MINISTRY OF FOOD PROCESSING INDUSTRIES
GOVERNMENT OF INDIA

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FOOD PROCESSING

Towards Sustainable Growth Opportunities

FOCUS PAPER: UNLOCKING LUCRATIVE OPPORTUNITIES IN THE FOOD MACHINERY SECTOR

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ABSTRACT

This focus paper provides an overview of the food processing machinery industry in India, highlighting its significance and growth potential. The paper emphasizes the interconnection between the food processing industry and the food machinery industry, as well as the role of technological advancements in improving efficiency and production. It discusses the current state of the industry, including government initiatives and incentives, and the challenges faced by domestic manufacturers in a competitive global market.

The paper also explores core competencies within the food machinery sector, such as the adoption of advanced technology and the growing packaging machinery industry. It emphasizes the need to enhance performance and growth opportunities through technological evolution, infrastructure development, and the development of specialized machinery for indigenous and traditional Indian foods.

Furthermore, the paper examines the prospects for advancement in the industry, including the potential market size and growth rates for various food sectors in India. It discusses the global food processing equipment industry, highlighting the dominance of developed countries and the opportunities for India to bridge the technological gap and become globally competitive.

Lastly, the paper addresses obstacles and vulnerabilities in the food machinery industry, focusing on cost challenges and strategies for mitigation. It concludes by emphasizing the importance of government support, research and development, and collaborative efforts to unlock the industry's potential and ensure long-term sustainability.

Overall, this focus paper provides valuable insights into the current state, challenges, and growth opportunities in the food processing machinery industry in India. It serves as a guide for policymakers, industry stakeholders, and researchers to formulate strategies that promote innovation, competitiveness, and sustainable growth in the sector.

01.

FOOD PROCESSING MACHINERY INDUSTRY IN INDIA

AN OVERVIEW

1.1 GLOBAL TRENDS

The Indian food processing industry is a sunrise sector that has gained prominence in recent years[1]. The Ministry of Food Processing Industries (MOFPI) under the Government of India is primarily engaged in the **development and execution of policies pertaining to the food processing sector**, aligning them with the broader national priorities and objectives.

The Gross Value Added (GVA) in the food processing sector at constant price was **₹ 2.37 lakh crore in 2020-21** contributing **1.88% of the total GVA in the country**[2]. In the fiscal year 2019-20, the food processing industry constituted **12.22% of the overall employment in the Registered Factory sector**[3]. Additionally, it exhibited a cumulative count of **41,481 operational units, employing approximately 2.032 million individuals** (equivalent to 20.32 lakh)[4].

[1] https://www.ibef.org/research/case-study/india-s-food-processing-industry
[2] National Accounts Division, Central Statistics Office
[3] Annual Survey of Industries, 2019-20
[4] Annual Report 2021-22, Ministry of Food Processing Industries, Government of India

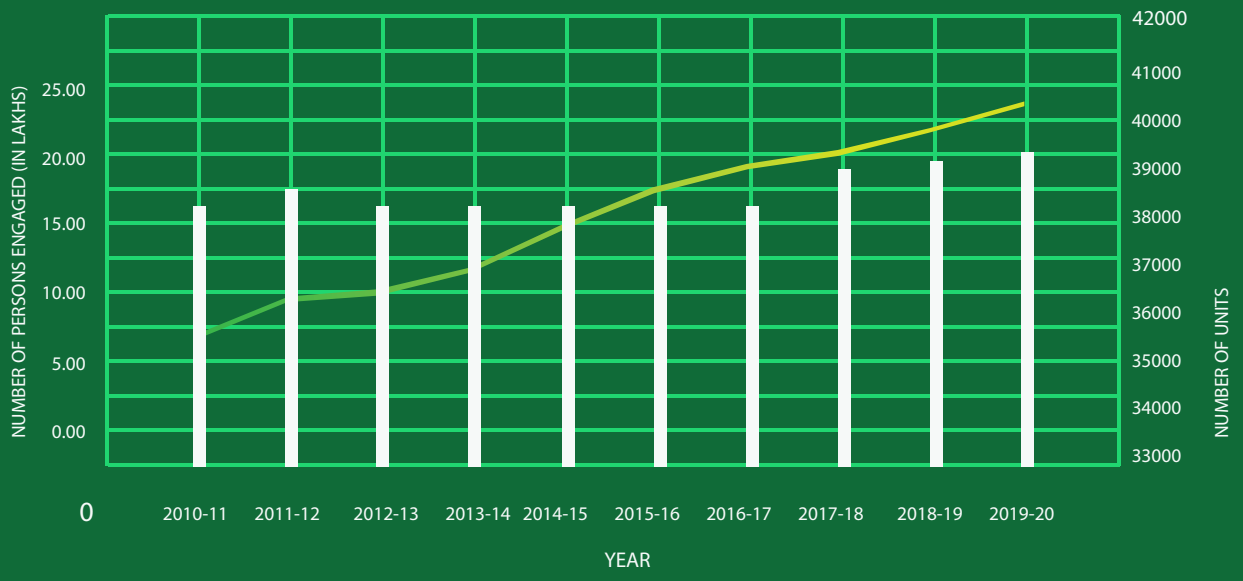


Figure 1: Number of Persons Engaged and Units in Registered FPI Sector

Figure 1, Sources: Annual Report 2021-22, Ministry of Food Processing Industries, Government of India

Figure 1 graphically illustrates the registration trends in the food processing industry from 2010-11 to 2019-20, providing a visual representation of the patterns and changes observed. Notably, the number of registered units has experienced a growth of over 15%, while the number of individuals engaged in these registered units has shown an increase of more than 22% over the years.

1.2

Earlier in 2022, the Government of India announced a Production Linked Incentive scheme worth ₹ 10,900 crore for the food processing industry, with a view of increasing India's total food processing capacity and driving up its ability to meet the global demand for food products[6].

1.3

The food machinery sector in India has been growing steadily in recent years and is expected to continue to do so in the future. The industry has seen significant investment and technical advancements that have led to an increased efficiency and production in the food processing business. The food machinery sector in India is also benefiting from the trend of automation and digital transformation in the food processing industry. The use of modern technologies, such as artificial intelligence, machine learning, and robots is helping food processing industries (food production, processing, and distribution) to improve efficiency, reduce costs, and enhance product quality with consumer satisfaction.

[5] Ibid
[6] https://mofpi.gov.in/PLISFPI/central-sector-scheme-production-linked-incentive-scheme-food-processing-industry-plisfpi-

1.4

During the five-year interval encompassing 2014-15 to 2019-20, the Food Processing sector exhibited a significant Average Annual Growth Rate (AAGR) of approximately 11.18%, thereby outperforming the agriculture sector's growth rate of roughly 4.19% (measured at 2011-12 prices)[7]. This robust growth in the Food Processing industry serves as a key catalyst for India's food machinery sector. Rapid urbanization, changing lifestyles, and rising disposable incomes have significantly altered consumer preferences for convenience meals. This has resulted in a sharp increase in the need for food processing and packaging machinery in India.

1.5

India’s food processing equipment market is expected to grow at a CAGR of 7.5% during 2021-2027[8]. Multinational and Indian food processing equipment manufacturers companies are categorized with respect to commodities wise such as raw product handling, processed product processing and packaging. The list is very extensive however some food processing equipment manufacturers are IDMC Ltd., Economode Food Equipment (India) Private Limited, Alfa Laval India Private Limited, Srujann Fenco Food Engineering Private Limited, Krones India Private Limited, John Bean Technologies India Private Limited, Rexnord India Pvt. Ltd., Marel India Private Limited, SPX India Pvt. Ltd., Buhler (India) Pvt Ltd, Danfoss Industries Pvt. Ltd. and others.

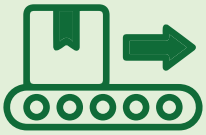
1.6

A range of machinery is manufactured for various food processing activities, such as conveying sieving, sorting, grading, washing, peeling, pulping, grinding, mixing, cooking, frying, drying, pulverizing, juicing and packaging (PET, FFS, bottle, tins, cartons etc.). Additionally, there are specialized machines for processing soya milk, food grains, coffee, bakery items, milk, and dairy products. These machines collectively form a significant part of the food processing infrastructure in India and are essential for meeting the growing demand for processed food products[9]. The Ministry of Heavy Industries has a brief overview of major food processing machinery manufactured in India.

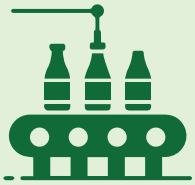
[7] Annual Report 2021-22, Ministry of Food Processing Industries, Government of India
[8] https://www.techsciresearch.com/report/india-food-processing-equipment-market/2027.html
[9] https://heavyindustries.gov.in/UserView/index?mid=1359

The various types of food machines used in India are:

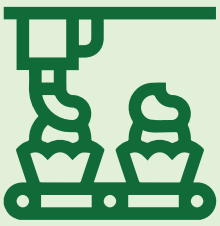
FOOD PROCESSING MACHINES:
Food processing devices, such as mixers, grinders, slicers, peelers, and cutters, are utilized to transform raw materials into finished food products.



PACKAGING MACHINES:
Packaging machinery employs a range of packaging materials to enclose and secure food products, such as pouch packing machines, cup/bottle filling machines, and cartoning machines.



DAIRY PROCESSING MACHINES:
The utilization of dairy processing machinery, such as homogenizers, pasteurizers, and separators, enables the production of cheese, butter, and yoghurt from milk and other dairy products.



SNACK FOOD MACHINES:
Snack food machinery, such as fryers, extruders, and seasoning machines, facilitate the production of various snack items, including potato chips, popcorn, and extruded snacks.

BEVERAGE MACHINES:
Beverage processing machinery, such as blenders, carbonators, and bottle washing machines, are utilized to process and package liquids, including milk, juices, soft drinks, and bottled water.

The food processing industry and food machinery industry are interconnected, with the latter being responsible for providing the necessary equipment and machinery to process and package food products. The expanding food processing industry is expected to drive a surge in demand for food machinery and equipment as companies aim to improve their operational efficiency and increase production capacity.

The food processing industry in India has shown a steady growth trend, with a Compound Annual Growth Rate (CAGR) of 9.97% from 2014-15 to 2020-21[10], indicating a burgeoning market for food machinery. This upward trajectory is expected to persist due to the continuous expansion of the food processing industry and the increasing demand for processed food products. In the fiscal year 2021, the export value of food processing machinery in India reached 45.55 billion Indian rupees. Between 2016 and 2021, the import value experienced a compound annual growth rate of 15.66%[11]. This category encompasses a range of machines, including milking and dairy machines, bakery machines, mixers, grinders, and cookers, among others. These machines fall within the domain of the machine tool and heavy engineering sector, which is a component of the capital goods segment. Consequently, the food machinery industry is expected to benefit from the growth in the food processing industry, as more companies invest in machinery and equipment to meet the escalating demand for processed food products.

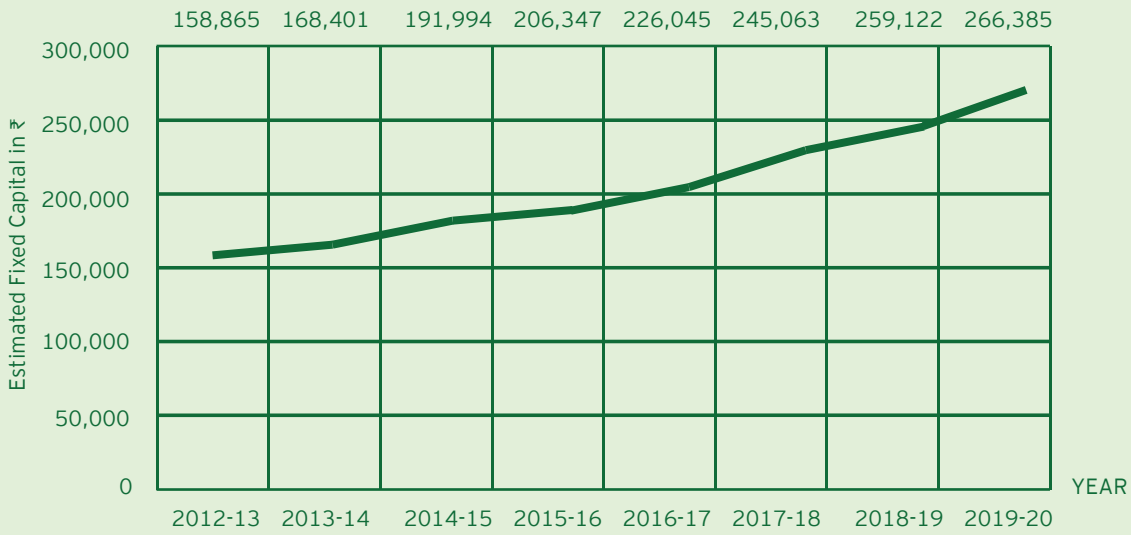


Figure 2: Estimated Fixed Capital in Registered Food Processing Units from (2012-13 to 2019-20)

Source: Annual Survey of Industries (ASI), Ministry of Statistics and Programme Implementation, Government of India (As per 2-digit industry division, NIC 2008 for all India)

Figure 2 visually represents the estimated fixed capital in registered food processing units, providing a clear and graphical illustration of the changes observed over time. The graph indicates that the fixed capital, which refers to the long-term investments and assets in these registered units, has experienced a substantial growth rate of over 65% across multiple years. This indicates a significant increase in the overall financial resources allocated to these units for establishing and maintaining their operations.

[10] Ministry of Food Processing Industries, Press Release, 05 AUG 2022 6:02PM by PIB Delhi
[11] https://www.statista.com/statistics/1266811/india-export-value-food-processing-machinery/

02.

CORE COMPETENCIES

The food processing equipment sector in India is currently striving to familiarize itself with the latest available technologies. However, in comparison to developed nations, the adoption rate of technology in this sector is relatively sluggish. This is primarily attributed to the composition of the Indian food processing sector, which is predominantly comprised of Micro, Small, and Medium Enterprises (MSMEs). As a result, the equipment requirements of these MSMEs differ from those of larger firms. Furthermore, the food processing industry in India is highly dependent on labour-intensive processes, and due to the availability of cheap labour, the pace of mechanization has been somewhat slow. However, mechanization plays a crucial role in ensuring consistency in product quality, reducing adulteration and wastage, and facilitating scalability. It enables faster and more efficient production and delivery through the utilization of machinery.

Consequently, there has been a notable reliance on imported machinery from countries such as China, Sweden, Denmark, Germany, Czechoslovakia, and Australia to meet the equipment demands of the Indian food processing industry. Nonetheless, recent research indicates that India's industrial machinery exports for dairy, food processing, and textiles were the second highest among all domestic machinery categories, generating 8001.63 million USD in revenue in 2022 .

The packaging machinery industry in India has seen a significant increase due to the focus on accelerated export growth. The priority placed on value-addition in export policies has created a pressing need for improved packaging techniques, materials, and machinery to maintain elevated quality standards. The European Hygienic Engineering and Design Group (EHEDG) and Global Food Safety Initiative (GFSI) recognized schemes for Indian food products in the global marketplace have made quality a critical aspect of the packaging machinery industry. This emphasis on exports and high-quality standards has increased the demand for advanced packaging machinery, positioning it as a potential strength for the industry in India.

The food processing industry is the primary consumer of flexible packaging, constituting over 50% of the overall demand. This signifies a substantial domestic market demand for the food machinery industry.

The packaging machinery industry in India is involved in the production of machines related to package conversion, processing, handling, and testing. To address the escalating demand, numerous domestic companies have engaged in joint ventures with foreign counterparts, with the objective of manufacturing diverse packaging machinery for the food processing industry.

03.

PATHS TO PROGRESS: ENHANCING PERFORMANCE AND GROWTH OPPORTUNITIES

With the rapid growth and evolution of the food processing industry in India, there is an exciting opportunity to identify and enhance key areas within the food machinery sector. This study aims to bring these areas to light, emphasizing their importance for further development and improvement. By proactively identifying and addressing these aspects, we can unlock greater efficiency, productivity, and overall performance in the realm of food machinery in India. Embracing this opportunity will propel the industry to new heights, fostering innovation, and ensuring a sustainable future for the food processing sector.

Embracing Technological Evolution: Upgrading Systems for Progress

The enhancement of equipment efficiency in India's manufacturing sector necessitates the development and utilization of advanced technology and research and development (R&D) resources. By allocating resources towards cutting-edge technology and expanding research capabilities, local manufacturers can bridge the existing gap between India's food processing technology and international standards, such as the NSF/ANSI Standard for Food Equipment. Furthermore, it is imperative to establish robust in-house quality control and testing facilities that not only meet but exceed international standards such as FSSC, BRC, SQF, and IFS, among others. Implementation of these proactive measures will not only result in improved equipment efficiency but also position India as a prominent global leader in the food processing industry.

Building the Foundation: Advancing Infrastructure for Growth

A reliable and uninterrupted power supply is vital for the efficient functioning of industrial and commercial activities, enabling businesses to operate seamlessly and contribute to overall productivity. Similarly, efficient, and affordable transportation networks are essential for expanding market access, reducing costs, and enhancing competitiveness.

Furthermore, the availability of adequate warehousing facilities is crucial for effective storage and management of goods, optimizing supply chain operations, and ensuring timely delivery of products.

By addressing the existing infrastructure challenges and strategically allocating resources to enhance infrastructure, we can unleash significant economic growth potential and enhance the overall well-being of individuals and communities. The transition of sectors into formal and modernized domains naturally leads to an increased adoption of machinery and automation technologies. Therefore, the establishment of a resilient and well-developed infrastructure framework plays a pivotal role as a catalyst for economic activities, attracting investments, and creating a pathway towards a prosperous and thriving future.

04.

UNLOCKING THE POTENTIAL: ENABLING THE DEVELOPMENT OF SPECIALIZED FOOD MACHINERY FOR INDIGENOUS AND TRADITIONAL INDIAN FOODS

The exploration and advancement of specialized food machinery specifically designed for indigenous food products and traditional Indian foods present significant research opportunities within the food processing industry. To effectively capitalize on this potential and overcome associated challenges, researchers can explore a diverse range of strategies. One promising avenue involves investigating the utilization of various food processing equipment for the preparation of traditional Indian foods. Examples of such equipment include batch type halwasan making machines, Automated Appam Makers, chapatti-making machines, ANARSA-making machines, and Automatic dosa-making machines.

These food processing equipment examples are currently being utilized in their original form or adapted to cater to the specific requirements of preparing traditional food products[13].

First and foremost, increasing investments in research and development (R&D) is vital. Allocating resources towards R&D initiatives focused on indigenous food products will facilitate the innovation and refinement of specialized machinery tailored to their unique requirements. This investment will not only enhance the quality and efficiency of food processing but also drive the overall growth of the industry.

[13] SV Anadani, SH Akbari, N Kumar and Amee Ravani, Processing and mechanization of Indian traditional food products

Collaborations between industry and research institutions play a pivotal role in expediting the advancement of specialized food machinery. By fostering partnerships, facilitating knowledge sharing, and facilitating technology transfer, the industry can harness the expertise of research institutions to design and manufacture machinery tailored to the specific requirements of indigenous and traditional Indian foods. The Council of Scientific and Industrial Research (CSIR) has developed a range of machinery, including Chapati making machines, Dosa making machines, Idli and vada-making machines, Agro-Equipment/Machinery, Continuous infrared heating systems, and Dry maize milling plants. Moreover, CSIR has successfully created and commercialized over 300 products, processes, and equipment designs. Approximately 1,600 licensees have utilized 160 technologies for commercial exploitation. CSIR has also fulfilled requests for knowledge and human resource development from countries in Asia, Africa, and Latin America[14].

Technical training programs play a significant role in nurturing a skilled workforce and promoting innovation. By offering training opportunities for engineers, technicians, and food processing professionals, the industry can enhance their technical expertise and knowledge of specialized machinery. This will ensure a competent workforce capable of effectively utilizing and maintaining the machinery for optimal results.

The contribution of start-ups and innovative firms in nurturing a highly skilled and proficient workforce, capable of effectively utilizing and maintaining machinery to achieve optimal results, is of paramount importance.

These entities actively participate in workforce development by implementing diverse strategies, such as offering specialized training programs, establishing initiatives for skill enhancement, and fostering a culture of innovation and continuous learning. Start-ups and innovative firms assume a critical role in identifying emerging trends and technologies related to machinery operation and maintenance, thereby enabling the workforce to remain up-to-date with the latest industry practices. Through their emphasis on the significance of technical expertise and provision of hands-on experience opportunities, start-ups and innovative firms elevate the competence and adaptability of the workforce, ensuring their ability to effectively leverage and maintain machinery, ultimately leading to the attainment of optimal outcomes.

Advocating for supportive policies and incentives is another key enabler for the development of specialized food processing machinery. Government support in the form of tax incentives, grants, and subsidies can encourage indigenous food processors to invest in and adopt specialized machinery. This, in turn, will drive the demand for such machinery and promote its widespread use within the industry.

[14] https://www.csir.res.in/achivement/csir-pride/food-food-processing

Promoting the establishment of localized manufacturing capabilities is crucial to reduce dependence on imported machinery. By encouraging the establishment of manufacturing facilities within the country, the industry can gain better control over the production process, reduce costs, and ensure the availability of specialized machinery tailored to the specific needs of indigenous and traditional Indian foods.

Raising awareness about the advantages of specialized machinery is essential to foster its adoption within the industry. Educating food processors about the benefits of specialized machinery, such as improved efficiency, product quality, and consistency, will create a greater demand and willingness to invest in such equipment. Facilitating access to financing options will also help overcome affordability obstacles, enabling more businesses to procure the specialized machinery they need.

By implementing these measures, the food processing industry can unlock the potential for specialized food machinery for indigenous and traditional Indian foods. The resulting innovation, scalability, and reduced dependence on imported machinery will not only benefit the industry but also contribute to the preservation and promotion of India's rich culinary heritage.

05.

PROSPECTS FOR ADVANCEMENT

India ranks first in global production of milk, spices, and livestock production and second in food, vegetable, fruit, and fish production. The Government of India has set a target of achieving a market size of USD 32.9 billion in the dairy industry by 2025 with an expected growth rate of 7.9%[15]. The Government also aims to increase fish exports to reach one lakh crore by 2024-25 while promoting environmental sustainability[16]. The organic products market in India is expected to grow at a CAGR of 25.25% from 2022 to 2027 due to increasing urbanization, rising household income, and growth in the organized retail sector[17]. Furthermore, the Indian food industry output is anticipated to reach US$ 535 billion by FY25[18]. Major equipment manufacturing countries in the food industry include Germany, Italy, Netherlands, Denmark, USA, Japan, China and Australia.

The import value of food processing machinery in India for the financial years 2014 to 2021[19] is illustrated below in Figure 3.

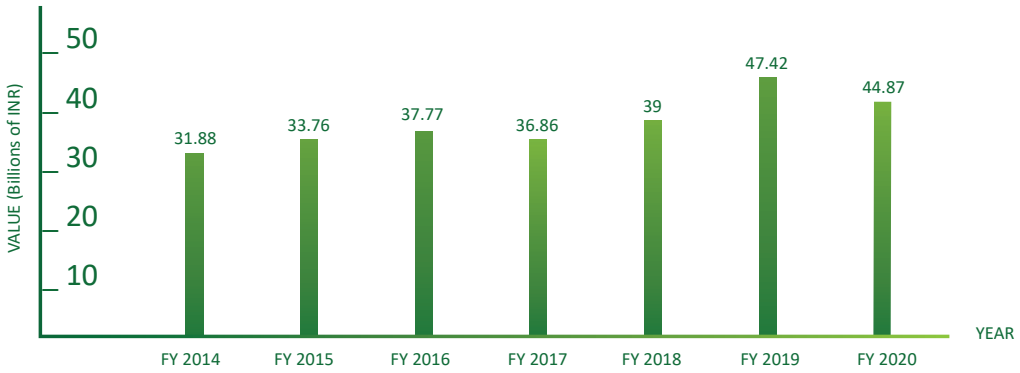


Figure 3: Import Value of Food Processing Machinery

[15] https://www.makeinindia.com/sector/food-processing
[16] ibid
[17] ibid
[18] ibid
[19] https://www.statista.com/statistics/1266787/india-import-value-food-processing-machinery/

06.

GLOBAL FOOD PROCESSING EQUIPMENT INDUSTRY: CHALLENGES AND OPPORTUNITIES

The food processing equipment industry showcases intricate and heterogeneous characteristics owing to its substantial engagement in the global food sector. It encompasses a diverse assortment of food products, including processed variants, that have witnessed significant expansion over the years. This proliferation of new food products poses a challenge in formulating a comprehensive delineation for the food processing equipment sector. Nevertheless, gaining a profound understanding, systematically categorizing, and effectively promoting the global food processing equipment sector is of paramount importance given its pivotal role in the contemporary landscape where food processing assumes critical significance.

Developed countries play a significant role in the food processing equipment industry, serving both domestic and international markets. Countries such as Germany, Italy, Netherlands, Denmark, US, Japan, and Australia are major equipment manufacturers and exporters. Their dominance in the industry is a result of their technological advancements. However, with the exception of China, developing nations have made a relatively minor impact on the global trade in this sector, primarily attributed to limited technology access and their reliance on developed countries for technological advancements. For instance, India's food processing industry heavily relies on equipment manufactured in these developed nations.

In comparison to developed countries, the food processing equipment sector in India is still in its early stages, indicating a potential for research and advancement. Notably, there has been a significant influx of equipment from China, European countries like Sweden, Denmark, Germany, and Czechoslovakia, as well as from Australia, highlighting India's dependence on technology imports in the equipment sector. Research and development efforts in the agri-food sector in India have primarily focused on primary food processing rather than equipment development. While some globally competitive technologies exist in the equipment sector, they are mainly related to pre-harvest processes. Due to the vast array of technologies available, providing a comprehensive comparison between Indian and global offerings within the scope of this report is not feasible.

However, this situation presents a positive opportunity for further research and development in the food processing equipment sector in India. By prioritizing and investing in research endeavours, India can enhance its technological capabilities, bridge the gap with developed countries, and foster the development of globally competitive equipment. These advancements will not only drive self-sufficiency but also strengthen India's position in the global food processing industry.

07.

OBSTACLES & VULNERABILITIES

The food processing machinery industry offers attractive prospects for companies considering technological progress and increased global market access. Nevertheless, businesses must remain vigilant of potential obstacles that may hinder their revenue and profitability. Failing to acknowledge and address these issues in a timely manner may negatively impact their financial performance. Hence, it is crucial for researchers to study and comprehend the opportunities and challenges present in the food processing machinery market, with the aim of providing businesses with effective strategies for long-term success.

Cost Challenges in Food Equipment Manufacturing: Strategies for Mitigation

Manufacturing food equipment for profit involves substantial monetary investment, mainly due to the high capital costs associated with advanced technology and automation required for machine production. Additionally, rising input costs, such as steel prices and automation charges have further elevated manufacturing expenses in recent years. As a result, businesses must proactively implement cost-reduction strategies to maintain profitability, such as improving machine designs and optimizing resource utilization to minimize waste. To achieve this objective, it is crucial for researchers to investigate and identify effective methods for cost minimization in food equipment manufacturing, including strategies for optimizing resource utilization and reducing waste`

08. CONCLUSION

The focus paper highlights an exciting opportunity for growth and development in the Indian hi-tech food machinery industry. While currently facing challenges related to low demand for locally produced machinery, there is immense potential for improvement. By implementing strategies to address the demand issue and promoting investment in research and development, the industry can unlock its full potential for growth and ensure long-term sustainability. It is crucial to focus on innovative solutions that will stimulate demand and encourage investment, paving the way for a thriving and prosperous Indian hi-tech food machinery industry.

The paper sheds light on the present scenario of the indigenous food machinery industry in India, emphasizing the obstacles it encounters in the face of growing competition posed by lower-priced imported machinery, primarily originating from China. While these challenges are significant, they also present an opportunity for growth and innovation. By formulating effective strategies that enhance the demand for locally produced hi-tech machinery and address industry challenges, companies can overcome these obstacles and maintain their competitiveness and profitability. It is crucial to adapt to rising input costs, navigate increasing regulations, and align with shifting consumer preferences. With a focus on enhancing demand and addressing challenges, the industry can achieve sustainable growth and establish itself as a resilient player in the market.

The paper underscores the crucial role of the Indian government in supporting the domestic food machinery industry and proactively addressing its challenges. The Government of India has already taken significant steps by implementing policies that encourage investment in research and development, providing subsidies, and promoting exports, all of which contribute to the industry's growth. By actively working towards enhancing demand for locally produced machinery, the government is empowering Indian players to thrive in the market. Additionally, efforts are being made to raise awareness among food manufacturers about the numerous advantages of utilizing high-quality, locally manufactured machinery, which will undoubtedly have a positive impact on demand. Through collaboration with industry stakeholders, the government is diligently working on formulating a comprehensive plan that provides unwavering support and promotion for the domestic food machinery industry in India.

The Indian government is actively supporting food processing machine manufacturing companies by providing financial incentives, subsidies, and grants to encourage investment and reduce initial capital costs. Additionally, the government has allocated funds specifically for research and development in food processing machinery, leading to advancements in innovation and product improvement. To enhance growth and efficiency, the government has made investments in specialized industrial zones that offer the necessary infrastructure and skilled labour. Collaborative efforts with educational institutions have helped bridge the skills gap in the industry. Measures such as export promotion, regulatory streamlining, and intellectual property rights protection have been implemented to enhance competitiveness. Moreover, facilitating access to finance and promoting international collaborations have further bolstered growth in the sector. These proactive measures exemplify the government's commitment to cultivating a thriving and prosperous industry ecosystem. However, continuous efforts and further implementation are required to strengthen the food processing machinery manufacturing sector.

The study concludes that the Indian food machinery industry faces a range of intricate and diverse challenges. However, these challenges present an opportunity for growth and transformation. With the right support and incentives, the industry can overcome these hurdles and emerge as a more robust and competitive player in the market. It is crucial for stakeholders and policymakers to fully understand the multifaceted nature of these challenges and work collaboratively to devise a comprehensive strategy. By doing so, they can provide the necessary support and incentives that will empower the industry to flourish and achieve remarkable success.

DISCLAIMER

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