

India Frozen Food Market By Product Type (Snacks, Fruits & Vegetables, Meat, Poultry & Seafood, Others), By Category (Organic, Regular), By Sales Channel (Supermarket/Hypermarket, Convenience Stores, Online, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

India Frozen Food Market was valued at USD 1.81 Billion in 2024 and is expected to reach USD 3.56 Billion by 2030 with a CAGR of 16.87% during the forecast period. The India Frozen Food market is driven by factors such as changing consumer lifestyles, increasing urbanization, and higher disposable incomes. With busy schedules, urban consumers are increasingly opting for convenient meal options, leading to a rise in demand for ready-to-eat frozen foods. The growing preference for international cuisines and quick meals, coupled with advancements in refrigeration technology, has further boosted the popularity of frozen foods. Also, the expanding retail sector, including supermarkets, hypermarkets, and online platforms, has made frozen food more accessible to a broader audience. These factors are driving the overall growth of the frozen food market in India.

Key Market Drivers

Surging Working Population

The surging working population is a key driver of growth in the India frozen food market. As a part of this, according to a recent study, over 596 million people were estimated to be employed in India in the financial year 2023, around a three percent increase from the previous year. The employed workforce was estimated to grow to over 643 million in

the financial year 2024. As urbanization continues to rise and more individuals, particularly women, join the workforce, there is an increasing need for convenient, time-saving meal options. Working professionals with hectic schedules often lack the time to prepare traditional home-cooked meals, leading to a shift toward ready-to-eat or easy-to-prepare frozen foods. These products offer a quick, hassle-free solution, making them a popular choice for lunch, dinner, and snacks. Frozen food items such as ready-to-cook vegetables, frozen snacks, frozen parathas, and ready-to-eat meals are gaining traction due to their convenience and long shelf life. The working population, especially in metropolitan areas, is also more exposed to global food trends, with many opting for international frozen food varieties like pizzas, pastas, and appetizers. Also, the growing demand for healthier frozen meal options, such as low-fat, high-protein, and vegetarian alternatives, is further driving the market. The availability of these products in supermarkets, hypermarkets, and online retail platforms has made it easier for consumers to access frozen food. As the working population continues to expand, their need for convenient, nutritious, and affordable frozen food options will continue to support the market's growth in India.

Expansion of Retail Infrastructure & E-Commerce

The expansion of retail infrastructure and e-commerce is a significant driver in the growth of the India frozen food market. As a part of this, according to a recent study, as of October 2024, the e-commerce sector in India is growing at an exponential rate, with a market value of 123 billion US dollars in 2024. This figure is expected to reach 300 billion US dollars by 2030. As urbanization increases and consumer preferences shift towards convenience, the demand for frozen foods has surged. The growth of supermarkets, hypermarkets, and modern retail chains has made frozen food more accessible to a larger segment of the population. These retail outlets provide a wide variety of frozen products, ranging from ready-to-cook meals to frozen snacks and desserts, catering to diverse consumer tastes. Also, the rise of e-commerce platforms like Amazon, BigBasket, and Grofers has further fuelled the growth of the frozen food market. Consumers can now easily browse, order, and have frozen food delivered directly to their homes, making the shopping experience more convenient. This online shopping trend has become especially important in the wake of the COVID-19 pandemic, with many consumers preferring the safety and ease of online grocery shopping. The expansion of cold storage and logistics infrastructure, both offline and online, has also improved the availability and quality of frozen foods. Efficient cold chain systems ensure that products are stored and transported at optimal temperatures, maintaining freshness and quality. As retail infrastructure and e-commerce continue to expand, they will play a crucial role in driving the growth of the frozen food market in

India.

Increased Awareness of Food Safety & Quality

Increased awareness of food safety and quality is a significant driver of the India frozen food market. As consumers become more conscious of the nutritional value and hygiene of the foods they consume, there is a growing demand for high-quality, safe, and reliable frozen food products. Food safety concerns, such as contamination, preservatives, and artificial additives, have led many consumers to seek brands that emphasize quality control, traceability, and transparency in their production processes. The increasing focus on food safety has prompted frozen food manufacturers to invest in advanced technologies and quality assurance measures, such as modern freezing methods, improved packaging, and efficient cold chain logistics, to ensure that products retain their nutritional value and freshness. This attention to quality and food safety has built consumer trust in frozen food products, contributing to their growing popularity. Also, the rise of certifications and labels such as 'organic,' 'gluten-free,' 'non-GMO,' and 'no preservatives' has increased consumer confidence, as more people opt for frozen foods that align with their health-conscious preferences. With rising concerns over foodborne illnesses and a higher standard of living, consumers are willing to pay a premium for frozen food items that meet their safety and quality expectations. As food safety awareness continues to grow, it will remain a key driver in the expansion of the India frozen food market.

Key Market Challenges

Regulatory & Quality Standards

Regulatory and quality standards present a significant challenge in the India frozen food market. The Food Safety and Standards Authority of India (FSSAI) enforces strict regulations regarding food safety, quality control, and labeling, which manufacturers must comply with. These regulations cover aspects such as hygiene, proper storage and transportation conditions, and ingredient quality. While these standards are essential for consumer protection, they also add to the operational complexities and costs for manufacturers. Frozen food companies must invest in robust quality control systems to meet FSSAI guidelines, ensuring that their products maintain freshness and nutritional value throughout the production, storage, and distribution processes. Also, maintaining the cold chain during transportation and storage is crucial for preserving the quality of frozen food, and any disruption in this chain can lead to spoilage, contamination, and quality degradation, posing significant risks to both consumers and

brands. Adherence to these regulations can be particularly challenging for smaller manufacturers or new entrants in the market, who may not have the infrastructure or resources to meet the high standards required by regulatory bodies. Also, the complexity of navigating the ever-evolving regulatory landscape, with updates on packaging, labeling, and ingredient restrictions, adds an additional layer of uncertainty and risk. These regulatory challenges can increase costs and slow down innovation, affecting the overall growth and competitiveness of the frozen food market in India.

Infrastructure & Cold Chain Challenges

Infrastructure and cold chain challenges pose significant hurdles for the India frozen food market. The integrity of the cold chain – the transportation and storage of frozen food at appropriate temperatures – is crucial for maintaining product quality and safety. However, inadequate infrastructure, particularly in rural areas, often leads to inefficiencies in maintaining the required temperature during transportation, storage, and distribution. This results in spoilage, compromised nutritional value, and potential food safety risks. India's vast geography and varied climate conditions exacerbate cold chain challenges, as maintaining a consistent temperature across long distances and through diverse environments can be complex and expensive. Rural areas, where cold storage facilities and refrigerated transportation networks are limited, often face difficulties in accessing high-quality frozen products. Even in urban centers, inconsistent electricity supply and lack of advanced refrigeration systems in some retail outlets further complicate the situation. Also, the high capital investment required to set up a reliable cold chain infrastructure, including refrigerated warehouses, trucks, and logistics management systems, makes it difficult for smaller players to compete. Larger companies may have the resources to establish and maintain a robust cold chain, but the lack of widespread infrastructure remains a barrier to the market's full potential. These challenges not only increase operational costs but also impact product availability, limiting market growth in certain regions.

Key Market Trends

Surging Demand for Premium & Gourmet Frozen Foods

The surging demand for premium and gourmet frozen foods is a prominent trend driving the India frozen food market. As disposable incomes rise and urbanization accelerates, consumers are increasingly seeking high-quality, indulgent food options that offer convenience without compromising on taste or nutrition. This trend is particularly evident in metropolitan areas where consumers are becoming more exposed to global

food trends and are willing to pay a premium for gourmet, restaurant-style frozen meals that can be prepared at home. Premium frozen foods often feature high-end ingredients, such as organic vegetables, artisanal cheeses, premium cuts of meat, and exotic flavors that appeal to health-conscious, discerning consumers. The growing preference for convenience combined with premium offerings has led to the introduction of gourmet frozen meals like ready-to-eat curries, pizzas, pastas, and international cuisines, which cater to the evolving tastes of consumers looking for diverse and high-quality food experiences. Also, this trend aligns with the increasing demand for healthier frozen food options, such as low-calorie, low-sodium, and organic products, as consumers become more health-conscious. The availability of premium frozen food products through supermarkets, hypermarkets, and e-commerce platforms has made these items more accessible to a wider audience, further driving the demand. As disposable incomes continue to rise, the demand for premium and gourmet frozen foods is expected to keep growing in India.

Expansion of Foodservice Sector Across the Region

The expansion of the foodservice sector across India is a significant trend driving the growth of the frozen food market. As a part of this, according to a recent study, as of July 2024, the Indian food services sector is predicted to develop at a CAGR (compounded annual growth rate) of 8.1% between 2024 and 2028, driven by fast urbanisation, substantial GDP growth, a growing younger population, and increased consumer exposure. As dining habits evolve and more consumers opt for convenient, high-quality meals, the demand for frozen food products within the foodservice industry has surged. Restaurants, hotels, cafes, and quick-service chains are increasingly turning to frozen foods to ensure consistency, cost-effectiveness, and reduced preparation time. This is particularly true in the fast-food and quick-service restaurant (QSR) segment, where frozen products such as ready-to-cook fries, pizzas, burgers, and snacks help streamline operations and reduce wastage. The rise of cloud kitchens and home delivery services has further fuelled this trend, as these businesses rely on frozen ingredients to offer a wide range of menu options without the need for extensive kitchen facilities. Also, the growing popularity of multi-cuisine restaurants and the desire for international food experiences have driven demand for frozen gourmet and ethnic food products, such as frozen meats, ready-to-serve curries, and frozen bakery items. Also, with the increasing number of foodservice outlets and the expansion of chains across tier II and III cities, frozen food products are becoming more widely used and accessible. The continued growth of the foodservice sector will undoubtedly continue to support the demand for frozen food in India.

Rising Demand for Organic Food Products

The rising demand for organic food products is a key trend shaping the India frozen food market. As a part of this, according to a recent study, as of February 2024, the market for organic food was worth approximately USD 0.25 billion. The organic food market is expected to grow to almost USD 0.73 billion by the fiscal year 2025. As consumers become more health-conscious and environmentally aware, there is a growing preference for organic options, including frozen foods made with organically sourced ingredients. This shift is driven by a desire for cleaner, healthier food with fewer pesticides, preservatives, and artificial additives. Organic frozen vegetables, fruits, meals, and snacks are gaining popularity as consumers look for products that align with their wellness and sustainability goals. The growing awareness of the benefits of organic food, coupled with rising disposable incomes, is encouraging consumers to invest in premium, organic frozen options. Major frozen food brands are expanding their product portfolios to include organic frozen vegetables, ready-to-eat meals, and snacks, catering to this evolving demand. Also, organic certification and eco-friendly packaging are becoming important selling points for consumers who are increasingly concerned about the environmental impact of food production and packaging. The organic trend is also driven by the increased availability of organic frozen foods in retail outlets, including supermarkets, hypermarkets, and online platforms. As more consumers adopt organic lifestyles, the demand for organic frozen food is expected to rise, creating new growth opportunities for manufacturers and retailers in India's frozen food market.

Segmental Insights

Sales Channel Insights

Supermarket/Hypermarket dominated the India Frozen Food market, due to their extensive product range, convenience, and accessibility. These retail formats offer a wide variety of frozen food products, from vegetables and snacks to ready-to-eat meals and frozen desserts, catering to diverse consumer preferences. The large store formats provide dedicated freezer sections that allow consumers to explore various frozen food options. Also, the growing presence of organized retail chains in urban and semi-urban areas, along with their strategic locations, has made frozen foods easily accessible to a broader audience. Supermarkets and hypermarkets also benefit from effective supply chain management and cold storage facilities, ensuring the quality and freshness of frozen products.

Regional Insights

The North region dominated the India Frozen Food market, driven by its high urbanization, increasing disposable incomes, and evolving food consumption patterns. Cities like Delhi, Chandigarh, and Jaipur are key hubs where demand for convenient and ready-to-eat frozen food products is growing rapidly. The region's well-developed retail infrastructure, including supermarkets, hypermarkets, and modern grocery stores, has made frozen foods easily accessible to consumers. Also, the popularity of quick-service restaurants and the rise of working professionals in the North further contribute to the market's growth. As consumer preferences shift toward convenient, premium, and healthy frozen food options, the North region continues to lead in market share.

Key Market Players

McCain Foods (India) Private Limited

Mother Dairy Fruit & Vegetable Pvt Ltd

Godrej Agrovvet Limited

Al Kabeer Frozen Foods

Innovative Foods Limited

ITC Limited

Arya Green field Pvt.Ltd

Conagra Brands, Inc

Apex Frozen Foods Ltd

Al-Shifa Frozen Foods

Report Scope:

In this report, the India Frozen Food Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Frozen Food Market, By Product Type:

Snacks

Fruits & Vegetables

Meat

Poultry & Seafood

Others

India Frozen Food Market, By Category:

Organic

Regular

India Frozen Food Market, By Sales Channel:

Supermarket/Hypermarket

Convenience Stores

Online

Others

India Frozen Food Market, By Region:

North

South

East

West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Frozen Food Market.

Available Customizations:

India Frozen Food Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. INTRODUCTION

- 1.1. Product Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Methodology Landscape
- 2.2. Objective of the Study
- 2.3. Baseline Methodology
- 2.4. Formulation of the Scope
- 2.5. Assumptions and Limitations
- 2.6. Sources of Research
- 2.7. Approach for the Market Study
- 2.8. Methodology Followed for Calculation of Market Size & Market Shares
- 2.9. Forecasting Methodology

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. VOICE OF CUSTOMER

- 4.1. Factors Influencing Purchase Decision
- 4.2. Brand Awareness
- 4.3. Source of Information

5. INDIA FROZEN FOOD MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value

5.2. Market Share & Forecast

5.2.1. By Product Type Market Share Analysis (Snacks, Fruits & Vegetables, Meat, Poultry & Seafood, Others)

5.2.2. By Category Market Share Analysis (Organic, Regular)

5.2.3. By Sales Channel Market Share Analysis (Supermarket/Hypermarket, Convenience Stores, Online, Others)

5.2.4. By Regional Market Share Analysis

5.2.4.1. North Market Share Analysis

5.2.4.2. South Market Share Analysis

5.2.4.3. East Market Share Analysis

5.2.4.4. West Market Share Analysis

5.2.5. By Top 5 Companies Market Share Analysis, Others (2024)

5.3. India Frozen Food Market Mapping & Opportunity Assessment

5.3.1. By Product Type Market Mapping & Opportunity Assessment

5.3.2. By Category Market Mapping & Opportunity Assessment

5.3.3. By Sales Channel Market Mapping & Opportunity Assessment

5.3.4. By Region Market Mapping & Opportunity Assessment

6. INDIA ORGANIC FROZEN FOOD MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product Type Market Share Analysis

6.2.2. By Sales Channel Market Share Analysis

7. INDIA REGULAR FROZEN FOOD MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product Type Market Share Analysis

7.2.2. By Sales Channel Market Share Analysis

8. MARKET DYNAMICS

8.1. Drivers

8.2. Challenges

9. MARKET TRENDS & DEVELOPMENTS

10. SWOT ANALYSIS

- 10.1. Strength
- 10.2. Weakness
- 10.3. Opportunity
- 10.4. Threat

11. POLICY & REGULATORY LANDSCAPE

12. INDIA ECONOMIC PROFILE

13. COMPETITIVE LANDSCAPE

- 13.1. Company Profiles
 - 13.1.1. McCain Foods (India) Private Limited
 - 13.1.1.1. Company Details
 - 13.1.1.2. Products & Services
 - 13.1.1.3. Financials (As Per Availability)
 - 13.1.1.4. Key Market Focus & Geographical Presence
 - 13.1.1.5. Recent Developments
 - 13.1.1.6. Key Management Personnel
 - 13.1.2. Mother Dairy Fruit & Vegetable Pvt Ltd
 - 13.1.2.1. Company Details
 - 13.1.2.2. Products & Services
 - 13.1.2.3. Financials (As Per Availability)
 - 13.1.2.4. Key Market Focus & Geographical Presence
 - 13.1.2.5. Recent Developments
 - 13.1.2.6. Key Management Personnel
 - 13.1.3. Godrej Agrovat Limited
 - 13.1.3.1. Company Details
 - 13.1.3.2. Products & Services
 - 13.1.3.3. Financials (As Per Availability)
 - 13.1.3.4. Key Market Focus & Geographical Presence
 - 13.1.3.5. Recent Developments
 - 13.1.3.6. Key Management Personnel
 - 13.1.4. Al Kabeer Frozen Foods
 - 13.1.4.1. Company Details

- 13.1.4.2. Products & Services
- 13.1.4.3. Financials (As Per Availability)
- 13.1.4.4. Key Market Focus & Geographical Presence
- 13.1.4.5. Recent Developments
- 13.1.4.6. Key Management Personnel
- 13.1.5. Innovative Foods Limited
 - 13.1.5.1. Company Details
 - 13.1.5.2. Products & Services
 - 13.1.5.3. Financials (As Per Availability)
 - 13.1.5.4. Key Market Focus & Geographical Presence
 - 13.1.5.5. Recent Developments
 - 13.1.5.6. Key Management Personnel
- 13.1.6. ITC Limited
 - 13.1.6.1. Company Details
 - 13.1.6.2. Products & Services
 - 13.1.6.3. Financials (As Per Availability)
 - 13.1.6.4. Key Market Focus & Geographical Presence
 - 13.1.6.5. Recent Developments
 - 13.1.6.6. Key Management Personnel
- 13.1.7. Arya Green field Pvt.Ltd
 - 13.1.7.1. Company Details
 - 13.1.7.2. Products & Services
 - 13.1.7.3. Financials (As Per Availability)
 - 13.1.7.4. Key Market Focus & Geographical Presence
 - 13.1.7.5. Recent Developments
 - 13.1.7.6. Key Management Personnel
- 13.1.8. Conagra Brands, Inc
 - 13.1.8.1. Company Details
 - 13.1.8.2. Products & Services
 - 13.1.8.3. Financials (As Per Availability)
 - 13.1.8.4. Key Market Focus & Geographical Presence
 - 13.1.8.5. Recent Developments
 - 13.1.8.6. Key Management Personnel
- 13.1.9. Apex Frozen Foods Ltd
 - 13.1.9.1. Company Details
 - 13.1.9.2. Products & Services
 - 13.1.9.3. Financials (As Per Availability)
 - 13.1.9.4. Key Market Focus & Geographical Presence
 - 13.1.9.5. Recent Developments

- 13.1.9.6. Key Management Personnel
- 13.1.10. Al-Shifa Frozen Foods
 - 13.1.10.1. Company Details
 - 13.1.10.2. Products & Services
 - 13.1.10.3. Financials (As Per Availability)
 - 13.1.10.4. Key Market Focus & Geographical Presence
 - 13.1.10.5. Recent Developments
 - 13.1.10.6. Key Management Personnel

14. STRATEGIC RECOMMENDATIONS

- 14.1. Key Focus Areas
- 14.2. Target Product Type
- 14.3. Target Category

15. ABOUT US & DISCLAIMER

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