

Upscaling Camel Milk Markets

An Experience from Kachchh, Gujarat

sahjeevan

sahjeevan

Sahjeevan is an organistion that works with pastoralists. Our journey spanning over 30 years began with Kachchh in Gujarat, spread to Saurashtra and has recently extended to the whole country. Our mission is to incubate and foster activities that empower independent, self-sustaining communities with strong grassroots leadership.

This document is an effort to synthesize learnings from Kachchh, Gujarat to understand how market initiatives can positively impact livestock economies in general and conserve camel breeding in particular.

It highlights how strengthening dairy livelihoods through a collaborative approach and a comprehensive development intervention can boost public health and nutrition while making camel pastoralism viable once again and reversing the alarming decline in camel populations.

Finally, it suggests that the initiatives carried out successfully in Gujarat hold valuable lessons specifically for its neighbouring State, Rajasthan, which has the country's largest camel population.



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Introduction

Camel pastoralism has been a distinctive feature of Gujarat and Rajasthan for centuries. In Gujarat, the Fakirani Jat, Rabari, Sama and Sodha communities are associated with breeding and herding the Kachchi and Kharai camels, the two camel breeds found in the State's arid and semi-arid regions. Kachchhi camels are found in the inland terrestrial ecosystems of the district, while Kharai camels move between that terrain and the humid coastal areas. The Kharai are renowned for swimming between the coastal mangrove islands as they forage.

In the decade from 2003 to 2012, the camel population had already experienced a 43% decline, with just 30,415 animals remaining. [1]

Camel ownership historically signified status and wealth. Camels were used for desert warfare, communication, draught power, transportation and trade. By the end of the 1990s, however, slackening demand for camels as draught animals and shrinking grazing lands for herds led to a sharp decline in camel populations. Thousands of camels were sent to meat markets since the sale of live camels was the only source of income for camel breeders. The situation has since continued to deteriorate. In the decade from 2003 to 2012, the camel population had already experienced a 43% decline, with just 30,415 animals remaining.[1] The 2024 Livestock Census will give us the latest figures in this continuing decline.

Young male camels sell for between Rs.10,000/- and Rs.15,000/-, catering to what remains of the draught and transport markets. This is of course a one-time income per animal.

The neglect of market development for milk and animal sales have in particular made it difficult for the camel breeding community to survive economically and conserve this unique livestock species.

Earlier, female camels were not sold, but in today's circumstances that proscription is weakening. Female camels cater to a very localised market in Banaskantha and Sabarkantha in North Gujarat, where they are used for milk production. They can typically bring in Rs.8000/- to Rs.10,000/- per camel. However, in the case of females, this one-time income also limits the owner's ability to increase or even maintain herd size through reproduction. The neglect of market development for milk and animal sales have in particular made it difficult for the camel breeding community to survive economically and conserve this unique livestock species.

In order to strengthen camel husbandry in the region, Sahjeevan, with financial support from the Government of Gujarat, organized camel herder communities to form the Kachchh Camel Breeders Association or Kachchh Unt Uchherak Maldhari Sangathan (KUUMS). KUUMS was registered in 2011 under the Bombay Public Trusts Act, 1950 and the Registration of Societies Act, 1860 its objectives were to conserve camels and their grazing resources; increase income for camel breeders by developing a market for camel milk and animal sales; improve the health of camel herds; and register the Kharai camel as a distinct Indian camel breed. 370 camel breeders, including 136 women, are members of this Sangathan. A primary census done by Sahjeevan in 2010 suggests that the Kachchhi camel accounts for 80% of the total camel population of Kachchh district, while the Kharai camel makes up the balance. Average herd size is about 30-40 camels, but the variation can be from a low of 5 or 6 to a high of around 100. Between the ages of 4 and 5, a female camel attains puberty and can breed. Winter is the breeding season for camels. A 12-month gestation period follows and the inter-calving period is 18-24 months. Which brings us to the subject of camel milk.

[1] 17th Livestock Census 2003 GOI, and 19th Livestock Census 2012 GOI



Camel Milk:
An Untapped Superfood

The research suggests that camel milk has high nutritional value and potential in helping deal with a range of medical conditions.

Camel milk has always constituted a major part of the camel breeders' own diet in India. Camels are renowned for feeding on a vast variety of plant species, all of which contribute to the nutritive value of their milk. The average daily yield of a lactating camel is around 2-3 litres, although there are instances where individual yields can be as high as 6 litres or more (Sahjeevan 2010). Studies on camel milk composition and its therapeutic value have been undertaken by the National Research Centre on Camel, Bikaner; S.P. Medical College, Bikaner; Anand Agriculture University of Gujarat; and by a variety of institutions outside India.

The research suggests that camel milk has high nutritional value and potential in helping deal with a range of medical conditions. It has three times more vitamin C than cow's milk. its lower fat content helps in managing cholesterol levels and also ensures that lactose intolerant people can digest it. It contains an insulin-like protein that has been shown to reduce blood sugar levels in diabetics, particularly pertinent given that India faces a diabetes crisis as people increasingly eat a high-sugar diet (Agrawal, 2005). Camel milk is thought to contain enzymes with anti-bacterial and anti-viral properties as well, and in the process help to fight a range of threats. Some studies suggest it may also have a positive effect on patients with HIV/AIDS, cancer, Alzheimer's disease and autism, although such research is preliminary and will need far greater work to be seen as definitive. In interactions with camel breeders, it was found that across Kachchh, camel milk is consumed by a large number of people from all walks of life as a nutritious supplement and as a traditional remedy for diabetes, tuberculosis, and even cancer (Sahjeevan, 2014).

FSSAI officially recognized camel milk as a food article and included minimum standards for it in its milk and dairy products category.

The sale of camel milk was, until recently, not encouraged in pastoralist camel herding communities for cultural reasons. Besides, there is no cultural tradition of drinking camel milk in India outside of the camel breeders and the regional communities that are closely associated with them. Moreover, until 2015, the Food Safety Standards Authority of India (FSSAI), the agency that regulates and develops standards for the food industry in India, had not recognized camel milk as a food article under the Food Safety and Standards Act, 2006. This meant that dairies were not permitted to sell camel milk.

As a result, no organized milk market for camel milk existed. Nonetheless, while a large number of breeders continued their age-old tradition of not selling camel milk, some of them began to do so, owing to changes in circumstances brought on by falling camel sales. They would sell camel milk locally, usually to tea stalls and hotels. In some parts of Gujarat, breeders would mix camel milk with that of buffaloes and cows before sale; this has not, however, been a widespread practice. These informal, local sales continue, and on average, camel milk fetches Rs. 15-25 per litre in this local economy.



In 2015, owing to efforts by the Government of Gujarat with the help of Sahjeevan, Sarhad Dairy, GCMMF and the National Research Centre on Camel (NRCC), FSSAI officially recognized camel milk as a food article and included minimum standards for it in its milk and dairy products category. This has eliminated a major barrier to efforts at mainstreaming the marketing of camel milk.

Civil society organizations working with camel breeders in the country, especially in Rajasthan and Gujarat, have made several efforts to popularize camel milk and highlight its therapeutic value, and have experimented to establish a market for various camel milk products such as ice cream, Kheer (made with sweetened camel milk and rice), Kulfi, flavoured milk, etc. There is now a rapidly growing demand for camel milk in the urban market, reflecting the growing interest in its potential therapeutic value. Rajasthan-based Lokhit Pashu Palak Sansthan (LPPS), an NGO that works with camel pastoralists, has been selling camel milk on a small scale, but is routinely responding to orders from remote locations, including cities such as Chennai.

The global market potential for camel milk could be in the billions of dollars, according to estimates by the Food and Agriculture Organisation (FAO) of the United Nations.

Camel milk is marketed as a health food and in beauty products in the Gulf, several African countries, Pakistan, Australia and the USA, where it commands a premium price. The global market potential for camel milk could be in the billions of dollars, according to estimates by the Food and Agriculture Organisation (FAO) of the United Nations. The income generated from milk sales can be substantial, far exceeding the one-time returns from selling young male camel offspring and potentially making it the best option for camel breeders' livelihood development.



Camel Milk Market in Gujarat

In 2011-'12, the Gujarat Government's Animal Husbandry Department worked in collaboration with the GCMMF, Sarhad Dairy, KUUMS and Sahjeevan to conceptualize a pilot project under RKVY to set up a camel milk dairy in Kachchh.

In 2011-'12, the Gujarat Government's Animal Husbandry Department worked in collaboration with the Gujarat State Cooperative Milk Marketing Federation (GCMMF), Sarhad Dairy (a Kachchh District Milk Cooperative Union), KUUMS and Sahjeevan to conceptualize a pilot project under the Rashtriya Krishi Vikas Yojana (RKVY) to set up a camel milk dairy in Kachchh. It took more than four years for the district union and GCMMF to start camel milk procurement from Kachchh owing to the absence of FSSAI standards for camel milk and other technical and bureaucratic reasons. Following FSSAI's recognition of camel milk as a certified food item in 2015, Sarhad Dairy started official procurement of camel milk. Camel Milk Chocolate was marketed under the Amul brand by GCMMF during Diwali 2017. Currently, they have a range of products including plain camel milk, flavoured camel milk, camel milk powder and camel milk chocolate, all under the brand name of Amul.



The engagement of multiple stakeholders was the unique factor that helped this project to overcome a variety of obstacles.

The Multi-Stakeholder Model

The engagement of multiple stakeholders was the unique factor that helped this project to overcome a variety of obstacles. The State Government, through its Animal Husbandry Department, owned the project. Not only did they provide significant financial support for infrastructure, they also anchored the entire process and made several representations to the concerned authorities to clear a variety of hurdles. Dairies of both the District Union and the State Federation welcomed the idea and showed their willingness to take risks while experimenting with the new idea of launching camel milk in the mainstream market. The State Federation, GCMMF, took on the responsibility of marketing camel milk and milk products under its prestigious Amul brand, and also helped the District Union to standardize camel milk properties to ensure consistent quality in the milk being procured. The District Union, Sarhad Dairy, took responsibility for the collection and procurement, chilling, processing, packaging and transportation of camel milk.

The camel breeders' association, KUUMS, was responsible for organizing the camel herders into cooperative societies, ensuring that hygiene standards were agreed upon and maintained by producers, working with the community to see that milk collection was taking place along mutually identified collection routes, and ensuring that the camel herders received timely payment for the milk they sold Sarhad Dairy. Sahjeevan's central role was to bring all stakeholders onto one platform to move things forward. The organisation also assisted the State, the dairies and KUUMS in meeting their respective responsibilities.





Meanwhile, and because it was taking Sarhad Dairy time to set up its procurement operations, KUUMS, with Sahjeevan's help, invited Bikaner-based private entrepreneur Aadvik Foods to start procuring camel milk as well in Kachchh. After several meetings to finalize the commercial terms, in November 2016 Aadvik began procuring between 300-500 litres of camel milk per month. Aadvik paid a rate of Rs.50/- per litre to the pastoralist producers and an additional Rs.1/- per litre as commission to the breeders' association to ensure regular and timely procurement at Nakhatrana block (western block of Kachchh district) Aadvik then initiated the marketing of camel milk products within and outside India under the brand name of Aadvik Foods and stepped up procurement to nearly 400 litres a day.


Amul
Camel
Milk
CAMEL MILK IS
A SOURCE OF
NATURAL INSULIN
LIKE PROTEIN



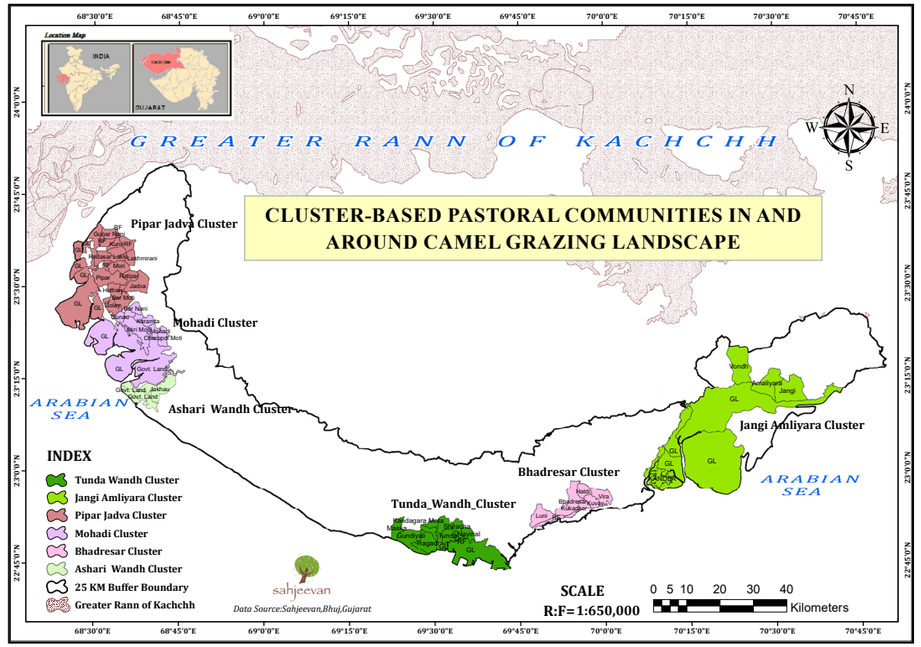
Initial Plan and Investment

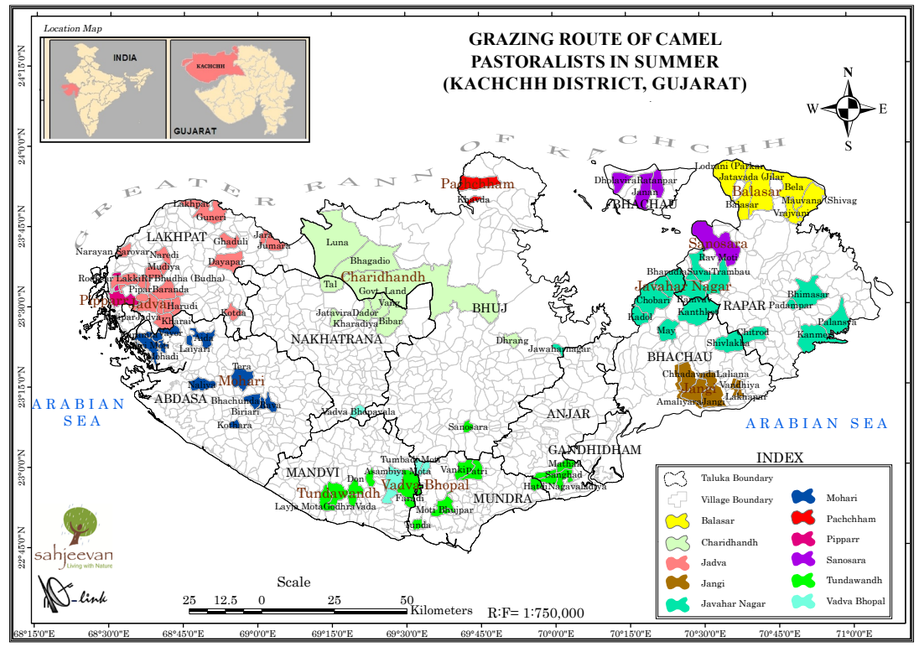
To assist the State and Sarhad Dairy in developing a project proposal, Sahjeevan prepared a 10-year projection plan on the potential of camel milk production in Kachchh District.

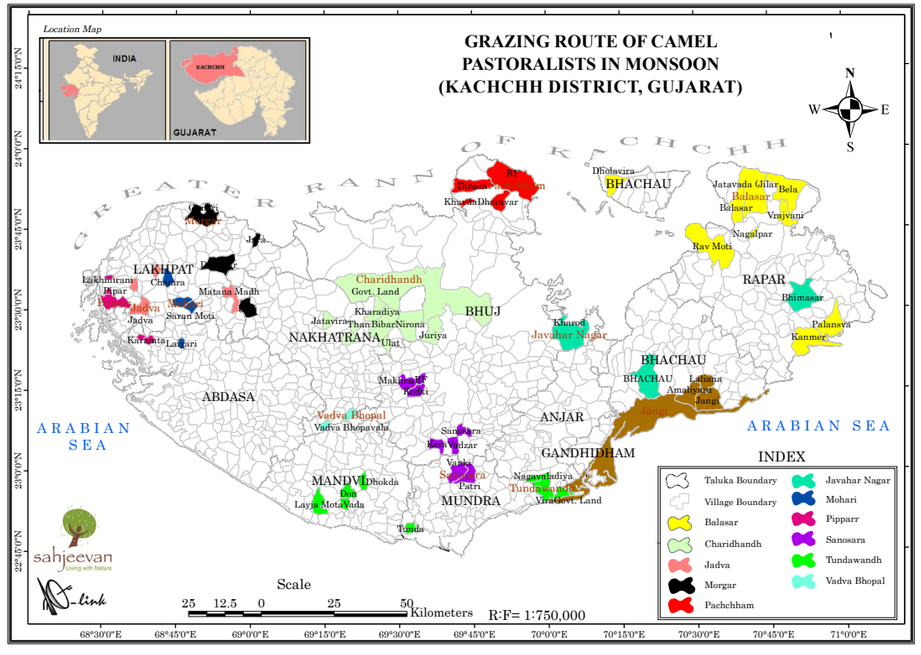
Based on availability of grazing and water resources in the district, 13 clusters were identified by Sahjeevan with the help of camel herder communities, where the density of camel populations is high for a given season because of pastoralist migration patterns. This mapping exercise helped in enhancing our understanding of the quantity of camel milk that could be procured from specific clusters and hence maximizing the potential of the whole operation. It also, therefore, enabled the design of collection routes for milk procurement and the identification of locations for Bulk Milk Chillers (BMCs). Given the size of the district, it was divided in to three parts: the western part covering Nakhtrana, Abdasa and Lakhpat blocks; the central part covering Mandvi, Bhuj and Mundra blocks, and the eastern part covering Anjar, Bhachau and Rapar blocks.

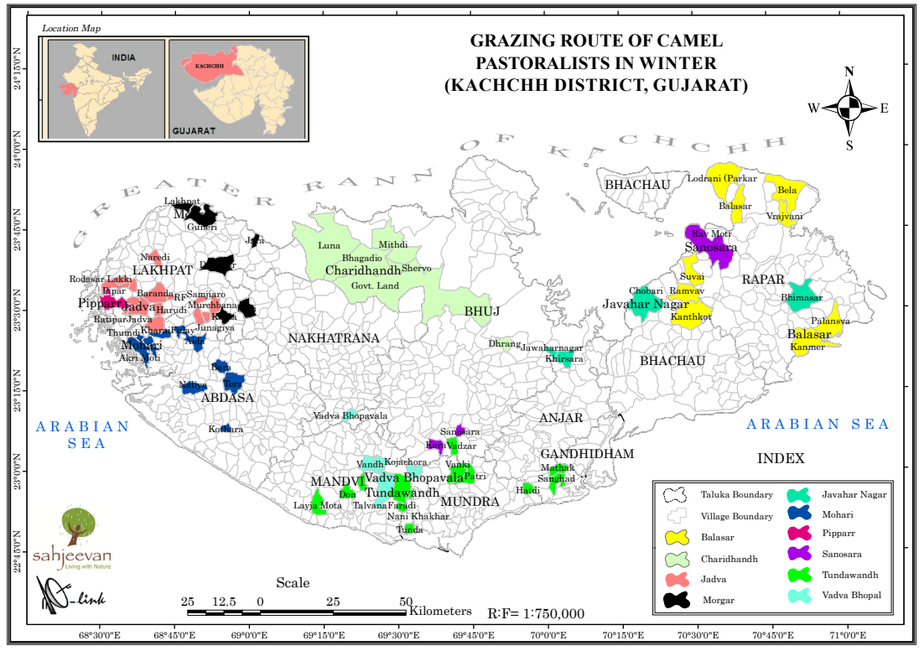
To assist the State and Sarhad Dairy in developing a project proposal, Sahjeevan prepared a 10-year projection plan on the potential of camel milk production in Kachchh District. Based on this, Sarhad Dairy proposed the installation of 3 BMCs with a storage capacity of 5-8 KL per day, a mobile tanker with a capacity of transporting 9KL, and a processing plant able to process up to 20KL per day. The proposed processing plant would include homogenization, pasteurization and deodorization processes and bottled filler packaging machines.

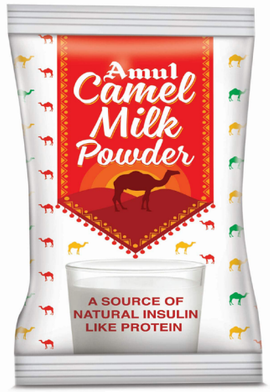
Financial outlay for the proposed plant was Rs. 4 crores with 70% grant support from the State Government under RKVY and 30% to be spent by Sarhad Dairy. GCMMF would market processed milk packed in bottles under the Amul brand. Considering the medicinal properties of camel milk, it was expected to fetch a premium in this niche market. The plan was to launch camel milk initially in selected mega-cities of Gujarat, i.e. Ahmedabad, Vadodara, Surat and Rajkot.


CLUSTER-BASED PASTORAL COMMUNITIES IN AND AROUND CAMEL GRAZING LANDSCAPE
GREATER RANN OF KACHCHH
Location Map
INDIA
GUJARAT
Pipar Jadva Cluster
Mohadi Cluster
Ashari Wandh Cluster
Bhadresar Cluster
Tunda_Wandh_Cluster
Jangi Amliyara Cluster
ARABIAN SEA
INDEX
Tunda Wandh Cluster
Jangi Amliyara Cluster
Pipar Jadva Cluster
Mohadi Cluster
Bhadresar Cluster
Ashari Wandh Cluster
25 KM Buffer Boundary
Greater Rann of Kachchh
sahjeevan
Data Source:Sahjeevan,Bhuj,Gujarat
SCALE
R:F=1:650,000
0 5 10 20 30 40
Kilometers


GRAZING ROUTE OF CAMEL PASTORALISTS IN SUMMER (KACHCHH DISTRICT, GUJARAT)
Location Map
INDIA
GUJARAT
GREATER RANN OF KACHCHH
LAKHPAT
BHUJ
NAKHATRANA
ABDASA
MANDVI
MUNDRA
ANJAR
GANDHIDHAM
BHACHAU
RAPAR
Padamdam
Balasar
Javahar Nagar
Charidhandh
Jadva
Tundawandh
Vadva Bhopal
ARABIAN SEA
INDEX
Taluka Boundary
Village Boundary
Balasar
Charidhandh
Jadva
Jangi
Javahar Nagar
Mohari
Pachchham
Pipparr
Sanosara
Tundawandh
Vadva Bhopal
sahjeevan
Scale
25 12.5 0 25 50 Kilometers
R:F= 1:750,000


GRAZING ROUTE OF CAMEL PASTORALISTS IN MONSOON (KACHCHH DISTRICT, GUJARAT)
Location Map
INDIA
GUJARAT
GREATER RANN OF KACHCHH
LAKHPAT
BHUJ
NAKHATRANA
ABDASA
MANDVI
MUNDRA
ANJAR
GANDHIDHAM
BHACHAU
RAPAR
Charidhandh
Javahar Nagar
Vadva Bhopal
ARABIAN SEA
INDEX
Taluka Boundary
Village Boundary
Balasar
Charidhandh
Jadva
Morgar
Pachchham
Javahar Nagar
Mohari
Pipparr
Sanosara
Tundawandh
Vadva Bhopal
sahjeevan
Scale
25 12.5 0 25 50 Kilometers
R:F= 1:750,000


GRAZING ROUTE OF CAMEL PASTORALISTS IN WINTER (KACHCHH DISTRICT, GUJARAT)
Location Map
INDIA
GUJARAT
GREATER RANN OF KACHCHH
LAKHPAT
BHUJ
NAKHATRANA
ABDASA
MANDVI
MUNDRA
ANJAR
GANDHIDHAM
BHACHAU
RAPAR
Javahar Nagar
Vadva Bhopal
ARABIAN SEA
INDEX
Taluka Boundary
Village Boundary
Balasar
Charidhandh
Jadva
Morgar
Javahar Nagar
Mohari
Pipparr
Sanosara
Tundawandh
Vadva Bhopal
sahjeevan
Scale
25 12.5 0 25 50 Kilometers
R:F= 1:750,000



Currently 5 BMCs are operational in the district, procuring a daily average of 5000-5500 litres of camel milk from around 250 camel herders.

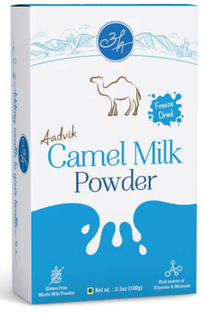
Current Operation

Since the proposed plant would take several months to be established, and because of pressure from the State as well as the market (Aadvik Dairy had already launched camel milk products in the market), an interim arrangement was made by Sarhad Dairy to launch camel milk chocolates to penetrate the market on Diwali, 2017. After this, regular procurement started in September 2017 and the camel milk plant at Sarhad Dairy become operational.

The current operation involves camel herders bringing milk to Sarhad Dairy's Nakhatrana BMC. Sarhad dairy had set up a BMC with a 30KL capacity at Nakhatrana for cattle and buffalo milk, but utilizes only 60-70% of its capacity, hence the remaining capacity is used for camel milk. There are 7-8 youths who provide collection services to herders who are not in a position to bring milk to the collection centre. They charge Rs.15-20 per litre for the transportation and collection services they provide. BMC operators collect milk and maintain a daily record for each herder. A chemist conducts laboratory tests on each sample for quality parameters such as Fat Content, SNF and Acidity. The collected milk is stored at 0.5° to 1°C and transported in a refrigerated tanker to Sarhad Dairy's Lakhond Plant for a second round of quality checks and then further processed and packed in bottles or transported to GCMMF, Anand for converting to powder and chocolates.

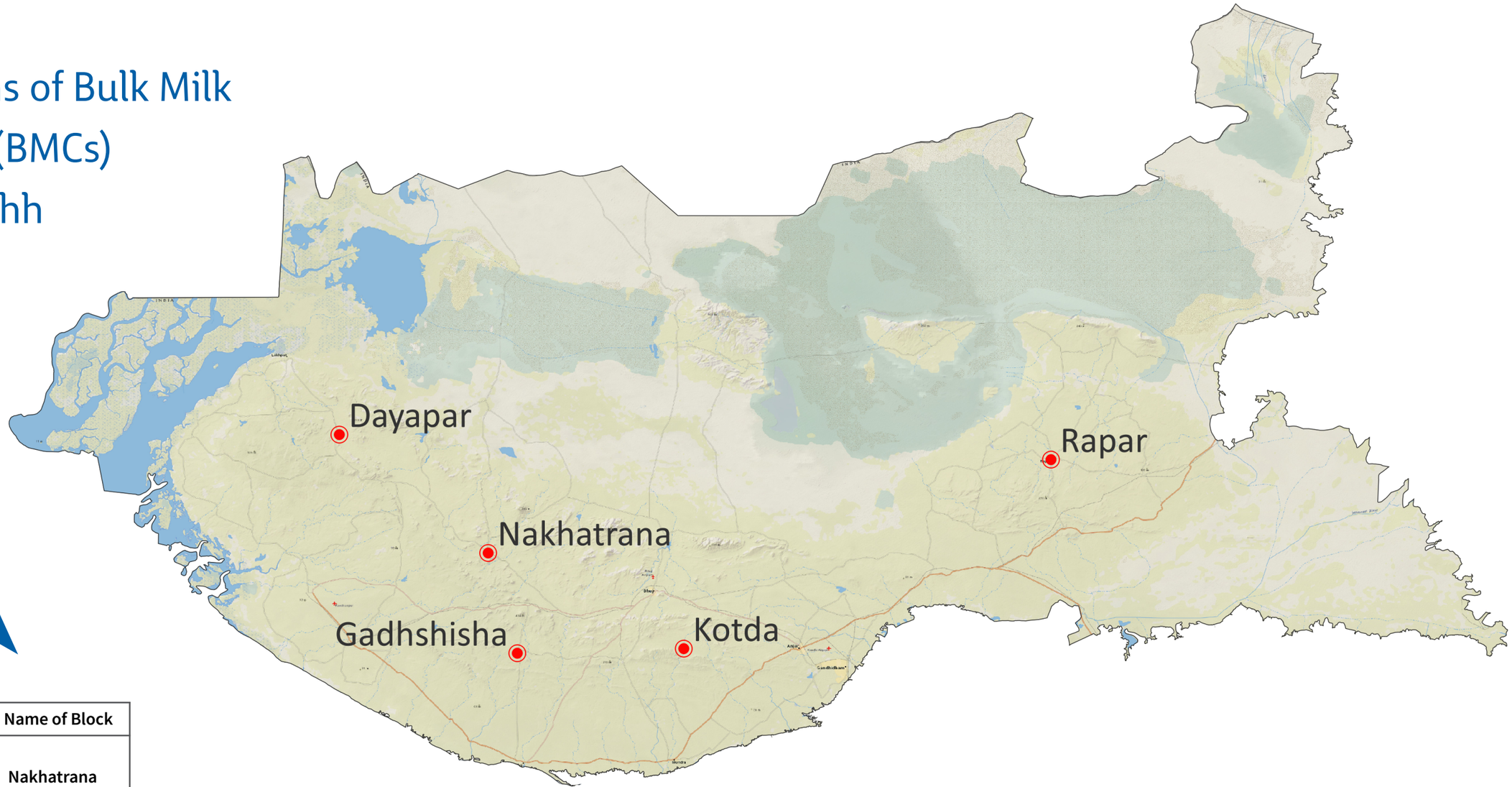
Nakhatrana, the first BMC to operationalize camel milk procurement from the pastoralist herders, began by procuring 500-800 litres of milk daily. Gradually other BMCs were added, taking into consideration the geographic spread of the camel herders. Currently 5 BMCs are operational in the district, procuring a daily average of 5000-5500 litres of camel milk from around 250 camel herders.





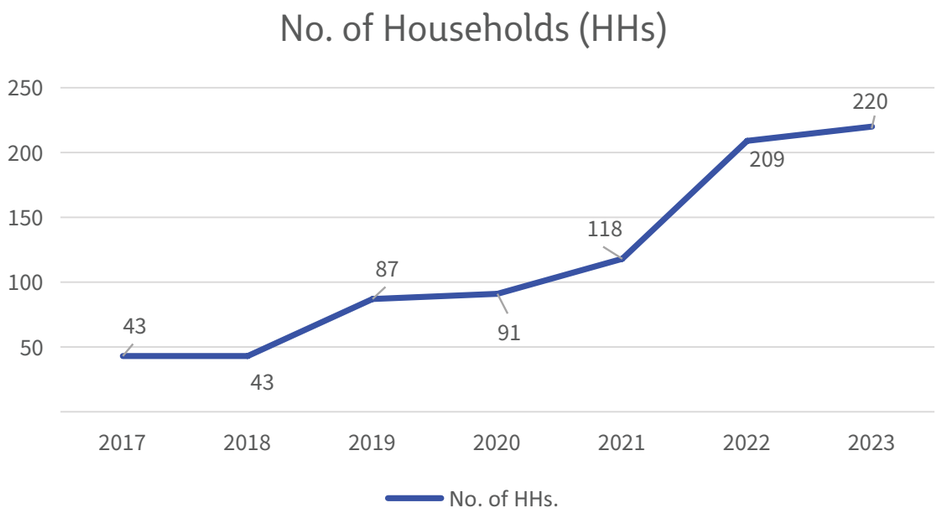
Aadvik Foods had already started procuring camel milk from Kachchh before Sarhad dairy started its operation, and both dairies follow the same basic process for milk collection. However, since Aadvik did not have a chilling facility at Nakhatrana when they first started procuring camel milk, they were using a private BMC for chilling and pasteurization and paying fixed monthly charges for this. Chilled milk was then transported through a hired refrigerated vehicle to Baroda for conversion to powder and further processing. Aadvik have now set up their own chilling plant in Kukhapar, Kachchh, with a processing capacity of 2KL per day and a refrigerated vehicle for transportation also with a 2KL capacity. As of June 2018 (before the Covid interruption) Aadvik had procured a total of 1.15 Lakh litres of camel milk from Kachchh.

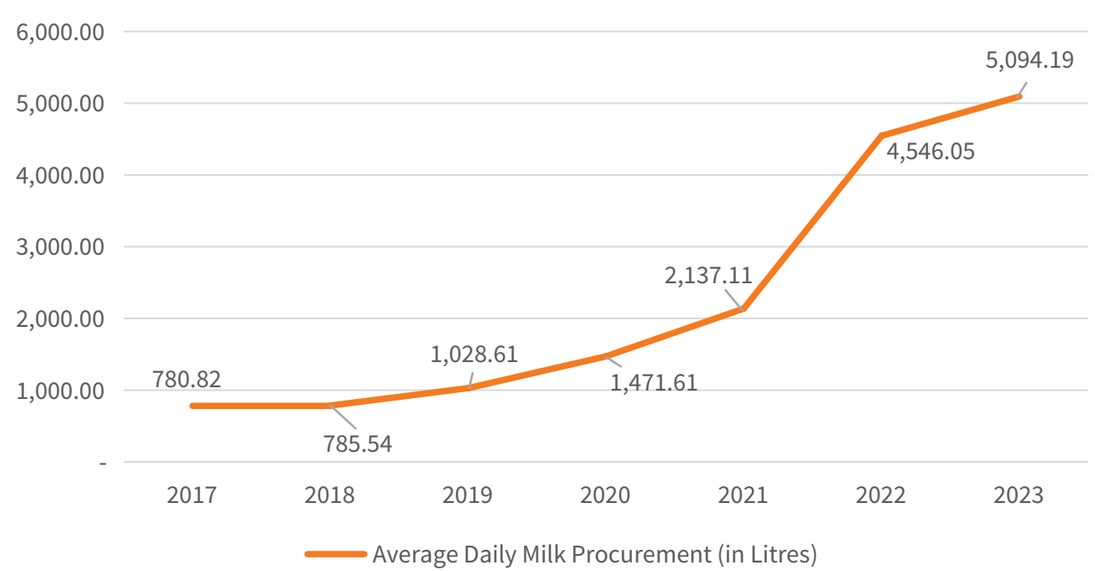
Locations of Bulk Milk Chillers (BMCs) in Kachchh



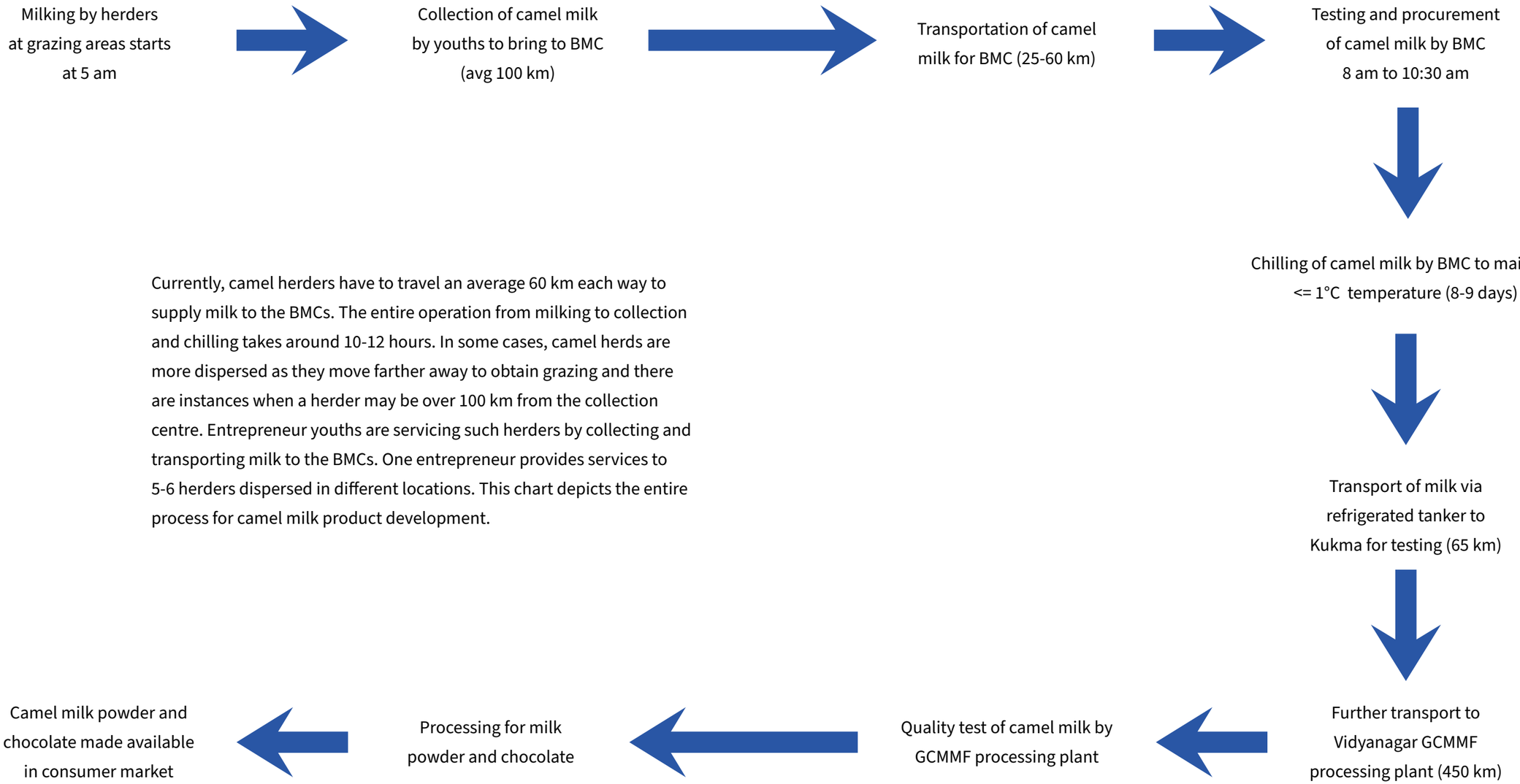
Location of BMC	Name of Block
Nakhatrana	Nakhatrana
Rapar	Rapar
Kotda	Bhuj
Gadhshisha	Mandvi
Dayapar	Lakhpat

0 25 50 75 100 km


No. of Households (HHs)
250
200
150
100
50
43
43
87
91
118
209
220
2017
2018
2019
2020
2021
2022
2023
No. of HHs.


Average Daily Milk Procurement
6,000.00
5,000.00
4,000.00
3,000.00
2,000.00
1,000.00
-
780.82
785.54
1,028.61
1,471.61
2,137.11
4,546.05
5,094.19
2017
2018
2019
2020
2021
2022
2023
Average Daily Milk Procurement (in Litres)





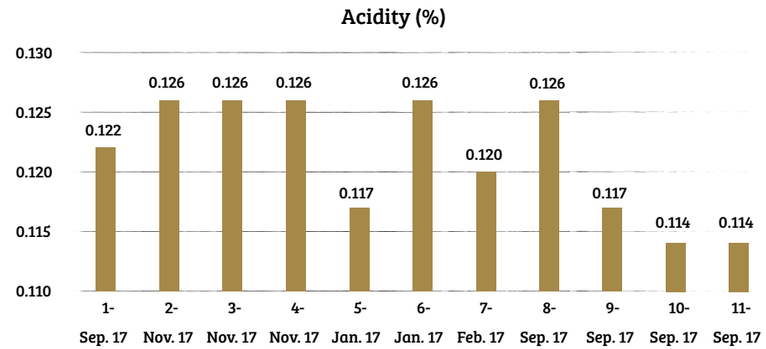
Currently, camel herders have to travel an average 60 km each way to supply milk to the BMCs. The entire operation from milking to collection and chilling takes around 10-12 hours. In some cases, camel herds are more dispersed as they move farther away to obtain grazing and there are instances when a herder may be over 100 km from the collection centre. Entrepreneur youths are servicing such herders by collecting and transporting milk to the BMCs. One entrepreneur provides services to 5-6 herders dispersed in different locations. This chart depicts the entire process for camel milk product development.

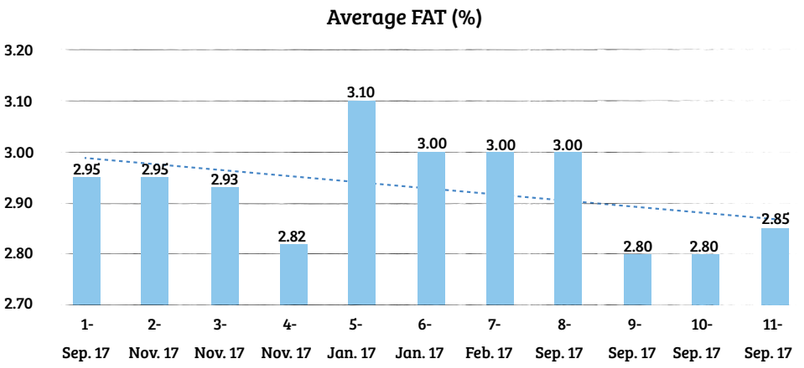

Coolmatic
5000 litres
BMC-6

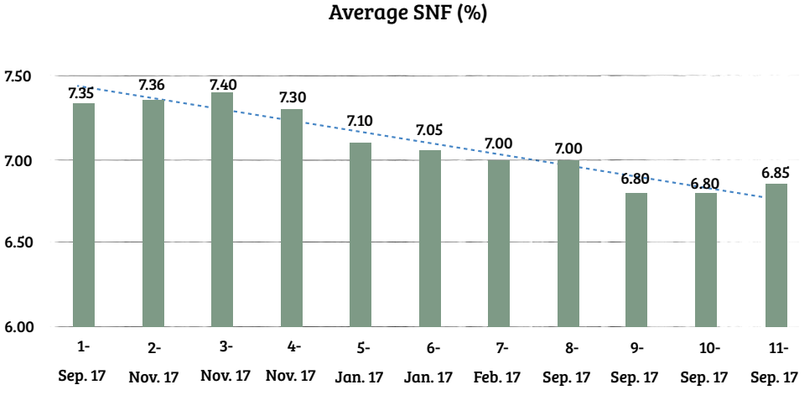
Camel Milk Standards

The Food Safety and Standards Authority of India (FSSAI) lays down the minimum standards to be maintained by dairies while making any products in the Indian market. For camel milk, these standards stipulate that the minimum FAT content should be 2.5% to 3% and 'Solids Not Fat' (SNF) content should be in the range of 6.5% to 7.5%. Apart from these two parameters, dairies also test the Lactometer Reading (LR) and pH value or acidity in the milk. LR helps to understand whether milk is being adulterated by adding water and pH or acidity helps to understand its shelf life (how long it remains without souring at room temperature). Sarhad Dairy and GCMMF follow these standards in every respect. The following charts depict the normal ranges of FAT, SNF and Acidity found in camel milk as per their operations. Seasonal variations in these parameters pose challenges for dairies and pastoralists alike, but they have been able to solve these challenges by dealing with them on a case-by-case basis.

Parameters	Desired Value
FAT	2.5% to 3%
SNF	6.5% to 7.5%
LR	24 to 25
Acidity	Below 0.13%








Tetra Pak
SABHAD DAIRY

Economic Analysis of Current Operation

The camel milk market has generated an economy worth 8-9 crore rupees per annum in the region, i.e., an average monthly household income of Rs. 28,000/- to Rs. 30,000/-.

The camel milk market has generated an economy worth 8-9 crore rupees per annum in the region, i.e., an average monthly household income of Rs. 28,000/- to Rs. 30,000/-. In 2022, twenty-two pastoralist youths are believed to have returned to herding, buying camels as an investment and recognizing camel herding as a remunerative livelihood option. There has been a 13.5 % increase in the camel population in the district over the last ten years; it is the only part of the country where camel numbers are increasing. 80% of this camel population in the district is being covered under health camps organized by the State AH department in collaboration with KUUMS.

Average herd size reported was 40-47 with a 25-30% milking animal ratio in the herds. Average daily milk production ranges from 2 to over 6 litres. If you take conservative figures, i.e., an average herd size of 40 and a 25% milking ratio, it suggests that the average number of milking camels per herd is approximately 10. Considering each as producing only 2 litres per day and with a price realization of Rs. 50/- per litre of milk, an average herder can earn in the region of at least Rs. 1000/- per day, or Rs. 30,000/- per month. As the market stabilizes, it is safe to assume that herders will assign a larger portion of their milk as marketable surplus.

Herders are getting a far better price, Rs. 50/- per litre, as compared to Rs. 25/- to Rs. 30/- per litre before the dairy initiative

The milk market has boosted the camel-based livestock economy in Kachchh over the last five years. Herders are getting a far better price, Rs. 50/- per litre, as compared to Rs. 25/- to Rs. 30/- per litre before the dairy initiative. This has reinforced faith amongst producers that livestock rearing is a viable occupation. As mentioned above, there is anecdotal evidence that several young pastoralists have returned to camel husbandry and purchased 8-10 camels in 2022. Other youths have identified new business opportunities in providing aggregation services to herders who are at large distances from collection centres. The service nets the aggregators remunerative margins in the range of Rs. 15/- to Rs. 20/- per litre. The residual earning of Rs. 30/- per litre still works for these particular far-flung producers, because it allows them to be part of the milk sales despite their distance; otherwise they would end up being left out of the loop altogether. This mechanism is an organically grown solution to handle the situation. At these rates an entrepreneur collecting 100 litres might generate an extra income of Rs. 1500-2000/- per day depending on the terms they have mutually agreed upon. If we consider Rs. 600/- (average 150-200 km @ Rs. 3/- per km) as cost of fuel to bring camel milk at BMC, even then they will earn Rs. 900-1400/- per day. This in itself translates into 27,000-42,000 rupees per month.





The Way Forward...

It is clear that market development has yielded positive results, helping to conserve important animal breeds in the region and enhance the livelihoods of camel herders

It is clear that market development has yielded positive results, helping to conserve important animal breeds in the region and enhance the livelihoods of camel herders. The role of each stakeholder is vital to this successful intervention. The herding communities have organized themselves to ensure quality milk supply; the district dairy union has ensured procurement and processing of the milk; the State milk marketing federation has taken the lead in ensuring a market; the State AH department has made available huge investment for dairy infrastructure and preventive health care for camel husbandry; and the civil society organization Sahjeevan has initiated and steered the process and brought the diverse stakeholders onto a single platform to turn this initiative into a reality.

Finally, it must be said that the experience of Gujarat provides valuable insights that can help replicate this success in Rajasthan, which has the country's largest camel population and has declared the camel as its State animal to conserve its unique germ plasm. Rajasthan too can bring all stakeholders onboard and take up a similar initiative to create a flourishing economy in the region and conserve its precious mascot!

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