

India Food Industry Report - H2, 2013

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Abstracts

This report surveys India's food and beverage sector, elaborating on market trends through H2 2013 and providing projections for the sector's outlook in 2014. It also profiles leading players in the sector, among them Britannia Industries Limited, Nestle India Limited, and Jubilant Foodworks Limited.

India's food and beverage sector consists of diverse segments and each segment contains a large number of product categories. The sector lacks a single central regulatory authority in the country. However, the Ministry of Food Processing Industries (MOFPI), under the central government, is responsible for formulating policies, sponsoring and supporting programs, and coordinating activities related to food processing in the country. The sector has recorded double-digit growth in the last few years. The purchasing power of young Indian consumers has created a fast-food revolution in the country. This phenomenon is attracting major global food chains like McDonalds, Yum! Brands, Domino's Pizza, and Subway. Many others like Burger King are planning to enter the Indian market soon.

The Indian economy experienced an economic slowdown with high inflation in FY13 as well as FY14. As a result, India's food and beverage players faced margin pressure owing to a rise in raw material costs. However, the outlook for India's F&B sector is positive because of growing sales, reforms in the organized retail sector, and rapid urbanization. The ever-increasing middle class will further drive growth in the F&B sector.

Key Points:

This report includes financial indicators and a summary of the market position for firms including Britannia Industries Limited (BIL), Nestle India Limited (NIL), and Jubilant Foodworks Limited (JFL).

Current regulations and policies allow 100% foreign direct investments under the automatic route in the food-processing sector. As of March 2013, the sector accounted for around 1.8% of total FDI inflows in India.

Out of the various industries covered by the index of industrial production (IIP), food and beverage was the fifth-largest in terms of weight (7.3%).

The food and beverage sector was the largest employer among the employment-intensive industries in 2011, according to the Annual Survey of Industries (ASI).

The index of industrial production (IIP) recorded a growth of 1% in FY13. The food products and beverage manufacturing index saw a growth of 3% during the same period.

Contents

1.INDUSTRY PROFILE

- 1.1 Sector overview
- 1.2 Sector size
- 1.3 Competitive landscape
- 1.4 Environmental scanning

2. MARKET TRENDS AND OUTLOOK

- 2.1 Key economic indicators-India
- 2.2 Food products segment
 - 2.2.1 Grain mill products
 - 2.2.2 Vegetable and fruit products
 - 2.2.3 Milk & dairy products
 - 2.2.4 Meat, marine and poultry products
- 2.3 Beverages segment
 - 2.3.1 Non-alcoholic beverages
 - 2.3.2 Alcoholic beverages
- 2.4 Food services and retail segment

3. LEADING PLAYERS AND COMPARATIVE MATRIX

- 3.1 Leading players
 - 3.1.1 Britannia Industries Limited (BIL)
 - 3.1.2 Nestle India Limited (NIL)
 - 3.1.3 Jubilant Foodworks Limited (JFL)
- 3.2 Comparative matrix
- 3.3 SWOT analysis

4. TABLES & CHARTS

- Table 1: FDI inflows in food processing sector
- Table 2: Policy initiatives taken by the Ministry of Food Processing Industries
- Table 3: Key financial ratios of the leading players
- Chart 1: Food production index
- Chart 2: Estimated size of Indian food & beverage sector
- Chart 3: Manpower employed by various industries in thousands

- Chart 4: Position of constituent parties in lower house of parliament
- Chart 5: Current account deficit and fiscal deficit
- Chart 6: Changing demographics of India
- Chart 7: Quarterly GDP growth rate-India
- Chart 8: Average Monthly USD to INR Exchange Rate
- Chart 9: Inflation during FY14-India
- Chart 10: Y/Y change in Index of industrial production
- Chart 11: Breakdown of food products segment by output
- Chart 12: Annual biscuit production in India-Organized sector
- Chart 13: Market share by sales value-Breakfast cereals
- Chart 14: Market share by sales value- Chocolates
- Chart 15: Annual fluid milk production in India
- Chart 16: Annual butter production in India
- Chart 17: Annual buffalo beef exports from India
- Chart 18: Estimated market size of the beverage market in India
- Chart 19: Non-alcoholic beverage market breakup
- Chart 20: Share of leading players in packaged tea market
- Chart 21: Major soft drink brands in India with market share
- Chart 22: Fruit juice brands with their market share
- Chart 23: Market share by sales value-Health drinks
- Chart 24: Major bottled water brands in India with market share
- Chart 25: Share of categories in Indian alcoholic beverage market by volume
- Chart 26: Category wise breakup of Indian made foreign liquor
- Chart 27: Market share of companies in beer category
- Chart 28: Estimated size of food service market in India
- Chart 29: Share of food services categories by market size
- Chart 30: Share of company and subsidiaries by annual revenue
- Chart 31: Sales of Britannia Industries
- Chart 32: Profit margins of BIL
- Chart 33: Breakup of Nestlé's India revenue by segments
- Chart 34: Sales of Nestle India
- Chart 35: Profit margins of NIL
- Chart 36: Number of Domino's Pizza Stores
- Chart 37: Sales of Jubilant Foodworks
- Chart 38: Profit margins of JFL

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