



FOOD PROCESSING

Towards Sustainable Growth Opportunities

MIZORAM



MIZORAM



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ACRONYMS

ABBREVIATION	DEFINITION
AHIDF	Animal Husbandry Infrastructure Development Fund
APC	Agro Processing Cluster
APEDA	Agricultural and Processed Food Products Export Development Authority
ASI	Annual Survey of Industries
ASPIRE	A Scheme for Promotion of Innovation, Rural Industry and Entrepreneurship
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
e-NAM	electronic National Agriculture Market
EoDB	Ease of Doing Business
EOI	Expression of Interest
F&V	Fruits & Vegetables
FAOSTAT	Food and Agriculture Organization Corporate Statistical Database
FDI	Foreign Direct Investment
FIDF	Fisheries and Aquaculture Infrastructure Development Fund
FME	Formalization of Micro Food Processing Enterprise
FPC	Farmer Producer Company
FPOs	Farmer Producer Organisations
FSSAI	Food Safety and Standards Authority of India
FTL	Food Testing Laboratory
GIS	Geographic Information System
GSDP	Gross State Domestic Product
GST	Goods and Services Tax
GVA	Gross Value Added
ha	Hectare
HACCP	Hazard Analysis and Critical Control Point
ICD	Inland Container Depot
INR	Indian Rupee
IQF	Individual Quick Freezing
Km	Kilometre
LEADS	Logistics Ease Across Different States
LLP	Limited Liability Partnership
MIDH	Mission for Integrated Development of Horticulture

ACRONYMS

ABBREVIATION	DEFINITION
MIFCO	Mizo Food and Allied Industries Corporation
MoFPI	Ministry of Food Processing Industries
MOVCD-NER	Mission Organic Value Chain Development for North-East Region
MSDE	Ministry of Skill Development & Entrepreneurship
MSEs	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
NEIIPP	North East Industrial and Investment Promotion Policy
NGO	Non-Governmental Organization
NOC	No Objection Certificate
ODOP	One District One Product
PLI	Production Linked Incentive
PLISFPI	Production Linked Incentive Scheme for Food Processing Industry
PLISMBP	Production Linked Incentive scheme for Millet-Based Products
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
RPO	Renewable Purchase Obligations
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
SWC	Single Window Clearance
USD	U.S. Dollar



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.

Mizoram's Agriculture-based Economy and Power Potential:

Mizoram's economy is predominantly agriculture-driven, with a Gross State Domestic Product (GSDP) of USD 2.19 billion. The State possesses a significant hydroelectric power potential of 4500 MW, presenting opportunities for electricity generation and economic growth. The State is currently strengthening its infrastructure network through MoFPI's flagship schemes such as Pradhan Mantri - Kisan Sampada Yojana, Pradhan Mantri Formalisation Micro Food Processing Enterprises, and the Production Linked Incentive Scheme.

Promising Opportunities in Mizoram:

Mizoram possesses approximately 24,000 hectares of viable land for inland fish farming. This silver line contributes to the development of the fisheries sector as well as food and nutritional security in the State. Mizoram holds the position of being the fourth-largest producer of strawberries and passion fruit, indicating promising prospects in horticulture and fruit processing. Mizoram possesses abundant reserves of bamboo, presenting significant potential for sustainable economic growth and the creation of job opportunities. Furthermore, the State has identified over 66,000 hectares of land suitable for cultivating oil palm, fostering the production of edible oil and promoting agro-based industries. Mizoram was awarded two Geographical Indicator (GI) tags for Mizo Chilli and Mizo Ginger. Mizoram presents abundant opportunities in processing fish to fillets, sausages, and dried fish, as well as creating value-added products such as strawberry jam, passion fruit pulp, and palm oil-based salad dressings. Mosambi) offer opportunities for processed fruit products such as juices, concentrates, arils, chips, pulps, jams and frozen fruits. Incentive Scheme.

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

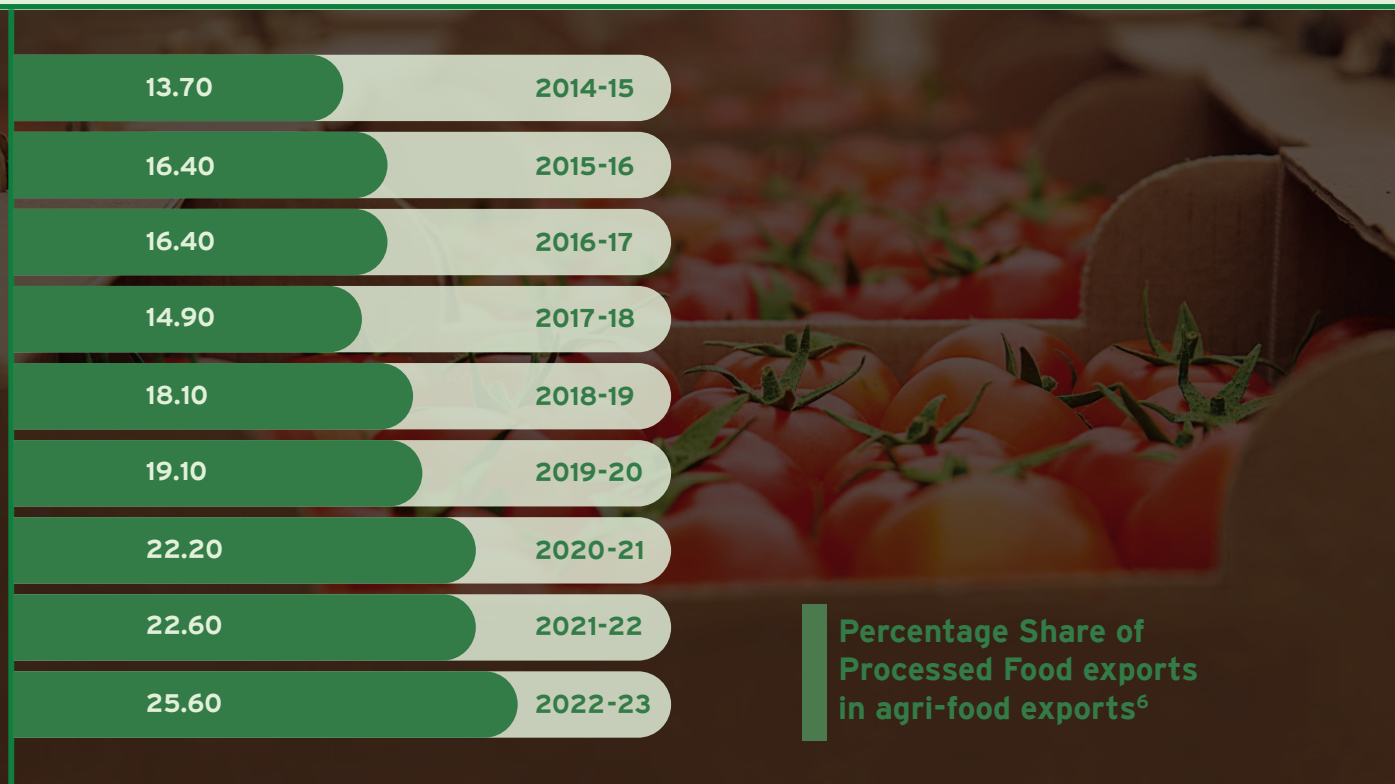
² MoFPI

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 (2019-20), the Food Processing Sector employs 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

Mizoram is in north eastern India and shares a 722 km long international border with Bangladesh and Myanmar. It is a significant producer of arecanut, ginger, and turmeric in addition to being India's fourth-largest strawberry producer. The State was formed on February 20, 1987 to become India's 23rd State. 51% of the State's land area is covered in bamboo plantations. With more than 60% of the workforce employed directly or indirectly in farming related activities, the State's economy is predominantly based on agriculture.⁹

State Capital

Aizawl

Geographic Area¹⁰

21,081 sq. km

Population (Census 2011)¹¹

1.10 Million

Total Road Length (2019)¹²

16250 (km)

Industrial Area¹³

1 Industrial Growth Centre

1 Export Promotion Industrial Park

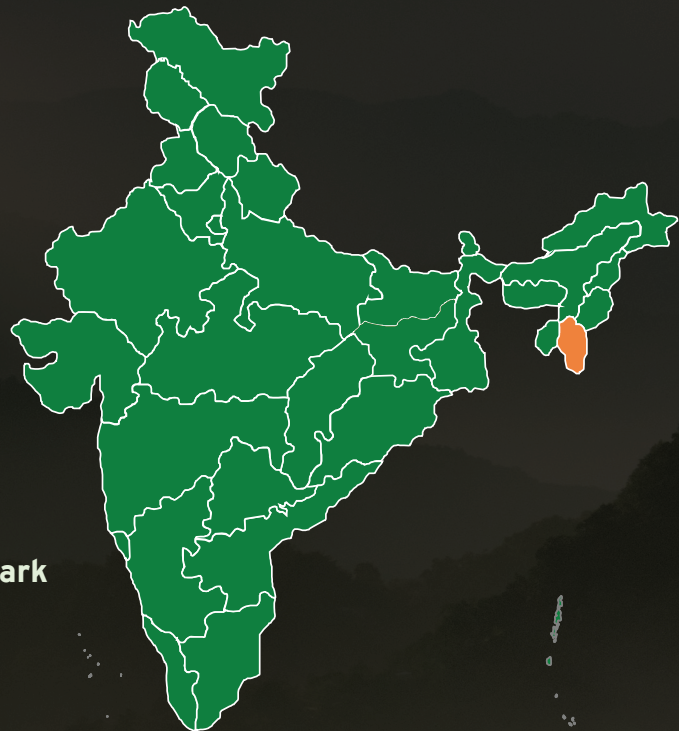
6 Industrial Estates

2 Integrated Infrastructure Development Centre

2 Industrial Area

Rail length¹⁴

6 (Route km)



⁹ E-Catalogue for Export Of Millets And Value-Added Products North Eastern States

¹⁰ Mizoram at Glance | State Portal of Mizoram | Government of Mizoram

¹¹ MoSPI | Population

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

¹³ Declaration of Industrial Areas | Commerce & Industries Department | Government of Mizoram

¹⁴ DPIIT | LEADS 2022 Logistics Ease Across Different States

Gross State Domestic Product (GSDP)¹⁵

USD 2.19 Billion
(2021-22)

Per Capita Net State Domestic Product¹⁶

USD 1745.03
(2021-22)

Airports

1 Domestic Airports
Lengpui

Available Land¹⁷

Mixed Category
263.62 ha

Infrastructure¹⁸

1
Air Cargo Terminals

2
Railway Goods Sheds

128 million
MT warehouse capacity

4,001
MT Cold Storage Capacity

Installed power¹⁹

Thermal
70.81 MW

Other Renewables
171.43 MW

Of which, Hydro is
97.94 MW

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

¹⁶ RBI | Handbook of Statistics on Indian States | Per Capita Net State Domestic Product | Exchange Rate as on 15th June 2023

¹⁷ India Industrial Land Bank | DPIIT (as on 31.05.2023)

¹⁸ DPIIT | LEADS 2022: Logistics Ease Across Different States

¹⁹ Central Electricity Authority | Installed Capacity Report (as on 31.03.2023)

03. ADVANTAGE MIZORAM



Hydroelectric Power Potential
of **4500 MW**²⁰



24,000 ha of potential area for
fish farming²¹



The State is rich with
abundant reserves of
bamboo, and is referred to
as '**Bamboo Queen**' of the
country²²



Potential area of more than
66,000 ha has been identified
for **oil palm cultivation**.²³



Graded **Aspirer** in North-eastern
Region Category, as per **LEADS
2022**²⁴



Formulated **Mizoram State
Logistics Policy 2022**²⁵



Exports worth **USD 3.6 million** in
2021-22²⁶



4th largest producer of
Strawberries and Passion Fruit²⁷

²⁰ Hydro Power Potential & its Development | Power & Electricity Department | Government of Mizoram

²¹ Opportunities | Economic Survey Report For 2021-2022 In Respect of Fisheries Department

²² Bamboo Resources | ENVIS Centre: Mizoram | Status of Environment and Related Issues | Mizoram Pollution Control Board

²³ Oil Palm Potential area as assessed in 2020 | Agriculture Department | Oil Palm | Government of Mizoram

²⁴ DPIIT | LEADS 2022: Logistics Ease Across Different States

²⁵ DPIIT | LEADS 2022: Logistics Ease Across Different States

²⁶ Mizoram Statistical Database | Directorate of Economics & Statistics | Government of Mizoram

²⁷ Department of Agriculture & Farmers Welfare | Horticulture | State Level | Area and Production of Horticulture crops for 2021-22 (3rd Advance Estimates)

04. LOCAL FOOD SYSTEM

4.1 INDIGENOUS PRODUCE

Mizoram's economy, known for its high literacy rate, has traditionally relied on slash-and-burn jhum farming. However, there has been a significant shift towards the thriving horticulture and bamboo products industry, marking a transition to more sustainable farming practices.²⁸

Horticulture holds immense importance and has recently made a substantial impact on the State's development. The emphasis is on enhancing the cultivation of diverse horticultural crops through the implementation of Area Expansion Schemes. This strategic approach aims not only to achieve self-sufficiency in vegetables, fruits, and other horticultural produce but also to generate a surplus for the market. State has three **agro-climatic zones**²⁹ favouring the cultivation of a multitude of crops, vegetables, and fruits around the year.

During 2021-2022, the agricultural sector and related industries employed over 60%³⁰ of the local workforce in the region. Main cultivation is of paddy, a staple food in the State.

STATE HAS RECEIVED 7 GEOGRAPHICAL INDICATOR (GI) TAGS FOR³¹ -

- Mizo Chilli
- Mizo Ginger

²⁸ E-Catalogue for Export of Millets and Value-Added Products North Eastern States

²⁹ Agriculture | ENVIS Centre: Mizoram | Status of Environment and Related Issues

³⁰ Agriculture | Mizoram Statistical Database | Directorate of Economics & Statistics | Government of Mizoram

³¹ Intellectual Property | Registration Details of Geographical Indications

4.2 KEY PRODUCTION HIGHLIGHTS

Key Production Highlights of the State (in India) include:



4th largest producer of **Strawberries** in India³²



4th largest producer of **Passion fruit** in India³³



4th largest producer of **Arecanut**³⁴



Maize & Rice are the main food crops³⁵



Exotic varieties & breeds of pigs and fowls have gained popularity among residents of the State



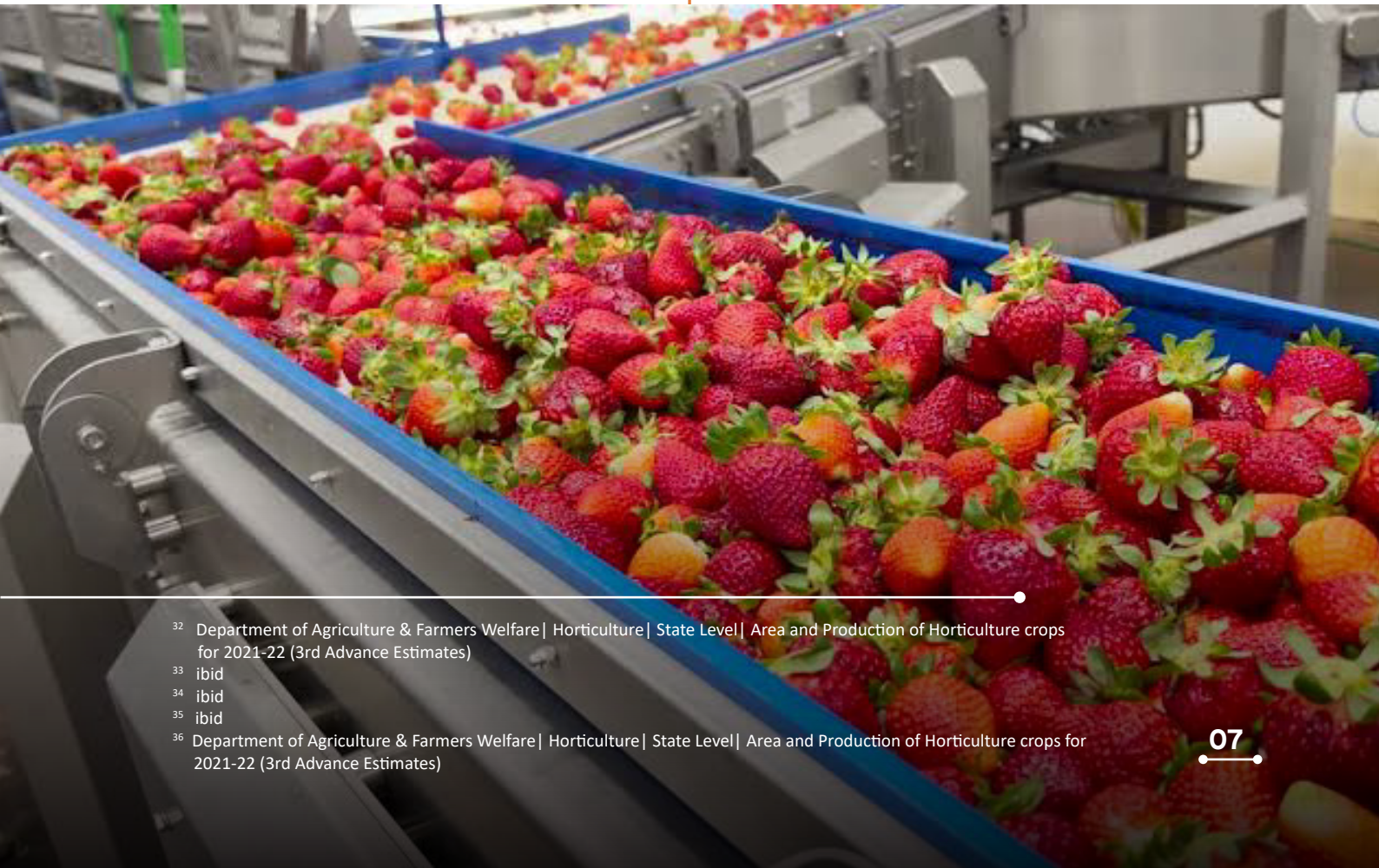
Cash crops include sugarcane, tapioca, ginger, and cotton



Among the top 10 producers of **Mandarin**³⁶



Orange, lemon, Kagzi lime, passion fruits, Hatkora, Jamir, pineapple, and papaya are the main horticulture crops



³² Department of Agriculture & Farmers Welfare | Horticulture | State Level | Area and Production of Horticulture crops for 2021-22 (3rd Advance Estimates)

³³ ibid

³⁴ ibid

³⁵ ibid

³⁶ Department of Agriculture & Farmers Welfare | Horticulture | State Level | Area and Production of Horticulture crops for 2021-22 (3rd Advance Estimates)

KEY PRODUCTION STATISTICS ARE PRESENTED BELOW ^{37, 38}

CROPS

'000 MT

RICE

62.20

SUGARCANE

43.00

COARSE CEREALS

12.60

PULSES

5.90

LIVESTOCK & FISHERIES

MILK

25 '000 tonnes

EGGS

434 lakh

MEAT

15 '000 tonnes

FISH

0.07 lakh tonnes

FRUITS

'000 MT

BANANA

140.50

PAPAYA

22.72

STRAWBERRY

1.08

PASSION FRUIT

2.23

VEGETABLES

'000 tonnes

CABBAGE

88.53

OKRA

25.02

TOMATO

27.10

BITTER GOURD

20.52

SPICES

'000 metric tonnes

GINGER

60.13

TURMERIC

29.82

RED CHILLIES

10.92

TAMARIND

0.03

³⁷ Department of Agriculture & Farmers Welfare | Horticulture | State Level | Area and Production of Horticulture crops for 2021-22 (3rd Advance Estimates)

³⁸ RBI | RBI Handbook of Statistics on Indian States

05. PRODUCTION CLUSTERS³⁸

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

MIZO CHILLI

Aizawl

PASSION FRUIT

based products

Champhai

TURMERIC

Hnahthial, Saiha,
Mamit, Lunglei,
Khawzawl

MANGO

based products

Lawngtlai

GINGER

based products

Khunti

PINEAPPLE

based products

Khawzawl, Serchhip



06. MILLETS IN MIZORAM



Millets, referred to as super foods, are varieties of crops that are highly climate resilient and rich in nutrients. Millets are gluten free, have low glycemic index and are recognised globally for their health benefits. The consumption of millet has changed little over time and differs between States in the north-eastern States. A family of small-seeded grasses known as millets is widely cultivated as a cereal crop or grain for human and animal nourishment all over the world.⁴⁰

Millets have been consumed traditionally by residents of the State for centuries. The Mara tribe of Mizoram incorporates sato or millet into their staple food, practicing shifting cultivation.

⁴⁰ APEDA | E-Catalogue for Export Of Millets And Value-Added Products North Eastern States

07. AGRICULTURAL MARKETING

The Mizoram State Agricultural Produce Marketing (Development and Regulation) Act, 2008 focuses on providing marketing initiatives to effectively support the interests of both farmers and consumers. With a focus on ensuring profitable returns for farmers, the department is actively working towards developing marketing infrastructure and post-harvest management facilities.⁴¹



⁴¹ The Mizoram State Agricultural Produce Marketing Act, 2008 | Directorate Of Commerce & Industries (Commerce Wing) | Government of Mizoram

⁴² MoFPI Annual Report (2021-22)

⁴³ APEDA | Mizoram

⁴⁴ DATA OF REGISTERED FPOs | Ministry of Agriculture & Farmers Welfare

⁴⁵ Ministry of Consumer Affairs, Food & Public Distribution | Storage of Food Grains

⁴⁶ Food Processing Industries | Ministry of Food Processing Industries

⁴⁷ Agmarket | Directorate of Marketing & Inspection (DMI), Ministry of Agriculture and Farmers Welfare

08. POTENTIAL OPPORTUNITIES

- To enhance the food processing industry in the State, several initiatives have been implemented. Two significant projects, namely the Dehydration Plant and the Ginger Oil and Oleoresins Plant located at Sairang, have been successfully completed. Additionally, the Mizo Milling Plant in Khawzawl and the Fruit Juice Concentrate Plant in Chhingchhip have been transferred to the Mizo Food and Allied Industries Corporation (MIFCO) for commercial production purposes.
- These initiatives signify the commitment of the State to promoting food processing activities and generating economic opportunities. By establishing these facilities, Mizoram aims to add value to agricultural produce, reduce post-harvest losses, and contribute to the growth of the food processing sector.
- Mizoram offers significant opportunities in the food processing sector. The State's rich agricultural resources, diverse crops, and unique traditional food products create a favourable environment for food processing activities. Some of the potential opportunities in food processing in Mizoram include:

SPICES PROCESSING

- Mizoram produces a substantial amount of ginger (5,597 MT), including Mizo Ginger, which has been awarded Geographical Indication (GI) tags, presenting a lucrative opportunity.
- The State is renowned for its production of spices such as ginger, turmeric, and black pepper. Setting up spice processing units for grinding, powdering, and packaging can capitalize on the increasing demand for high-quality spices





FISHERIES

- Fisheries can be a potential sub-sector in the State, as the estimated production of fish is 7,000 tonnes, utilizing only 5,500 hectares of fish farming area, while the State has a potential fish farming area of 24,000 hectares.
- Opportunities such as fish processing and packaging (activities like cleaning, filleting, deboning, and packaging of fish for domestic and export markets), fish canning and curing, value-added fish products (fish fillets, fish fingers, fish cutlets, fish sausages, and fish-based snacks), fish pickling and fermentation, fish oil extraction, fish feed manufacturing, cold storage and refrigeration facilities, market linkages, and export opportunities, etc., can be explored in this sector.



FRUITS AND VEGETABLES

- Mizoram has a significant cultivation of fruits such as oranges, pineapples, passion fruits, strawberries and lemons. Establishing fruit processing units for juice concentrates, jams, and other value-added products can present a profitable opportunity. Other processed products can be
 - Lemon: Juice/Concentrate, Pickles, Essential Oil
 - Strawberry: Jam/Preserves, Frozen Strawberries, Syrup
 - Pineapple: Nectar, Dried & Canned Pineapple
 - Passionfruit: Pulp/Puree, Syrup, Flavoured Yoghurts & Ice-creams
- Mizoram's favourable climatic conditions make it well-suited for organic farming. Setting up organic food processing units for grains, cereals, and spices can cater to the increasing demand for organic and natural products.



09. GOVERNMENT OF INDIA SCHEMES FOR FOOD PROCESSING

9.1 SCHEMES UNDER MINISTRY OF FOOD PROCESSING INDUSTRIES⁴⁸

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.

⁴⁸ 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 Mizoram (as on date: 31.05.2023)⁴⁹

PRADHAN MANTRI KISAN SAMPADA YOJANA (PMKSY) SCHEME

SCHEME NAME	NO. OF PROJECTS APPROVED	TOTAL PROJECT COST (INR CR.)
MEGA FOOD PARK	1	75.2
COLD CHAIN	2	22.46
CEFPPC UNIT/FOOD PROCESSING UNIT	1	9.35

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

SCHEME NAME	NO. OF PROJECTS APPROVED
MICRO ENTERPRISES APPROVED UNDER FME (production linked incentive)	10
INCUBATION CENTRES	1

⁴⁹ Ministry of Food Processing Industries

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) Scheme⁵⁰

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) Scheme⁵¹

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)⁵²

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.

⁵⁰ Mission for Integrated Development of Horticulture (MIDH)

⁵¹ National Agriculture Infra Financing Facility

⁵² Department Of Fisheries

4 Pradhan Mantri Matsya Sampada Yojana (PMMSY) Scheme⁵³

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)⁵⁴

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)⁵⁵

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)⁵⁶

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)⁵⁷

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.

⁵³ Pradhan Mantri Matsya Sampada Yojana

⁵⁴ Animal Husbandry Infrastructure Development Fund (AHIDF) | Department of Animal Husbandry and Dairy

⁵⁵ Dairy processing & Infrastructure Development Fund (DIDF) | Department of Animal Husbandry and Dairy

⁵⁶ Agriculture And Processed Foods Export Promotion Scheme of APEDA for the 15th Finance Commission Cycle (2021-22 To 2025-26)

⁵⁷ 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)⁵⁸

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)⁵⁹

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)⁶⁰

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



⁵⁸ Small Farmers' Agri-Business Consortium | Venture Capital Assistance Scheme

⁵⁹ A Scheme For Promotion Of Innovation, Rural Industries & Entrepreneurship (ASPIRE) | Ministry of Micro, Small & Medium Enterprises

⁶⁰ 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 sector⁶¹

- 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.

⁶¹ "Key Reforms in the Food Processing Sector Since 2014-15" | MoFPI

10. STATE GOVERNMENT INITIATIVES AND SCHEMES

State Government has undertaken several reforms to offer an enabling and investor-friendly business climate for investors keen on setting up business in the State. Some of the key EoDB initiatives by the State are included in Table below:

'Industrial Rooftop Solar Policy 2020 in Mizoram'

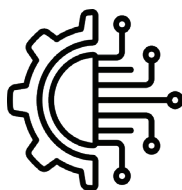


Aims to ensure a stable energy mix and reliable electricity supply in the State. To meet its 10.5% renewable purchase requirement (RPO) by 2021-2022, Mizoram plans to install 80 MW of solar projects (rooftop and ground-mounted). In the residential sector, the State issued a tender in May 2020 for 500 KW of rooftop solar.⁶²



'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.⁶³



'The Mizoram State Logistics Policy 2022,

Objective is to enhance the logistics network by establishing new infrastructure, implementing efficient regulations and support systems, promoting the adoption of advanced technologies by private players, and facilitating the upskilling of logistics professionals.⁶⁴



'Mizoram New Land Use Policy'

Aims to provide farmers with sustainable alternatives to shifting cultivation by offering them opportunities for land-based activities under the new policy.⁶⁵

⁶² Power & Electricity Department | Solar Power Policy of Mizoram | Government of Mizoram

⁶³ MDONER | PM-DevINE

⁶⁴ Commerce & Industries Department | The Mizoram State Logistics Policy 2022

⁶⁵ Mizoram Portal | New Land Use Policy (NLUP)



Central Industrial Land Bank Portal

Industrial parks serve 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.

 iis.ncog.gov.in

Mizoram provides an advantageous business climate for establishing food processing units, offering investors excellent infrastructure, support for capital investment and technology upgrades, a well-developed marketing network and a diverse pool of skilled labour. The table below summarizes the key incentives available for the food processing industry under major policies.

KEY INITIATIVES MIZORAM INDUSTRIAL POLICY 2012⁶⁶

Key Initiatives	Eligibility	Amount Claimable
Subsidy on Cost of Project Report	All new Industrial Unit within 5 yrs. of existence	<ul style="list-style-type: none"> ■ 90 % for micro-enterprises subject to a ceiling of INR 5,000/- per unit. ■ 75 % for small enterprises subject to a ceiling of INR 25,000/- per unit. ■ 50 % for medium enterprises subject to a ceiling of INR 50,000/- per unit.
Land Subsidy	New Industrial unit established inside Notified Industrial Area within 5yrs of existence.	<ul style="list-style-type: none"> ■ 5% of the lease charge/fee of allotted developed/undeveloped land will be subsidized for a period of 5 years. ■ 25% of the amount spent by the unit on the development of undeveloped land allotted to the unit will be subsidized.

Key Initiatives	Eligibility	Amount Claimable
Factory Rent Subsidy	New MSME occupying the built-up factory sheds within the declared Industrial Area on monthly/annual rent basis for a period of 5yrs from the date of commencement of production	50 % of the duly assessed rent of factory Shed subject to a ceiling of INR 30,000/- per unit per year.
Manpower Development Subsidy	New and existing Industrial units	50 % of the actual course fee for training subject to a ceiling of INR 10,000/- per trainee and INR 50,000/- per unit per year.
Interest Subsidy	New Industrial unit	<ul style="list-style-type: none"> ■ The interest on loan paid by an industrial unit in excess of 8.5 % shall be subsidized up to a maximum of 4 %. ■ Subsidy shall be limited to a claim on a total amount not exceeding INR 3,60,000/- paid by an industrial unit towards interest on term loan in a full year. However, for working capital loan, the total amount paid towards interest on which subsidy can be claimed shall be limited to INR 1,20,000/- in a full year. ■ If the unit avail interest subsidy under NEIIPP, only the shortfall amount, if any, will be applicable for interest subsidy on working capital loan.

Key Initiatives	Eligibility	Amount Claimable
Power Subsidy	New MSME for a period of 5yrs from the date of commencement of production	<ul style="list-style-type: none"> ■ 60 % of total expenditure on power consumption in case of micro-enterprises. ■ 50 % of the total expenditure on power consumption in case of small enterprises. ■ 30 % of the total expenditure on power consumption in case of medium enterprises.
Subsidy on Power Line	New MSME for a period of 5yrs from the date of commencement of production	50 % of the actual expenditure to a ceiling of INR 50,000/- per unit.
Subsidy on Power Generating Set	New MSME for a period of 5yrs from the date of commencement of production	50 % of the cost of Captive generating set and installation charge thereof subject to a ceiling of INR 3,00,000/- per unit.
State Transport Subsidy on Plant & Machineries	New MSME for a period of 5yrs from the date of commencement of production	50% of the actual cost of transportation by railway or on road or both of plants and machinery.

11. REGULATORY FRAMEWORK: REGISTRATION/NOCS/ LICENSES

The table below represents the indicative information regarding Regulatory Mechanism available in the State of Mizoram.

FOR STARTING OPERATIONS

S.No	Name of Service	Authority/ Agency/ Office/ Department officer granting approval
1.	License for Cold Storage	Department of Food, Civil Supplies, and Consumer Affairs
2.	Registration under FSSAI Act,2006, regulation 2011	FSSAI, Health & Family Welfare Department, & Food Safety
3.	License under FSSAI Act,2006, regulation 2011	FSSAI, Health & Family Welfare Department, & Food Safety
4.	Trade license or Trade Certificate of Enlistment	Concerned Gram Panchayat Municipality or Notified Authority
5.	Health license/food license	Concerned Municipality
6.	GST Registration	Commercial Tax office
7.	Pollution Control <ul style="list-style-type: none"> • No objection certificate • Environment protection / Prevention and Pollution control 	State Pollution Control Board
8.	Fire License <ul style="list-style-type: none"> • License • No objection certificate (as per the range of use) 	a) Directorate of Fire Service, b) Dept. of Local Government & Urban Development c) District Magistrate d) Panchayet & Municipality
9.	Food Safety and Standard Authority of India	Ministry of Health, Govt. of India

FOR SETTING UP OF BUSINESS

S.No	Name of Service	Authority/ Agency/ Office/ Department officer granting approval
10.	Licenses / Registration under the Factories Act	Factories Labour Commissioner,
11.	Clearance under the Town and country planning Act.	a) Zilla Parishad b) Notified Area Development Authority
12.	Urban Land Ceiling Clearance	District Panchayat / Municipality
13.	Conversion of land (Clearance) & Mutation	District Panchayat / Municipality
14.	Application for Water Connection	Municipal Board
15.	Application for building plan approval	Labour Department
16.	Consent to Establish under Air (Prevention and Control of Pollution) Act, 1981	Mizoram State Pollution Control Board

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
-------------------------	-----------------

Zoram Mega Food Park Pvt. Ltd.	Kolasib
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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
-------------------------	-----------------

Mizofa Fish Seed Farm	Aizawal
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Zoram Fish Seeds Production Centre	Aizawal
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13. LIST OF FARMER PRODUCER ORGANISATIONS

A total of 34 Farmer Producer Organisations (FPO) are present in the State and out of which the following indicative list in Table below represents FPOs with major crop/produce production of the State. The overall details of FPOs in the State are available at APEDA Farmer Connect FPO Directory.⁶⁷

NAME OF THE FIRM	ADDRESS / CONTACT	COMMODITY
Aizawl District Organic Spices Producer Society	Thingsul Tlangnuan	Mizo Chilli and Ginger
Bird Eye Chilli Farmer Producer Organization (FPO)- I(MOVCD-NER)		Mizo Chilli
Zo Thlai Thar Producer Company Limited	Zo Thlai Thar Producer Company Limited, Durtlang, Mizoram, Aizawl- 796025	Birdie chili, cabbage, squash, Tomato
West Phaileng Block Bird Eye Chilli Grower Society		Mizo Chilli
Chilli Growing Farmer Producer Organization		Mizo Chilli
Reiek Block Turmeric (Aieng) Grower Society	Reiek	Turmeric
Organic Turmeric Farmer Producer Organization	West Lungdar, Raiek Block	Turmeric
Organic Turmeric and MizoChilli Producer Society	Tlabung	Mizo Chilli and turmeric

⁶⁷ APEDA Farmer Connect | FPO/FPC/Cooperative Societies Directory

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