

A vibrant still life of fresh food items including grapes, tomatoes, carrots, eggs, and canned goods. The scene is set on a wooden surface with a warm, reddish-brown background. In the foreground, there's a large bunch of green and purple grapes, several bright red tomatoes, and a bowl of white grains. Behind them are several carrots, a bunch of green leafy vegetables, and a small basket of white eggs. In the background, there are several green cans, a glass pitcher of white milk, and a vase with green herbs. The overall composition is rich and colorful, representing a variety of fresh and processed food products.

FOOD PROCESSING SECTOR

India Ranks

1st Milk Production, Livestock Population, Millets, and Pulses Production

2nd Fruits and Vegetables, Groundnuts, Tea, Rice, Wheat, and Fish

Levels of Processing



Key highlights

- Valued at **USD 535 Bn** by 2026
- Agri-Food Exports in 2022-23 **USD 51.05 Bn**
- **3rd Largest Food & Grocery Market** in the world; USD 850 Bn by 2025
- FDI equity inflow from April 2000 – March 2023 – **USD 11.97 billion**
- **Employees 12.2%** of the total workforce in the registered manufacturing sector
- Growing at an **average annual growth rate of around 8.38%**

A still life composition of fresh food items. In the foreground, there is a large bunch of green and purple grapes, several bright red tomatoes, and a bowl of white grains. To the left, there are fresh carrots and a head of lettuce. In the background, there are several green jars, a glass of milk, and a vase with greenery. The overall scene is vibrant and represents a variety of fresh produce.

SUB-SECTORAL OPPORTUNITIES

221.06 MMT
production in
2021-22



Target: 300
MMT by **2024**

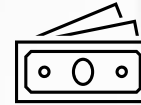
Dairy

Opportunities

Value Added Dairy Products Segment

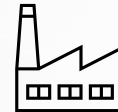
Cheese: Revenue expected to grow annually by 8.78% (CAGR 2022-2027), reaching \$10.42 Bn in 2022.

Yoghurt: Revenue expected to grow annually by 9.54% (CAGR 2022-2027), reaching \$26.93 Bn in 2022.



Investment potential of **USD 18-20 Bn** in Dairy Infrastructure

- Processing infrastructure: **USD 13-14 Bn**
- Chilling infrastructure: **USD 3-4 Bn**



Infrastructure gap of about 120 - 130 MMT with investment potential of ~ USD 2.6 billion & ~ 17-20% ROI over the next 9-12 years.



Increasing per capita consumption of milk and milk products, changing dietary preferences



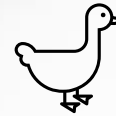
USD 2.1 Bn infrastructure development fund to promote investment by private players

Poultry & Meat

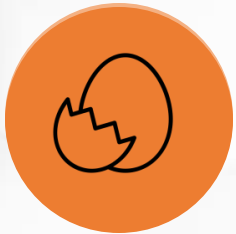
Opportunities



Total meat production- **9.29 million tons (2021-22):** annual growth rate of 5.62%.



Share of **Poultry & other meat** in household food consumption is expected to grow from **12 % to 24% by 2030.**



Total egg production in **2021-22: 129.60 billion nos.**



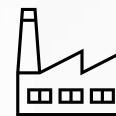
Hardly 5% of eggs produced are processed. The **Egg White powder market** projected to be **US\$ 88.45 Mn** by 2027 at a CAGR of **8.6% during 2019-27**



- India is the **2nd largest** producer of goat meat
- Export of Buffalo Meat in 2021-22: **USD 3.3 Bn**



Owing to rapid urbanization in India, there is an increasing demand for poultry products with **80% of the poultry and meat coming from the urban areas.**



The country has **5-6% meat processing capacity, thus showing gap between production and processing** indicates opportunities for the interested player

Fruits & Vegetables



2nd Largest Producer of Horticulture Crops: **342.33 MMT production in 2020-21**



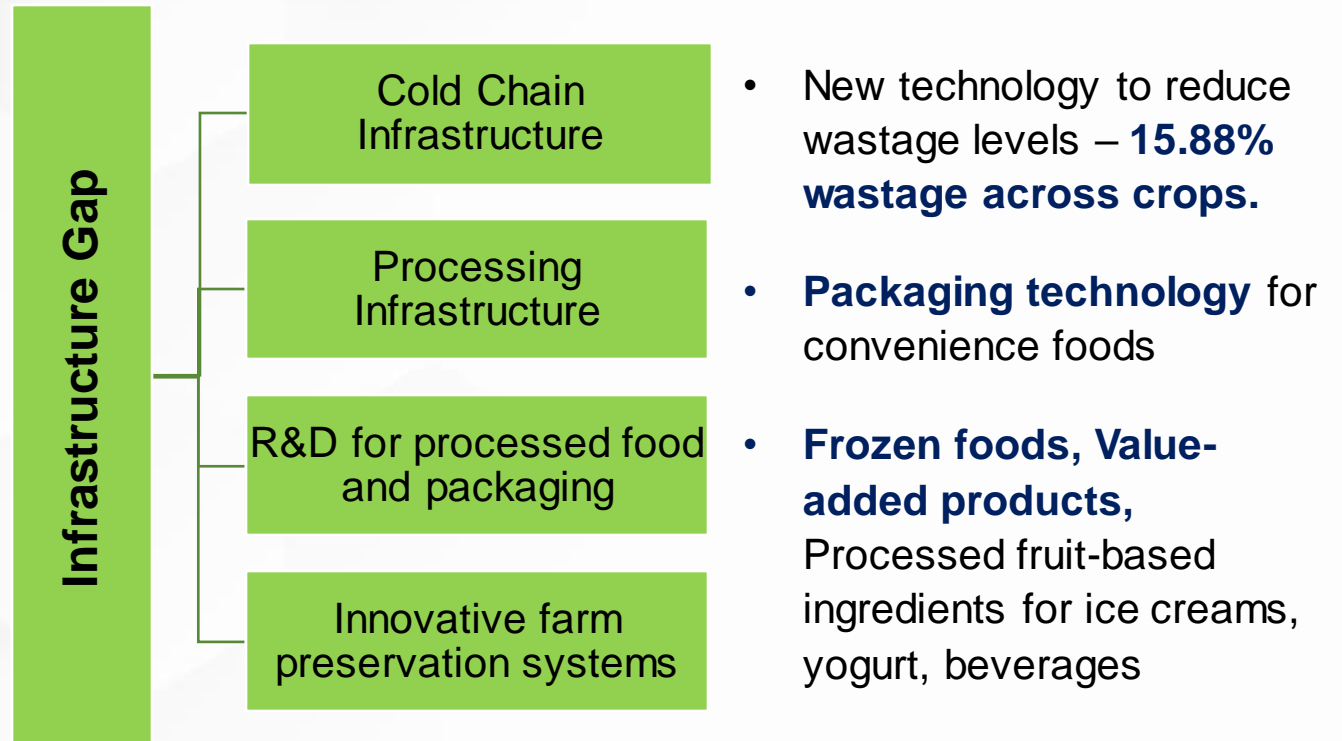
Largest producer, consumer and exporter of spices.



Largest producer of ginger and okra

Fruits, **ranks first** in the production of Bananas, Mangoes and Papayas.

Opportunities



Fisheries

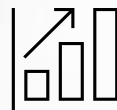
Opportunities



Fish production: **16.25 MMT**
production in 2021-22



Annual Average Growth of Fish Production 9% till FY 2024–25



Fisheries export to increase by 12.5 Bn USD by 2024–25.



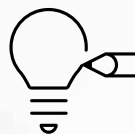
Largest **shrimp exporting country**, 2nd largest aquaculture producing country.



Value addition and product development for items such as ready-to-cook, ready-to-eat, canned and frozen goods, etc.



India's **seafood exports stood at USD 7.76 billion during 2021- 22** - frozen shrimp continued to be flagship export item with export value of USD 5.82 billion



Innovations in packaging for increased shelf life and product differentiation.



Infrastructure development for fishing harbors / landing centers /wholesale markets as per international standards



GOVERNMENT INITIATIVES





Government of India

Government Incentives & Schemes

Incentives

- GST rates almost 73% of the food items are under the **lowest tax slab** of 0% or 5%
- **Income tax deductions** for eligible food processing units
- **A special fund of USD 241 Mn** fund under NABARD
- **Project Development Cell**
- **100% FDI permitted** through automatic route for food processing
- **100% FDI under government approval route** for trading, including through e-commerce

Schemes

Pradhan Mantri Kisan Sampada Yojana (PMKSY)

Production Linked Incentive Scheme (PLIS)

PM Formalization of Micro Food Enterprises (PMFME)

Agriculture Infrastructure Fund

Animal Husbandry Infrastructure Development Fund

Pradhan Mantri Matsya Sampada Yojana



**INDIA – NEW
ZEALAND
PARTNERSHIP**

India – New Zealand Investment Opportunities

Major FP Exports from India



- Fish and crustaceans, mollusks, and other aquatic invertebrates.
- Cereals.
- Preparations of Vegetables, Fruits, Nuts, or Other Parts of Plants.

Major FP Imports in India



- Edible Fruits & Nuts, Peel or Citrus Fruit or Melons
- Sugar and Sugar Confectionary
- Oil Seeds and Olea, Fruits, Misc. Grains, Seeds and Fruit, Industrial or Medicinal Plants, Straw, and Fodder

Opportunities

- **Value – Addition in Dairy:** New product development in value-added dairy products viz. **cheese, smoothies, flavored milk, custard, yogurt, etc**
- **Research & Development:** Joint research programs could be organized to increase food research and education cooperation.
- **Plant – Based Protein:** Growing demand of Plant based protein in India provides immense opportunities for New Zealand companies
- **Sustainable Aquaculture:** New Zealand and India can collaborate for the sustainable development of the fisheries and aquaculture sector while sharing the best practices in aquaculture.

A still life composition of various fresh foods. In the foreground, there are several ripe red tomatoes, a bunch of green and purple grapes, and several strawberries. A wooden bowl filled with white grains, possibly quinoa or rice, sits in the lower center. To the left, there are fresh green leafy vegetables and several whole white eggs. In the background, there are colorful bell peppers (red, orange, yellow, and green), a glass pitcher of white milk, and several small green jars. The entire scene is set against a warm, reddish-brown background.

WORLD FOOD INDIA

Leveraging the Interest – World Food India 2023

To capitalize in this growing interest in the sector, Ministry of Food Processing Industries is organizing



Pragati Maidan, New Delhi

Mega International Investment & Sourcing Event for the entire Agri-Food Sectors

Leveraging the Interest – World Food India 2023

Exhibit

Innovation-driven solutions to transform supply chain ecosystem of the Food Processing Sector in India



Explore

Opportunities for investment in technology, equipment manufacturing, logistics and cold chain.

Promote

India as Food Basket to the world with focus on RTE / RTC Millets, organic produce, indigenous processed food etc.

Boost

Investment interests from both domestic & foreign investors

Showcase

'Amrit Kaal' by projecting various achievements due to progressive initiatives of Government of India

Focus Pillars

Shree Anna

Leveraging India's Super Food
for the World

Exponential Food Processing

Positioning India as the global
hub

Efficient ecosystem

Harnessing opportunities with
inclusion

Strategic Segments

Unlocking Potentials for growth

Sustainable Development

Processing for Prosperity



Proposed Flow of Event

World Food India 2023

Day 1	Day 2	Day 3
<ul style="list-style-type: none"> ❖ Inaugural Session (proposed to be inaugurated by Hon'ble PM) in presence of State Heads & CMs of Partner Countries & States respectively ❖ Proposed Inauguration of Exhibition Area & Food Street by Hon'ble PM ❖ Plenary Session ❖ CEO Roundtable Interactions ❖ Country Sessions- Partner Country Session ❖ Cultural Evening & Networking Dinner 	<ul style="list-style-type: none"> ❖ Parallel Sessions– <ul style="list-style-type: none"> ○ State Sessions – Partner & Focus States ❖ State–specific roundtables for participating Chief Ministers ❖ Session on identified innovations by elected Startups – to be chaired by Hon'ble Minister FPI 	<ul style="list-style-type: none"> Parallel Sessions – <ul style="list-style-type: none"> ○ Country Sessions – Focus Countries ○ State Sessions – Focus States ❖ Valedictory Ceremony – Awards to Start-up Grand Challenge Winner

Sub-sectoral / technical sessions

B2B / B2G / G2G interactions

Buyer Seller Meet at Exhibition area

Food Street

Expected Participants Profiles

- ❑ Food Processing & Manufacturing Companies
- ❑ Food Startups & Innovators
- ❑ Exporters and Importers of Food Products
- ❑ Ingredient Manufacturers
- ❑ Government Representatives & Delegates
- ❑ Foreign Missions in India



- ❑ Academia & Research Institutions
- ❑ Equipment Manufacturers & Solution Providers
- ❑ Investors, Private Equity Firms & Venture Capitalists
- ❑ Food Packaging, Cold Chain & Logistics companies
- ❑ Financial Institutions
- ❑ Trade & Media Partners

Key Elements of World Food India 2023

48 sessions

1000+ buyers to be invited for RBSM

Promotion of Investments & Sourcing Opportunities

8000+ startups to find innovative solutions (cash prizes & incubation support by NIFTEM)

Conferences & Sessions



Exhibitions



B2B meetings & RBSM



Digital Showcase



Start-up grand challenge



Food Street



1200+

Exhibitors expected

Dedicated Pavilions of States & UTs, Ministries, Countries

Amrit Kaal, Health benefits of *Shree Anna*, Novel Technologies

5,000 sqm

Specially curated area to showcase rich culinary taste of India

Reverse Buyer Seller Meet (RBSM)

Joint RBSM

by

APEDA, MPEDA and Commodity Boards during
World Food India 2023

1000+ Buyers

to be invited

on a Single platform for forging Partnerships

Developing **strategic partnerships** in the food processing sector with potential countries.

Promoting **investment and exports of millets** and other processed foods.



Snapshot of World Food India 2017 (1/4)

**3-day event – was inaugurated by
Hon'ble Prime Minister of India**

- **International Participation –**
 - 7 International Ministers, 11 Business Chambers
 - Partner Country: Denmark, Germany, Japan
 - Focus Country: Italy, Netherlands
- **Domestic Participation –**
 - 75 policy makers, 7 Union Ministers
 - Chief Ministers of Andhra Pradesh, Chhattisgarh, Haryana
- **Food Street**
 - Unique concept acted as a platform for guests to learn about the globalization of Indian food

75,000
Business
Visitors

61
Countries

8000
B2B
Meetings

36
Conferenc
es &
Sessions

CEO
Roundtable
s
with
PM & FM

25
Ministers
from 18
states

THANK YOU

