

Food Processing Market in India (2018-2023) with data on Organized vs Unorganized Market, FDI in the Indian Food Processing Industry and Company Profiles(Dabur India Limited, ITC Limited, Kohinoor Foods Limited, Nestle India Limited, Adani Wilmar LimitedMTR Foods Private Limited)

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Abstracts

A crucial contributor to India's social and economic growth, the food processing industry plays a central role in influencing farming and distribution practices throughout the country. It is one of the primary focus sectors under the Make in India initiative.

Market insights:

The food processing industry is expected to expand at a compound annual growth rate (CAGR) of ~11.5% between FY 2018 and FY 2023 to reach a value of INR 15,971.9 Bn in FY 2023. It is one of the largest industries in India and ranks fifth in terms of production, consumption, and exports. Large availability of food infrastructure and diverse agro-climatic conditions, among other factors, shall make India one of the largest food processing hub. Hindustan Unilever Limited, Pepsico India Holdings Private Limited, Cadbury India, Nestle India Limited, Mondelez International Incorporation, Pizza Hut (India) Private Limited, and Perfetti Van Melle India Private Limited are some of the major multinational companies (MNCs) that are investing in the Indian food processing industry.

Market segment insights:

There are 10 segments within the Indian food and beverage industry - breakfast

cereals, dairy food, bakery, organic food, confectionary, ready meals, naturally healthy beverages, pet food, ingredients, and savory snacks. These segments are increasingly gaining acceptance in the country, thereby creating immense opportunities for new as well as existing industry players to expand their business operations. Among these, breakfast cereals and savory snacks are the fastest growing segments and are expected to expand at a CAGR of ~19.23% and ~33.59%, respectively during 2018 to 2023.

Processing levels in different food segments:

In terms of processing levels, India still lags compared to other developed countries, particularly in the processing of agricultural products. Less than ~10% of the total food produced in India is converted into value-added products, as against ~65% in the United States (U.S.) and ~23% in China. Only 2.2% of the fruits and vegetables produced in the country gets processed.

Government initiatives:

The Ministry of Food Processing Industries (MOFPI) has improvised fiscal incentives and several schemes for promotion of the country's food processing industry mainly covered under Pradhan Mantri Kisan Sampada Yojana. Mega food park scheme, value addition and preservation infrastructure, infrastructure for agro-processing clusters, the scheme of cold chain, and scheme for creation/expansion of food processing and preservation capacities are some of the plans implemented for the overall growth of the food processing infrastructure. The comprehensive development of infrastructure is expected to play a significant role in the development of the overall food processing sector in the country.

Key growth drivers of the market:

Foreign direct investment (FDI) and several other government initiatives in the Indian food processing industry shall aid the country's food value-chain and also create multiple employment opportunities, as well as investment opportunities in farming, retail, storage infrastructure, and quality control.

The Indian food processing industry is also well supported by a large number of research institutions like National Dairy Research Institute (NDRI), Central Food Technological Research Institute (CFTRI), National Research and Development Center (NRDC) and Central Institute of Fisheries Technology (CIFT), among others, which in a

way is driving the growth of the market.

Key deterrents to the growth of the market:

High cost of processed food poses a major threat to the growth of the market. A large part of the final price paid by customers comprises transportation costs and trader margins at various levels of the distribution network.

Even with the increasing disposable income of Indians, the higher price of processed foods acts as an impediment to its adoption in some cases.

Companies profiled:

ADF Foods Limited

Dabur India Limited

ITC Limited

Kohinoor Foods Limited

Vadilal Industries Limited

Nestle India Limited

Adani Wilmar Limited

Gujarat Cooperative Milk Marketing Federation

MTR Foods Private Limited

Ushodaya Enterprises Private Limited

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