

# Indian Food Processing Sector Overview & Opportunities

May 2025



# Maximising the India Opportunity

Fastest-growing major economy



Foreign Direct  
Investment  
**USD 1 Trillion**



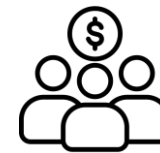
Last 10 years  
**~68%**



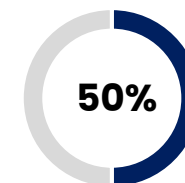
**1.4 Billion**

**65%**  
under **35 years** of age

**Largest** youth population



**Consumer Spending**  
**~ USD 4 Trillion**  
by 2035

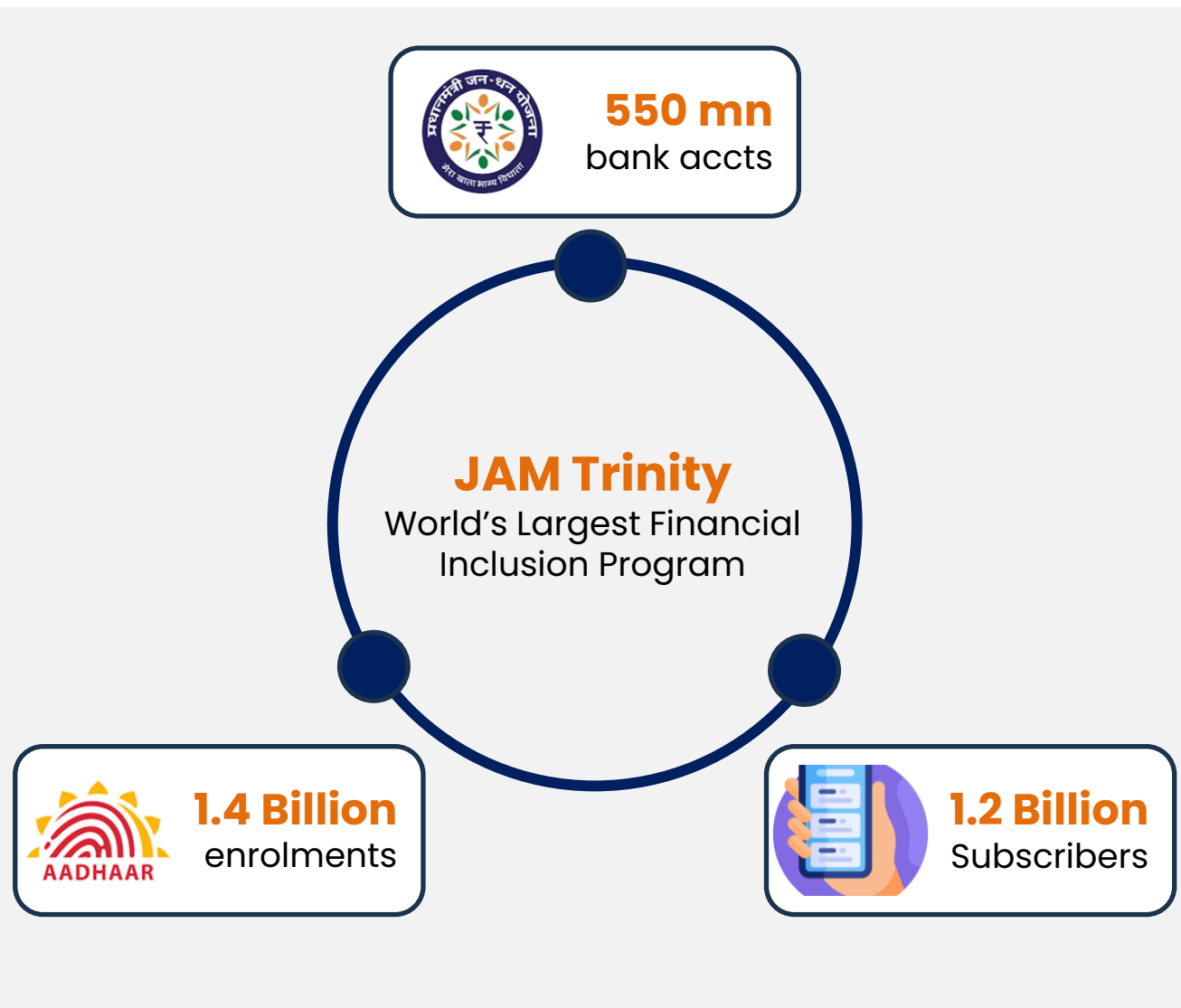


to be  
contributed by  
**Gen Z**



Annual Salary Growth  
**9.1%**  
(2019 – 24)  
Y-o-Y increase

# Maximising the India Opportunity



## Start – Up Ecosystem

- 3<sup>rd</sup> largest ecosystem
- > 1 Lakh recognized startups

## Goods & Services Tax

- One Nation – One Tax
- subsumed 17 large taxes and 13 cesses

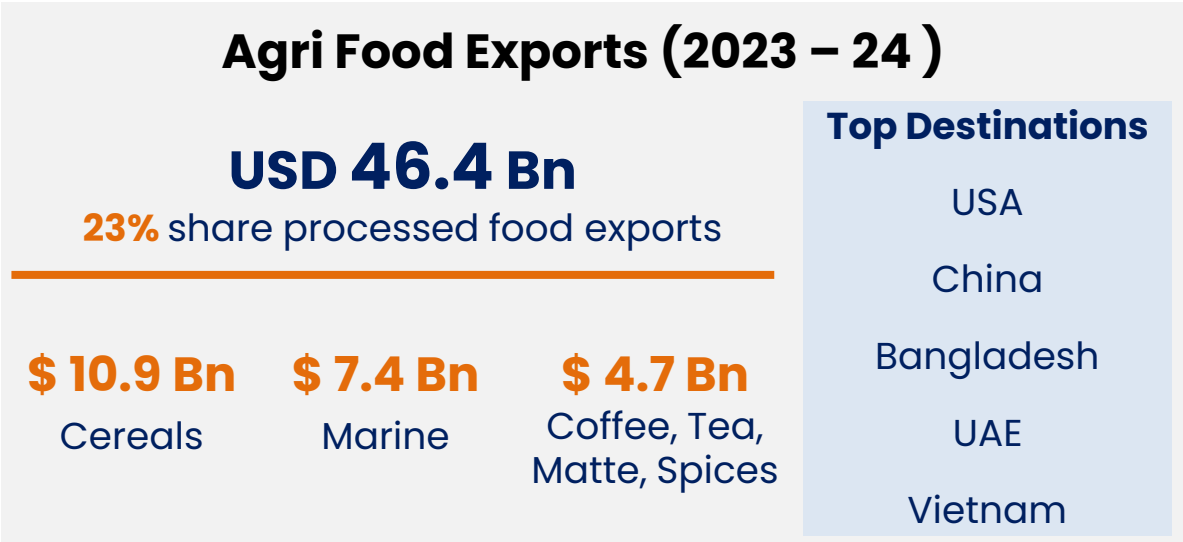
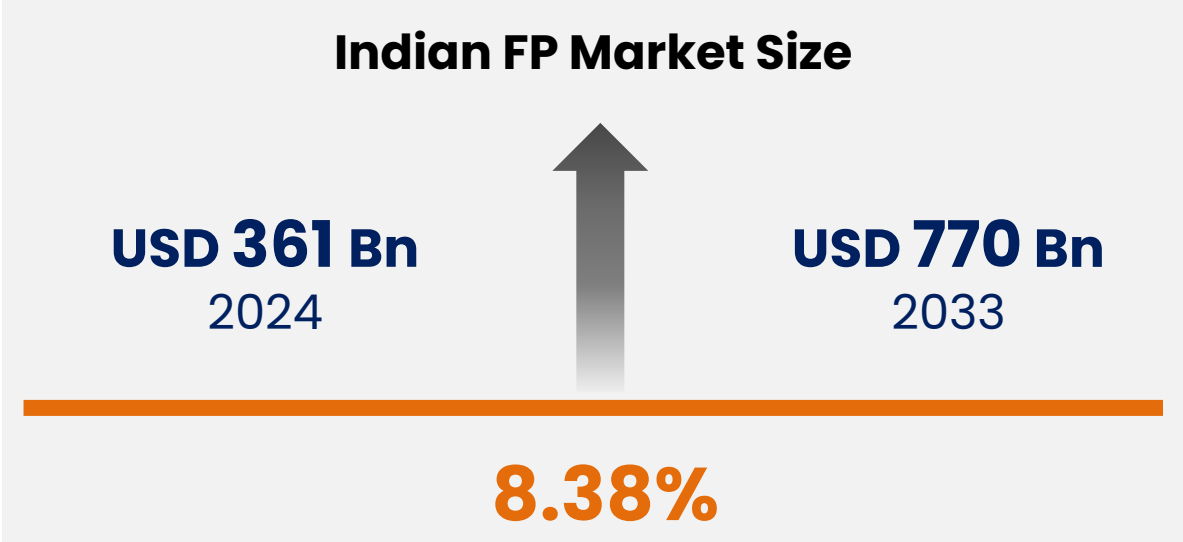
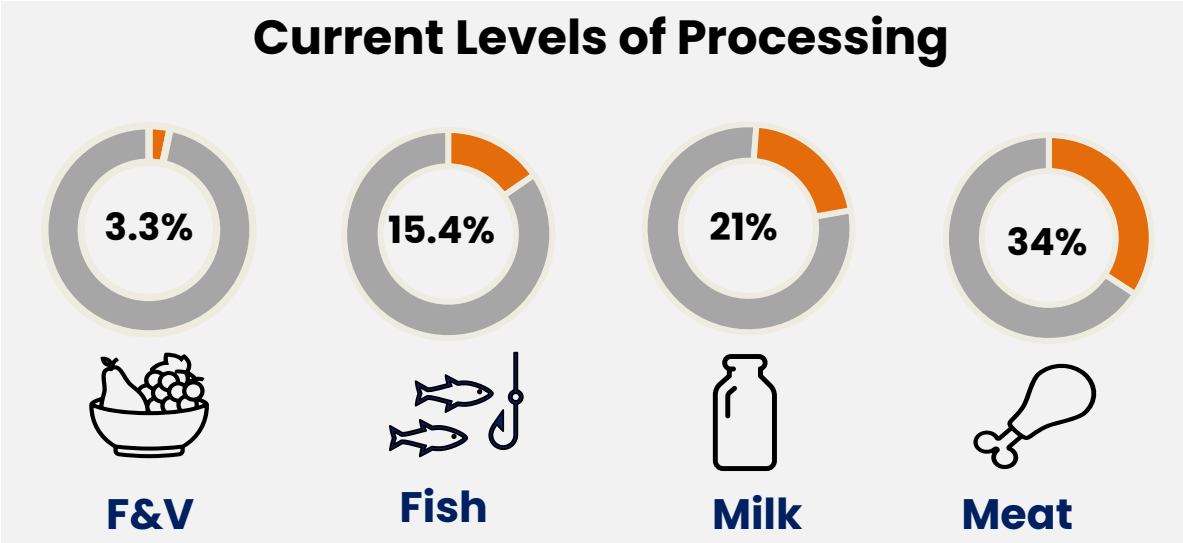
## PM Gati Shakti

- National Master Plan for Multi-modal Connectivity
- Integrated Infra development to make businesses more competitive

# Indian Food Processing Sector Overview



# India's Food Processing Sector Overview



# Infrastructure

## 325 Designated Food Parks

### MoFPI assisted infrastructure



**41** Mega Food Parks; **>4 MMT** total capacity; 24 Operational



**394** Cold Chain Projects with **>35 MMT** Cold Chain Infrastructure



**71** Agro – Processing Clusters **>2 MMT** total capacity 23 Operational



**209** Food Safety and Quality Assurance Infrastructure

### MoFPI approved designated Food Parks

#### Jammu & Kashmir

1 MFP; 1 APC

#### Himachal Pradesh

1 MFP; 1 APC

#### Punjab

3 MFP; 3 APC

#### Haryana

2 MFP; 2 APC

#### Uttarakhand

2 MFP

#### Gujarat

2 MFP; 4 APC

#### Telangana

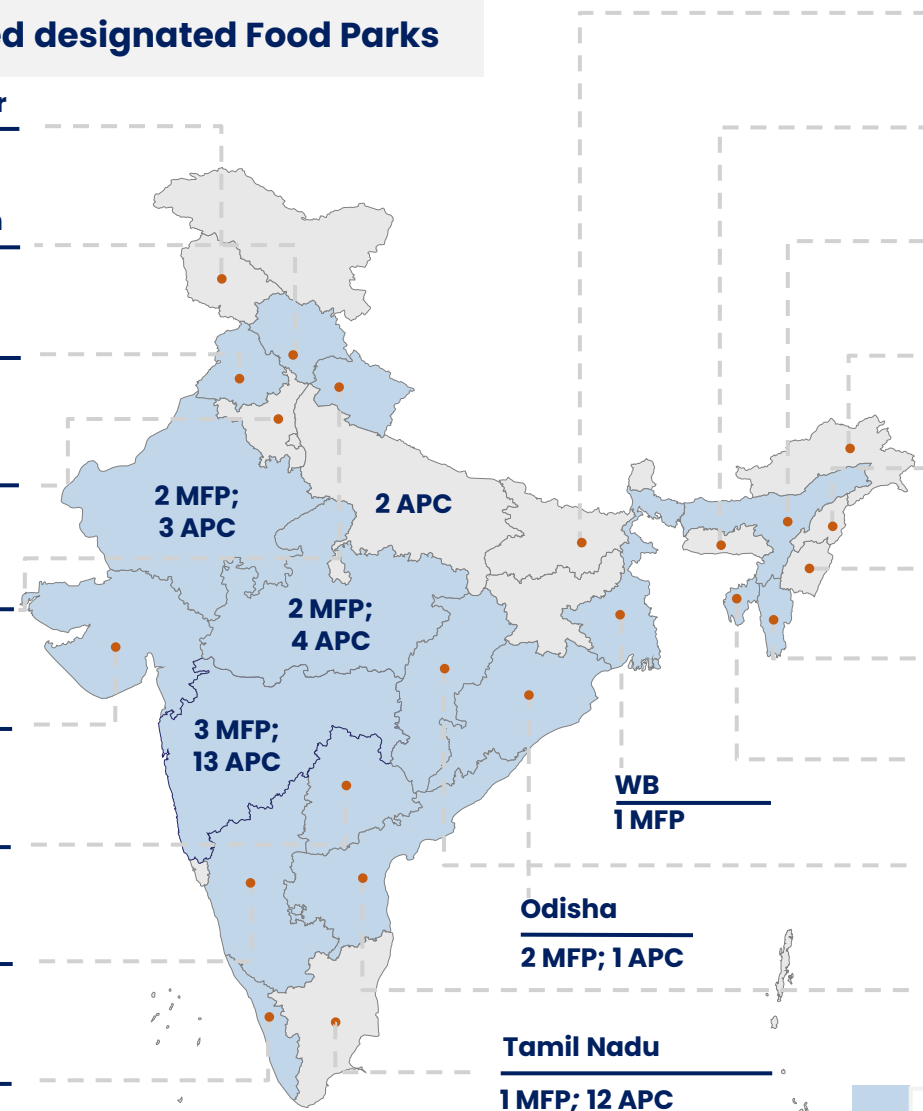
2 MFP; 5 APC

#### Karnataka

2 MFP; 3 APC

#### Kerala

2 MFP; 2 APC



#### Bihar

2 MFP; 1 APC

#### Meghalaya

1 MFP

#### Assam

1 MFP; 7 APC

#### Arunachal Pradesh

1 MFP; 1 APC

#### Nagaland

1 MFP

#### Manipur

1 MFP

#### Mizoram

1 MFP

#### Tripura

1 MFP

#### Chhattisgarh

1 MFP; 1 APC

#### Andhra Pradesh

3 MFP; 6 APC

Operational Food Parks

# Fruits & Vegetables Sub-Sector

**112 MMT**

Fruits production in 2023-24

**207 MMT**

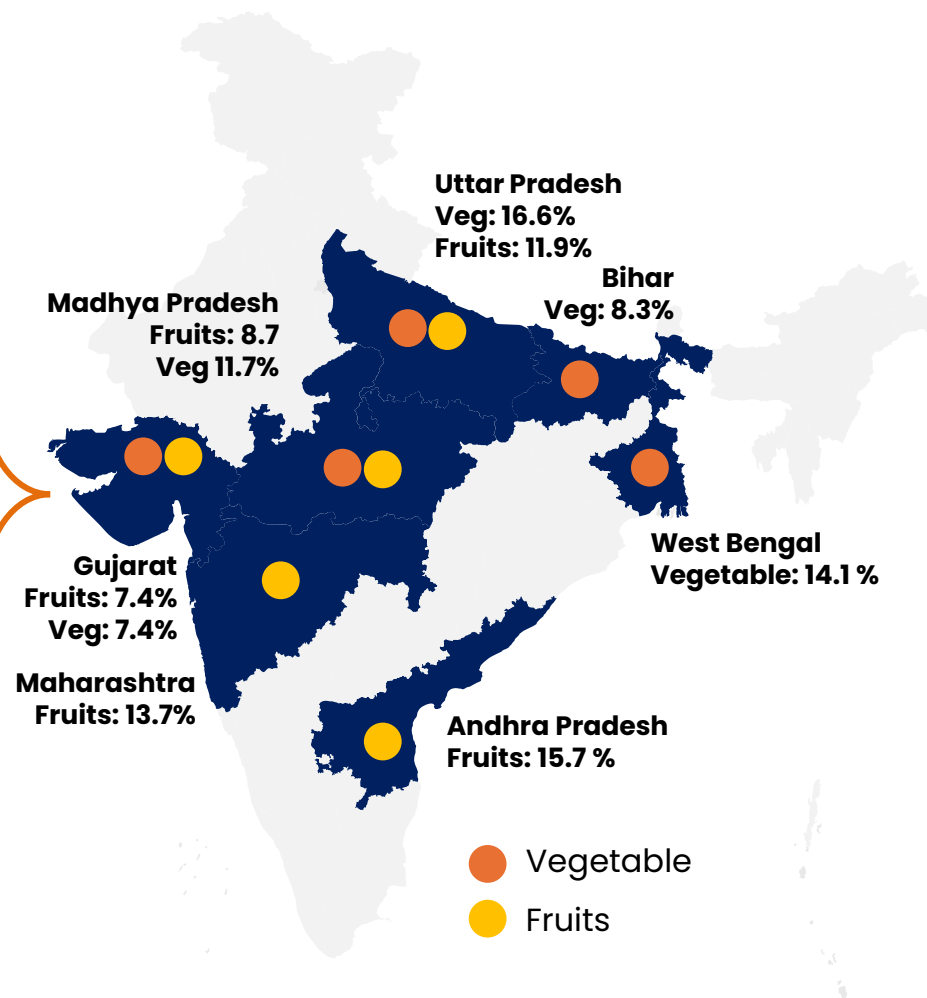
Vegetables production in 2023-24

**USD 1.8 Bn**

Fresh F&V Exports

**USD 1.5 Bn**

Processed F&V Exports



## Opportunities

- ❖ **Post harvest management:** Growing demand for **frozen and processed** fruits and vegetables including **ready-to-cook, ready-to-eat, functional food** such as plant-based products;
- ❖ **Reducing waste:** Expanding **cold chain infrastructure** and multi-commodity cold storage to minimize wastage.
- ❖ **Packaging technology** for convenience foods

**Production & Exports Powerhouse**

# Dairy Sub – Sector

**239.3 MMT**

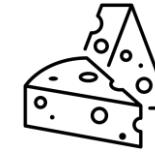
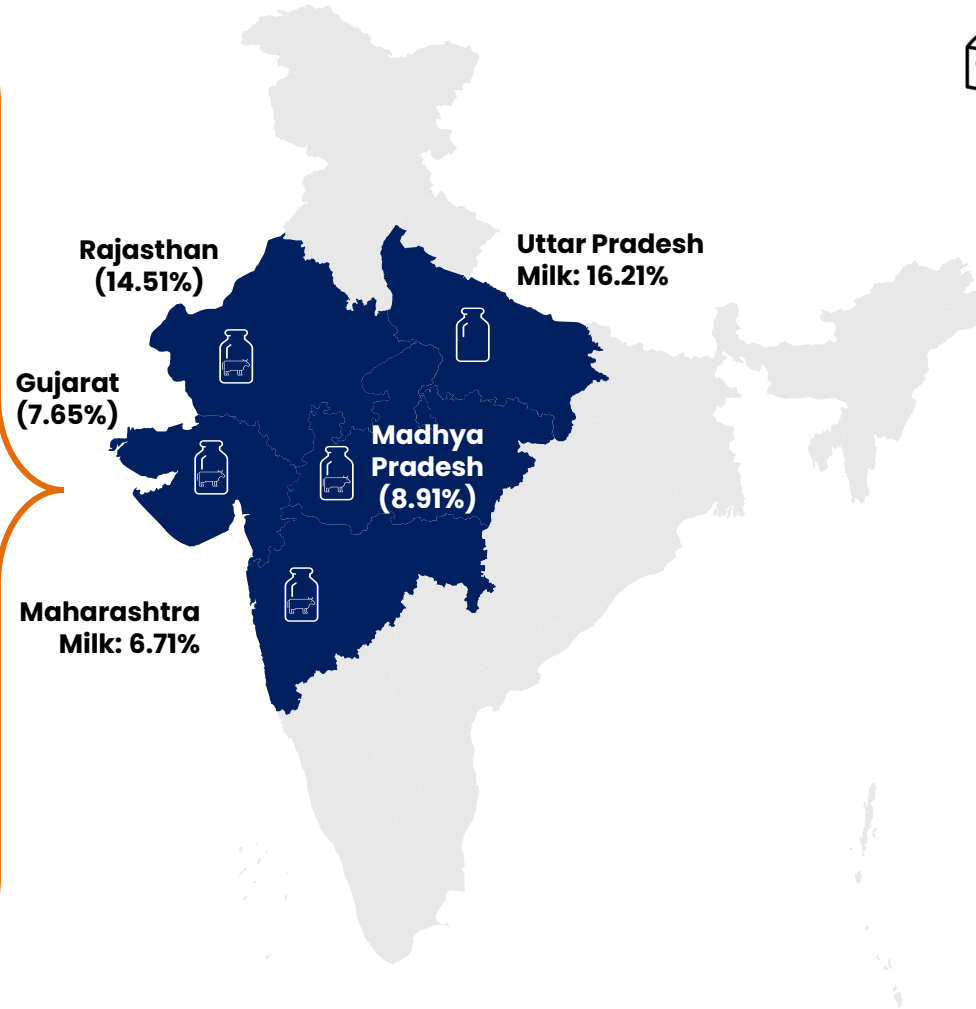
Milk Production (2023 – 24)

**~23%**

World's milk production

**USD 272.9 Mn**

Dairy products exports (2023 – 24)



## India's Cheese Market

Poised for **5X** growth by 2032 to **USD 6.9 bn**, CAGR **19.8%**



## India's Clarified Butter Market

Projected to reach **USD 86.2 bn** by **2032** from **USD 41.8 bn** in 2024 with **CAGR 8.4%**



## India's Ice Cream Market

Projected to reach **USD 13 bn** by 2032 from **USD 3.2 bn** in 2024 with **CAGR 16.7%**

## Opportunities

- ❖ **Processing & value addition**  
Automated processing units for value added dairy products including cheese, yogurt, dairy-based functional foods
- ❖ Integrated cold chain infrastructure

**Production & Exports Powerhouse**



# Poultry & Meat Sub – Sector

**142.7 Bn**

Nos of eggs in 2023 – 24

**10.25 MMT**

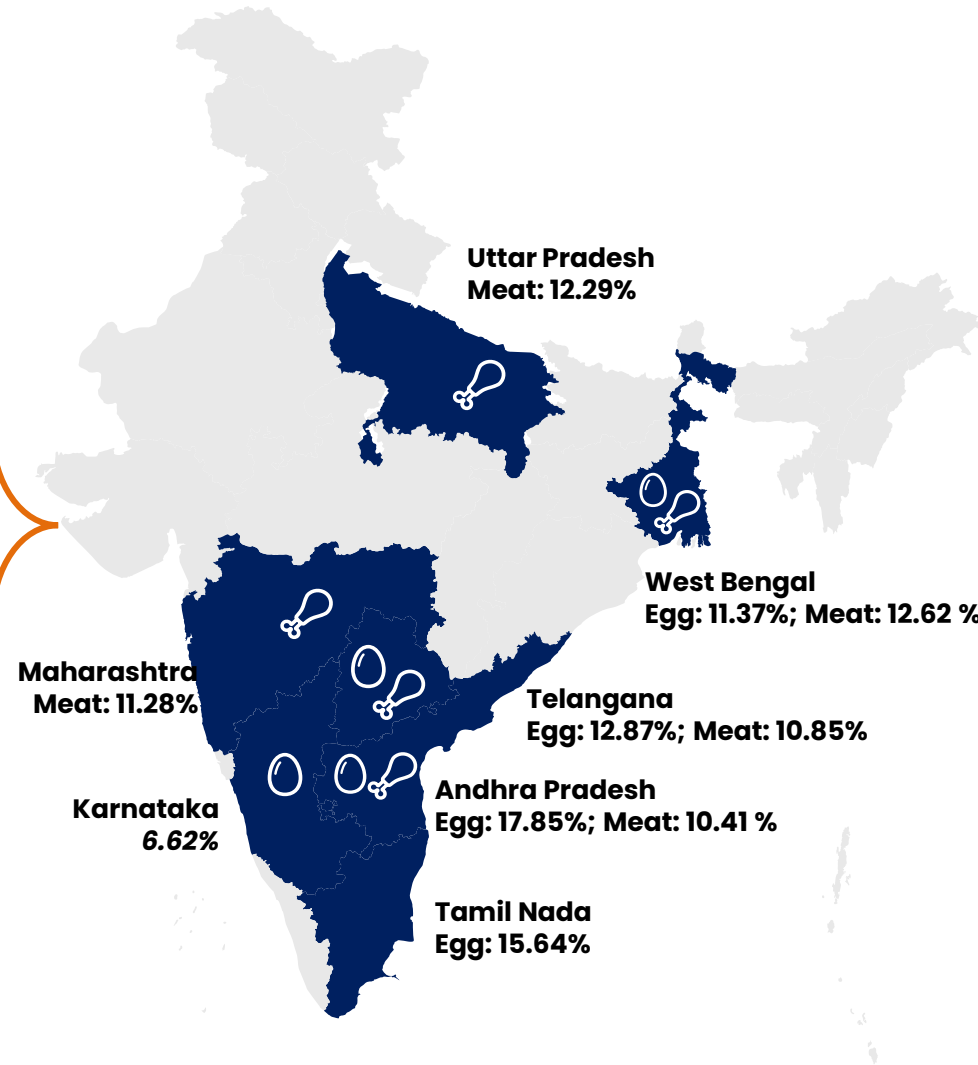
Total meat production (2023–24)

**USD 3.8 Bn**

Meat & edible meat offal exports  
2023–24

**61.3%**

Increase in per capita availability  
egg from FY 2015–23



## Opportunities

- ❖ Value added products like frozen/chilled products, RTC/RTE, Indian ethnic products/snacks
- ❖ Egg powder plants, New feed formulations and manufacturing
- ❖ Establishment of modern abattoirs/slaughterhouse
- ❖ Integrated cold chain infrastructure
- ❖ Establishing pet food manufacturing units

**Production & Exports Powerhouse**

# Fisheries & Aquaculture Sub – Sector

**1<sup>st</sup>**

Inland capture fisheries

**2<sup>nd</sup>**

Largest aquaculture producer

**17.54 MMT**

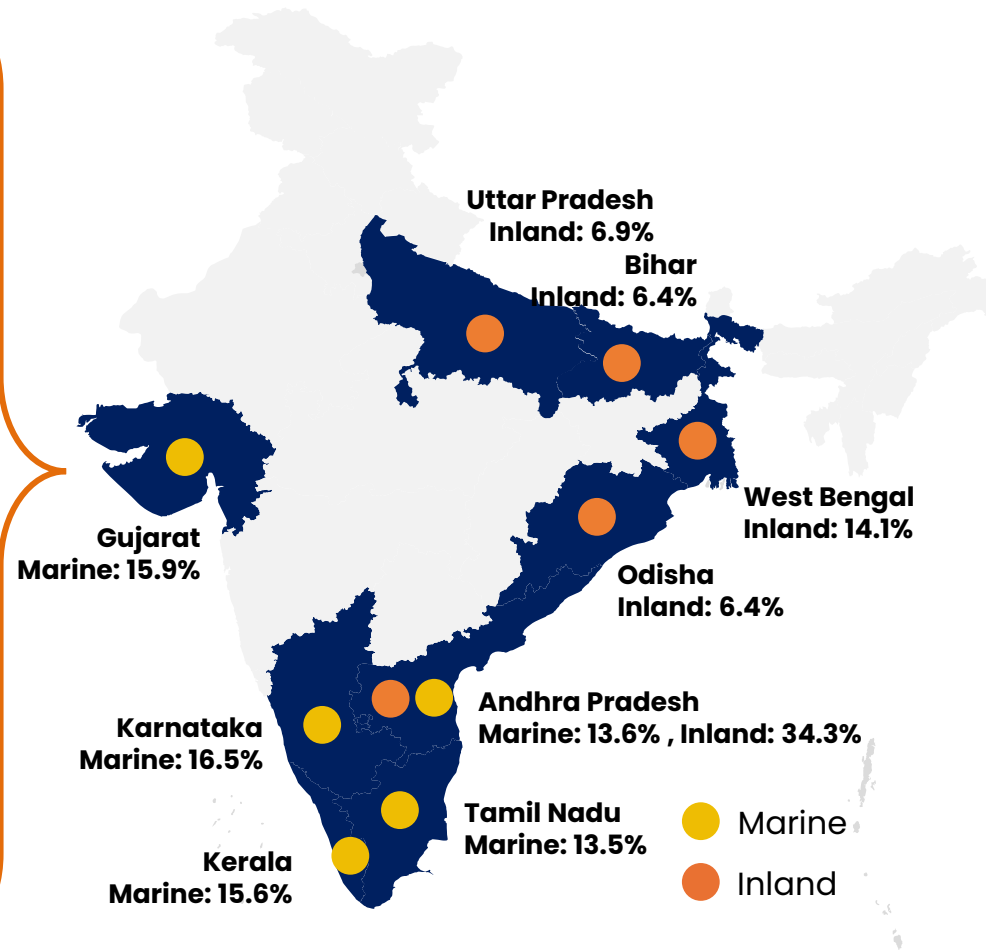
India's fish production (2023-24)

**USD 7.38 Bn**

Seafood exports in 2023-24

**26.5 MMT**

Expected fish consumption by  
2047-48

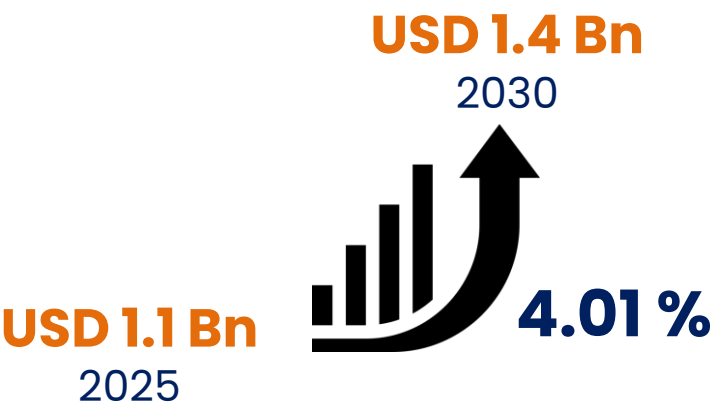


## Opportunities

- ❖ Establishment of **integrated seafood processing** and value addition (RTE/RTC) units including fish (tuna, trout etc.), shrimps, seaweed etc. with a focus on circular economy.
- ❖ Establishment of integrated cold chain and post harvest infrastructure near production zones

**Production & Exports Powerhouse**

# Indian Food Processing Machinery Market Overview

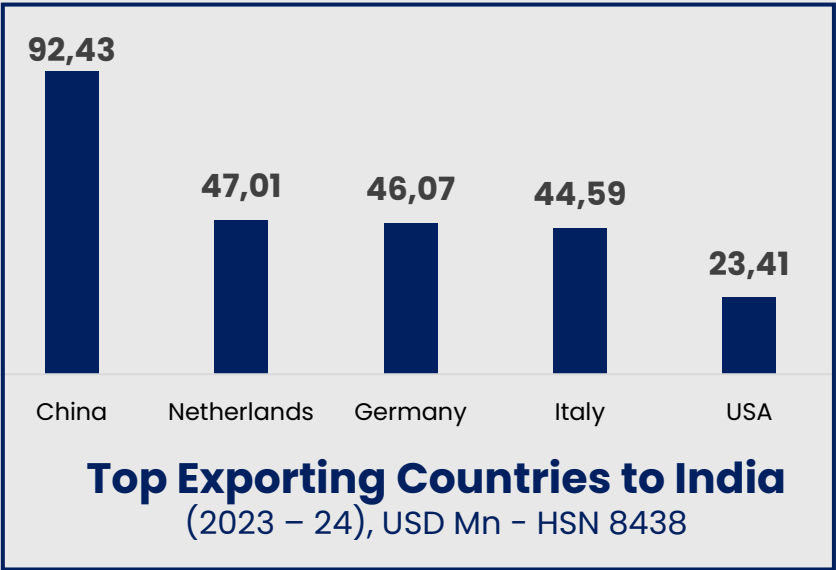


## Indian FP Equipment Market

- ❖ Growing demand for packaged and processed foods
- ❖ High growth in key subsectors such as bakery, confectionery, meat, and processed fruits & vegetables
- ❖ Expansion of organized retail and e-commerce fueling need for advanced food processing equipment.

## Demand Drivers

## USD 2.7 Bn Total Machinery Imports



USD 388 Mn  
HSN 8438

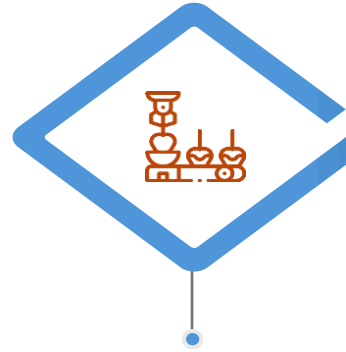
## Top Imported Segments

Confectionery/Cocoa/  
Chocolate Machinery

Cleaning, Sorting,  
Grading Equipment

Labelling, Sealing,  
Aerating Machinery

# Government Incentives



## Ministry of Food Processing Industries

Pradhan Mantri Kisan Sampada Yojana (**PMKSY**)

Special Food Processing Fund



## Department of Animal Husbandry & Dairying

Animal Husbandry Infrastructure Development Fund (**AHIDF**)



## Department of Fisheries

Pradhan Mantri Matsya Sampada Yojana (**PMMSY**)

Fisheries Infrastructure Development Fund (**FIDF**)



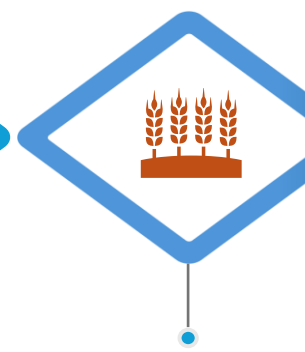
## Lower GST

Lower GST for food products: **71.7%** food products under various chapter are covered in lower tax slab of **0% & 5%**



## FDI regulations

**100%** Foreign Direct Investment (FDI) permitted



## Agriculture Infrastructure Fund

interest subvention of 3% per annum



## Cluster Development Program

# India – Italy: Focus on Food Processing

## Key areas of collaboration



**Technology transfer & innovation:** Leveraging Italian expertise in food processing and packaging machinery along with waste valorization



**Strategic Partnerships & Joint Ventures** to address the rising demand for processed and value-added food products in both domestic and international markets.



**Cold Chain & post harvest infrastructure:** Investments for establishing integrated cold chain and value addition infrastructure

## How we support

### Opportunity Assessment

- Market Research
- Incentive mapping, Policy advisory
- Business case development with sourcing insights

### Strategic Facilitation

- Relevant stakeholder connect – Ministries / Departments, supply chain stakeholders
- Regulatory clarification and approval navigation

### Project Finalization

- Location analysis: infra, logistics, site benchmarking
- Aftercare: issue resolution, expansion planning, state connects



**India's Largest Event**  
**for**  
**the Food Processing**  
**&**  
**Allied Sectors**

# About World Food India

To capitalize on the growing interest in the sector, Ministry of Food Processing Industries is organizing the 4<sup>th</sup> edition of World Food India in 2025



## 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 **RTC/RTE, organic produce, indigenous processed food** etc.



## Boost

**Investment interests** from both domestic & foreign investors

# Key Elements: World Food India 2025

Exhibition  
and  
showcasing  
opportunity

Startup Grand  
Challenge

B2B/ B2G/ G2G  
meetings

Food Street



Conferences  
and  
Thematic, State &  
Country sessions

Industry roundtable  
with  
policy makers

Buyer Seller Meet





## Highlights of World Food India 2024

4-day mega food event – was inaugurated by **Hon'ble Minister of Consumer Affairs, Food and Public Distribution & New and Renewable Energy; Hon'ble Minister of Food Processing Industries & Hon'ble Minister of State of Food Processing Industries and Railways**

# Key Highlights: World Food India 2024



# WFI 2024 – International Participation



- ✓ **Partner country: Japan & Focus country: Iran, Vietnam**
- ✓ **20 Exhibiting Countries in WFI 2024**



- ✓ **Official governmental delegations from 10 countries**
- ✓ **Japan, USA, Australia, Saudi Arabia, Sri Lanka, Burkina Faso, Mozambique, Guinea, Kuwait, Lesotho,**



- ✓ **3<sup>rd</sup> India Japan JWG on Agriculture and Food Processing**



- ✓ **809 International Buyers from 109 countries**
- ✓ **BSM: 18,000+**





# WFI 2024 – CEO Roundtable

- **High-level industry** roundtable **co-chaired** by Hon'ble Union Minister, Ministry of Commerce and Industry and Hon'ble Union Minister, MoFPI
- Participation of **Hon'ble Minister of Industries & Commerce, Andhra Pradesh** & **Hon'ble Minister of Agriculture, Gujarat**
- **11 Senior Officials** from line ministries and departments
- **100+** Global & Domestic CXOs



# WFI 2024 - Industry Partners

## Platinum

## Diamond

## Gold



Good food, Good life



Hindustan Unilever Limited



Enduring Value



## Silver

## Networking Dinner

## Visitor Bag

## Lanyard

## Banking



For a healthy growing nation



## Badge

## Hydration

## Registration Desk

## Appliance Partner

## E-Retail



# Thank You

For Queries

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