



FOOD PROCESSING

Towards Sustainable Growth Opportunities



MANIPUR

MANIPUR

A scenic view of a mountain range in Manipur, India, with dense green forests and pine trees in the foreground. The word 'MANIPUR' is overlaid in large white letters.



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ACRONYMS

ABBREVIATION	DEFINITION
ASPIRE	A Scheme for Promotion of Innovation, Rural Industry and Entrepreneurship
APEDA	Agricultural and Processed Food Products Export Development Authority
APC	Agro Processing Cluster
A&N	Andaman & Nicobar Islands
AHIDF	Animal Husbandry Infrastructure Development Fund
ASI	Annual Survey of Industries
CAGR	Compound Annual Growth Rate
CEFPPC	Creation/Expansion of Food Processing & Preservation Capacities
CLCSS	Credit Linked Capital Subsidy Scheme
DIDF	Dairy Processing & Infrastructure Development Fund
DPIIT	Department for Promotion of Industry and Internal Trade
DPR	Detailed Project Report
DRPs	District Resource Persons
EoDB	Ease of Doing Business
e-NAM	electronic National Agriculture Market
EEZ	Exclusive Economic Zone
EOI	Expression of Interest
FPC	Farmer Producer Company
FPOs	Farmer Producer Organisations
FIDF	Fisheries and Aquaculture Infrastructure Development Fund
FAOSTAT	Food and Agriculture Organization Corporate Statistical Database
FSSAI	Food Safety and Standards Authority of India
FTL	Food Testing Laboratory
FDI	Foreign Direct Investment
FME	Formalization of Micro Food Processing Enterprise
F&V	Fruits & Vegetables
GIS	Geographic Information System
GMP	Good Manufacturing Practices
GST	Goods and Services Tax
GSDP	Gross State Domestic Product
GVA	Gross Value Added
HACCP	Hazard Analysis and Critical Control Point
ha	Hectare
HT	High Tension
INR	Indian Rupee
IQF	Individual Quick Freezing
ICD	Inland Container Depot
Km	Kilometre
LLP	Limited Liability Partnership
LEADS	Logistics Ease Across Different States

ACRONYMS

ABBREVIATION	DEFINITION
LT	Low Tension
MIDH	Mission for Integrated Development of Horticulture
MoFPI	Ministry of Food Processing Industries
MSDE	Ministry of Skill Development & Entrepreneurship
MSE	Micro and Small Enterprises
MSME	Micro, Small and Medium Enterprises
MT	Metric Ton
MW	Mega Watt
NABARD	National Bank for Agriculture and Rural Development
NAIFF	National Agriculture Infra Financing Facility
NDDB	National Dairy Development Board
NGO	Non-Governmental Organization
NOC	No Objection Certificate
ODOP	One District One Product
PFT	Private Freight Terminal
PLI	Production Linked Incentive
PLISFPI	Production Linked Incentive Scheme for Food Processing Industry
PLISMBP	Production Linked Incentive Scheme for Millet-Based Products
PM-DevINE	Prime Minister's Development Initiative for North-East Region
PMFME	Pradhan Mantri Formalisation of Micro Food Processing Enterprises
PMKSY	Pradhan Mantri Kisan Sampada Yojana
PMKVY	Pradhan Mantri Kaushal Vikas Yojana
PMMSY	Pradhan Mantri Matsya Sampada Yojana
PSL	Priority Sector Lending
RBI	Reserve Bank of India
RTC	Ready to Cook
RTE	Ready to Eat
SFAC	Small Farmers' Agri-Business Consortium
SGST	State Goods and Services Tax
SHG	Self-Help Groups
SMEs	Small and Medium Enterprises
SNA	State Nodal Agency
SPV	Special Purpose Vehicle
Sq. KM	Square Kilometre
SRI	System of Rice Intensification
SWC	Single Window Clearance
USD	U.S. Dollar
VAT	Value-Added Tax

ABSTRACT

Establishing Strong Linkages between Industry and Agriculture:

The food processing sector plays a crucial role in establishing strong linkages between the industry and the agriculture sector. It facilitates collaboration and integration, benefiting both sectors and boosting the overall agricultural value chain.

Remarkable Growth in the Indian Food Processing Sector:

The Indian food processing sector has achieved impressive growth, surpassing a 9% average annual growth rate since 2014-15. This indicates its strong potential and contribution to the Indian economy.

Significant Increase in Processed Food Exports:

India's processed food exports have experienced a significant surge, increasing from US\$4.96 billion in 2014-15 to US\$13.07 billion in 2022-23. This growth showcases the sector's competitiveness and ability to cater to international markets.

Manipur's Strong Agricultural Sector and Economic Contribution:

Manipur, with a Gross State Domestic Product (GSDP) of USD 4.13 billion, boasts a robust agricultural sector. It actively promotes the System of Rice Intensification (SRI) for high-yield rice production and efficient fertilizer usage. The State celebrates the Kachai Lemon Festival to promote its unique lemon fruit and support local farmers. It is also a leading producer of Passion Fruit and Bamboo. Manipur is graded as an Aspirer in the north-eastern region, according to LEADS 2022. The State has formulated the Manipur Integrated Logistics Policy 2022 and holds the 5th position in NITI Aayog's Export Preparedness Index for Himalayan States.

Promising Opportunities in Manipur's Food Processing Sector:

Manipur places significant emphasis on the food processing sector as part of its development agenda. The State boasts a diverse range of fruits, such as, pineapple, orange, lemon, banana, guava, peaches, and more. It holds the distinction of being the largest producer of passion fruits and a major producer of mandarins, figs, and olives. Additionally, Manipur takes pride in its rich agricultural heritage, as evidenced by the presence of four food and allied geographical indicator tags for black rice, chilli, lemon, and orange. These factors contribute to the abundance of opportunities in the food processing sector in Manipur, encompassing a wide range of products, including fruits, vegetables, and ready-to-eat/ready-to-cook items. The State also provides a dedicated Ease of Doing Business (EODB) platform to support businesses in the sector.

01. FOOD PROCESSING IN INDIA

The food processing sector is a uniquely placed amongst the manufacturing sector due to its backward linkages to the farming activities. A well-developed food processing sector with sufficiently higher level of processing helps in the improving value addition reducing post-harvest losses, promoting crop diversification, ensuring better returns to the farmers, promoting off-farm employment as well as increasing export earnings.

India ranks first in production of pulses & milk, second in vegetable & fruit, wheat & rice and third in cereals and eggs, in the World as per FAOSTAT estimates.¹

An abundant supply of raw materials, increase in aggregate demand for processed food products and incentives offered by the Government of India has impacted food processing sector positively. The Gross Value Addition (GVA) has increased from INR 1.34 Lakh Crore in 2014-15 to INR 2.37 Lakh Crore in 2020-21 exhibiting an average annual growth rate of 9.3%. The sector constituted as much as 10.54% and 11.57% of GVA in Manufacturing and Agriculture sectors respectively in 2020-21 (at the 2011-12 prices).²



India's food and beverages market grew at a CAGR of 6.92% between 2017 - 22.³

India's food and beverages market is forecasted to grow at a CAGR of 9.94% from 2022 - 27.⁴

¹ Statistics | Food and Agriculture Organization of the United States

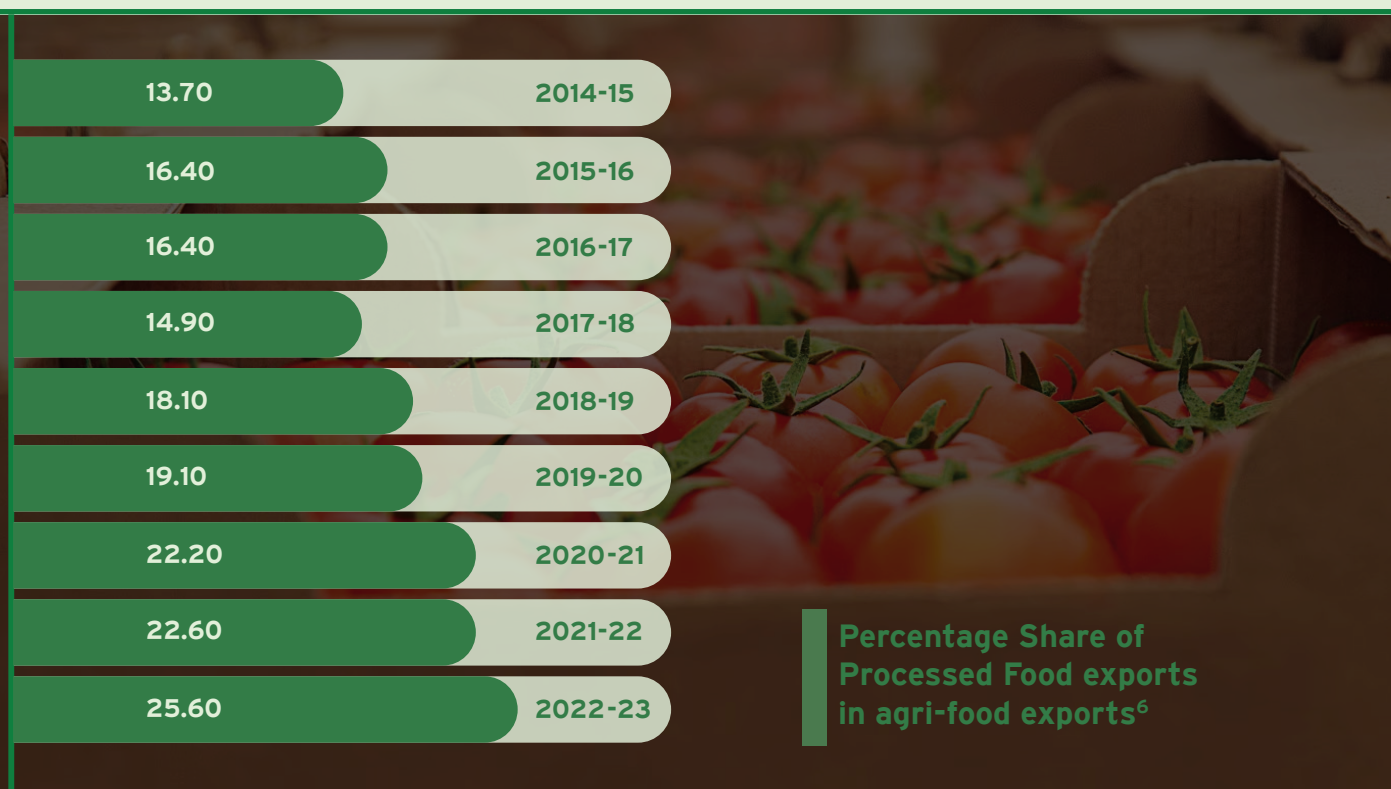
² MoFPI

³ Food and Beverages Global Market Briefing 2023 – The Business Research Company, December 2022

⁴ Ibid

As per the Annual Survey of Industries (ASI) latest estimates production of, the Food Processing Sector employees nearly 12.2 % of the workforce in the registered factory sector.

The Export of Agri-Food products has increased from US\$ 36.17 in 2014-15 to US\$ 51.05 billion in 2022-23. The Export of Processed-Food products has increased from US\$ 4.96 in 2014-15 to US\$ 13.07 billion in 2022-23. Thus, the share of the processed-food products in overall agri-food products export has increased from 13.70 % in 2014-15 to 25.60 % in 2022-23⁵.



As per an Industrial estimate, Asia Pacific emerged as the dominant region in the global food and beverages market with 41.5% share of the global food and beverages market in 2022. Within the Asia Pacific region, India's food and beverages market was the third largest, followed by China and Japan, in the said period.⁷

⁵ MoFPI

⁶ Ibid

⁷ Food and Beverages Global Market Briefing 2023 – The Business Research Company, December 2022

⁸ Ibid

02. OVERVIEW

Manipur, situated in the north-eastern part of India, shares borders with Nagaland, Mizoram, Assam, and Myanmar. Its landscape features a gently sloping valley, safeguarded by mountain ranges that provide protection against chilly winds and cyclonic storms originating from the Bay of Bengal.⁹

Manipur can be categorized into two distinctive zones: the outer area characterized by rugged hills and narrow valleys, and the inner area comprising flat plains and corresponding land formations. These regions not only vary in physical attributes but also showcase a rich diversity of flora and fauna. Agriculture holds paramount importance in Manipur, serving as the primary occupation and making a significant contribution to the State's Gross Domestic Product (GDP).

State Capital

Imphal

Geographic Area¹⁰

22,347 sq. km

Population (Census 2011)¹¹

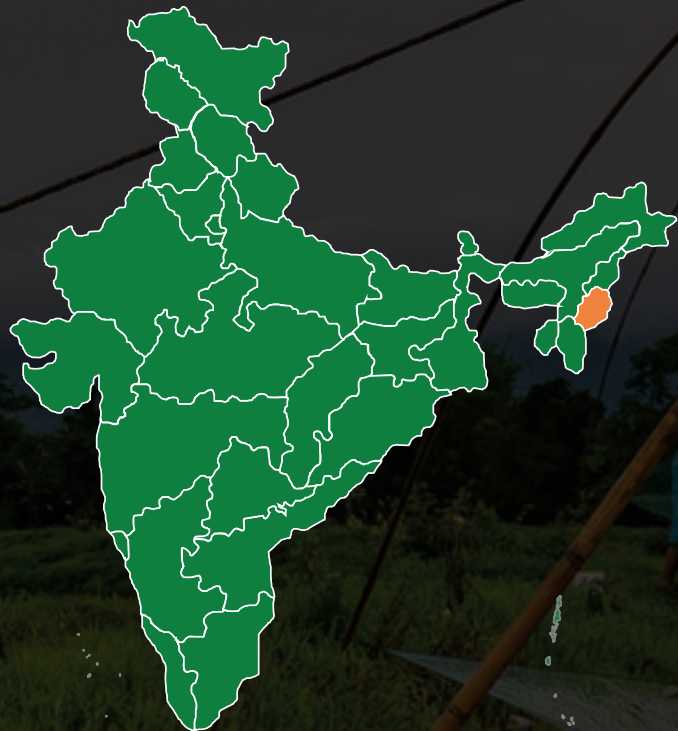
2.8 million

Total Road Length (March 2019)¹²

32,389 km

Rail length (2021)¹³

18



⁹ Profile Of the State | Town Planning Department | Government of Manipur

¹⁰ Profile Of the State | Town Planning Department | Government of Manipur

¹¹ MoSPI | Population Census

¹² RBI | Handbook of Statistics on Indian States | State-wise Length of Roads

¹³ DPIIT | LEADS 2022 Logistics Ease Across Different States

Gross State Domestic Product (GSDP) ¹⁴

USD 4.13 billion

Per Capita Net State Domestic Product ¹⁵

USD 1063.66 (2021-22)

Airports

1 Domestic -

Bin Tikendrajit - Imphal

Available Land¹⁶

Mixed Category

12 ha

Infrastructure¹⁷

1
Integrated Check Post (ICP)

4
Railway Goods Sheds

1
Air Cargo Terminals

4500
MT Cold Storage Capacity

Installed power¹⁸

Thermal
133.26 MW

Renewables
104.97 MW

of which Hydro is
87.24 MW

¹⁴ RBI | Handbook of Statistics on Indian States | Gross state domestic product | Exchange Rate as on 15th June 2023

¹⁵ RBI | Handbook of Statistics on Indian States | Per Capita Net State Domestic Product | Exchange Rate as on 15th June 2023

¹⁶ India Industrial Land Bank (as on 31.05.2023)

¹⁷ DPIIT | LEADS 2022: Logistics Ease Across Different States

¹⁸ Central Electricity Authority | Installed Capacity Report (as on 31.03.2023)

03. ADVANTAGE MANIPUR



High-yield rice production through **System of Rice Intensification (SRI)**¹⁹



Moreh: South-East Asia's Gateway



State celebrates Kachai Lemon Festival, to promote unique lemon fruit production and supports local farmers²⁰



Graded as **Aspirer** in the North-Eastern Region, DPIIT's as per **LEADS 2022**.²¹



Ranked **#5th** in NITI Aayog's Export Preparedness Index for Himalayan States' Category²²

Largest producer of Passion Fruit²³



2nd largest producer of Kiwi²⁴



¹⁹ Economic Survey Manipur, 2020_21

²⁰ News Service Division | All India Radio | Government of India

²¹ DPIIT | LEADS 2022: Logistics Ease Across Different States

²² Niti Aayog | Export Preparedness Index 2021

²³ Department of Agriculture & Farmers Welfare | Horticulture | State Level | Area and Production of Horticulture crops for 2021_22 (3rd Advance Estimates)

²⁴ ibid

04. LOCAL FOOD SYSTEM

4.1 INDIGENOUS PRODUCE

Manipur's economy relies mainly on agriculture, with potential for commercial cultivation of various horticulture products, such as, figs, olives, and mandarins. It is the leading producer of passion fruit among Indian States, and its food processing industry is rapidly expanding.

In Manipur, the valley districts predominantly practice permanent cultivation, while terrace cultivation is found in some hill pockets. However, shifting cultivation, known as jhuming, is widely practiced in most hilly regions. Rice, the staple food, is grown in both hilly and plain areas. Fruit cultivation can be expanded in the hilly regions, while the fertile soil conditions of the plains favor the growth of citrus fruits, bananas, guavas, peaches, apricots, and papayas. Pineapples thrive in the medium-high range hills of Manipur. The State primarily cultivates pineapple, orange, lemon, banana, guava, peaches, and, more recently, apples in the hills.²⁵ The State falls under the Eastern Himalayan agroclimatic zone and is divided into two primary topographic regions: plains and hills.

STATE HAS RECEIVED 4 GEOGRAPHICAL INDICATOR (GI) TAGS FOR²⁶–

- ▲ Kachai Lemon
- ▲ Tamenglong Orange
- ▲ Chak – Hao (black rice)
- ▲ Hathei Chilli

²⁵ Economic Survey Manipur, 2020_21

²⁶ Intellectual Property | Registration Details of Geographical Indications

4.2 KEY PRODUCTION HIGHLIGHTS

State offers advantageous conditions for horticulture, and there is significant potential for expanding fruit farming in the hilly regions. The flatlands provide suitable soil conditions for cultivating citrus fruits, bananas, guavas, peaches, apricots, papayas, and various other fruits. The moderately high range of Manipur's hills presents abundant opportunities for pineapple farming.



The State's main fruits include pineapple, orange, lemon, banana, guava, peaches, and more



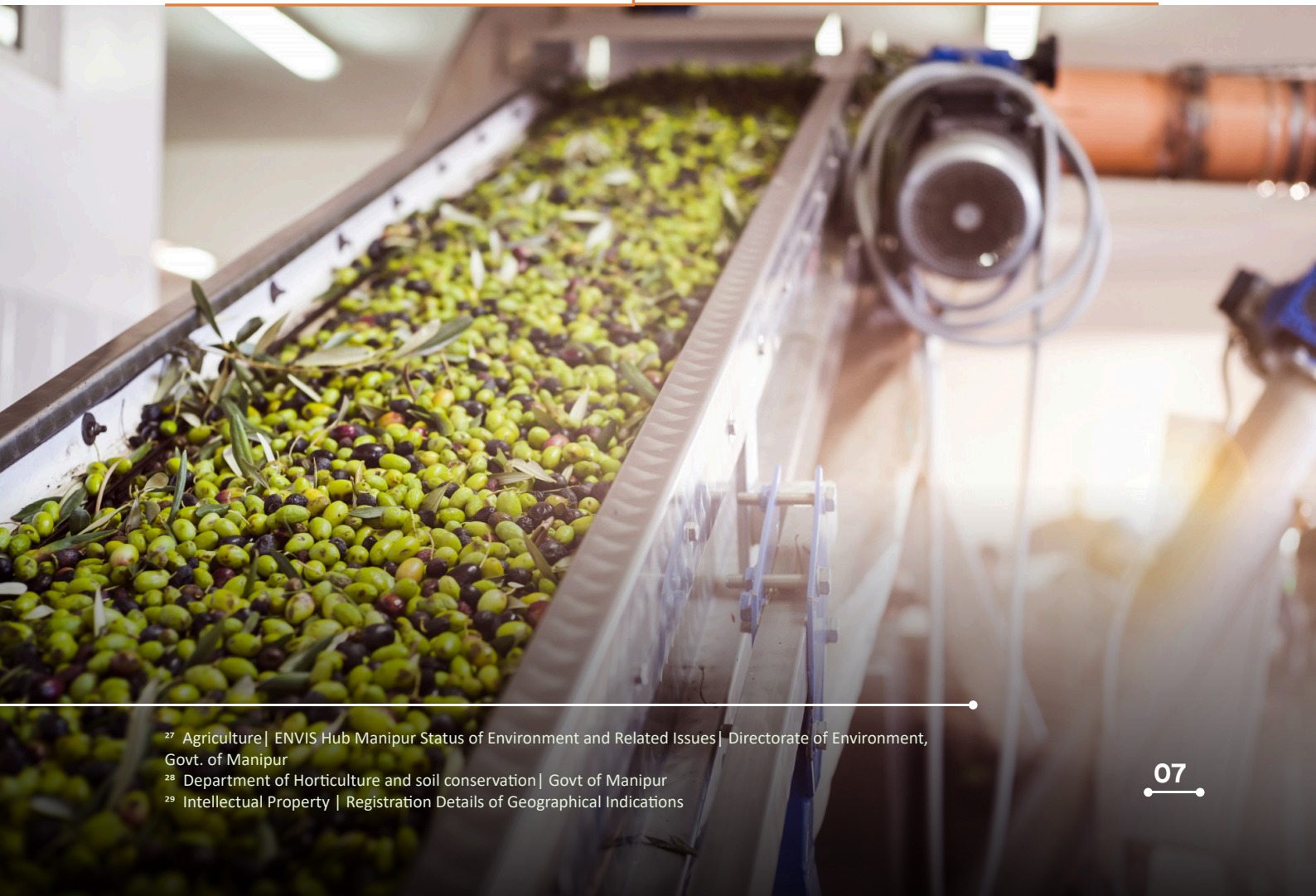
Largest producer of **Passion Fruit**²⁷



98% of the food grain production of the State is **rice**²⁹



Major producer of mandarin, papaya and olives²⁸



²⁷ Agriculture | ENVIS Hub Manipur Status of Environment and Related Issues | Directorate of Environment, Govt. of Manipur

²⁸ Department of Horticulture and soil conservation | Govt of Manipur

²⁹ Intellectual Property | Registration Details of Geographical Indications

KEY PRODUCTION STATISTICS ARE PRESENTED BELOW^{30&31}

CROPS

'000 MT

WHEAT

5.8

PULSES

29.4

COARSE CEREALS

59.7

RICE

602.2



LIVESTOCK & FISHERIES

MILK

71 '000 tonnes

MEAT

29 '000 tonnes

EGGS

1142 lakh

FISH

0.32 lakh tonnes



FRUITS

'000 MT

PASSION FRUIT

35.20

CITRUS

111.15

BANANA

86.49

PINEAPPLE

130.86



VEGETABLES

'000 tonnes

TOMATO

36.94

PEAS

80.73

CAULIFLOWER

35.20

CABBAGE

109.35



SPICES

'000 MT

RED CHILLIES

1.56

CORIANDER

0.07

TURMERIC

5.58

GINGER

59.26

³⁰ Department of Agriculture & Farmers Welfare | Horticulture | State Level | Area and Production of Horticulture crops for 2021-22 (3rd Advance Estimates)

³¹ RBI | RBI Handbook of Statistics on Indian States

05. PRODUCTION CLUSTERS³²

The list below showcases the Production Clusters within the State under the Pradhan Mantri Formalisation of Micro Food Processing Enterprises Scheme (PMFME) -

GINGER based products

Chandel, Pherzawl



PINEAPPLE based products

Churachandpur, Imphal East, Thoubal



FISH based products

Imphal West, Bishnupur



BLACK RICE based products

Kakching



BANANA based products

Noney



KIWI based products

Senapati





ORANGE based products

Tamenglong



BAMBOO SHOOT based products

Tengnoupal



TURMERIC

Kangpokpi



KACHAI LEMON

Ukhrul



KING CHILLI

Kamjong



COCONUT based products

Jiribam

06. MILLETS IN MANIPUR



The consumption of millet has changed little over time and varies between regions in the north-eastern States. A family of small-seeded grasses known as millets is extensively cultivated as a cereal crop or grain for human and animal sustenance throughout the world.

The majority of the species commonly referred to as millets belong to the Paniceae tribe, although some millets are also part of other tax.

Millet is an important crop for staple cereals. It is also known as dry-land cereals or nutri-cereals. Millets are also referred to as "smart food" due to their gluten-free nature, high calcium, zinc, and iron content, and low glycemic index. Millets are included in jhum agriculture. Foxtail, bajra, and finger millet (Ragi) varieties have been successfully tested by the ICAR.³³

³³ APEDA | E-Catalogue For Export Of Millets And Value Added Products North Eastern States

07. AGRICULTURAL MARKETING

State has a specialized department for agricultural marketing, allowing farmers the freedom to sell their products at any time and location. The aim is to improve transparency in trading activities and the pricing system by adopting electronic and other innovative technologies. Furthermore, it aims to foster the growth of various avenues for competitive marketing, agricultural processing, and exporting. Additionally, it seeks to encourage investments in the development of markets and marketing infrastructure within the region of Manipur.



³⁴ Food Processing Industries | Department of Trade Commerce and Industries

³⁵ Food Processing Industries | Ministry of Food Processing Industries

³⁶ DATA OF REGISTERED FPOs | Ministry of Agriculture & Farmers Welfare

³⁷ Agmarket | Directorate of Marketing and Inspection | Ministry of Agriculture & Farmers Welfare

08. POTENTIAL OPPORTUNITIES

Manipur is one of the agriculturally rich States in India. With an overview of the State profile and geographical conditions, following segments can be focused under food processing in the State of Manipur -

FRUITS AND VEGETABLES

Manipur is the largest producer of passion fruit among Indian States with a production of 35.20 thousand tonnes . Passion Fruit has multiple uses and has ample amount of food processing opportunities:

■ PASSION FRUIT PULP:

Juice: The pulp can be used to make refreshing juice, smoothies, and sweet beverages.

Sweets: It can be utilized as a flavouring ingredient for candies, desserts, and confectionery products.

Nutritional Benefits: Rich in vitamin A, vitamin C, potassium, magnesium, and fiber.

■ EDIBLE FRUIT SEEDS:

Tea: The seeds can be used to brew flavourful and aromatic passion fruit tea.

Topping: They can serve as a crunchy topping for salads, desserts, or as a garnish.

Nutritional Benefits: Good source of healthy fats, protein, and dietary fiber.

■ DRIED PASSION FRUIT PULP:

Passion Fruit Flour: The dried pulp can be ground into a fine powder, producing gluten-free Passion Fruit flour.

Baked Goods: The flour can be used as a substitute in various baked goods, catering to gluten-free diets.

■ PASSION FRUIT JUICE CONCENTRATE:

Flavouring Agent: Concentrated juice can be used as a natural flavouring ingredient in beverages, ice cream, yogurt, and other food products.





BAMBOO

Manipur is among the largest producers of Bamboo among other Indian States. It poses the following opportunities:

- Bamboo shoot powder can be used as a fortifying agent in various food products, such as, biscuits. Bamboo shoot powder is a good source of minerals, fibre, and protein, and has antioxidant properties.
- Bamboo leaves can be used to flavour liquids, such as, teas and broths.
- Bamboo shoots are of great use in Asian cuisine. Canned Bamboo shorts are convenient to use and have a longer shelf life.
- They can be easily added to various recipes, such as, hot pots, stir-fries, or noodle dishes.

09. GOVERNMENT OF INDIA SCHEMES FOR FOOD PROCESSING

9.1 SCHEMES UNDER MINISTRY OF FOOD PROCESSING INDUSTRIES³⁹

Support rendered under the scheme of Ministry of Food Processing Industries, Government of India are mentioned below:

9.1.1 PRADHAN MANTRI KISAN SAMPADA YOJANA (PMKSY)

Brief of Scheme

Given the nature and size of processing units operating in the food processing sector, investment requirements in basic infrastructure and common facilities are enormous. In order to attract private investment to the food processing sector, the Ministry of Food Processing Industries has taken various initiatives through schemes to develop infrastructure, expand processing capacity, and provide other supportive measures for the healthy growth of the industry. To streamline these efforts, all these schemes have been integrated under a comprehensive program called the Pradhan Mantri Kisan Sampada Yojana (PMKSY), which was launched on May 3rd, 2017.

PMKSY has the following component schemes.

- Mega Food Parks
- Integrated Cold Chain and Value Addition Infrastructure
- Creation/Expansion of Food Processing & Preservation Capacities (Unit Scheme)
- Infrastructure for Agro-Processing Clusters
- Creation of Backward and Forward Linkages
- Food Safety and Quality Assurance Infrastructure
- Human Resources and Institutions
- Operation Greens

PMKSY is a comprehensive package that aims to establish modern infrastructure with efficient supply chain management, spanning from the farm gate to the retail outlet. This initiative not only provides a significant boost to the growth of the food processing sector in the country but also contributes to better returns for farmers. It is a crucial step towards doubling farmers' income, generating substantial employment opportunities, particularly in rural areas. Additionally, it helps reduce agricultural produce wastage, promotes higher levels of processing, and enhances the export of processed foods.

³⁹ MoFPI | Annual Report (2022- 2023)

Initially approved with a budget of INR 6,000 Crore for the period 2016-20, aligned with the 14th Finance Commission cycle, PMKSY's timeline was subsequently extended to FY 2020-21. The Government has now decided to restructure the component schemes for implementation during the 15th Finance Commission, with a total outlay of INR 4,600 crore. This revision includes the provisions for committed liabilities of its component schemes such as Mega Food Park, Creation of Backward & Forward Linkages, and Human Resources and Institution - Skill Development, Promotion Activities and HACCP, as these components have been discontinued in the 15th FC cycle. The component scheme continued during the 15th Finance Commission Cycle for new projects are:

- **Integrated Cold Chain and Value Addition Infrastructure (ICC)**
- **Creation/Expansion of Food Processing & Preservation Capacities (CEFPPC)**
- **Infrastructure for Agro-Processing Clusters (APC)**
- **Food Safety and Quality Assurance Infrastructure (FTL)**
- **Human Resource and Institutions - R&D**
- **Operation Greens**

9.1.2

PRADHAN MANTRI FORMALISATION OF MICRO FOOD PROCESSING ENTERPRISES SCHEME (PMFME)

Introduction

In line with the Aatmanirbhar Bharat Abhiyan initiative, the Ministry of Food Processing Industries (MoFPI) has introduced a nationwide centrally sponsored scheme called the "PM Formalisation of Micro food processing Enterprises (PMFME) Scheme." This scheme aims to provide financial, technical, and business support to establish or upgrade micro food processing enterprises. It was approved by the Union Cabinet on 20th May 2020, and the scheme's guidelines were issued on 19th June 2020. The PMFME Scheme will be implemented over a period of five years, from 2020-21 to 2024-25, with a budget allocation of INR 10,000 Crore. The scheme aims to directly assist two lakh micro food processing units by providing credit-linked subsidies.

Objectives

Recognizing the significance of unorganized micro food processing enterprises and the obstacles they face; the Ministry of Food Processing Industries (MoFPI) is implementing the scheme by providing a comprehensive package of support and services. The objectives of the scheme are as under:

- **Increased access to credit by existing Micro Food Processing entrepreneurs, FPOs, Self Help Groups and Co-operatives.**
- **Integration with organized supply chain by strengthening branding & marketing**
- **Support for transition of existing 2,00,000 enterprises into formal framework.**
- **Increased access to common services like common processing facility, laboratories, storage, packaging, marketing, and incubation services.**
- **Strengthening of institutions, research, and training in the food processing sector.**
- **Increased access for the enterprises to professional and technical support.**

Provisions under the Scheme

Support for setting up / upgradation of Micro Food Processing Enterprises

- Support for setting up of new micro food processing enterprises and for upgradation of existing micro food processing enterprises are provided under the scheme.
- Organizations such as Individual entrepreneurs/ Proprietorship Firms/ Partnership Firms/ FPOs / NGOs / Cooperatives/ SHGs / Pvt. Ltd. Companies, who have established or propose to establish micro food processing unit, are eligible for financial assistance under the Scheme.
- Credit-linked capital subsidy @35% of the eligible project cost, maximum ceiling INR 10 lakhs per unit. Eligible project cost comprises cost of plant and machinery and technical civil work, but excludes cost of land/ rental or lease work shed. However, technical civil work should not be more than 30% of the eligible project cost.
- Beneficiary contribution - minimum of 10% of the project cost, balance loan from Bank.
- Applicant/Enterprise is eligible for bank loan under the Scheme, even if he has availed bank loan in other Subsidy Linked Schemes of Government. Applicant is also eligible for Interest Subvention and Top Up convergence with other relevant Government Sponsored Schemes. Lending Banks may consider sanctioning need based working capital limit to the beneficiaries, as admissible. However, no subsidy is provided on the working capital.

Support for setting up of common infrastructure Facilities

- Organisations such as Farmer Producer Organisations (FPOs)/ Farmer Producer companies (FPCs)/ Cooperatives/Self Help groups (SHGs) and its Federation/Govt. agencies, who have established or propose to establish food processing line along with common infrastructure/value chain/incubation centres are eligible for financial assistance under this component of the Scheme.
- Credit-linked capital subsidy @35% of the eligible project cost, maximum ceiling INR 3 Crore per unit would be provided. Eligible project cost comprises cost of plant and machinery and technical civil work but excludes cost of land/rental or lease work shed. However, technical civil work should not be more than 30% of the eligible project cost.
- Total eligible project cost should not exceed INR 10 Crore. There will be no pre condition of minimum turnover and experience of the applicant organization.
- The applicant organization's contribution should be minimum of 10% of the project cost with balance required funds being loan from Bank. Before applying on the portal, the applicant organization is also required to submit in-principal approval from the lending bank for the loan envisaged in the means of finance of the project.
- Assistance of INR 50,000/- per case is provided to the applicant organisation for preparation of Detailed project report.

Support to Self-Help Groups (SHGs)

- Seed capital @ INR 40,000/- per member of SHG for working capital and purchase of small tools
- Seed capital to be given as grant to the SHG Federations which should provide as a loan to the members of SHGs

Branding and Marketing Support

- Grant upto 50% for Branding and Marketing support to groups of FPOs/ SHGs/ Cooperatives or an SPV of micro food processing enterprises. It is to be provided for ODOP product at the State or regional level.
- Developing a common brand and packaging including standardization and common packaging for branding.
- Marketing tie-up with national and regional retail chains and state level institutions; and Quality control to ensure product quality meets required standards.
- Support to the said activity under provisions of marketing and branding could also bring competitive price realisation according to the targeted market and customer base.

Capacity Building

The capacity development aspect of the Scheme encompasses a wide range of initiatives aimed at empowering institutions, individuals, and groups. Training plays a pivotal role within this component. The Scheme aims to provide training to various stakeholders, including trainers such as Master Trainers and District Level Trainers, as well as District Resource Persons. Additionally, both existing and new food processing entrepreneurs, along with members of different groups such as Self-Help Groups (SHGs), Farmer Producer Organizations (FPOs), and Cooperatives, engaged in food processing activities, will receive training through the Food Processing Entrepreneurship Development Program. District Resource Persons (DRPs) are appointed by State Nodal Agencies (SNAs) to provide ongoing support to beneficiaries, including assistance with application filing, preparation of Detailed Project Reports (DPR), and guidance for formalization and operationalization processes.

9.1.3

PRODUCTION LINKED INCENTIVE SCHEME FOR FOOD PROCESSING INDUSTRY (PLISFPI)

The food processing industry in India includes manufacturing enterprises at all scales, ranging from micro to large industries. India possesses a competitive advantage due to its abundant resources, a sizable domestic market, and opportunities for promoting value-added products. To unlock the full potential of this sector, Indian companies need to enhance their competitive strength compared to global counterparts in terms of output scale, productivity, value addition, and their integration into the global value chain.

The Central Sector Scheme known as the Production Linked Incentive Scheme for Food Processing Industry (PLISFPI) aims to support the establishment of global food manufacturing champions in line with India's abundant natural resources. It also aims to promote Indian food product brands in international markets. The scheme has a budget allocation of INR 10,900 crore. The PLISFPI has been developed based on the Production Linked Incentive scheme of NITI Aayog under the "Aatma Nirbhar Bharat Abhiyaan for Enhancing India's Manufacturing Capabilities and Enhancing Exports." The scheme will be implemented over a period of six years, from 2021-22 to 2026-27.

The objectives of the scheme are to provide support to food manufacturing entities that meet the specified minimum sales criteria and are willing to make the required minimum investment for expanding their processing capacity. The scheme also aims to offer branding support for promoting Indian brands in international markets, with the intention of incentivizing the development of strong Indian food product brands. The scheme seeks to not only facilitate the establishment of global food manufacturing champions but also to enhance the presence and acceptance of selected Indian food product brands in international markets. In addition, the scheme aims to generate more employment opportunities in non-farm sectors, ensure better prices for agricultural produce, and increase income for farmers.

The first component of the Scheme focuses on providing incentives for the manufacturing of four primary food product segments, namely *Ready to Cook/ Ready to Eat (RTC/ RTE) foods, including products based on millets, processed fruits & vegetables, marine products, and mozzarella cheese.* The second component is dedicated to the production of innovative and organic products by Small and Medium Enterprises (SMEs) in these four segments. This includes products such as free-range eggs, poultry meat, and egg products. The third component is centered around offering support for branding and marketing activities overseas. This aims to encourage the development of strong Indian brands through in-store branding, renting of shelf space, and marketing initiatives.

An additional element pertaining to Millet Based Products was incorporated into the scheme. This inclusion aimed to promote the utilization of millets in Ready to Cook/Ready to Eat (RTC/RTE) products and provide incentives for their value addition and sale in both domestic and export markets under the PLI Scheme. The millet-based products with over 15% millet content by weight/volume are covered under this component.

Approved Applications under PLISFPI Scheme

SCHEME	SEGMENT	NO. OF APPROVALS	TOTAL
CATEGORY 1	RTE/RTC	12	56
	Fruits & Vegetables	29	
	Marine	11	
	Mozzarella Cheese	4	
CATEGORY 2	Innovative	2	16
	Organic	14	
CATEGORY 3	B&M	78	78
PLISMBP	Large Entities	8	30
	MSME	22	

Achievements of MoFPI schemes in Manipur (as on date: 31.05.2023)⁴⁰

PRADHAN MANTRI KISAN Sampada YOJANA (PMKSY) SCHEME

SCHEME NAME	NO. OF PROJECTS APPROVED	TOTAL PROJECT COST (INR CR.)
MEGA FOOD PARK	1	81.83
COLD CHAIN	1	18.49
FOOD TESTING LABORATORY	2	12.68
CEFPPC UNIT / FOOD PROCESSING UNIT	1	1.66

PRADHAN MANTRI FORMALIZATION OF MICRO FOOD PROCESSING ENTERPRISE SCHEME (PMFME)

SCHEME NAME	NO. OF PROJECTS APPROVED
MICRO ENTERPRISES APPROVED UNDER FME (Formalisation of Micro Food Processing Enterprises Scheme)	249 (as on 07-06-2023)

9.2 SCHEMES BY ALLIED MINISTRIES

Support rendered under various schemes of Allied Ministries of the Government of India is mentioned below:

1 Mission for Integrated Development of Horticulture (MIDH) Scheme⁴¹

A centrally sponsored scheme under the Ministry of Agriculture and Farmers Welfare for the holistic growth of the horticulture sector covering fruits, vegetables, root & tuber crops, mushrooms, spices, flowers, aromatic plants, coconut, cashew, cocoa, and bamboo. Under MIDH, financial assistance is provided for following major interventions/activities:

- Setting up of nurseries, tissue culture units for production of quality seed and planting material;
- Area expansion i.e. Establishment of new orchards and gardens for fruits, vegetables, and flowers;
- Rejuvenation of unproductive, old, and senile orchards;
- Protected cultivation, i.e. poly-house, green-house, etc, to improve the productivity & grow off season high value vegetables and flowers;
- Organic farming and certification;
- Creation of water resources structures and watershed management;
- Bee-keeping for pollination;
- Horticulture Mechanization;
- Creation of Post Harvest Management and Marketing infrastructure.

2 National Agriculture Infra Financing Facility (NAIFF) Scheme⁴²

The National Agriculture Infra Financing Facility (NAIFF) is an online single window facility under the aegis of the Department of Agriculture & Farmers Welfare. The objective of the initiative is to provide impetus for development of farm gate & aggregation point, affordable and financially viable Post Harvest Management infrastructure, with a financing facility worth INR 1,00,000 Crores, by converging all schemes of central & State governments.

3 Fisheries and Aquaculture Development Infrastructure Fund (FIDF)⁴³

Government of India has created a dedicated fund, FIDF, implemented by the National Fisheries Development Board with a total fund outlay of INR 7522.48 crore (US\$ 940.31 Million). Under FIDF, creation of fisheries infrastructure facilities both in marine and inland fisheries sectors are augmented, including fishing harbours, fish landing centres, construction of ice plants, cold storage, transport facilities etc.

⁴¹ Mission for Integrated Development of Horticulture (MIDH)

⁴² National Agriculture Infra Financing Facility

⁴³ Department Of Fisheries

4 Pradhan Mantri Matsya Sampada Yojana (PMMSY) Scheme⁴⁴

Pradhan Mantri Matsya Sampada Yojana (PMMSY) is a flagship scheme under the Department of Fisheries, Ministry of Fisheries, Animal Husbandry and Dairying to facilitate the Blue Revolution, promoting sustainable and accountable growth in the fisheries industry in India, an approximate investment of INR 20050 crores (US\$ 2.51 Billion) has been allocated. This investment aims to ensure comprehensive development of the fisheries sector, while also prioritizing the well-being of fishers. Supporting activities under PMMSY:

- Enhancement of Production and Productivity
- Infrastructure and Post-harvest management
- Fisheries management & Regulatory framework

5 Animal Husbandry Infrastructure Development Fund (AHIDF)⁴⁵

The Department of Animal Husbandry and Dairying is implementing the Animal Husbandry Infrastructure Development Fund (AHIDF) scheme with an outlay of INR 15000 crore (US\$ 1.88 Billion) under the Atma Nirbhar Bharat Abhiyan stimulus package. The objective of the scheme is to help increase milk and meat processing capacity and product diversification in the country.

6 Dairy Processing & Infrastructure Development Fund (DIDF)⁴⁶

DIDF is implemented with a total outlay of INR. 11,184 crores with National Bank for Agriculture and Rural Development (NABARD), comprising a corpus fund of INR 8004 crores have been set up for the creation of dairy processing infrastructure. The objective is to provide subsidized loans @6.5% to capital-stressed milk cooperatives for replacing their decades-old chilling and processing plants and addition of value-added product plants. The National Dairy Development Board (NDDB) is the implementing agency of the fund.

7 Agriculture Export Promotion Plan Scheme of APEDA (Agricultural and Processed food Products Export Development Authority)⁴⁷

The Agriculture Export Promotion Plan Scheme of APEDA supports the development and promotion of export of products like, Fruits, vegetables and their products, Meat and meat products, Poultry and poultry products, Dairy products, Confectionary, biscuits, and bakery products, etc. The scheme is designed to boost agricultural product exports, offers support to exporters by addressing challenges in the industry. It accomplishes this by understanding exporter difficulties, providing necessary assistance to overcome obstacles, and offering financial aid in areas such as export infrastructure development, quality enhancement, and market expansion. The scheme focuses on three broad components viz,

- Infrastructure Development
- Market Development
- Product Quality Development

8 Credit Linked Capital Subsidy Scheme (CLCSS) of Ministry of MSME (Ministry of Micro, Small and Medium Enterprises)⁴⁸

The objective of the CLCSS Scheme is to facilitate technology up-gradation in MSEs by providing interest subsidy on upgrade of plant & machinery with state-of-the-art technology. The scheme provides an upfront capital subsidy of 15% (on institutional finance of upto INR 1 crore availed by them) for induction of well-established and improved technology.

⁴⁴ Pradhan Mantri Matsya Sampada Yojana

⁴⁵ Animal Husbandry Infrastructure Development Fund (AHIDF) | Department of Animal Husbandry and Dairy

⁴⁶ Dairy processing & Infrastructure Development Fund (DIDF) | Department of Animal Husbandry and Dairy

⁴⁷ Agriculture And Processed Foods Export Promotion Scheme of APEDA for the 15th Finance Commission Cycle (2021-22 To 2025-26)

⁴⁸ Credit Linked Capital Subsidy Scheme for Technology Upgradation | Ministry of Micro, Small & Medium Enterprises Credit Linked Capital Subsidy Scheme

9

Venture Capital Assistance Scheme of SFAC (Small Farmers' Agri-Business Consortium)⁴⁹

Venture Capital Assistance is financial support in the form of an interest-free loan provided by SFAC (Small Farmers' Agri-Business Consortium) to qualifying projects to meet the shortfall in the capital requirement for the implementation of the project.

10

A Scheme for Promotion of Innovation, Rural Industry and Entrepreneurship (ASPIRE)⁵⁰

ASPIRE- A scheme for promotion of Innovation, Rural Industry and Entrepreneurship, is being implemented by the Ministry of Micro, Small & Medium enterprises (MSME). The objective of the scheme is to set up a network of technology centres and to set up incubation centers to accelerate entrepreneurship and to promote startups for innovation in the agro-industry. The scheme also envisages programmes to facilitate Forward and Backward linkages with multiple value chain of manufacturing and service delivery will also be put in place

11

Pradhan Mantri Kaushal Vikas Yojana (PMKVY)⁵¹

PMKVY is the flagship scheme of the Ministry of Skill Development & Entrepreneurship (MSDE), implemented by National Skill Development Corporation. The objective of the PMKVY scheme is to encourage and promote skill development in the country by providing free short-duration skill training and incentivizing this by providing monetary rewards to youth for skill certification. The overall idea was to boost the employability of youth corresponding to the industrial demand. The scheme can be leveraged for skill development in the food processing sector



⁴⁹ Small Farmers' Agri-Business Consortium | Venture Capital Assistance Scheme

⁵⁰ A Scheme For Promotion Of Innovation, Rural Industries & Entrepreneurship (ASPIRE) | Ministry of Micro, Small & Medium Enterprises

⁵¹ Pradhan Mantri Koshal Vikas Yojana | Ministry of Skill Development & Entrepreneurship

9.3

GOVERNMENT OF INDIA INCENTIVES FOR THE FOOD PROCESSING SECTOR

Income tax incentive to the Food Processing sector⁵²

- 100% deduction on profits and gains for new Food Processing Units for the initial 5 assessment years and 25% (30% for companies) for the next 5 years.
- 100% deduction on the expenditure on capital invested for setting up and operating Cold Chain and Warehouse Storage facilities for agricultural produce.



Agro-Processing included in Priority Sector Lending

- Loans for food and agro-processing up to an aggregate sanction limit of INR 100 crore per borrower classified under agricultural activity for Priority Sector Lending (PSL) - RBI Master Directions dated 4th September, 2020.
- Loans to MSMEs engaged in "food and agro-processing" are eligible for classification under Priority Sector Lending (PSL).



100% FDI permitted

- 100% FDI permitted under automatic route in manufacturing of food products since 2016-17.
- 100% FDI allowed through government-approval route for retail trading, including through e-commerce, in respect of food products manufactured/ produced in India since 2016-17.



Automatic Route

Under the Automatic Route, the non-resident investor or the Indian company does not require any approval from the Government of India for the investment.

Government Route

Under the Government Route, prior to investment, approval from the Government of India is required. Proposals for foreign direct investment under Government route, are considered by respective Administrative Ministry/ Department.

⁵² "Key Reforms in the Food Processing Sector Since 2014-15" | MoFPI

10. STATE GOVERNMENT INITIATIVES AND SCHEMES

Manipur has always endeavoured to provide a hassle-free business environment to enable investors. The Manipur State Government has implemented numerous reforms to create a conducive and investor-friendly business environment for those interested in establishing their businesses within the State. The table below highlights some of the key initiatives undertaken by the State Government:

'EODB Manipur'



The aim of promoting Ease of Doing Business (EODB) in Manipur is to create a supportive platform for both prospective and existing businesses in the State. By embracing technology, innovation, inclusivity, and sustainability, Manipur strives to achieve its vision of prosperity for all. This initiative employs objective measures to assess business regulations and encourages competition among economies for more efficient regulation. The Government of Manipur is dedicated to guiding and assisting in the establishment of industries in the State, offering the Single Window Clearance System as a timely solution for obtaining licenses, permissions, and sanctions required under the 'Manipur Ease of Doing Business Act 2016'.

 eodbmanipur.mn.gov.in



Central Industrial Land Bank Portal

Industrial parks serving as a one-stop repository of all infrastructure-related information, such as, connectivity, infra, natural resources and terrain, plot-level information on vacant plots, and contact details.⁷⁹

 iis.ncog.gov.in/parks/login1



PM-DevINE - Prime Minister's Development Initiative for North-East Region

Aims to accelerate and comprehensively develop the North-East Region by funding infrastructure and social development projects according to the states' identified needs. It seeks to address gaps in different sectors without replacing existing Central and State Schemes.⁵³



Manipur Integrated Logistics Policy 2022

To develop an integrated logistics ecosystem in Manipur, to reduce transportation/freight cost by adopting technology, skilled labour/manpower to increase operational efficiency and sustainability; to consolidate Manipur's strategic location as India's Gateway to South-East Asia.⁵⁴

⁵⁴ Manipur Integrated Logistics Policy 2022

⁵⁵ Assistance for installation of Juice Extractor with crusher etc | Department of Trade Commerce and Industries | Government of Manipur

Key incentives introduced by State Government of Manipur for the food processing industry and other industrial units under its major policies are summarized in the table below:

KEY INITIATIVES

ASSISTANCE FOR INSTALLATION OF JUICE EXTRACTOR WITH CRUSHER⁵⁵

Capital Investment subsidy

100% grant in aid for the purchase of juice extractor with crusher, grinder etc. up to INR 5 lakhs

R & D on Food Processing Industries, the project envisages research and development on Manipur traditional foods like traditional liquor through the application of modern food science and technology to determine the various constituent of rice as a source of raw material. The total outlay is capped at INR 1 lakh for the Setting up of the Quality Control Laboratory.

VAT/CST/SGST/ TAX Exemption/ Reimbursement

For products consumed within the State, shall be eligible from payment of State GST portion of the GST to be paid by them for a period of 5 years from the date of commercial production.

Power/ Electricity Subsidy

New industrial units will be eligible for concessional pre-paid meters with built-in components of concessional tariff based on consumption limits.

⁵⁵ Assistance for installation of Juice Extractor with crusher etc| Department of Trade Commerce and Industries| Government of Manipur

11. REGULATORY FRAMEWORK: REGISTRATION/NOCS/ LICENSES

Table below represents the indicative information regarding Regulatory Mechanism available in the State.

FOR STARTING OPERATIONS

S.No	Name of Service	Authority/ Agency/ Office/ Department officer granting approval
1.	License for Cold Storage	Directorate of Food Processing
2.	Registration under FSSAI Act,2006, regulation 2011	FSSAI, Government of India Health & Family Welfare Department & Food Safety
3.	License under FSSAI Act,2006, regulation 2011	FSSAI, Government of India Health & Family Welfare Department & Food Safety
4.	License under Contract Labour Act, (Regulation and Abolition), 1970	Labour Commissionerate
5.	Registration under GST (Goods and Services Tax Rules, 2017)	Department of Commercial Tax
6.	Consolidated Consent & Authorization under Water Act, 1974, Air Act, 1981 & Authorization under The Hazardous and Other Wastes (Management and Transboundary Movement) Rules, 2016	Manipur State Pollution Control Board
7.	Application for Pre-Operational Fire NOC (National Building Code, 2005)	Manipur Fire and Emergency Services

FOR SETTING UP OF BUSINESS

S.No	Name of Service	Authority/ Agency/ Office/ Department officer granting approval
8.	Land allotment in departmental industrial estates	Director Of Commerce & Industries
9.	Application for Land / Plot Allotment	Manipur Industrial Development Corporation Limited
10.	Application for new connection LT / HT line non-domestic / industrial	Department of Power, Manipur
11.	Application for Water Connection	Public Health Engineering Department
12.	Application for building plan approval	Labour Department
13.	Application for Completion cum Occupancy Certificate	Urban Local Bodies / Development Authorities
14.	Consent to Establish under Water (Prevention and Control of Pollution) Act, 1974	Manipur State Pollution Control Board
15.	Consent to Establish under Air (Prevention and Control of Pollution) Act, 1981	Manipur State Pollution Control Board
16.	Consent to Operate under Air (Prevention and Control of Pollution) Act, 1981	Manipur State Pollution Control Board
17.	Application for Pre-Establishment Fire NOC (National Building Code, 2005)	Manipur Fire and Emergency Services
18.	Site Plan Approval under the Factories Act, 1948	Labour & Employment Department

12. MAJOR PLAYERS IN FOOD PROCESSING AND ALLIED SECTORS

**BENEFICIARIES UNDER INTEGRATED COLD CHAIN AND VALUE ADDITION
INFRASTRUCTURE SCHEME, UNDER PMKSY SCHEME OF MOFPI,
GOVERNMENT OF INDIA (OPERATIONAL UNITS)**

NAME OF THE FIRM

LOCATION

Associate Action for Progressive Dev. Society

Senapati

**BENEFICIARIES UNDER CREATION / EXPANSION OF FOOD PROCESSING &
PRESERVATION CAPACITIES (CEFPPC) SCHEME, UNDER PMKSY SCHEME
OF MOFPI, GOVERNMENT OF INDIA (OPERATIONAL UNITS)**

NAME OF THE FIRM

LOCATION

M/s Baker's Bakery

Imphal East

13. LIST OF FARMER PRODUCER ORGANISATIONS

A total of 36 Farmer Producer Organisations (FPO) are present in the State of Odisha and out of these the following indicative list represents FPOs with major crop/produce production of the State. The details of FPOs in the State are available at APEDA Farmer Connect FPO Directory.

NAME OF THE FIRM	ADDRESS / CONTACT	COMMODITY
Oriental Organic Producer Company Ltd	Imphal, Manipur	King Chilli and Turmeric
Loulhomi Organic Producer Company Ltd.	Churachandpur	Ginger, Turmeric, King Chilli
Kangleipak Farmer Producer Company Limited	Moirang Purel Leikai, Imphal West- 795001	Cabbage, Cauliflower, Potato, Tomato, French Bean, Pea, Bhendi and Watermelon.
Iramdam United Food Producer Company Limited	Kakching Wairi Sabal Leikai Bamon Pareng Po Kakching Thoubal District, Pin-795103	Black Rice, Spices, Turmeric Powder, Bamboo Shoot, Foodgrains
Hingminnashi Farmer Producer Company Limited	Thouwanthaba, led, Imphal East	Fisheries, Poultry, Piggery, King Chili, Ginger
Green Sustainable Futura (Gsf) Farmers Producers Organization	Bwanruangh, Taudaijang Village, P/O & P/S Nungba, Noney District, Manipur	King Chilli, Bamboo Shoot
Gaithao Producer Company Ltd.	Longmai Li, Po&Ps - Longmai, Tamenglong, Manipur	Fermented Bamboo Shoot, Vegetables, Bamboo Shoot
Bishnupur Veg. Farmers' Cooperative Society	Moirang Konjeng Bam Leikai, Po. Moirang Bishnupur, Distt-Moirang- 795133, Manipur	Cabbage, Cauliflower, Potato, Tomato, French Bean, Pea, Bhendi and Watermelon.
Kakching Organic Farmer Producer Company Ltd	Kakching & Tengnoupal	Ginger And Turmeric
Oriental Organic Producer Company Ltd	Imphal, Manipur	King Chilli and Turmeric
Loulhomi Organic Producer Company Ltd.	Churachandpur	Ginger, Turmeric, King Chilli

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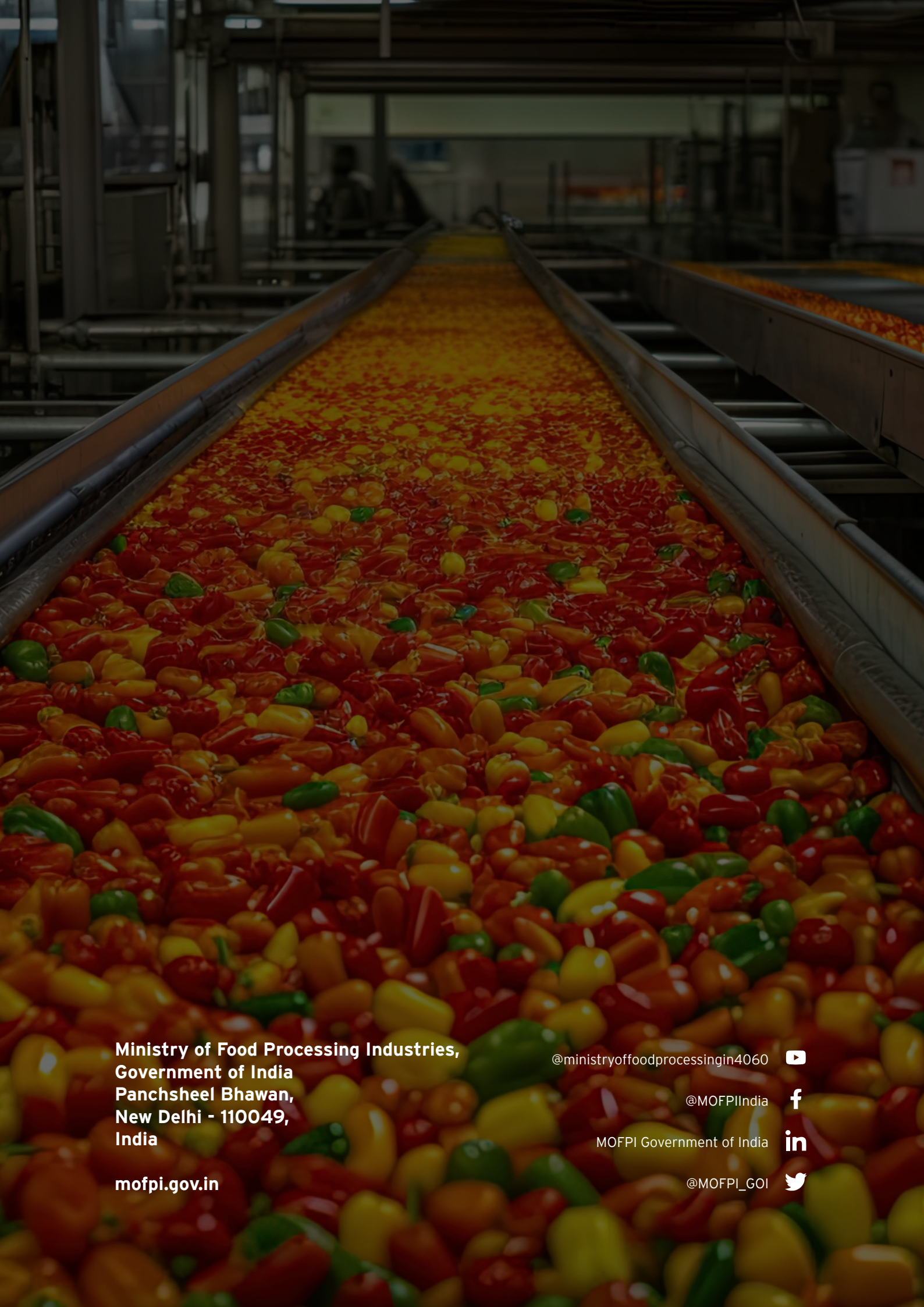
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