fall of 47 per cent in quantity and 40 per cent in value in dollar terms. The US and Europe together account for over 45 per cent of the country's total seafood exports.
- The sudden move by the Japanese Food and Safety Authority to impose compulsory testing for Ethoxyquin in shrimp consignments from India on the basis of a default standard of 0.01 ppm has rattled shrimp exporters from Andhra Pradesh, even though there has been no rejection of consignments from the State yet. Fishmeal was an important ingredient of shrimp feed and to protect the feed from rancidity a large number of anti-oxidants were being used. Ethoxyquin, being one of the most popular and effective anti-oxidants, finds its way into the shrimp through the feed.

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