

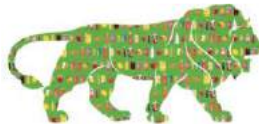
# World Food India 2017

3-5 Nov 2017 | Vigyan Bhawan, New Delhi

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## Meeting with Ambassadors and High Commissioners

27<sup>th</sup> February 2017 | New Delhi



# World Food India 2017

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## **Mega International Event**

bringing Global & Indian Leaders across the food value chain on one platform.



## **Showcasing investment opportunities**

in India's food processing sector.



## **India immersion**

to familiarize global industry with India's policy environment.



## **Establishing India as a valued partner**

in the global food ecosystem.

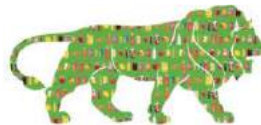


## **Linking the Indian agri-economy**

to global value chains



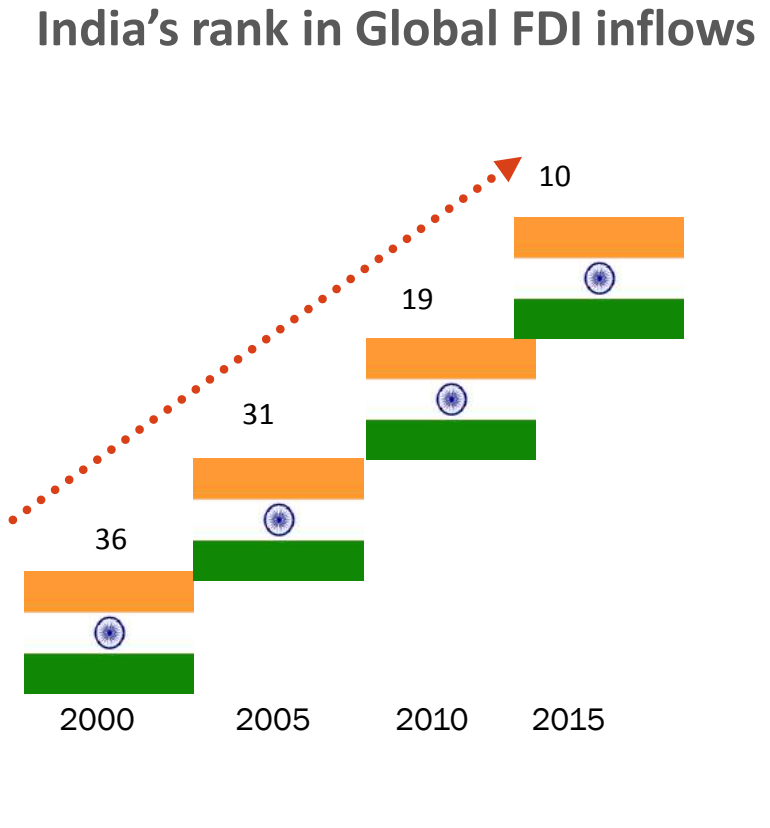
# Advantage India



# India emerges as top FDI destination

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## India's rank in Global FDI inflows



FDI inflows of USD 40 billion in 2015-16

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3<sup>rd</sup> largest economy in terms of Purchasing Power Parity

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Up by 12 Ranks in World Banks Ease of Doing Business report

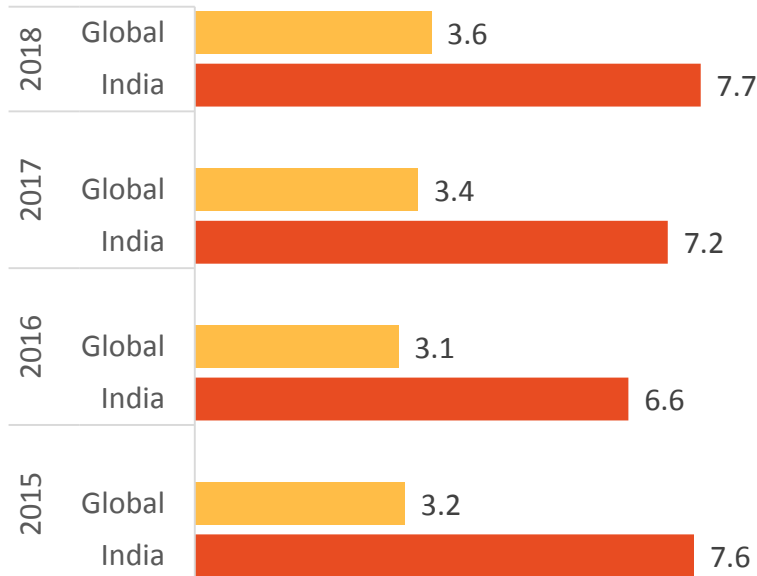
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*Source: World Investment Report 2016 by the United Nations Conference for Trade and Development (UNCTAD)*



# One of the fastest growing economies in the world

## GDP Growth Projections



1.3 billion population ~ 30% of which is middle class having growing disposable income

Middle class expected to grow by 50% approx. in next 5 years.

Expenditure level of food expected to double in next 6 years (from US \$ 386 billion to US \$772 billion )

Source: IMF's World Economic Outlook Update, July 2016



# There's never been a better time to MAKE IN INDIA

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Supportive government: creating conducive environment



**MAKE IN INDIA**



**Ease of Doing Business**



**New Infrastructure**



**Open Economy**



**Regulatory Reforms**



**Fiscal Reforms**



# India Food Sector Advantage



# India offers the largest diversified production base

## Milk Production



- 1<sup>st</sup> in milk production
- 155.5 MT production in 2015-16
- Expected to grow by 13-15% CAGR in the coming years
- Offers huge opportunity for technology, automation, integration etc

## Fruits & Vegetables



- 2<sup>nd</sup> largest global producer
- 254 MT production
- Processing levels currently ~ 2%

## Cereals & Grains



- 2<sup>nd</sup> in rice, wheat & prod. of other cereals
- Largest exporter of cereal product
- Offers huge opportunity for milling tech. up-gradation, automation, integration, fortification etc

## Marine



- 2<sup>nd</sup> in fish production
- Processing levels of marine products at ~23%
- offers huge opportunity cold chain, export, packaging innovations, product differentiation etc.

## Egg & Meat



- 3<sup>rd</sup> in egg and 5<sup>th</sup> in meat production
- Trends shifting towards processed, cleaned and frozen meat & poultry products



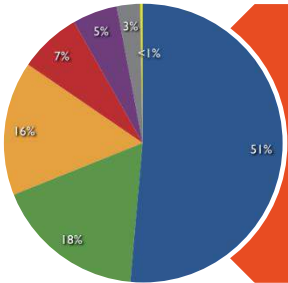
# Proactive Policy support

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## FDI

- 100% FDI through automatic route in food processing.
- 100% FDI in food retail for food products manufactured / produced in India



## Credit

- Food processing units can avail preferential rates under Priority Sector Lending
- Special fund of INR 2,000 crore (US \$ 300 million) with NABARD for designated food parks and processing units



## Regulatory Reforms

- Food Safety Standards harmonized with international standards



# Proactive Policy support

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## Fiscal Reforms

- GST implementation to harmonize the tax regime-seamless operations across states



## Infrastructure support



### Mega Food Parks

- 42 Mega food parks with an investment of US \$ 750 million
- Fully developed plots available for setting up units incl. plug & Play



### Cold Chain

- 135 Integrated Cold Chain projects with an investment of US \$ 500 Million



## Proactive State Investment Policies

- Attractive investment policies across states



# Fiscal Incentives

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## 100 % Income Tax Deductions

- on capital expenditure for cold chain / warehouse.
- on profit for new food processing, preservation and packaging units



## Service Tax exemptions

- on pre-conditioning, pre-cooling, ripening, waxing, retail packing, labeling of fruits & vegetables.
- construction, erection, commissioning or installation of post-harvest storage infrastructure/cold storages



## Excise duty reduced from

- 10% to 6% on machinery for food processing
- 12.5 % to 6% on Refrigerated Containers



## Basic Custom Duty reduced on Refrigerated Containers from 10% to 5%



## Concessional Customs Duty on imported equipment



# Sub sector opportunity

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## Processing & Value addition

- New product development – Fortified products, health food, traditional Indian food, convenience food
- New Packaging technology for enhanced shelf life, retaining taste and texture, easy to handle and space efficient



## Infrastructure development

- Mega Food Parks/Agro processing clusters
- Cold Chain facilities for frozen F&VP & ready to eat items
- Modern pack houses for fruits and vegetables



## Logistics

- Investments in cold storage, reefers, warehouse, equipment & machinery



# Sub sector opportunity

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## Technology & equipment

- New technology in processing, storage, logistics , packaging etc
- Energy efficient technologies
- Food testing labs



## Packaging material & machinery

- Supply of machinery for processing and other operations in the food chain
- Supply of safe and high quality packaging material as well as technology



## R&D and skill development

- Product innovation based on local food habits
- Skilling the work force in handling processing operations efficiently



# Food Retail – the next big opportunity

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## Growth story

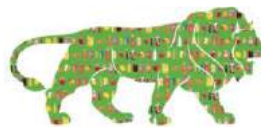


- Retail sector estimated at USD 600 billion
- Estimated to be growing at CAGR of 7.5% - USD 1.3 trillion by 2020
- Food retail estimated to constitute 60% share

## Opportunity



- Largely unorganized - around 92-95%
- Share of organized sector is expected to increase to 24% by 2020
- 15 million mom and pop stores in the country
- Online market is expected to reach 530 million shoppers by 2025
- E-commerce sales are expected to treble, reaching 120 billion by 2020
- Policy support – 100% FDI in food retail for foods manufactured/produced in India





# World Food India Mega International Event



# WORLD FOOD India 2017

## An opportunity to showcase, connect & Collaborate

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### SHOWCASE

- Vast resource base
- Growing food processing sector
- Progressive policies & processes

### CONNECT

- Global & domestic industry leaders
- Administrators/ policy makers
- Trade / Industry / Knowledge bodies/Farmer Organizations

### COLLABORATE

- To facilitate public & private engagement to the next level.
- To ensure grounding of investment intentions
- To strengthen Linkage between Industry & Farmers



# An opportunity for everyone

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## Growing Market

- Population of 1.32 billion. Increasing disposable income.
- Preference of youth for processed, branded and ready to eat food

## Sourcing opportunity

- Raw material (f&v, milk, meat etc) available in abundance
- Geographically strategic location and proximity to food importing nations

## Make in India

- Improved infrastructure availability in terms of mega food parks, cold chain network etc
- Slew of incentives to ease setting up of new business

## JV & Collaboration

- Opportunity for collaboration with Indian food companies
- Retail footprint in the country already expanding

## Changing face of retail

- Many neighborhood shops adopting department store / retail format
- Retail chains growing in India. Booming e-retail segment

## Technology & Equipments

- New & emerging technology in F&V processing, cold storage, refers, IQF, pack houses, packaging
- Food testing labs



# Key elements

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Conferences



B2B & B2G Meetings



Country sessions



Awards/Manthan  
Manch (Hackathon)



State sessions



Food Street



Parallel tracks

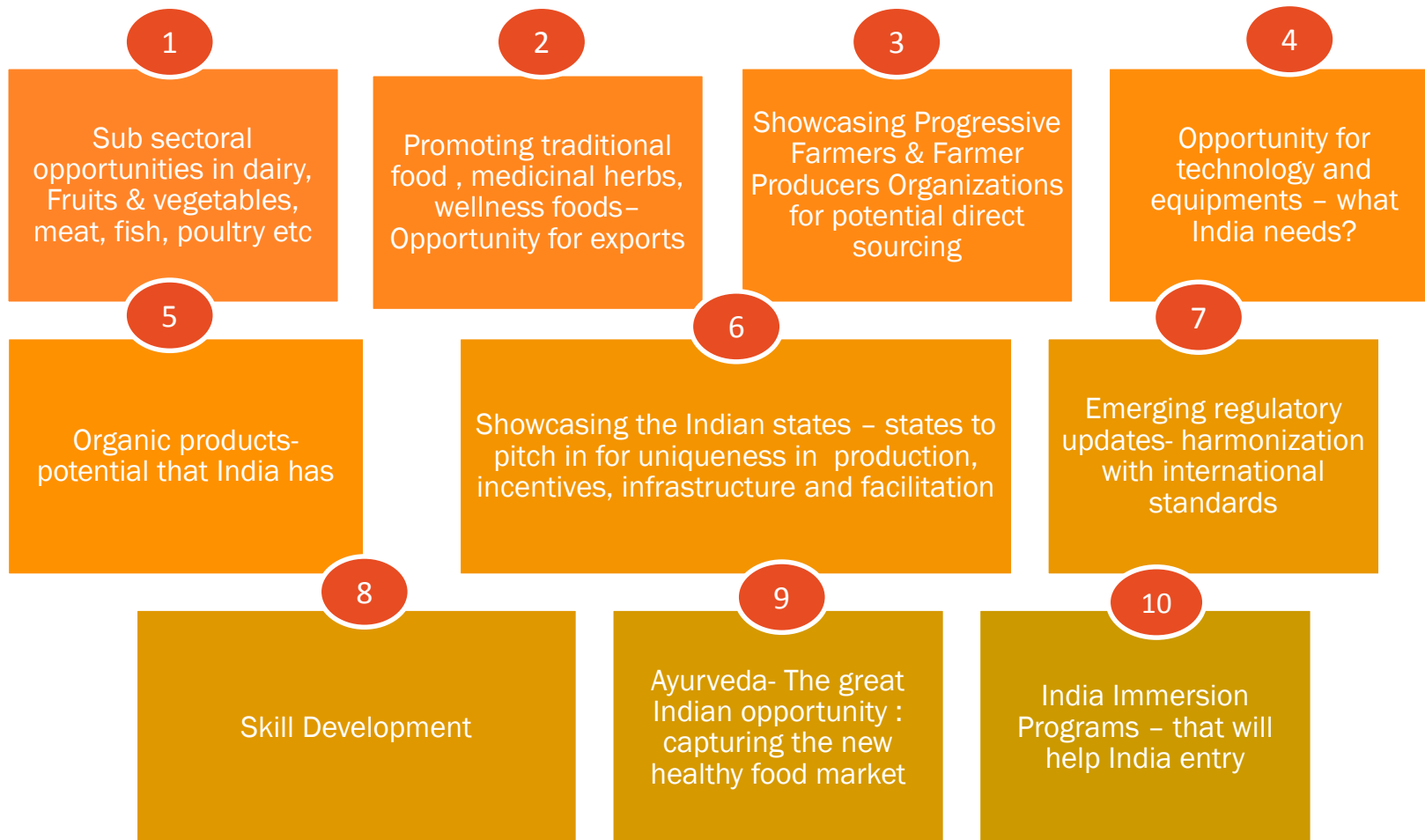


Exhibition



# Parallel Tracks

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# Schedule

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## Seminars and Business Sessions



(3<sup>rd</sup> Nov, 2017)

- Inauguration by Hon'ble Prime Minister of India
- Sectoral seminars
- B2B, G2B & G2G Meetings



(4<sup>th</sup> Nov, 2017)

- Sectoral seminars
- Country Sessions
- State Sessions
- B2B, B2G & G2G Meetings



(5<sup>th</sup> Nov, 2017)

- B2B, B2G & G2G Meetings
- Manthan Manch
- Closing Ceremony



# Food Street



Desserts of India



International Food



Foods of India



Wellness foods



International Food with an Indian Twist/Fusion



# Additional Softer Elements

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Gourmet food



Sessions with well known chefs from India  
(ingredients/ how to cook delicious Indian  
foods simply/ ingredients)



Wine & Cheese  
tasting sessions



Yoga & Food : The India  
connection of Food with wellness



Delhi Food walk



DEMOS – Cooking/  
Yoga



# Participant Profile

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- 1 International companies that propose to setup base in India
- 2 National & International retailers in food & grocery segment including in e- retail
- 3 Companies with investment / presence in India & plans for expansion
- 4 Companies that are supplying globally and have integration with the global value chain
- 5 Manufactures with an export focus
- 6 Companies that have invested in R & D in India
- 7 Sourcing and supply chain teams
- 8 Progressive farmers & FPOs



# Participant Profile

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9 Technology & equipment suppliers

10 Regulatory institutions eg FSSAI & international food regulators

11 Hotels & restaurants

12 Agri banks & financial institutions, PE firms

13 Global trade associations

14 Diplomats

15 Government - Central & State

16 Institutes





# Opportunity for partnership



# Proposed opportunity

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Understand the policy environment around food processing sector



Identify specific opportunities during the B2G & G2G meetings



Exposure to a shelf of specific projects for investment in processing and retail



Exposure to strengths of India in pre-identified food processing sub-sectors



Exposure to FPOs' / Progressive Farmers – potential suppliers



Exposure to opportunities in food retail in India



Exhibit in the country pavilion



# Invitation to Partner

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- 500 sq. mtr. exhibition space
- Country Seminar / Conference to highlight opportunities offered
- Invitation to government body & officials
- Inclusion of country food processing sector profile in delegate kits
- Complimentary delegate registrations



# INDIA BECKONS



## Invest in India's food sector

**Government of India,  
Ministry of Food Processing Industries**

Tel: +91-11-26492216/ 26490933/ 26406501

Email: [makeinindia-fpi@gov.in](mailto:makeinindia-fpi@gov.in)

Website: [www.mofpi.nic.in](http://www.mofpi.nic.in)



Thank you

