

Heat and Eat Foods Industry in India, 2014 - 2019

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Abstracts

The heat and eat foods industry is to be marked by new entrants and the re-launch of products in parts of India over the next five years

ValueNotes presents a research report on the heat and eat foods industry in India. This industry report covers intelligence on the market size, growth, industry trends, industry attractiveness, and Porter's analysis. The report covers fiscal years 2014 through 2019. Heat and eat foods are products which are merely meant to be heated and then consumed by the user without changing the form or structure of the food item. They are prepared using retort or heat-sterilization technology. The heat and eat foods industry forms a segment of the convenience foods industry.

Key Findings:

The heat and eat foods industry in India, valued at INR 2,370mn (~USD 39.49mn) in FY 2014, has been growing at a CAGR of ~18% over the last three years. ValueNotes estimates that the industry will be worth approximately INR 6,405mn (~USD 106.73mn) by FY 2019, growing at a CAGR of ~22%

The heat and eat foods industry can be segmented by the type of food products which are manufactured. This includes curries, rice delicacies, light meals and desserts.

Steadily growing urbanisation and disposable income, expected increase in youth population and female work participation in India as well as widening scope of the Indian retail market will drive the industry towards growth

Latest trends witnessed in the industry reveal that companies manufacturing heat and eat food products tend to focus more on export markets. To increase

domestic presence, the manufacturers are now adopting new technologies and launching more region-specific or state-specific products

The report includes profiles of the top 5 players with a brief overview about their service offerings, key financial ratios, expansion strategies, etc.

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About

- India's heat and eat food industry is valued at INR 2,370 million in FY 2014, of which the top-5 players account for 84% of the market share
- The industry is expected to grow at a CAGR of 22% and will be worth INR 6,405 million by FY 2019
- The industry is largely export-driven with the domestic market contributing 40% to the total revenues

Although the ready to eat (RTE) food category was first introduced in India in 1987, it was not well received by Indian consumers due to the dependence on traditional cooking. In the early 2000s, with the advent of new technology that improved the shelf life of products and the growth of storage and distribution centres, RTE products began to gain popularity. Several segments were introduced in the industry resulting in an increase in product differentiation. One of these segments was developed by using retort technology, and came to be known as the heat and eat food industry.

The heat and eat food industry in India, valued at INR 2,370 million (~USD 39.5 million) in FY 2014, has been growing at a CAGR 18% for the last three years. The industry is expected to grow at a CAGR of 22% in the next five years till FY 2019 due to rapid urbanisation, increasing disposable income, and an expected improvement in retail infrastructure. ValueNotes estimates that the industry will be worth approximately INR 6,405 million (~USD 106.7 million) by FY 2019.

India's heat and eat food industry is currently dominated by the top five players, viz. ITC, MTR Foods,

Kohinoor Foods, Gits and Tasty Bite Eatables. ITC and MTR together contribute to about 49% of the market share, while the other three players make up 35% of the total production of heat and eat food. Other players in the category include ADF Foods, Priya Foods and Heinz who are relatively new entrants in the market with limited product lines and have a regional presence.

According to Vaishnavi Raichur, a research analyst at ValueNotes, "The heat and eat food category has a tremendous growth opportunity in the near future due to a growing youth population and working woman segment." She adds, "Increasing work and study

commitments, declining culinary skills, the rising need for convenience, and surging disposable incomes, along with clever marketing will all lead to a higher demand for heat and eat products.”

The heat and eat category of food products is largely export-driven as it is yet to establish a firm footing in the Indian retail market. However, the domestic markets constitute 40% of the total revenues of heat and eat products. Maximum sales of these products occur in urban areas, especially in tier I cities where retail infrastructure is significantly developed.

The ValueNotes report, titled Heat and Eat Foods Industry in India: 2014-2019, takes a look at the industry including the current market size and growth, the drivers and challenges for growth, the competitive landscape, an analysis of the industry for investor attractiveness, and Porter's Five Forces.

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