

Integrated Cold Chain Industry in India 2013-17

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Abstracts

ValueNotes presents a research report on the cold chain 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 2013 through 2017.

India is the second largest producer of fruits and vegetables (about 200million metric tonnes) but it has a very limited integrated cold-chain infrastructure, with only ~5,400 stand-alone cold storages having a total capacity of ~23.6million metric tonnes.

Key Findings:

The cold chain industry in India is currently valued at INR 245bn (~USD 4billion) in FY 2013 and has been growing at ~18% for the last three years. ValueNotes estimates that the industry will be worth approximately INR 520bn (~USD 10billion) by FY 2017, growing at CAGR of ~20%

Surface storage warehousing in India has a capacity of around 23.6million metric tonnes as of 2010, and private sector cold storages in the country accounts for a capacity of 22.24million metric tonnes; cooperative sector for 1.88million metric tonnes; while the public sector accounts for 0.47million metric tonnes

Surface storage in cold chain industry to reach 95 million metric tonnes (MT) by 2017

The new initiatives announced during the Union Budget - modernization of existing facilities, new ventures via private & government partnerships, etc. – will boost the integrated cold chain industry in India

Change in lifestyle and demand for processed or packaged food is creating the need for cold storage solutions across India

The report includes profiles of the leading players in the cold chain industry - Brahmanand Himghar, Dev Bhumi Cold Chain, Gati Ltd, Gubba Cold Storage Ltd, Snowman Logistics Ltd - with a brief overview about their service offerings, key financial ratios, expansion strategies, etc.

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About

While India is the second largest producer of fruits and vegetables in the world, the country's integrated cold chain industry is nascent and is witnessing a wide demand-supply gap. Cold storages at production zones are archaic in nature. The lack of cool rooms and refrigerated transport is causing more than 40% losses in annual produce.

India's integrated cold chain industry - a combination of surface storage and refrigerated transport - has been growing at ~18% for the last three years. The industry, currently valued at INR 245 billion (FY 2013), is expected to reach INR 520 billion by 2017, growing at a CAGR of 20%.

India has around ~5,400 cold storage units, but can only store less than 11% of the country's total produce. While ~105mn MT of perishable produce is transported across India annually, only ~4mn MT is transported via reefers. To address the gap in demand and supply, the Indian government has introduced multiple initiatives - modernization of existing facilities, new ventures via private and government partnerships, etc.

The private sector accounts for 90% of cold storages in India. In 2017 too, private players will dominate the surface storage segment, which is estimated to reach ~95mn MT. Players such as Snowman Logistics Limited and Gubba Cold Storage have announced plans to increase their capacity.

Cold chain service providers across the globe and in India have been researching new technologies that will not only decrease their operational costs, but will also give them a competitive advantage over their peers in the industry. One of the focus areas is currently to make reefer trucks more energy efficient to withstand the variations in the ambient temperatures at drop-off points.

"Cold chain storages in India are still archaic in nature and are only suitable for single commodities like potatoes and apples in comparison to the global industry. But with new initiatives by the Indian government and a steep growth in the consumption of processed foods, cold chain logistics will witness huge growth in the coming years," says Shilpa Eguvanti, Team Lead (Consulting) at ValueNotes.

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