



A JOURNEY THROUGH THE INDIAN FOOD PROCESSING SECTOR



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INDIAN FOOD PROCESSING SECTOR**



India's food processing sector has witnessed huge transformation over the past few decades, driven by evolving consumer tastes, changing demographics and rising income levels. Internationally, India's rich and varied culinary landscape is very appealing to global palates, thereby making Indian cuisine the most popular globally and paving the way for culinary diplomacy.

The Food & Agri-business sector, characterized by diverse agricultural output, growing popularity of high-value produce and increasing demand for processed food, has tremendous potential to create employment and boost entrepreneurship. The Government has actioned several key initiatives such as FDI in food retail and Pradhan Mantri Kisan SAMPADA Yojana, for attracting investment, including in food processing, Mega Food Parks and cold chain infrastructure, which will provide significant impetus to our food processing capabilities and help position India as a global food factory.

This MoFPI-YES BANK-CII publication, 'A Journey through the Indian Food Processing Sector', showcases the evolution and dynamic growth of the sector through a series of narratives capturing the spirit of excellence, innovation and entrepreneurship. YES BANK is privileged to collaborate with the Ministry of Food Processing Industries for this unique publication which comprehensively maps the food processing value chain & ecosystem across India and highlights the immense potential for infrastructure and technology-led investments.

I am confident that this publication will be a significant value addition for the global Food and Agri-value chain players, as we collectively work towards establishing India as a 'Global Food Factory & Sourcing Hub'.

Rana Kapoor
Managing Director & CEO 
Chairman 



India's food processing sector is based on a rich and varied agricultural resource base, immense human talent pool, and sophisticated culture of cuisine. With India's aspiration to emerge as a \$4 trillion economy by 2022, the sector has the potential to address a huge market while becoming a significant economic contributor.

Currently, the food industry in India is its fifth largest sector, a significant and key employment generator, and a strong source of exports. With proactive reform policies from the Government of India under the Make in India campaign and measures to attract foreign direct investments, the food economy of the country is being transformed. Steps have been taken towards infrastructure, safety and quality, and skill development, among others. The SAMPADA scheme for agro-processing clusters is an innovative policy for encouraging the industry.

World Food India 2017 is a unique convention to raise awareness on the potential of the sector and attract investments. CII is proud to be the National Event Partner for the Ministry of Food Processing Industries and sees World Food India as a strong platform to boost the industry.

This book, jointly prepared by MoFPI, YES Bank and CII, showcases our traditional domain knowledge and the current ecosystem for the food processing sector. It highlights the strengths of our country and provides a glimpse of the ample offerings we present to the world.

Shobana Kamineni
President
Confederation of Indian Industry



OUR TRADITIONAL WISDOM

SCIENTIFIC INNOVATIONS OF THE PAST

OUR TRADITIONAL WISDOM

Using stones for grinding is an age old practice in India- used primarily to grind wheat, rice, millets into flour, spices into powder and pulses into powder/paste.



Small Mortar and Pestle still form an integral part of Indian Kitchens- used to grind and blend food ingredients.

OUR TRADITIONAL WISDOM



Rice Pounders - Used to dehusk rice. The technique involved persistently raising & then dropping the pestle of the pounder into a block or mortar.



Traditionally, foot-operated rice pounders were also prevalent in India.

Dheki was used to separate rice grains from their outer husks, while leaving the bran layer, thus producing brown rice. It was usually operated by women.

OUR TRADITIONAL WISDOM



Ghani or *Kolhu*- One of the oldest known techniques of oil extraction through a mortar-and-pestle arrangement powered by animals.



Wind Winnowing - Age old method to remove husk from grains. The process involves throwing the mixture into the air so that the wind blows away the lighter chaff.

OUR TRADITIONAL WISDOM



Indian pickles or *Achaar*—as they are popularly called in India, has been a traditional food preservation technique.

A host of fruits, vegetables, berries, roots, shoots and even chicken and prawn are preserved through this traditional technique.

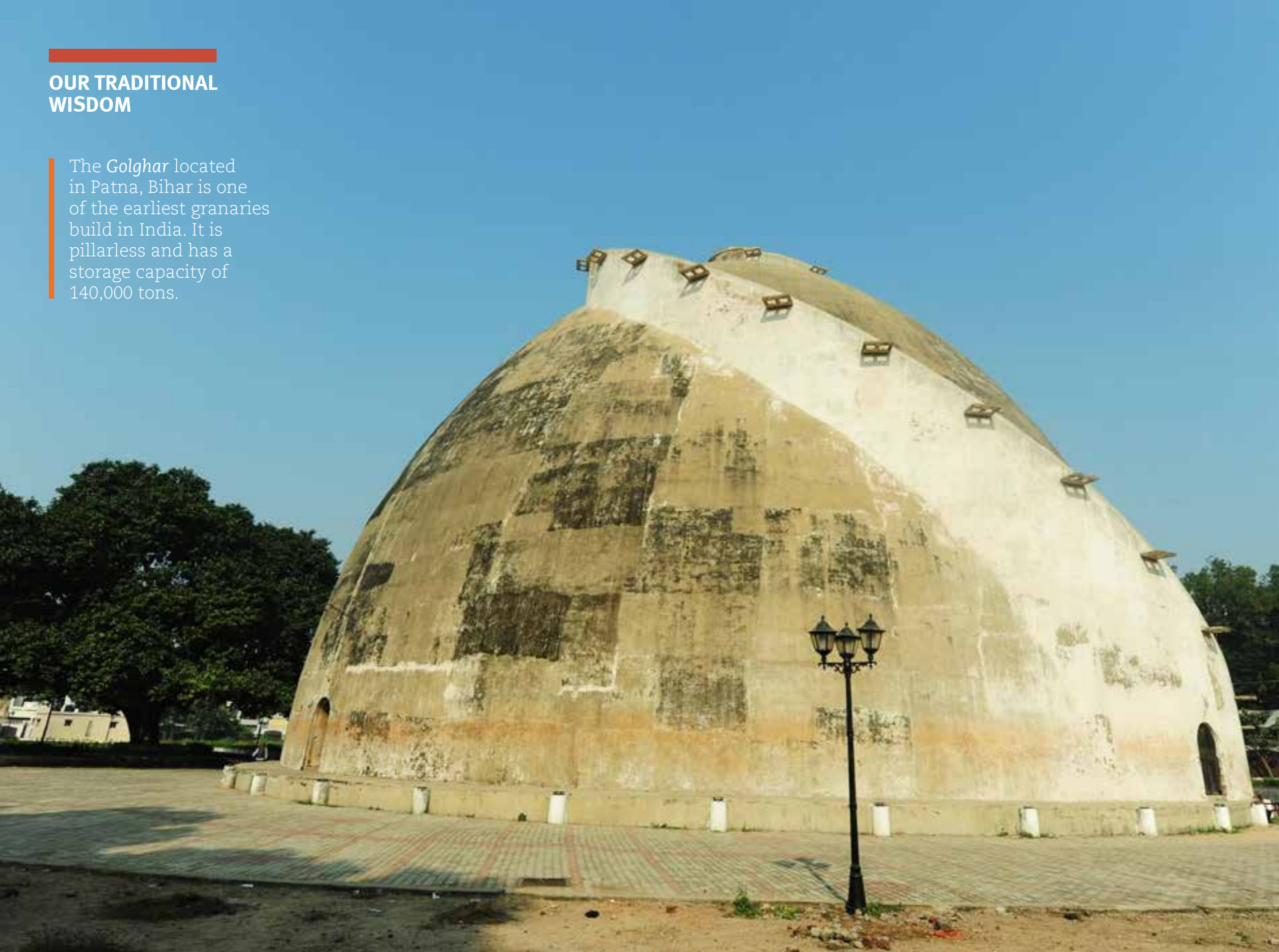
Drying of food is the world's oldest known preservation method.

Open air drying using sun and wind has been traditionally practiced in the coastal areas and the North Eastern regions of India to preserve seafood.



OUR TRADITIONAL WISDOM

The Golghar located in Patna, Bihar is one of the earliest granaries build in India. It is pillarless and has a storage capacity of 140,000 tons.



Dairy processing is a household affair in India. Even before dairy processing commercialized on a large scale, value added dairy products were prepared at home.

Butter, Ghee, Buttermilk and Curd formed an integral part of the Indian daily meal.



Butter Churning

OUR TRADITIONAL WISDOM



Buttermilk or *Chhach*, as it is called in Hindi, is a traditional yogurt based drink which is associated with two major benefits - cooling and improved digestion.





THE TORCH BEARERS

INITIAL YEARS OF INDUSTRIALIZATION

**THE TORCH
BEARERS**

YEAR 1892

Britannia was established around 125 years ago, with an investment of Rs. 295, in a small house in Kolkata. The first product made was a batch of delicious, golden brown biscuits for officers of the British Raj and their families.

Today Britannia is a total foods company, manufacturing biscuits, cakes, rusk, bread and dairy products and is the undisputed market leader across most categories.



Britannia is a brand that many generations of Indians have grown up with. It is among the most trusted food brands, and manufactures India's favorite brands like Good Day, Bourbon, Tiger, NutriChoice, Milk Bikis and Marie Gold, each of them a household name in India.

The company's manufacturing network is spread across 80 factories in the country, reaching over 5 million retail outlets and over 60% of Indian households. Britannia's R & D centre is a one-of-its-kind facility in the food processing space. Britannia's products are sold in over 72 countries world-wide.

THE TORCH BEARERS

YEAR 1905



BIKANERVALA is synonymous with quality Indian sweets and snacks. What started a 100 years ago in the city of Bikaner as a small business establishment, has today galvanized into an international brand.

Today, the company operates through a network of 152 mega outlets, including 21 of them operating in the global market.



BIKANO the packaged food product range of BIKANERVALA has a nation-wide reach to over 900,000 retail outlets through 1500 distributors.

BIKANO products are also exported to 42 countries with major presence in USA, Europe, Canada, Australia, New Zealand and the Middle East.

**THE TORCH
BEARERS**

YEAR 1924

A popular household name today, **MTR Foods** is synonymous with authentic Indian cuisine.

Established in 1924 as MTR Restaurant, the enterprise diversified into the business of convenience foods and instant mixes.

MTR adheres to the most stringent quality standards, from sourcing ingredients to processing and packing.



With a diverse portfolio including breakfast, lunch and dinner, snacks and desserts that cover every meal occasion, MTR unifies India tastefully. Blending authentic Indian flavours in modern formats, MTR Foods keeps abreast with the evolving tastes of India.

Culinary secrets that have been protected and handed down over the generations are evolved into truly authentic recipes from their region of origin and packaged in innovative and convenient formats.

THE TORCH BEARERS

YEAR 1925



YEAR 1934

Kissan was the first brand in fruit and vegetable processing in the country.

Trains passing through Punjab stopped at a processing unit where farmers sold freshly picked fruits, locals called that spot Kissan – and there was coined a brand that was poised to become a household name.

In 1993, Kissan was eventually acquired by Brooke Bond India and thus Kissan is now an integral part of the **Hindustan Unilever (HUL)** franchise

Established in 1925, **Keventers** is an iconic milkshake brand in India. People had come to associate Keventers with butter, cheese and milkshakes. Unfortunately in 1970 the Delhi plant was shut down, resulting in dissolution of the brand.

The brand received an overhaul recently by young budding entrepreneurs who are willing to take Keventers to newer heights and once again make it the most loved brand in milkshakes.



Kissan ketchup buys 86% of its tomatoes through sustainable sources. Today, Kissan is the market leader in both jams and ketchup with over 60 per cent and 25 per cent share respectively.

THE TORCH
BEARERS

YEAR 1929

Happiness is memories baked golden.



Parle Products, established in 1929, had its humble beginning by manufacturing a single confectionery brand named Orange candy.

Today, Parle Products is India's largest food company, having presence across a wide range of segments like Biscuits, Confectionery, Cakes, Rusk, Chocolates, Namkeens, Western Snacks and Staples.



Of sweets boiled in a barn in Vile Parle. That's how we started. Sweetly.

Of biscuits baked in a factory in Vile Parle.

And that's how we grew. Sometimes it was sweet. Sometimes, salty.

Of sweet, salty, sweet and salty... Several sweet biscuits and salty biscuits later, sweet and salty came together in one biscuit.

Of gold, silver and similar precious metals. They have been coming in medals awarded for quality from "Le Monde" selection, seven years in a row from 1971.

Of a Golden Anniversary. Time to thank those who made all this possible. Including you and your family.

Parle Products Private Limited.



From the World: laurels for India



Parle is the first Indian food company to win Monde Selection awards— for four successive years

• These awards have been won by Parle for excellence in taste, hygienic production and packaging.

• Parle is also the largest exporter of biscuits from India ... the largest-selling Indian biscuit abroad is



Gluco—which has been the best-seller in India for over 12 years.

• Because it has India's largest biscuit factory, Parle can mass produce popular biscuits faster, for the enjoyment and nourishment of millions.



Owners of world's largest selling biscuit brand 'Parle-G', Parle is the highest penetrated FMCG brand in India today with 4 out of every 5 households in India being consumers of one or the other Parle Brand.



www.141/PP

THE TORCH BEARERS

YEAR 1932

CCP 2



Established in 1932, as a small retail store by the name - American Dry Fruits, the enterprise is now globally known as **ADF Foods Limited**.



Today, ADF houses an array of traditional ethnic Indian, spicy Mexican and exotic Mediterranean foods.

Their frozen foods, salted, sweet & savory pickles and the wide variety of Pizza & Pasta sauces are relished across the globe. ADF Foods has strong network of over 180 distributors in over 52 countries making it one of the leading ethnic Indian food companies.

THE TORCH BEARERS

YEAR 1939



Chitale Agro specialises in fruit processing. The company produces high quality pulp and juices of mango, papaya, tomato, banana, guava, pineapple, grapes and pomegranate.

Chitale Dairy Farm was established in 1939 and since inception has been one of the firsts to apply relevant technologies in the field of dairy processing.

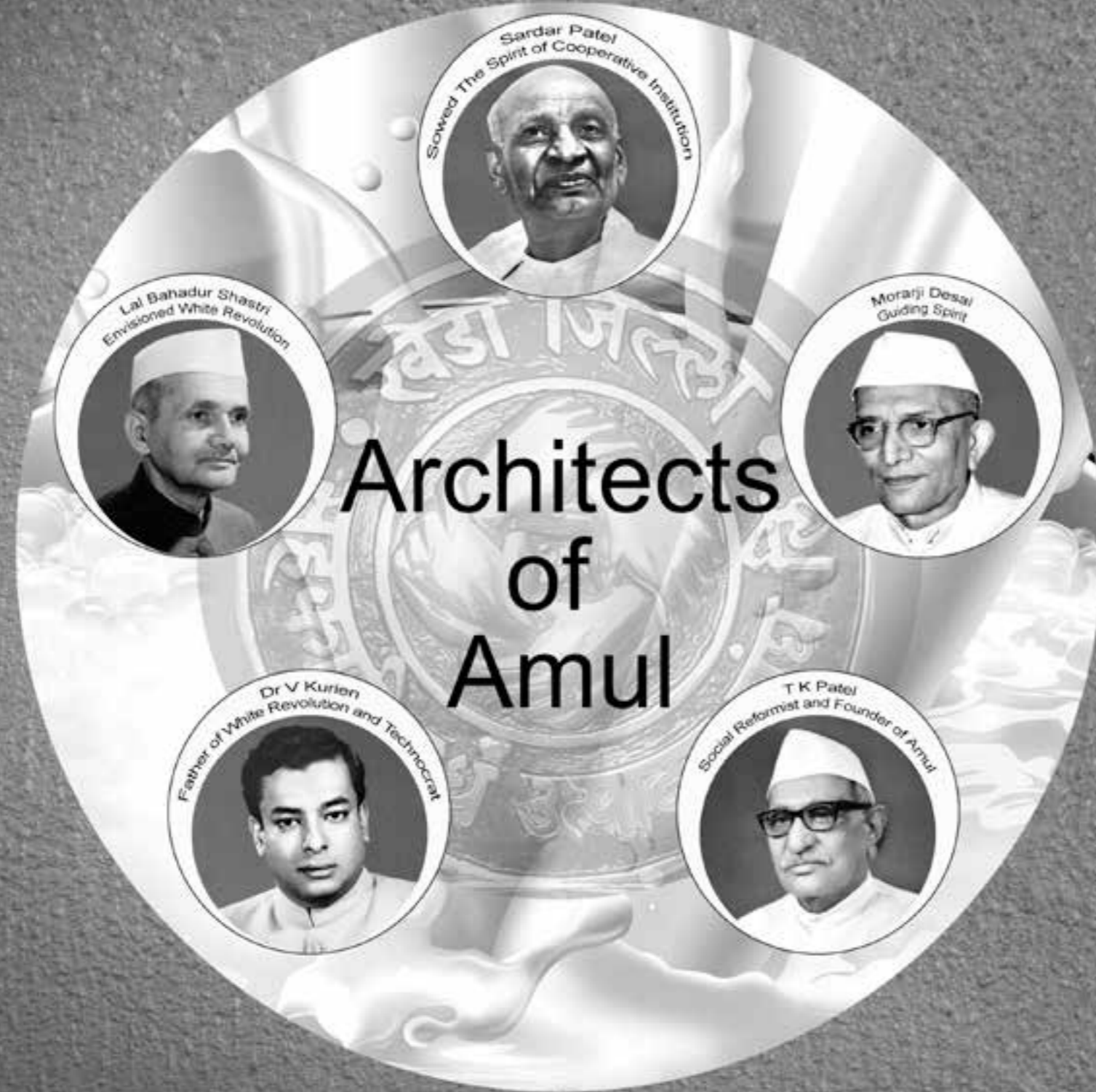
Chitale was pioneer in introducing the first polythene pouch packaging for milk in India, first Hands Free hygienic continuous Khoya Making machine, computerized milk billing system for farmers, automation in Shrikhand making and many more.

THE TORCH BEARERS

YEAR 1946



AMUL- The first Dairy Cooperative in India was established in the year 1946. AMUL spurred India's White Revolution, which made the country the world's largest producer of milk and milk products.



AMUL, for the first time in the world, innovated the technology for making milk powder from buffalo milk and took it to a commercial scale.

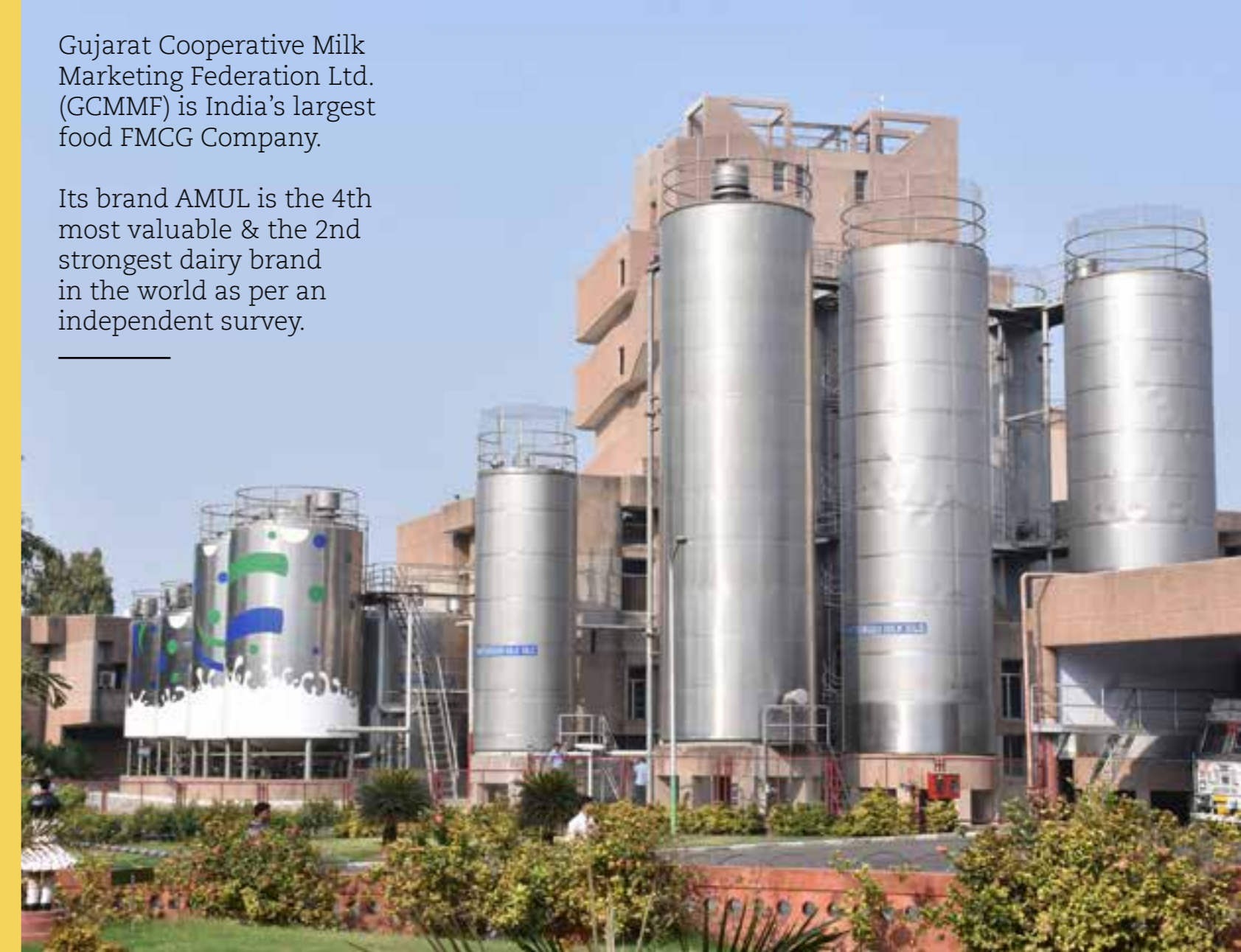


Gujarat Cooperative Milk Marketing Federation Ltd. (GMMF) is India's largest food FMCG Company.

Its brand AMUL is the 4th most valuable & the 2nd strongest dairy brand in the world as per an independent survey.



AMUL's advertising campaign is one of the best advertising concept of India. The AMUL girl has been promoting the brand for more than 50 years now.

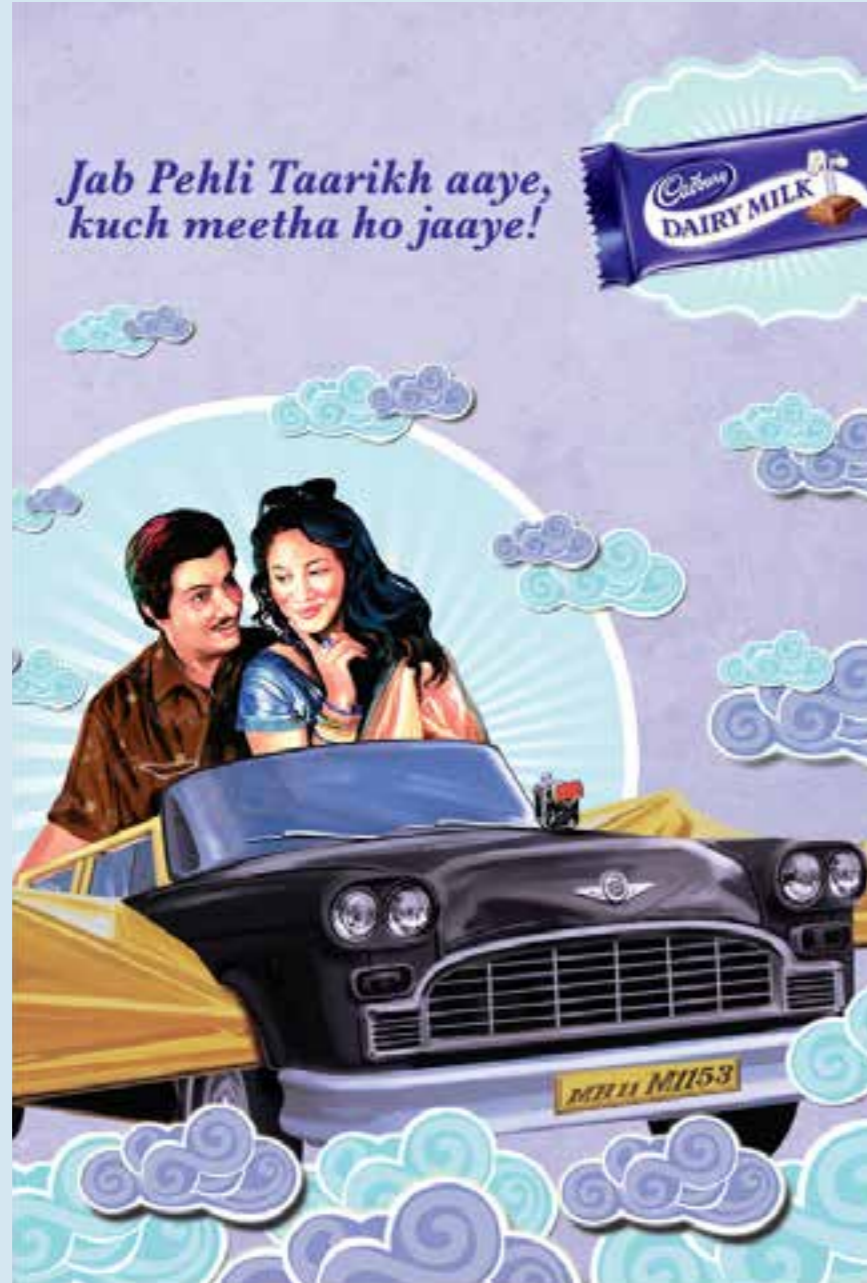


THE TORCH BEARERS

YEAR 1948

Mondelez India (formerly Cadbury India) has been in the country for seven decades and continues to provide Indian consumers with its much loved brands across chocolates, biscuits, candy and powdered beverages.

Cadbury Dairy Milk has defined the taste of chocolate for Indian consumers for over 70 years. Today the company reaches out to millions of consumers through its distribution network in urban and rural India and through e-commerce.



Mondelez International inaugurated its largest multi category manufacturing facility in Asia Pacific in 2016. Spread across 134 acres at Sri City in Andhra Pradesh, India, the plant will produce 250,000 tonnes of product in its end state in 2020.

MONDELEZ INDIA COCOA LIFE PROGRAM



Over 50 years ago the company planted the first cocoa sapling pioneering the development of cocoa cultivation in India.

Today, the Cocoa Life programme reaches out to around 100,000 farmers in four states in Southern India supporting them in best practices in all aspects of cocoa cultivation – from seeds, to saplings to planting and harvesting – and working in partnership with Kerala Agricultural University and Tamil Nadu Agriculture University

THE TORCH BEARERS

YEAR 1961



Nestlé has been a partner in India's growth for over 105 years. Nestlé continuously focuses its efforts to better understand the changing consumer lifestyle and anticipate their needs to provide Taste, Nutrition, Health & Wellness through its offerings.

Nestlé India set up its first manufacturing plant in Moga in 1961 with a commitment to develop the local milk economy.

On the first day, Nestlé collected only 511 kgs of milk from 180 farmers. Today, Nestlé works with around 110,000 milk farmers and collects over 300 million kilograms of high quality milk every year.



Nestlé launched its first food safety institute in Manesar. The institute is one of its kind and state of the art that is aimed at building and sharing knowledge through collaborative partnerships for strengthening the food safety environment in India.

THE TORCH BEARERS

YEAR 1962

Nilon's was founded in 1962 as a small cottage industry. It is now one of the fastest growing processed food manufacturers in India.



Nilon's is the largest producer of pickles, Tooty Fruity, Ginger Garlic Paste and roasted vermicelli in India.

THE TORCH
BEARERS

YEAR 1965



Modern Peanut Butter in a modern jar

Looks as great as it tastes.

Rich in Protein, full of Vitamins just like Modern Bread. Modern Peanut Butter is low in fat too. Great with bread, biscuits...almost anything! Available in 100 gm and 350 gm bottles.

For Rs. 1.80 & Rs. 4.75 (plus sales tax) respectively.



Launched in 1965 as **Modern Bakeries** (India) Limited, the company introduced bread to the Indian household. In 1991 the company launched Wheatamin India's first Brown Bread.



Today Modern has a completely new portfolio with superior products such as Milk Plus bread enriched with calcium; Hi-Fibre Brown bread reinforced with premium wheat fibre; 100% Whole-Wheat bread; and new innovations such as Multigrain Superseed Bread which not only has superseed sprinkles on top but even the flour is made of seven grains and contains Omega 3.



THE TRAIL BLAZERS

TAKING THE LEGACY FORWARD

THE TRAIL BLAZERS

Blue Star is India's leading air conditioning and commercial refrigeration company.

The company is also a leading provider of banana ripening solutions in India. Thousands of banana traders and farmers are Blue Star customers and over 14,000 tonnes of bananas get ripened at their Banana ripening cold rooms.



AGRICULTURAL COMMODITY TRADING AND PROCESSING



STARCHES AND SWEETENERS



FOOD AND BEVERAGE INGREDIENTS



INDUSTRIAL



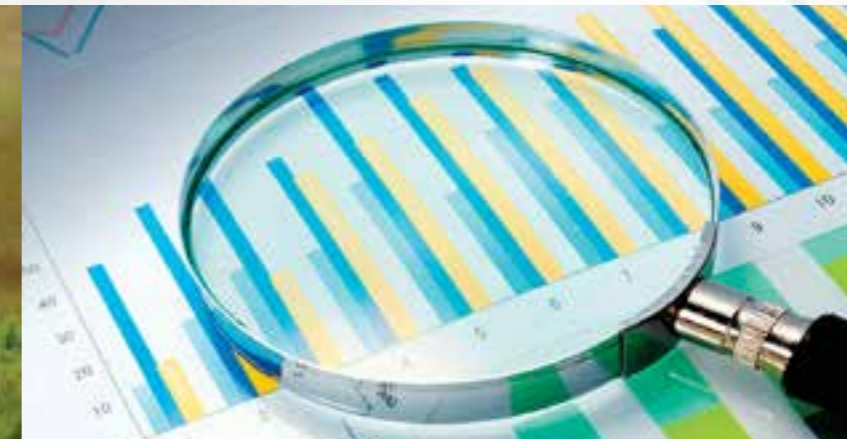
OIL AND FATS



BUSINESS SERVICES



ANIMAL FEED AND NUTRITION



FINANCIAL AND RISK MANAGEMENT



OCEAN TRANSPORTATION

With a modest beginning in India in 1987 as a liaison office, **Cargill** has come a long way with pan India footprint and interest across food, agriculture, financial and industrial products.

Cargill pioneered fortification of consumer pack edible oils and is reaching to 100+ million consumers. First time in the history of the edible oil category, Cargill India has launched anti-counterfeiting technology to help consumers identify original and fake.

THE TRAIL BLAZERS

Carrier Transcold helps improve transport and shipping of temperature controlled cargoes with a complete line of equipment and services for refrigerated transport and cold chain visibility.

For more than 45 years, Carrier Transcold has been an industry leader, providing customers around the world with advanced, energy-efficient and environmentally sustainable container refrigeration systems and generator sets, direct-drive and diesel truck units, and trailer refrigeration systems.



BEFORE

Punjab Mandarin
Winter delivery only
Local markets
32% wastage
Market potential
No cold chain
Nil Reefers

AFTER

Cold chain pilot set up
S.India delivcery: 630 MT
Longer sales window
Retail price up 23%
Wastage down by 76%
CO2 emission down 16%
Reefers 37 to 350

By 2023-24, the project is expected to deliver close to 240,000 MT of mangoes.

UNNATI (MANGO)
25,000 ACRES
OF LAND UNDER SUSTAINABLE AGRICULTURE PRACTICES AND ENABLING **12,500 MANGO FARMERS** DOUBLE THEIR YIELD.

FURTHER PROVIDING A BOOST TO INDIAN AGRICULTURAL SECTOR



95% LOCALLY PROCURED AGRICULTURAL INGREDIENTS

JUICE WITH FIZZ LAUNCHED ALL NEW **FANTA FRUITY ORANGE** WITH 5.3% ORANGE JUICE IN 2017

USD 1.7 BILLION

INVESTMENT BETWEEN 2017 AND 2022 AS PART OF OUR FRUIT CIRCULAR ECONOMY INITIATIVE FOR EXPANDING PROCUREMENT OF FRUITS FROM INDIA



MINUTE MAID PULPY MOSAMBI
12.7% MOSAMBI PULP
1800 MT+ OF MOSAMBI FRUIT ALREADY SOURCED FOR FIRST PHASE OF PRODUCTION

Project Unnati is a unique partnership with farmers to demonstrate and enable adoption of Ultra-High Density Plantation (UHDP) practice for mangoes.

The recent launch of Minute Maid Pulpy Mosambi marks the beginning of Coca-Cola's transformational journey towards creating a sustainable fruit circular economy in India.



Coca-Cola India is a leading beverage company, offering a range of healthy, safe, high quality, refreshing beverage options to consumers.

In line with the Government's vision for the food processing sector and the role of beverage players therein, Coca-Cola for the first time introduced fanta fruity orange under the category "juice with fizz".

THE TRAIL
BLAZERS



Crop Connect's Original Indian Table is a curated traditional food experience, reviving the traditional food and wellness experience for a consumer. They bring in an authentic experience sourced directly from the best farmers of India.



**THE TRAIL
BLAZERS**



Fieldfresh Foods Private Limited is a JV between Bharti Enterprises and Del Monte Pacific Limited. It is the largest exporter of fresh Babycorn in India servicing leading retail giants like TESCO, Sainsbury's, Marks & Spencers in Europe.



With its state-of-the-art manufacturing facility in Hosur, Tamil Nadu, Fieldfresh Foods also makes and markets a range of premium quality culinary and beverage products under the Del Monte brand in India.

It is the preferred partner for all leading QSR chains like Domino's, YUM, Subway - in India & Asia Pacific



THE TRAIL BLAZERS

DuPont works closely with food manufacturers to provide customized local applications on foods they are developing for their consumers.



Godrej Tyson Foods focuses on serving the growing demand for raw and value added poultry products in India.

Godrej Tyson is the first company to market fresh chilled chicken in the country.

Real Good, the flagship brand is a leader in fresh poultry products in India. The vertically integrated process offers raw fresh, frozen and pre marinated poultry products in a variety of cuts and portions that are ready to use.



THE TRAIL BLAZERS

GSK Consumer Healthcare is India's leading fast moving consumer healthcare company, operating across categories like Nutrition & GI, Oral Healthcare, Pain & Respiratory.

The flagship product Horlicks, based on high science, leads the market, while Boost is among the top three health food drink that India prefers. Horlicks came to India in 1958 and is consumed in over 47 million households today.



Hector Beverages through its brand **Paper Boat** provides authentic, traditional drinks, made with the finest raw materials and packaging.

Paper Boat made a mark in the market from day 1 due to its innovative 4-part-laminate doypack. The award-winning unique packaging gives Paper Boat an exclusive brand identity – and is a design that has won the hearts of many consumers.



ITC e-Choupal is the world's largest rural digital infrastructure. It empowers 4 million farmers across 35,000 villages.

ITC e-Choupal lends competitive advantage to the Company's Foods Business through efficient sourcing of quality agri produce.



FARMER FIELD SCHOOLS



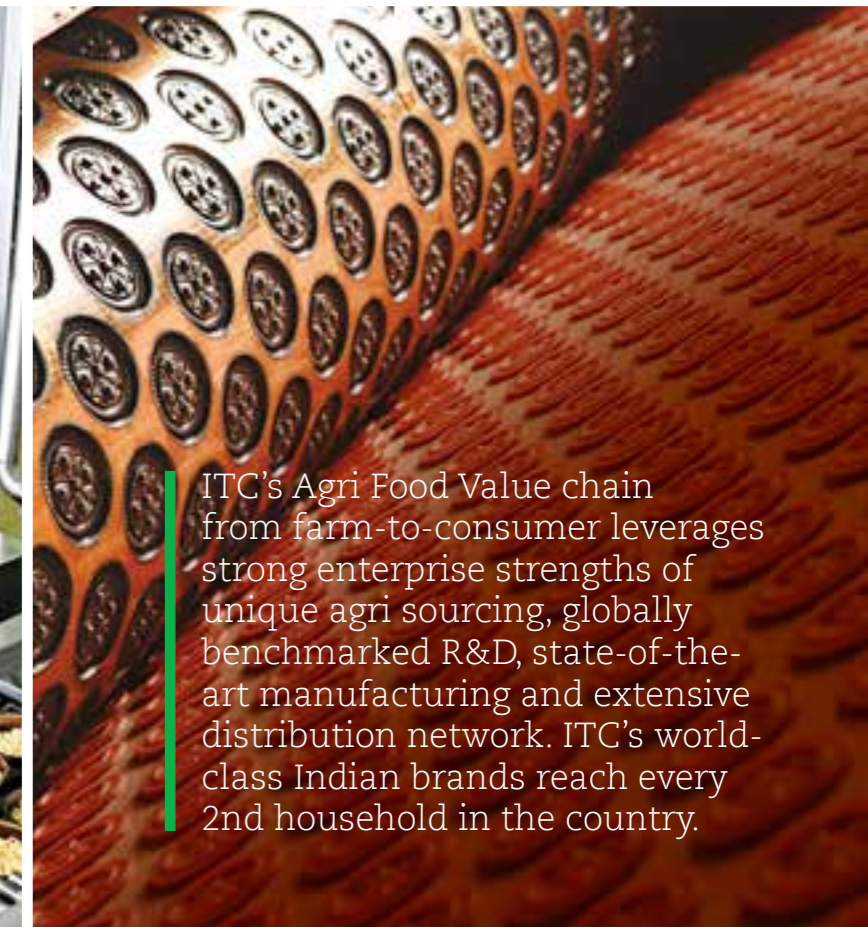
WATERSHED DEVELOPMENT



GLOBALLY BENCHMARKED R&D



STATE-OF-THE-ART INTEGRATED MANUFACTURING FACILITIES



ITC's Agri Food Value chain from farm-to-consumer leverages strong enterprise strengths of unique agri sourcing, globally benchmarked R&D, state-of-the-art manufacturing and extensive distribution network. ITC's world-class Indian brands reach every 2nd household in the country.

THE TRAIL
BLAZERS



In 1994 **Jain Irrigation** entered the business of food processing.

They set up world class food processing facilities for dehydration of onion, vegetable and production of fruit purees, concentrates and pulp. These plants meet international FDA statute requirements.



The Company has established the largest Banana Tissue Culture laboratory in the country.

Jains have also pioneered tissue culture of 'Grand Nain' variety of banana since 1994-95. The variety has increased the productivity from an average of 12 kg to over 26 kg per bunch per year.

**THE TRAIL
BLAZERS**

The Indian Institute of Packaging is an autonomous body in the field of packaging and working under the administrative Control of the Ministry of Commerce and Industry.

Besides various other innovative packaging designs, the institute has recently developed a package design based on plastic laminated collapsible tube for the packaging of liquid jaggery made of date palm to enhance the shelf life from 5 hrs to 92 days.

The Institute has also undertaken a R&D project for the innovative package design of fresh tender coconut water.



Kejriwal Group is the first organized exporter of Natural Honey from India to Europe, USA and the Middle East. The company has an ultra modern facility with a capacity to handle above 100MT daily.

Complete traceability is maintained from the farm level and is packed under most stringent hygienic conditions.

The company handles approximately 20,000 MT of honey annually and are the largest exporters of honey from India. They are also the only USDA-NOP approved exporters of Organic Indian honey.



**THE TRAIL
BLAZERS**



KRBL is first to commercialize the most popular PUSA - I Basmati and PUSA 1121 Basmati which today account for over 70% of the country's production. This was a perfect example of Public Private Partnership (PPP) wherein the variety developed by a research institute was commercialized through a private firm.

KRBL owns the world's largest rice milling facility with a capacity to handle 40% of India's total basmati production.

The company engages with over 90,000 farmers covering over 2.4 lakh acres of land producing basmati rice.

The company grows, grades and distributes quality seeds to the farmers & guides them through best farm management practices & assures crop buy back.



**THE TRAIL
BLAZERS**



Since 1998, **McCain Foods** (India) has been engaged in agriculture R&D and in development of frozen food market in India.



MCCAIN RANGE OF INTERNATIONAL FAVOURITES AND INDIAN SPECIALTIES



McCain Foods Ltd. is one of the world's largest producer of French Fries and Potato Specialties. One in every three French fries around the world is a McCain fry.

The company has set up a World class potato processing plant in Mehsana district of Gujarat for producing a range of products.



McCain has gone a step ahead in innovating and customizing products for the Indian palette. A delectable range of world favorites like McCain French Fries, McCain Smiles are available in the Indian market along with local delights such as McCain Aloo Tikki, Potato Cheese Shotz and Mini Samosa.

**THE TRAIL
BLAZERS**



**Bade Sapno ki
Sahi Shuruuat**
Kellogg's Anaaj ka Nashta

The **Kellogg** Company's purpose is to nourish families so that they can flourish and thrive. Kellogg's in India is guided by the purpose and has been offering grain-based breakfast cereals since more than two decades in the country.

Kellogg's breakfast range includes wheat, corn, rice, barley, ragi and oats. Kellogg's takes these grains, fortifies them with vitamins and minerals and makes them into breakfast cereals.



For more than 100 years, Kellogg Company is striving to make foods people love. Kellogg's is proud to Make in India for India.



Mohani Tea believes in the adage of "Tea Bush to Tea Pot" with which the brand ensures pertinent consumer delight with consistent tea taste at an affordable price, delivered every day.

With an efficient supply chain and logistics operation that is amongst the best in the industry, Mohani Tea ensures shortest lead time from procurement of tea to delivery in the market. The company has built a state of the art tea storage warehouse of 70,000 sq ft to ensure consistency of tea quality.



**THE TRAIL
BLAZERS**



Mother Dairy's Safal is engaged in retailing of fresh fruits and vegetables and value added products like fruit juices, ketchup, pickles, jams, frozen peas and tomato puree. Safal is the largest retail chain of fresh fruits and vegetables in Delhi, operating about 400 retail outlets in Delhi NCR. Safal provides around 120 SKUs of fresh fruits & vegetables.

Patanjali Ayurved Limited has emerged as a disruptive force to reckon with, in the food FMCG space over the past 5 years. Through exponential growth across multiple categories, the brand has established itself as one of the largest and fastest growing names in the processed food space. The company has a strong backward linkage program working with farmers at the back-end, supported by a strong infrastructure at the processing leg (including multiple food parks), both of which strongly support the brand at the front-end.





**THE TRAIL
BLAZERS**

Nekkanti Sea Foods Limited is one of the largest exporter of seafood from India and has been in this business for over three decades.

Nekkanti, from a humble beginning in the seafood industry, integrated backwards by venturing into captive and contract shrimp farming with collection centres across the East and West Coast of India.



Nekkanti Sea Foods Limited is a fully integrated seafood entity with Hatcheries, Shrimp Feed, Aqua Farms and State-of-the-Art Processing Plants, enabling it to deliver quality products.

The company has set up state of the art facility conforming to European Union Standards and produces value added IQF Products, thus helping the company move up the value chain.

THE TRAIL BLAZERS

OmniActive Health Technologies offers a range of quality ingredients, which are innovative and scientifically validated for dietary supplementation, nutritional fortification and functional food/beverage applications.

OmniActive leverages international R&D strengths to deploy an array of state-of-the-art manufacturing technologies in extraction, purification, isolation and delivery of nutritional actives.



Over the last 25 years, **PepsiCo** India has been combining deep insights into Indian farming with its global technological expertise to transform the lives of farmers.

PepsiCo India established a model of partnership with farmers and currently works with over 24,000 happy farmers across nine states through the crop lifecycle by providing new varieties, technologies and sustainable farming practices.

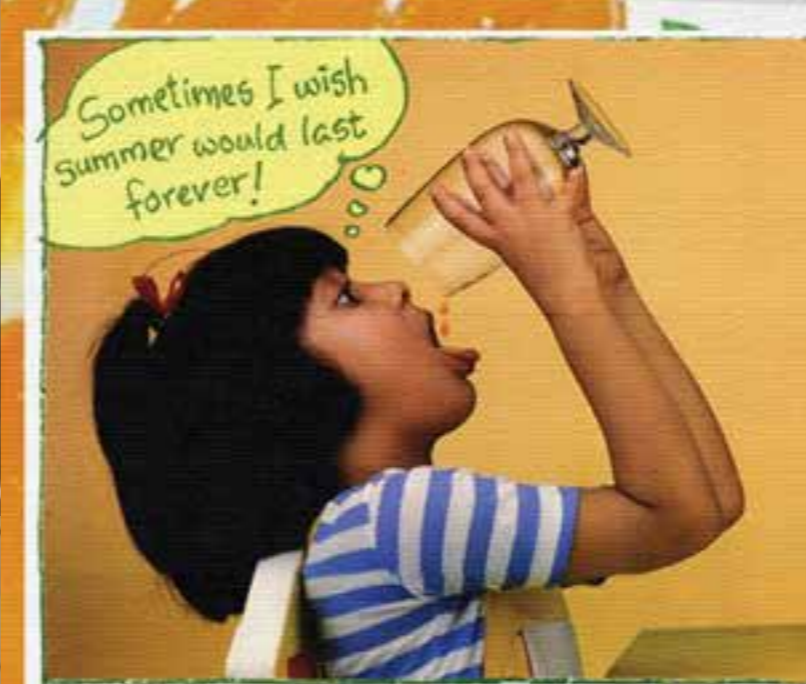
THE TRAIL BLAZERS



Promethean Power Systems

designs and manufactures refrigeration systems for cold-storage and milk chilling applications in off-grid and partially electrified areas of developing countries.

Since 2013, leading dairies have installed Promethean's systems across hundreds of village-level collection centres. This has helped their customers to chill milk successfully, without using a single drop of diesel.



India's largest selling soft drink concentrate.



India's largest selling soft drink concentrate.



India's largest selling soft drink concentrate.

HOME MAGIC

Just one wonder-pack of Rasna makes 32 glasses of delicious soft drink!

It's so simple, even a child could do the trick. All you do is mix Rasna with sugar and water, and it's ready in minutes. 2 bottles of Rasna to make 32 glasses of delicious soft drink. Just mix it up with water and sugar, and you'll find Rasna works out in less than half the cost.

Rasna
Soft Drink Concentrate
So delicious
So economical

Manufactured by: Datta Industries, Andhra Pradesh 500 010.
Also available in: Kuwait, Dubai, Bahrain, Mauritius, Cairo, Khartoum, London, Nairobi, Jakarta, Oita, London.

"It's a pity they can't share my Rasna!"

Rasna
SO ORANGE ORANGE!
India's largest selling Soft Drink Concentrate

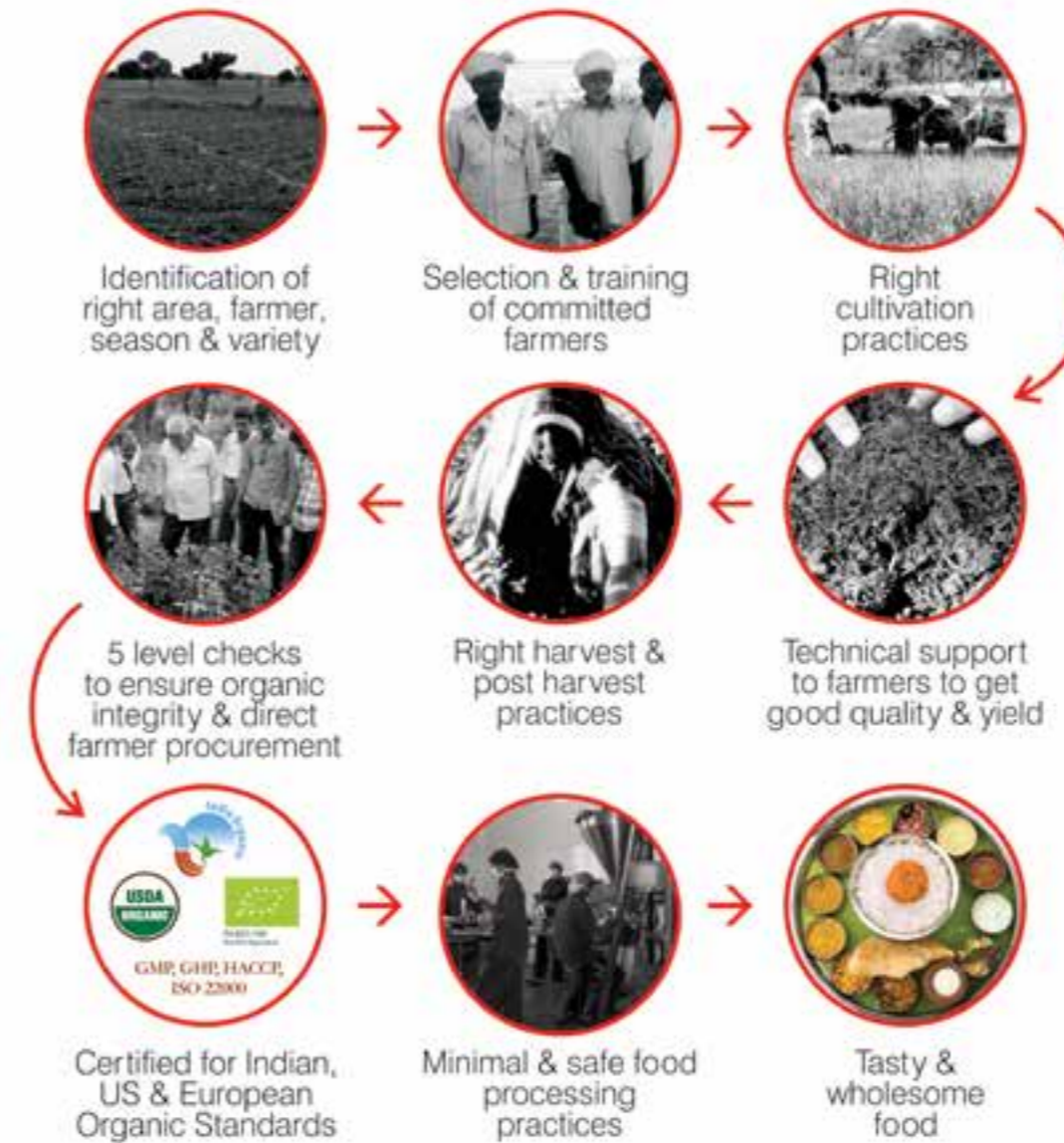
Rasna Pvt Ltd is the largest manufacturer of concentrates and instant powder in the world., Rasna has come a long way in the soft beverage category ever since it was started several decades ago.

Not only has the company understood the requirements of the Indian consumer, it has, at all times made efforts to offer the best possible value proposition in keeping with the Indian mindset of 'value for money'.



Sresta Natural Bioproducts Pvt. Ltd. is one of the leading players in the organic food sector in India. It has a unique farming approach which ensures alignment with processes and allows for round the year supervision.

FARM TO FORK APPROACH TO MAINTAIN THE ORGANIC INTEGRITY



We work directly with over 45,000 farmers across 15 States on 2,25,000 acres of land



Testing at every level is a key input in the maintenance of organic integrity. Strict vigilance on the complete supply chain is ensured at the field, factory and lab level.

THE TRAIL BLAZERS

Founded in 2014, **Rivigo's** unique driver relay model has disrupted long distance logistics in India reducing transit times by up-to 70%.

Rivigo Cold Chain has eliminated the conventional challenges in reefer transportation with its active tech-enabled temperature control, quick response to emergencies through its hubs pan India, and shorter transit times enabling movement of perishable goods across the country with improved shelf life.



Tata Global Beverages is the 2nd Largest player in branded tea in the world.

The brand is present in over 40 countries.

After pioneering the green tea wave in India, TGB introduced a first-of-its-kind vitamin-enhanced range of Super Green Teas as the latest addition to the company's green tea portfolio.

**THE TRAIL
BLAZERS**

Walmart India has been working with one million members, especially Kiranas & other small businesses since it opened its first store in the country in 2009. The company has been striving to create 'shared value' for its members, local suppliers, small farmers, employees and the community.



Walmart has been contributing to the national and local economies through employment generation, by establishing inter-regional supply chain network, developing SME suppliers, sourcing directly from farmers, enhancing women's economic empowerment and the community at large.

THE TRAIL BLAZERS



As the largest fully integrated aquaculture company of India, WestCoast Group is an example of a 'Farm to Fork' story in real sense.

With a strategic focus on integration, within a span of two decades the company has extensively set-up operations of own shrimp hatcheries, shrimp nurseries, shrimp farms, seafood processing, distribution & retail with home-delivery offerings under the brand Cambay Tiger.

WestCoast, with the largest shrimp farming operations of the country, has consistently focussed on making the aquaculture landscape modern, environmentally friendly and of global standards, by introducing innovation in shrimp farming techniques.

The company has many firsts to its credit; it is the first to launch a Larvae Counting Machine; first to introduce Automatic Shrimp Harvester in the country; first to have the hi-tech Brine Freezing technology; and the first & only one to use the Modified Atmosphere Packaging (MAP) packs.

The company is now set to revolutionise the organised Fish Cage Culture in India, to help mitigate the country's need of affordable protein.

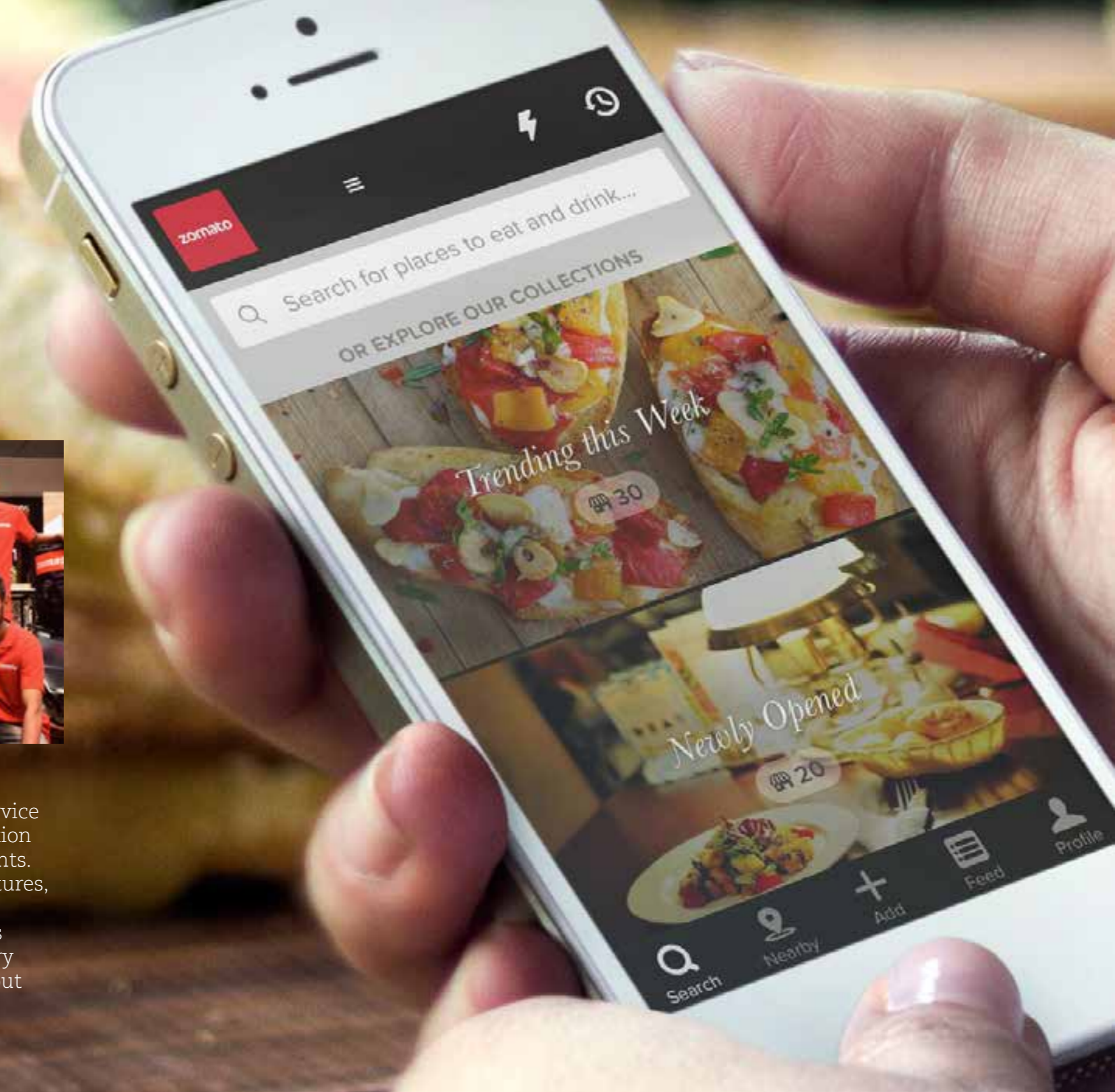
THE TRAIL BLAZERS

Tilda Hain India Pvt. Ltd. is a subsidiary of the Hain Celestial group in India that offers its high quality good-for-you products. Carrying forward its vision, Hain Celestial has launched a variety of natural and organic good-for-you food products in various categories including snacks and plant-based beverages.

Tilda Hain has implemented several initiatives over the years that are designed to leave positive impact on the environment and the farming community in India. Project PASS is a unique initiative taken to counter the issue of pesticide residue in rice.



Zomato is a restaurant search and discovery service which provides information and reviews on restaurants. By providing menus, pictures, locations, ratings and reviews, Zomato ensures that their users find every piece of information about the restaurant they are looking for.





UNIQUE OFFERINGS

BEST OF THE WORLD IN INDIA

UNIQUE OFFERINGS

RICH PRODUCTION BASE

ANNUAL PRODUCTION



DAIRY: 163.7 Mn MT



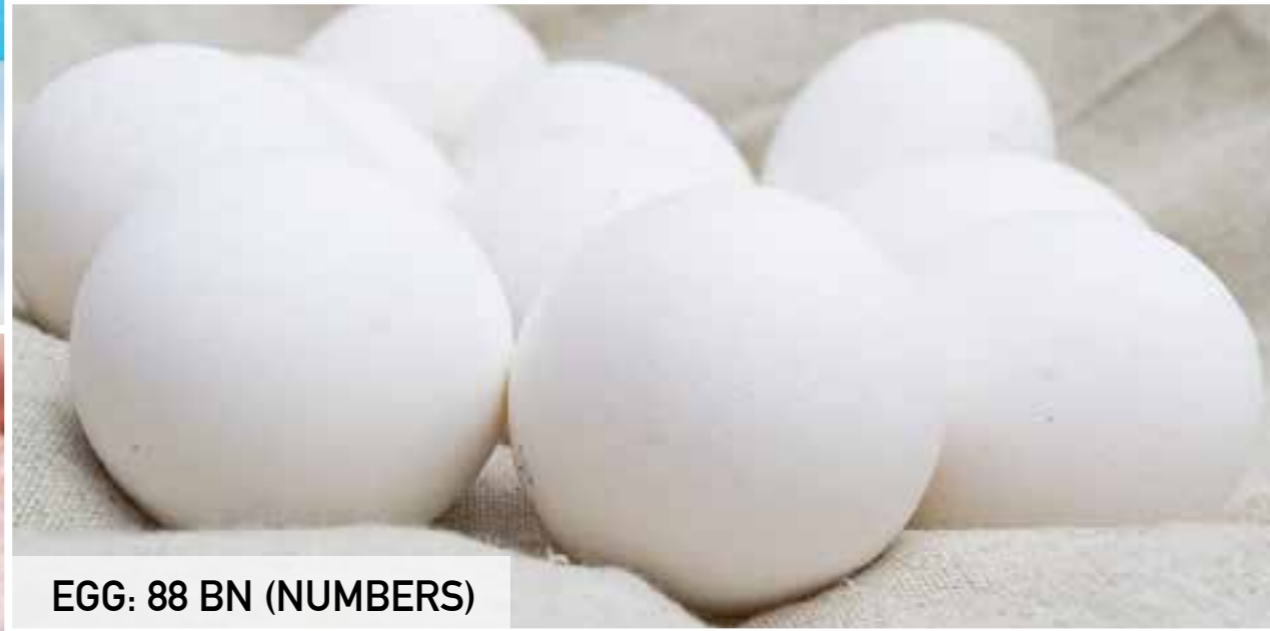
FISHERIES: 10.8 Mn MT



VEGETABLES: 169 Mn MT



FOODGRAIN: 276 Mn MT



EGG: 88 BN (NUMBERS)



HONEY: 88,000 MT



SPICES: 6.9 Mn MT



POULTRY MEAT: 3.5 Mn MT



FRUITS: 90 Mn MT



MEDICINAL & AROMATIC PLANTS: 1 Mn MT



TEA: 1.2 Mn MT

UNIQUE OFFERINGS

RICH PRODUCTION BASE

India is the world's largest producer of bananas, papaya, mangoes and guavas.



POTATO
43.4 Mn MT



ONION
20.9 Mn MT



TOMATO
18.7 Mn MT



BRINJAL
12.5 Mn MT



CABBAGE
8.8 Mn MT

BANANA
29.1 Mn MT



MANGO
18.6 Mn MT



CITRUS
11.6 Mn MT



PAPAYA
5.7 Mn MT



GUAVA
4.1 Mn MT



India is the second largest producer of potatoes, green peas, tomatoes, cabbage and cauliflower.

UNIQUE
OFFERINGS

DAIRY

India produces approximately 19% of world's milk and is the largest producer globally.

The Indian dairy market is amongst the largest and fastest growing markets in the world.

Production of milk is dominated by small and marginal farmers with a herd size of 1-2 animals (~72% of dairy farmers are small & marginal).


India has managed to attain top position in milk production globally owing to huge bovine population. India has the largest livestock population in the world at 512 Mn.




**UNIQUE
OFFERINGS**

**MEAT AND
POULTRY**

India produces around 7.4 million MT of Meat and around 88 bn eggs annually.



Poultry is a highly vertically integrated industry in India and matches the efficiency levels of many western countries.




Given the changing preference of Indian consumers for clean, safe and hygienic meat and meat products, farm automation, abattoirs, logistics, processing and point of sale cold storage infrastructure are an opportunity in India.



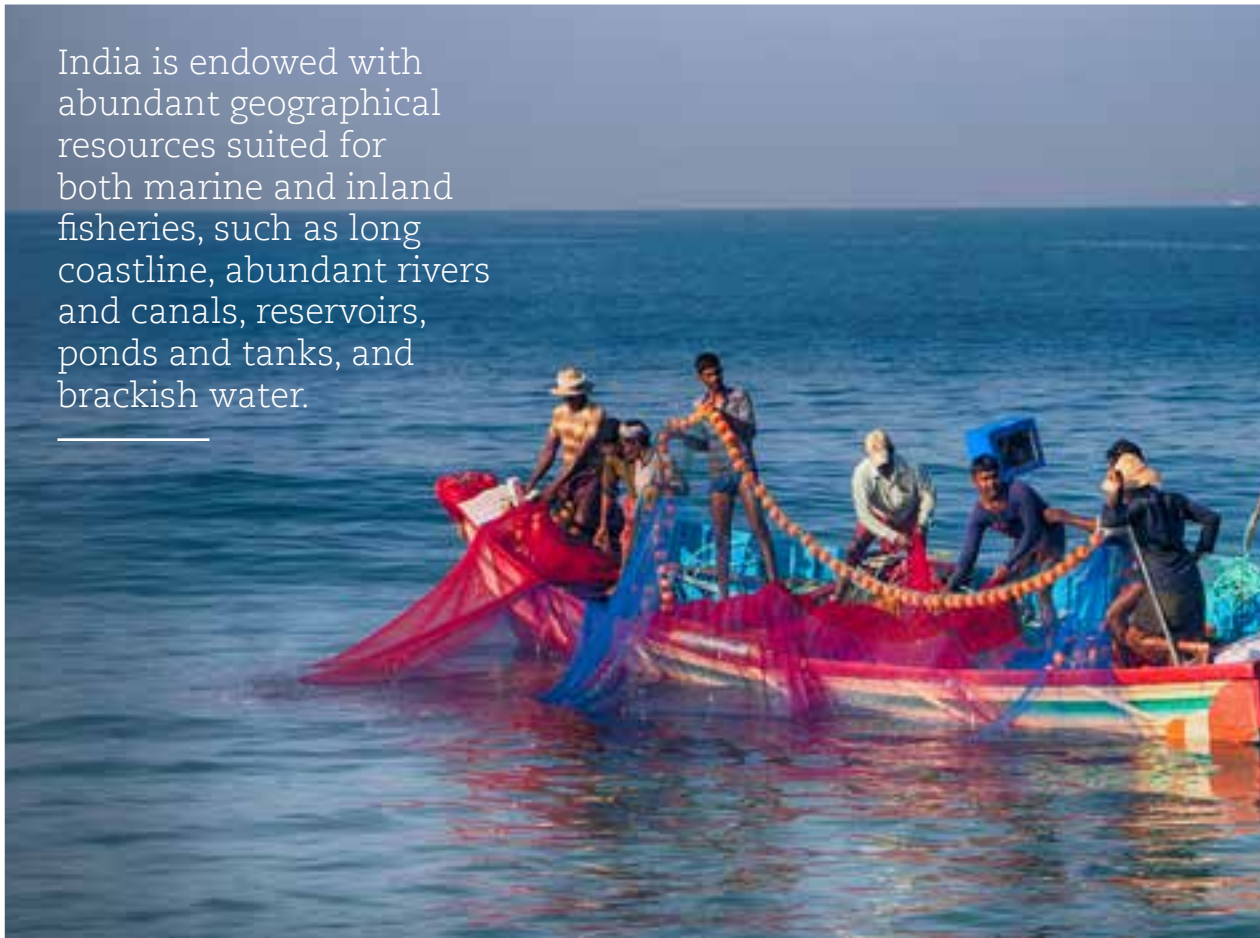
UNIQUE
OFFERINGS

FISHERIES

India, with a production of around 10.8 million MT is the second largest fish producer in the world.



Processing levels of marine food in India are currently at ~23%.



India is endowed with abundant geographical resources suited for both marine and inland fisheries, such as long coastline, abundant rivers and canals, reservoirs, ponds and tanks, and brackish water.



The export market is currently valued at USD 5.8 Bn/ 1 Mn MT. Most exports currently are in the frozen form and there is immense potential for exporting value added products.



India exports frozen shrimps worth USD 3 Bn annually.

UNIQUE OFFERINGS

SPICES & HERBS



Garlic 1.6 Mn MT



Chilli 1.5 Mn MT



Ginger 1.0 Mn MT



Turmeric 1.0 Mn MT



Coriander 0.6 Mn MT



Organic farming for spices is gaining great prominence in the country due to the increasing demand for safe and non-contaminated spices.



Most of the spices have therapeutic properties and many of these are emerging as Superfoods globally.

'Golden milk' or turmeric latte – a combination of nut milk and juiced turmeric root – is becoming the most sought after drink in many countries. 'Haldi-Dudh' (Turmeric milk) as it is popularly called in India has been our homemade remedy for various ailments since ages.



India is the world's largest producer, consumer and exporter of spices. It is known for its spices globally because of their rich aroma, taste and texture.




During 2016-17, India exported spices and spice products worth USD2.6 Bn to destinations like USA, China, Vietnam, UAE and Indonesia.

The key products include chilli, turmeric, cumin, pepper, mint products and spice oils/oleoresins.


**UNIQUE
OFFERINGS**

**INDIAN
SUPERFOODS**




Ghee has been used in India for thousands of years. It is truly an “ancient” health food and has become one of the most sought after superfood globally.


Ghee is rich in antioxidants and essential fatty acids which protect the body from various diseases, improves absorption of fat soluble nutrients, nourishes and lubricate the joints, and improves memory.



Gooseberry or Amla is amongst the healthiest food due to its high nutrient content. It is a rich source of antioxidants, iron, vitamin A, C, fiber, potassium, magnesium and calcium. It is effective in preventing cancer or tumor cell growth.



Tamarind has a long history of medicinal uses including easing stomach discomfort, aiding digestion, and use as a laxative. One of the most significant vitamins in tamarind is the B complex which is responsible for improving nerve function, as well as muscle development.



Moringa is one of the most nutrient-rich plants in the world. It is a rich source of iron, vitamin A, K, E, calcium & magnesium. Moringa is also one of the richest source of antioxidants. One of the best moringa benefits is its super immune-boosting powers.

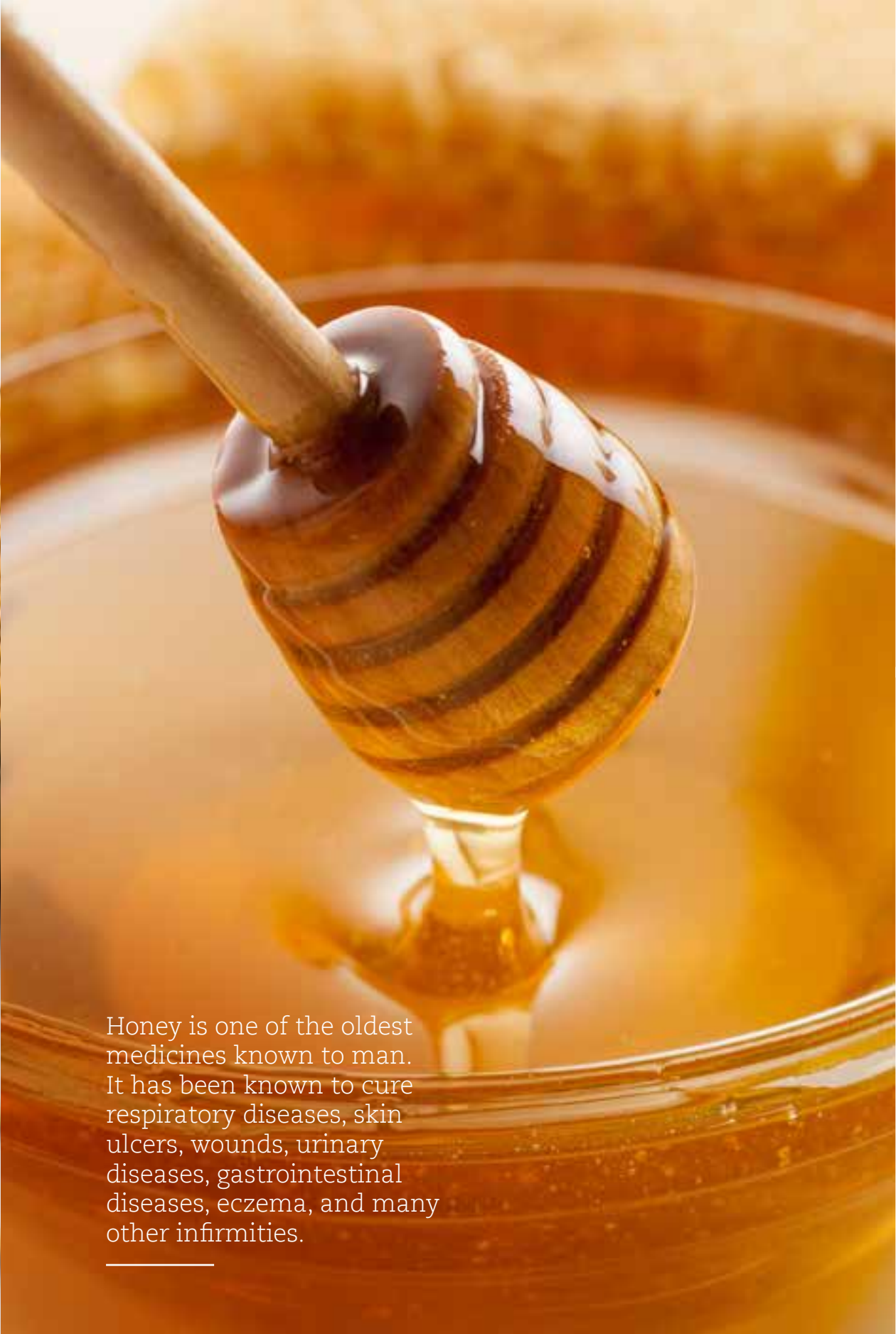
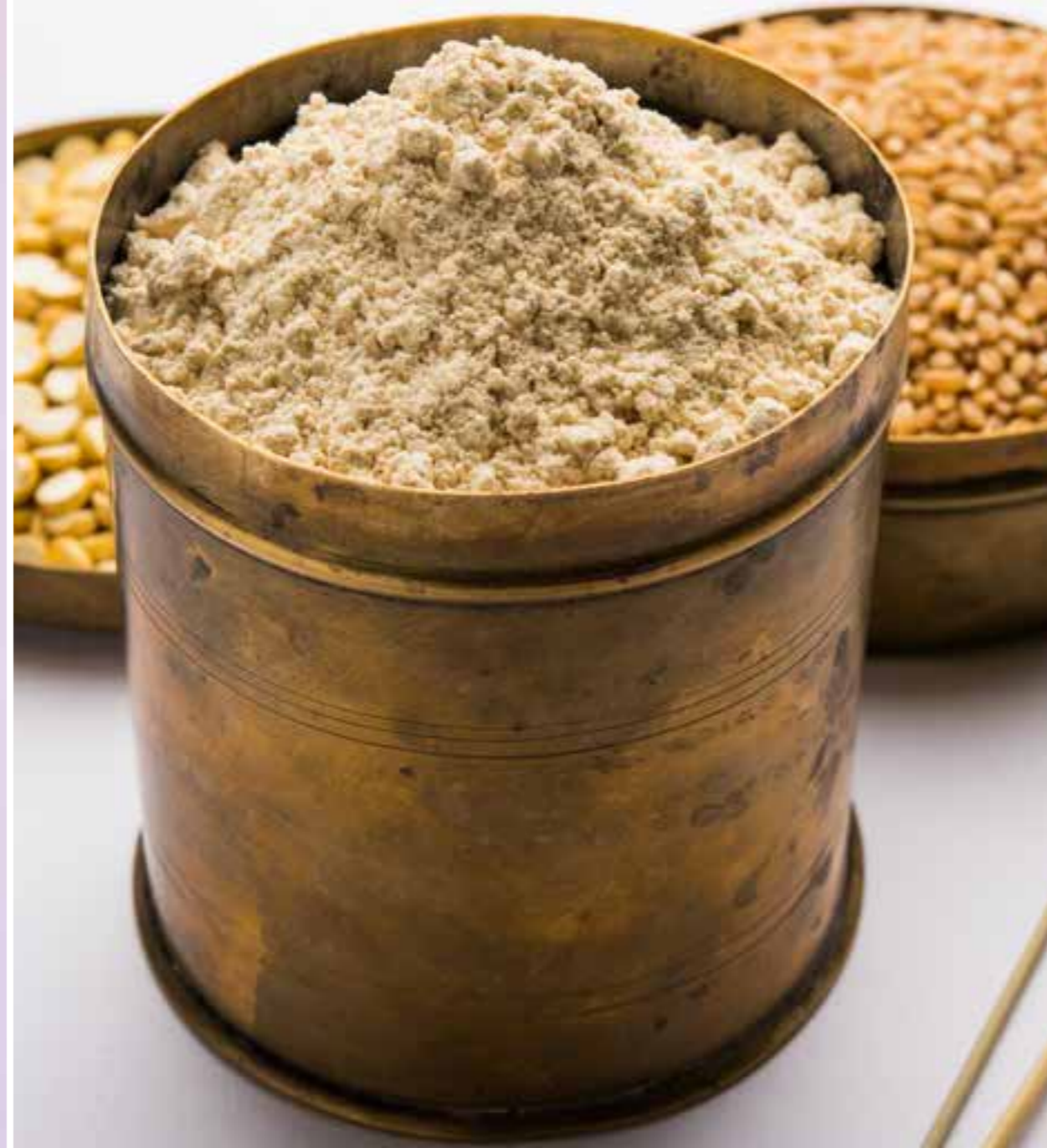


UNIQUE
OFFERINGS


INDIAN
SUPERFOODS

Foxnuts (Makhana) is popular in India as a fasting food. Its health benefits are superior to those of dry fruits as these are good source of protein, carbohydrates, fibre, magnesium, potassium, phosphorus, iron and zinc.

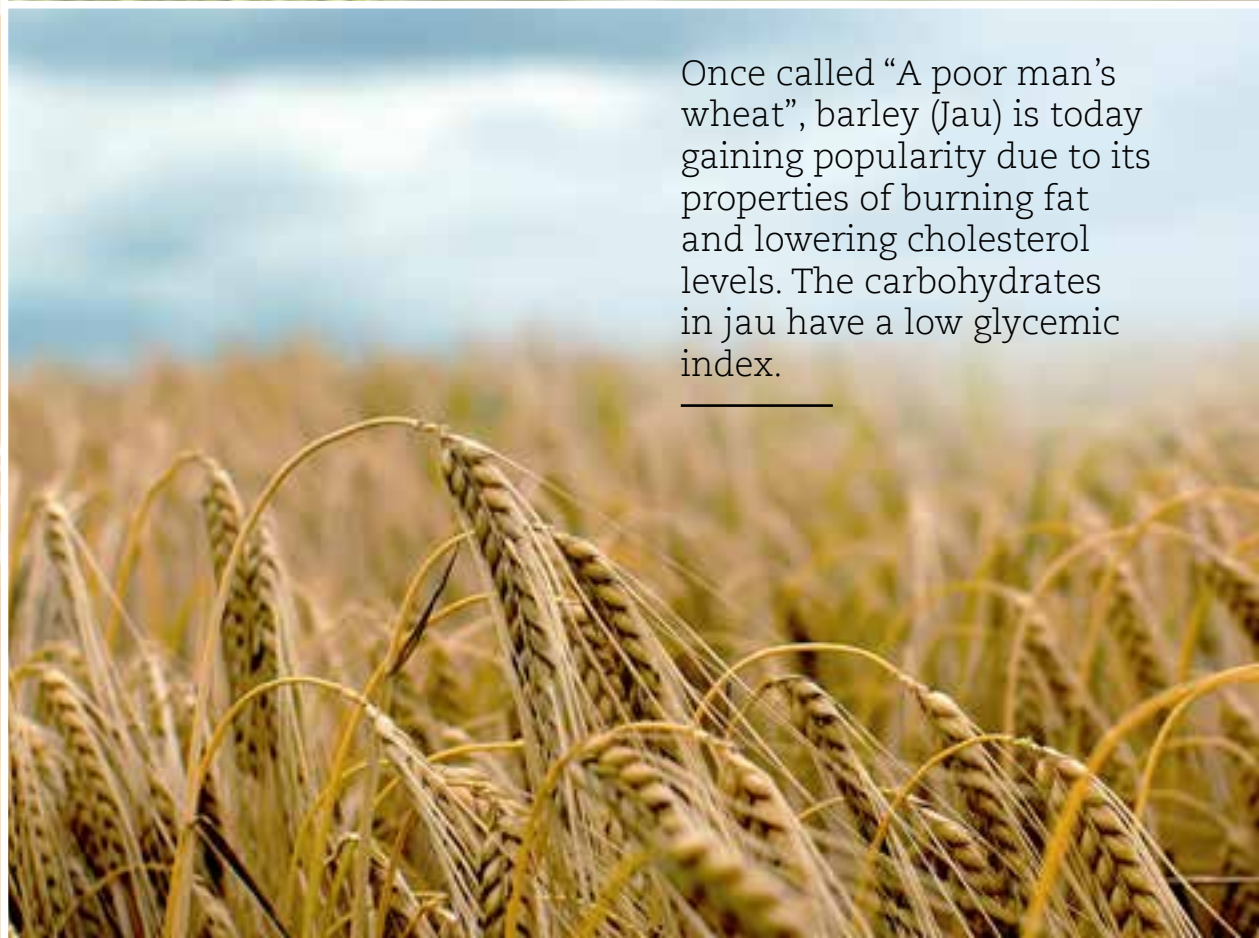
Sattu is One of the most indigenous protein sources of India. Sattu provides essential nutrients like folic acids, amino acids and minerals like iron, magnesium, and calcium. It is low on glycemic index, making it safe, and in fact beneficial for diabetics.



Honey is one of the oldest medicines known to man. It has been known to cure respiratory diseases, skin ulcers, wounds, urinary diseases, gastrointestinal diseases, eczema, and many other infirmities.



Ragi (finger millet) is high in protein and minerals and is also a very rich source of iron, calcium and potassium. Low in fat and gluten free, ragi is easy to digest. It is for that reason, given as first food to babies.



Once called "A poor man's wheat", barley (Jau) is today gaining popularity due to its properties of burning fat and lowering cholesterol levels. The carbohydrates in jau have a low glycemic index.



UNIQUE OFFERINGS

ORGANIC FOOD



India produced around 1.2 million MT of certified organic products which includes Sugarcane, Oilseeds, Cereals & Millets, Cotton, Pulses, Medicinal Plants, Tea, Spices, etc.



Indian traditional farming is Organic in nature. The total area under organic cultivation in India including wild area is close to 5.7 million hectares of which, the certified farm area is 26% or 1.5 Mn ha while 74% or 4.2 Mn ha is wild collection area.



India has around 0.5 Mn farmers- the largest in the world who practice Organic Farming



India is amongst the top 10 countries in terms of land area under organic agriculture.

India exported around 3 lakh MT of Organic products worth USD 370 Mn in 2016-17.



UNIQUE
OFFERINGS

ORGANIC
FOOD

In 2016 the state of **Sikkim** was declared as the first **fully organic state**. Around 75,000 hectares of agricultural land has gradually been converted to certified organic land by implementing practices and principles as per guidelines laid down in National Programme for Organic Production.

KEY PRODUCTS OF SIKKIM



The state government is also promoting organic tourism where tourists can pluck, cook and relish fresh organic food from the kitchen gardens of the resorts/homestays.



NAGA MIRCHA



RATLAMI SEV



ASSAM KRABI ANGLONG GINGER



UTTARAKHAND TEJPAT



SIKKIM LARGE CARDAMOM



TRIPURA QUEEN PINEAPPLE



GIR KESAR MANGO



DARJEELING TEA



KANGRA TEA



BIKANERI BHUJIA



GUNTUR SANNAM CHILLI



EATHOMOZHY TALL COCONUT



NAGPUR ORANGE



MALABAR PEPPER



MIZO CHILLI



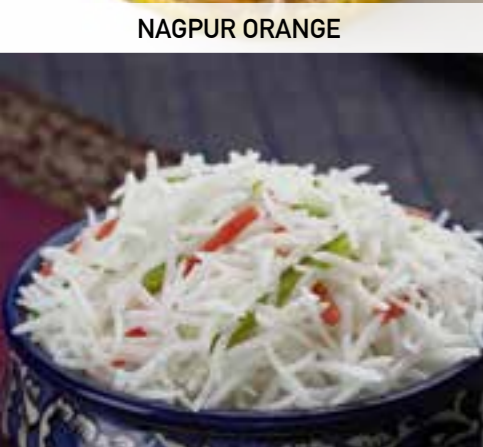
COORG GREEN CARDAMOM



MANGO MALIHABADI DUSSEHERI



HYDERABAD HALEEM



BASMATI



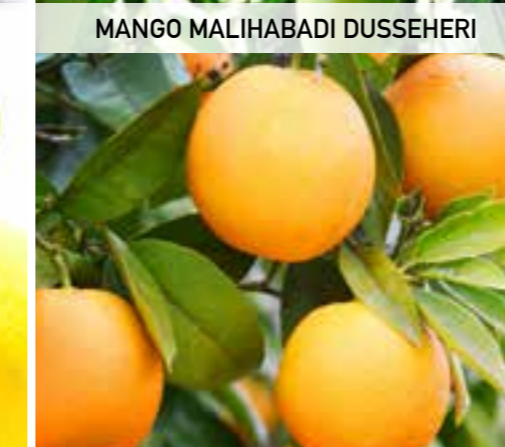
KHASI MANDARIN



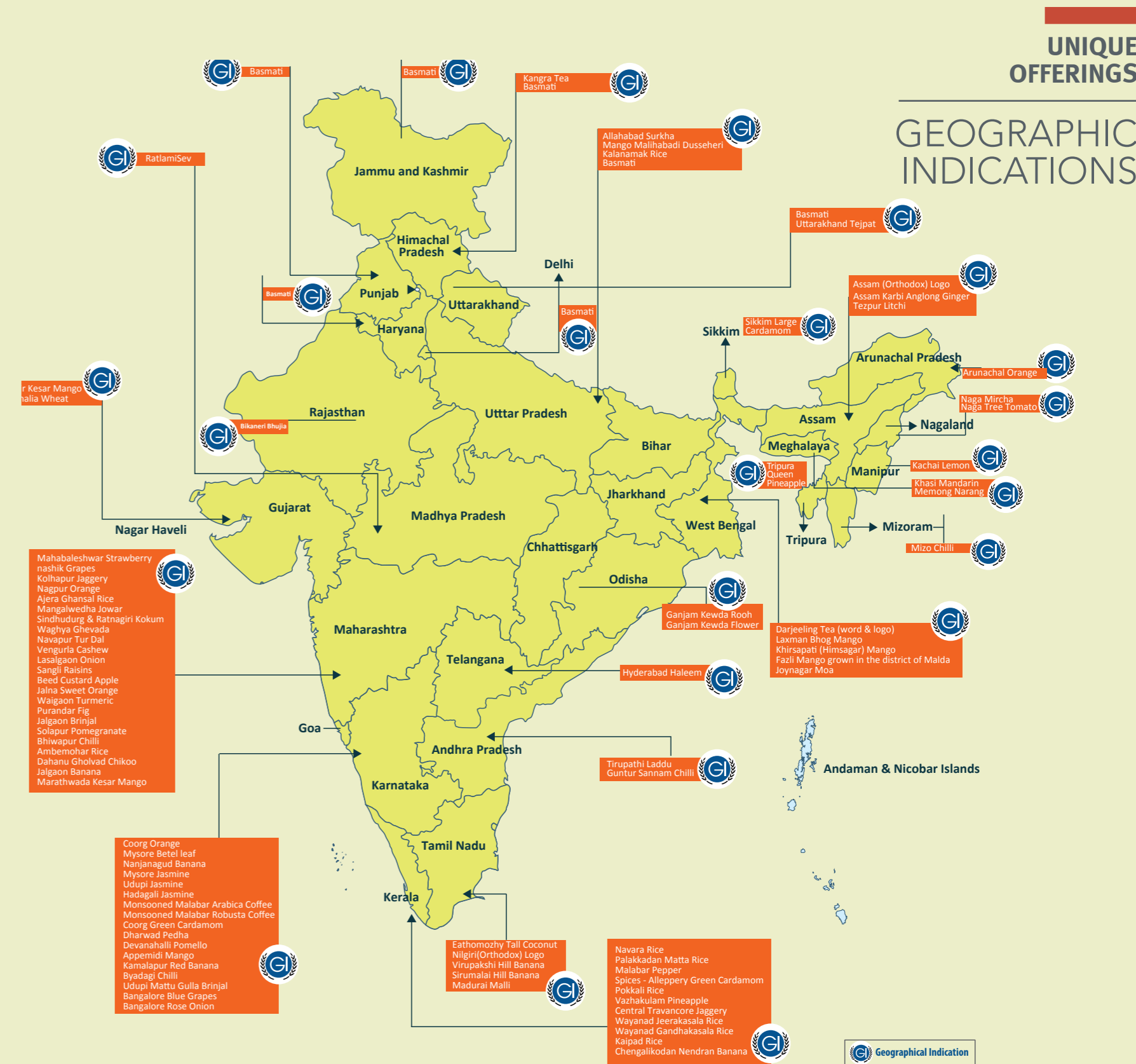
GANJAM KEWDA FLOWER



KACHAI LEMON



ARUNACHAL ORANGE



UNIQUE
OFFERINGS

MEGA
FOOD
PARK

INDIA FOOD PARK, TUMKUR



The Scheme of Mega Food Park aims at providing a mechanism to link agricultural production to the market by bringing together farmers, processors and retailers so as to ensure maximum value addition, minimum wastage, increased farmers' income and employment opportunities particularly in rural sector.

INDIA FOOD PARK, TUMKUR



PATANJALI FOOD AND HERBAL PARK, HARIDWAR



Mega Food Park typically consist of supply chain infrastructure including collection centers, primary processing centers, central processing centers, cold chain and around 30-35 fully developed plots for entrepreneurs to set up food processing units.

UNIQUE OFFERINGS

COLD CHAIN

Cold chains assisted by MoFPI



Under the Pradhan Mantri Kisan SAMPADA Yojana, one of the key schemes of The Ministry of Food Processing industries is the Scheme for Cold Chain, Value Addition and Preservation Infrastructure which aims at providing an integrated cold chain and preservation infrastructure facilities, without any break, from the farm gate to the consumer.

Under the scheme the ministry has already sanctioned grant to 228 cold storages across the length and breadth of the country covering all the key perishable segments.





INDIA: THE FOOD FACTORY OF THE WORLD

COME BE A PART OF THE GROWTH STORY

About MoFPI

The Ministry of Food Processing Industries is concerned with formulation and implementation of the policies & plans for the food processing industries within the overall national priorities and objectives. A strong and dynamic food processing sector plays a vital role in reduction in the wastage of perishable agricultural produce, enhancing shelf life of food products, ensuring value addition to agricultural produce, diversification & commercialization of agriculture, generation of employment, enhancing income of farmers and creating surplus for the export of agro & processed foods. In the era of economic liberalization, all segments including; private, public and co-operative sectors have defined roles to play and the Ministry promotes their active participation. The Ministry of Food Processing Industries, the Nodal Ministry of the Government of India for the sector has a clear goal of attaining these objectives by facilitating and acting as a catalyst to attract quality investments from within India and abroad into this sector with the aim of making food processing a national initiative.

About YES BANK

YES BANK, India's fifth largest private sector Bank with a pan India presence across all 29 states and 7 Union Territories of India, headquartered in the Lower Parel Innovation District (LPID) of Mumbai, is the outcome of the professional & entrepreneurial commitment of its Founder Rana Kapoor and its Top Management team, to establish a high quality, customer centric, service driven, private Indian Bank catering to the future businesses of India. YES BANK has adopted international best practices, the highest standards of service quality and operational excellence, and offers comprehensive banking and financial solutions to all its valued customers. YES BANK has a knowledge driven approach to banking, and offers a superior customer experience for its retail, corporate and emerging corporate banking clients. YES BANK is steadily evolving as the Professionals' Bank of India with the long term mission of becoming "INDIA's FINEST QUALITY BIG BANK by 2020". As a part of its knowledge driven approach to banking, YES Global Institute, a new practicing think-tank is established as a division of YES BANK, focuses on India's inclusive and green socio-economic development and growth.

A specialized Food & Agribusiness Strategic Advisory & Research group (FASAR) at the Bank is actively involved in **project advisory, strategic advisory & policy advisory** services for corporates, small & medium enterprises, global multinationals, Central & State Governments and multilateral agencies in the food and agri sector. The sub sectors covered include dairy, agri inputs, food processing & food services, food parks, agri-infrastructure, logistics, agri supply chain and rural retail among others. YES BANK has advised many marquee global processed food companies for enabling their entry and diversification into the Indian food market.

About CII

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering industry, Government, and civil society, through advisory and consultative processes. CII engages closely with Government on policy issues and interfaces with thought leaders to enhance efficiency, competitiveness and business opportunities for industry through a wide portfolio of specialized services and strategic global linkages. Extending its agenda beyond business, CII facilitates corporate initiatives for integrated and inclusive development across diverse domains.

As a developmental institution working towards India's overall growth with a special focus on India@75 in 2022, the CII theme for 2017-18, India@75: Inclusive. Ahead. Responsible emphasizes Industry's role in partnering Government to accelerate India's growth and development. Founded in 1895, India's premier business association has over 8500 members, from the private as well as public sectors, and an indirect membership of over 200,000 enterprises from around 250 national and regional sectoral industry bodies. With 67 offices in India and 11 overseas offices, CII serves as a reference point for Indian industry and the international business community.

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