FOOD PROCESSING

COUNTRY PROFILE

NETHERLANDS

TABLE OF CONTENTS

1 GLOBAL FOOD & BEVERAGES MARKET

1.1 MARKET OVERVIEW

The food processing sector is involved in transforming raw agricultural products into processed food items that are suitable for consumption. It encompasses a wide range of activities, including harvesting, sorting, cleaning, packaging, preserving, and distributing food products. Food processing involves various techniques and technologies to enhance the quality, safety, and shelf life of food. Some common processes include cutting, grinding, cooking, pasteurization, canning, freezing, and dehydration. These processes often involve the use of machinery, equipment, additives, and other ingredients to modify the characteristics of the raw materials. The food processing sector plays a crucial role in meeting the global demand for safe, convenient, and nutritious food products. It not only helps to extend the availability of seasonal produce but also allows for the development of a wide variety of food options. This sector covers a broad range of products, including fruits, vegetables, grains, dairy products, meat, poultry, seafood, bakery items, beverages, and prepared meals. Food processing companies may operate at different scales, from small-scale local businesses to large multinational corporations. They must adhere to strict quality control and safety standards to ensure that the processed foods meet regulatory requirements and consumer expectations. Overall, the food processing sector contributes significantly to the economy, employment, and food security by adding value to raw agricultural products and making them suitable for consumption on a mass scale.

In the year 2022, the global food and beverages market exhibited an impressive valuation of $6,730.8 billion[1]. This expansive market displayed an intriguing perspective when scrutinized from the standpoint of per capita consumption, amounting to $862.8.[2] Additionally, in relation to the vast expanse of the global GDP, the market held a significant share of 6.32%.[3]

[1] Food and Beverages Global Market Briefing 2023 – The Business Research Company, December 2022
[2] Ibid
[3] Ibid

When examining the various segments within the food and beverages market, it becomes evident that the domain of meat, poultry, and seafood claimed the top position, boasting a substantial market share of 22.3%. Following closely behind, the dairy food sector made a commendable showing at 14.0%, while the realm of bakery and confectionary held its own at a captivating 13.8%.[4]

The global food and beverages market grew from **US $5437.42 Bn in 2017 to US $6730.88 Bn in 2022**[5]

The market grew at a compound **annual growth rate (CAGR) of 4.36%**[6]

FIGURE 1

Global Food & Beverages Market, 2017-2018

1.2 EMERGING TRENDS

The food and beverages market are being influenced by several significant trends, which are as follows:

- Functional drinks for hydration & nutritional benefits
- High pressure pasteurization of fruits & vegetables
- Increasing demand for clean label products
- Individual quick freezing (IQF) technology
- Robotics and automation in meat processing
- Premiumization of pet foods

[4] Food and Beverages Global Market Briefing 2023 – The Business Research Company, December 2022

[5] Ibid

[6] Ibid

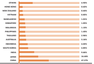
2 INDIAN FOOD PROCESSING SECTOR

2.1 OVERVIEW

In the year 2022, the food and beverages market witnessed Asia Pacific emerging as the dominant region, boasting a substantial valuation of $2,793.3 billion. This impressive figure accounted for a noteworthy 41.5% share of the global food and beverages market. Trailing behind, Western Europe secured the second position with a respectable share of 23.3%, while North America followed closely at 21.4%.[7]

FIGURE 2

Country wise split of Asia Pacific Food & Beverages Market, 2022



[7] Food and Beverages Global Market Briefing 2023 - The Business Research Company, December 2022

Within the Asia Pacific region, India's food and beverages market held the position of being the third largest, following the likes of China and Japan. In the year 2022, the market revenue reached an impressive sum of US $269.77 billion, thus commanding a significant 9.66% market share within the vast expanse of the Asia Pacific market. [8]

India's food and beverages market grew at a
CAGR of 6.92% between 2017 - 22.[9]

India's food and beverages market is forecasted to grow at a
CAGR of 9.94% from 2022 - 27.[10]

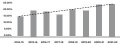
The Indian food processing sector has experienced rapid growth, exhibiting an impressive average annual growth rate of over 9 percent since the fiscal year 2014-15[11]. This sector plays a pivotal role in establishing strong connections between the industry and the agriculture sector through a comprehensive range of activities that encompass farming, aggregation, processing, packaging, storage, and distribution.

In India, the food processing sector extends its support to a wide array of products, encompassing traditional food items such as food grains, spices, fruits, and vegetables, as well as modern processed foods like baked goods, dairy products, superfoods, infused products, nutraceuticals, and convenience foods. Its contributions to the economy are substantial, with a multiplier effect on employment, as it employs 12.2% of the total workforce in the Indian registered manufacturing sector. In the fiscal year 2021-22, the remarkable contribution of processed foods to India's total Agri-Food Exports reached an astonishing 22.6%. The percentage share of food processing industries in the overall Indian manufacturing GVA was 10.54% at 2.37 lakh crores (US $31.9 Bn) in 2020 - 21.[12]

[8] Food and Beverages Global Market Briefing 2023 - The Business Research Company, December 2022
[9] Ibid
[10] Ibid
[11] MOFPI Data
[12] Ibid

FIGURE 3

Percentage share of processed foods exports in agri - food exports



India's agri - food exports grew from
US $36,171.92 Mn in 2014 - 15 to US $ 46,113.3 Mn in 2021 - 22.[15]

India's processed food exports grew from
US $4959.44 Mn in 2014 - 15 to US $10,420 Mn in 2021 - 22.[16]

[15] MOFPI Data
[16] Ibid

2.2 KEY GROWTH DRIVERS

The food and beverage sector hold substantial significance as a contributor to the Indian economy. Forecasts indicate that the Indian processed food market is poised to witness remarkable growth, with expectations of reaching a valuation of USD 470 billion by the year 2025. This projection signifies a substantial increase from its previous valuation of USD 263 billion in the fiscal year 2020. The key growth drivers for the growth prospect of the sector are

- Strong economic growth
- Increased disposable income
- Demand for higher quality products and premiumisation
- Improvements in logistics infrastructure
- Modernisation of cold chain infrastructure
- COVID-19 pandemic accelerating the shift towards healthier and more hygienic products
- Industrial automation
- Manufacturing process improvement

This upward trajectory is expected to trigger a substantial surge of opportunities across the entire value chain of processed foods.

2.3 KEY OPPORTUNITIES

The following are the high potential opportunities in the food processing sector of India

FOOD PROCESSING MACHINERY

The machinery sector for food and beverage processing in India experienced a growth rate of 6.3% in the year 2021. Regionally (Asia Pacific), it stood as the fourth largest in terms of production value. Looking ahead, the industry's turnover is projected to achieve a compound annual growth rate (CAGR) of 4.5% during the period of 2021-2026. Furthermore, it is anticipated that the industry will regain pre-pandemic levels by the year 2024.

The machinery sector for food and beverage processing relies primarily on the expansion of domestic markets for its growth. In the year 2021, exports constituted 9.4% of the overall production output, indicating that the industry's focus is predominantly on catering to domestic demand.

FIGURE 4

Regional Comparison of Machinery Production Value, 2021

India's is the fourth largest producer
in terms of production value in Asia Pacific

India represents a significant 9.0% share
of the total production value in the Asia Pacific region.

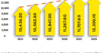
OILS & FATS

During the period from 2016 to 2021, the Indian oils and fats market exhibited robust growth. The key drivers behind this growth were rapid urbanization, an expanding middle-class population, increased income levels, and enhanced purchasing power among consumers. In 2021, the Indian oils and fats market generated total revenues of $12,235.3 million, showcasing a noteworthy compound annual growth rate (CAGR) of 7.3% over the period from 2016 to 2021. Moreover, the market witnessed a steady increase in consumption volume, with a CAGR of 6% during the same timeframe, culminating in a total volume of 10,436.2 million kilograms in 2021. By the end of 2026, the market's volume is projected to reach 12,300.1 million kilograms.

Among the segments within the market, the vegetable oil segment emerged as the most lucrative in 2021, amassing total revenues of $8.0 billion, accounting for a significant 65.6% of the market's overall value. The sunflower oil segment also made a substantial contribution, generating revenues of $2.0 billion in 2021, which equates to 16% of the market's collective value.

FIGURE 5

Oils & fats market volume forecast, 2021 - 26, million kilograms.



India's agri-food imports are dominated by three primary commodities: Palm Oil, Soya-bean oil, and Sunflower seed oil. Collectively, these imports accounted for a significant sum of US $16,767.33 million in 2021.

FIGURE 6

India's top agri-food imports in 2021, USD million

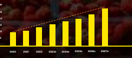
COLD CHAIN INFRASTRUCTURE

India currently holds the position of the global leader in milk production, ranks second in the production of fruits and vegetables, and boasts a significant output of marine, meat, and poultry products. The majority of these commodities are highly susceptible to temperature variations, necessitating precise storage and transportation conditions. The cold chain market in India demonstrated a revenue of USD 24.9 billion in 2022 and is projected to attain USD 57.5 billion by 2027. This indicates a robust compound annual growth rate (CAGR) of approximately 14.27% between the years 2023 and 2027.

The surge in demand for cold chain infrastructure stems from multiple factors, including heightened requirements from the healthcare industry, expansion of organized food retail, growth in the processed food sector, and a shift towards increased consumption of fruits and vegetables. Additionally, the COVID-19 pandemic has had a positive impact on the overall cold chain market, leading to an increased need for cold storage and temperature-controlled logistics across various sectors. Over the past two years, the government has actively engaged in numerous cold chain development initiatives. Moreover, organized players have prioritized the augmentation of cold storage capacities to accommodate the storage and distribution of COVID-19 vaccines and medcations.

FIGURE 7

Market Size & Growth Forecast - India Cold Storage Market, in USD Billion



- The implementation of a proficient and reliable cold chain storage infrastructure enhances the transportation and storage of products sensitive to temperature fluctuations, resulting in extended shelf life and minimized spoilage risks from the point of origin to the point of consumption.
- Numerous stakeholders from various industries are actively engaging in the development of a dynamic and seamless cold chain storage system that adheres to the necessary standards and regulations.
- Anticipated growth in this segment is projected in the coming years, driven by a growing interest from third-party logistics providers and institutional funds. This increased attention highlights the potential for significant expansion and underscores the attractiveness of the cold chain storage market

3 THE NETHERLANDS - COUNTRY OVERVIEW

The Netherlands is a sovereign country in Western Europe. It is bordered by Germany to the east, Belgium to the south, and the North Sea to the north and west. The capital of the Netherlands is Amsterdam. The form of government in the Netherlands is a parliamentary democracy, i.e. the people of the Netherlands elect representatives to a parliament, which makes the laws. Table 1 highlights features about the Netherlands

CAPITAL	AMSTERDAM
AREA	41,540 SQ KM
POPULATION (2023 estimates)	17.6 MILLION
CURRENCY	EURO
LANGUAGES	DUTCH, FRISIAN, ENGLISH, PAPIAMENTO, SWEDISH, GERMAN
LIFE EXPECTANCY	80 years (men), 83 years (women)
HEAD OF STATE	KING WILLEM-ALEXANDER
PRIME MINISTER	MARK RUTTE
GOVERNING PARTY	PEOPLE'S PARTY FOR FREEDOM & DEMOCRACY
GLOBAL POPULATION RANK	72
URBAN - RURAL POPULATION (2018)	Urban : 93% Rural : 7%

4 THE NETHERLANDS - ECONOMY

The Netherlands GDP grew by 4.5 percent in 2022 after growing by 4.9 percent in 2021. It ranked 5th among the 132 economies as per the Global Innovation Index 2022 and 6th as per the Global Talent Competitiveness Index 2022. Tabe 2 highlights features about Netherlands

GROSS DOMESTIC PRODUCT PER CAPITA (CURRENT USD) (AS OF 2021)	US $ 55,985.4
GDP (CURRENT USD)	US $ 991.11 BILLION
TOTAL FINAL CONSUMPTION EXPENDITURE (% OF GDP)	69.1%
HOUSEHOLD SAVING RATIO (% OF GDP)	26%
CPI INFLATION	10.0%
GDP GROWTH	4.5%

Statistics Netherland https://www.cbs.nl/en-gb/news/2023/08/dutch-economy-grew-by-4-5-percent-in-2022
Global Innovation Index 2022 https://www.wipo.int/edocs/pubdocs/en/wipo_pub_2000_2022/nl.pdf
Invest in Holland https://investinholland.com/news/The-Netherlands-top-country-talent-competitiveness/#:~:text=The%20country%20ranked%20fifth%20in_2022)%20ranked%20the%20The Netherlands%20sixth.
World Bank Country Statistics - UK
Office for National Statistics, Government of UK

5 THE NETHERLANDS - FOOD PROCESSING SECTOR OVERVIEW

The Dutch agricultural sector produces mostly cereals (wheat in particular), feed crops (such as fodder maize) and potatoes. The industry employs 1,78,575 people. Over 7,340 food companies in the the Netherlands generated net sales of $88 billion in 2021. The industry has been a steady supplier of jobs and the number of food companies continues to grow due to the growing number of small food companies.

The revenue in the Netherlands food market is estimated at USD 51.32 billion in 2023 . The market has grown by a CAGR of 4.45% during this period. Figure 8 summarises the growth of Food market in the Netherlands over the last 5 years (2019-2023). The market's largest segment is Meat with a market volume of USD 10.34 billion in 2023. Figure 9 summarises the food sector market share for the year 2023.

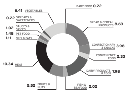
FIGURE 8

The Netherlands Food Sector Market Size (US$ Bn)

Agriculture, CBC, Statistics The Netherlands https://www.cbs.nl/en-gb/figures/detail/80780eng
Food Processing Ingredients, USDA https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20Processing%20Ingredients_The%20Hague_The Netherlands_NL2022-0019.pdf
Food-The Netherlands, Statista https://www.statista.com/outlook/cmo/food/The Netherlands

FIGURE 9

Food Sector Revenue of the Netherlands 2023 (US$ Billion)



** UK Food Production Trends 2017-2021

6 THE NETHERLANDS - FOOD SECTOR FUTURE TREND

Demand for convenience food with variety and sustainable packaging is increasing in the Netherlands. There is also a growing demand for organic and sustainable products with inclination on healthy and nutritious food products. By developing new food processing, separation and packaging technologies and innovations, the Netherlands is staying at the forefront of the food industry worldwide.

The food market in the Netherlands which is estimated at US$ 51.32 billion is expected to grow annually by a Compounded Annual Growth Rate "CAGR" of 3.37% between 2023 to 20279. Figure 10 summarises the growth of the food market in the Netherlands from 2023 to 2027.

FIGURE 10

Figure 10: New Zealand Food Market share in 2023 (US$ Billion)

7 THE NETHERLANDS - KEY FOOD SUB-SECTORS

Agriculture and food are the top sectors of the Netherlands. The industry is highly dynamic driven by demanding consumers seeking diversity, quality, and value. The Netherlands is one of the world's largest exporters of agricultural food products, with a focus on meat and dairy.

7.1 DAIRY

The Dutch dairy sector is one of the frontrunners in the international dairy world. Distinctive product quality, food safety, animal health, animal welfare and sustainable development are the key focus areas of Dutch dairy sector. Crucial dairy facts (as of 2021) are shown in the table 3.

TABLE 3 **The Netherlands Dairy Sector Statistics**

Key Facts	Unit
Netherland Dairy Cow Herd	1.60 million Cows
Netherland Dairy Goat Herd	0.5 million goats
Dairy Cow Milk Production	13.8 billion kg
Dairy Goat Milk Production	0.4 billion kg
The Netherlands Milk Processing	• 7% Drinking Milk and other Fresh Milk Products • 20% other • 3% Butter and butteroil • 57% Cheese • 30% Milk Powder

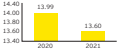
[22] NZO, Dutch Dairy Association https://zdcl.assets-servd.host/zuivel-nl/production/images/Marktinformatie-en-Export/ZuivelNL_Dutch-dairy-in-Figures-2021_single-page.pdf

FIGURE 11

The Netherlands Gross Production Value - Dairy Farming

FIGURE 12

Netherlands Milk Supply Volume (million tonne)



7.2 MEAT

Beef, veal, pork, poultry are all produced and processed in the Netherlands for both local and international markets. Revenue in the meat segment is estimated at US$10.34bn in 2023. Figure 13 summarizes the growth in meat production over the last 04 years.

FIGURE 13

The Netherlands Meat Production (in million metric ton)

In 2021, meat production in the Netherlands stood at 3.5 million metric tons. This was a slight decrease in comparison to the previous year. According to a study conducted by Wageningen University & Research, the total per capita consumption of meat and meat products has seen a downward trend since 2019.

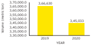
Meat Production, Statista https://www.statista.com/statistics/619001/meat-production-in-the-the-Netherlands/

7.3 SEAFOOD

The Netherlands has a long tradition of catching and farming fish. In 2020, seafood production totalled to more than 344 million kg . The Netherlands also has a long tradition of farming fish. The Dutch aquaculture sector is known for its mussels and, to a lesser extent, its oyster production. Figure 14 summarizes the total fisheries production in the Netherlands in 2019 and 2020.

FIGURE 14

Total Fisheries Production (in metric ton)



In 2020, fisheries production has seen a marginal decline at 345033 metric ton as compared to 366630 metric ton in 2019.

Dutch Seafood Market Overview, USDA GAIN https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Dutch%20Seafood%20Market%20Overview_The%20Hague_The Netherlands_NL2022-0033.pdf

7.4 SOME KEY INDUSTRY PLAYERS OPERATING IN INDIA

TABLE 4 **Dutch companies operating in India:**

Companies	Sector	Core Competency	Location in India
Incotech India Pvt Ltd	Agro-food	Seed enhancing machinery & technology	Ahmedabad, Gujarat
International Agriculture Processing Pvt. Ltd	Food Processing	Processing of gherkins, and pickle vegetable	Nilakotai, Tamil Nadu
FoodCert India Pvt Ltd	Food Processing	Chemicals	Hyderabad, Telangana

TABLE 5 **Key industry players operating in the Netherlands:**

Companies	Sector	Core Competency	Location in Netherland
AB Inbev The Netherlands	Alcoholic Beverage	Beer	Regus-Breda, Netherlands
Cono Kaasmakers	Dairy	Cheese	Westbeemster, Netherlands
Dr. Oetker	Baking	Desserts, Pizza	Amersfoort, Netherlands
Danone	Packaged Food	Essential Dairy and Plant-Based Products, Water, Early Life Nutrition, Medical Nutrition	Multiple location in Netherlands
Heineken	Alcoholic Beverage	Beer	Multiple location in Netherlands
Jacob Douwe Egberts (JDE)	Beverage	Coffee, Tea	Multiple location in Netherlands
Nestle	Dairy, Beverage	Coffee, pet food, chocolate, and dairy	Amstelveen, Netherlands

8 TRADE OVERVIEW - THE NETHERLANDS

TABLE 6

The Netherlands' top export destination countries for food products in CY 2022

HS Code	Products	Exports Destinations Countries
17	Sugars and sugar confectionery	Belgium (USD 410.84)
		Germany (USD 335.15)
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal	Germany (USD 1923.65)
		Spain (USD 282.5)
21	Miscellaneous edible preparations	Germany (USD 1078.56)
		Belgium (USD 674.11)
23	Residues and waste from the food industries; prepared animal fodder	Germany (USD 1571.45)
		Belgium (USD 1380.85)
18	Cocoa and cocoa preparations	Germany (USD 1373.95)
		Belgium (USD 706.12)

Major export destinations of the Netherlands are Germany and Belgium.

TABLE 7

The Netherlands' top import source countries for food products in CY 2022

HS Code	Products	Import Source Countries
08	Edible fruit and nuts; peel of citrus fruit or melons	Peru (USD 1065.27)
		South Africa (USD 1000.27)
03	Fish and crustaceans, molluscs and other aquatic invertebrates	Germany (USD 299.06)
		Belgium (USD 241.88)
15	Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal	Germany (USD 1522.94)
		Malaysia (USD 1186.9)
20	Preparations of vegetables, fruit, nuts or other parts of plants	Belgium (USD 473.9)
		Brazil (USD 458.51)
10	Cereals	Germany (USD 1053.11)
		France (USD 1036.22)

Major import sources of the Netherlands are Peru, South Africa, Germany, and Belgium.

9 THE NETHERLANDS - INDIA TRADE

In the year 2022, the Netherlands' total imports of agricultural commodities from India was US$ 928.90 million. During the same period, the Netherlands' agricultural export to India was USD 189.02 million .

The section below examines the Netherlands' top food exports to and imports from India.

TABLE 7 **The Netherlands' exports to India in the last 03 years given in table 8:**

HS code	Product label	Value in US$ Million				India's share% in Netherland Agri-Food Exports in 2022
		2020	2021	2022	% Growth	
17	Sugars and sugar confectionery	27.25	29.34	35.57	31%	1.78%
12	Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal ...	24.14	19.21	20.46	-15%	0.43%
21	Miscellaneous edible preparations	9.84	9.91	14.81	50%	0.21%
23	Residues and waste from the food industries; prepared animal fodder	6.50	5.46	5.58	-14%	0.08%
18	Cocoa and cocoa preparations	5.57	6.74	9.29	67%	0.16%
Total		73.29	70.65	85.70	17%	0.32%

- According to the above mentioned statistics, the Netherlands' main exports to India in calendar year 2022 were sugar and sugar confectionery and oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal worth USD 35.57 million and USD 20.46 million respectively.

- The Netherlands' exports of food to India surged by 17% and totalled USD 85.70 million in calendar year 2022 as compared to USD 70.65 million in calendar year 2021.

[20] ITC Trademap Data

- Further, miscellaneous edible preparations exports to India have substantially increased and stood at USD 14.81 million in CY 2022.

- India's share (%) in the Netherlands' exports of the food market is 0.32% in CY 2022

TABLE 8

The Netherlands' imports from India in the last 03 years in table 9.

HS Code	Product label	Value in US$ Million				India's share% in Netherland Agri-Food Imports in 2022
		2020	2021	2022	% Growth	
08	Edible fruit and nuts; peel of citrus fruit or melons	140.43	151.98	203.44	45%	2.05%
03	Fish and crustaceans, molluscs and other aquatic invertebrates	73.99	99.14	146.67	98%	3.20%
15	Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal ...	60.15	75.37	104.23	73%	0.95%
20	Preparations of vegetables, fruit, nuts or other parts of plants	38.87	50.26	96.56	148%	2.47%
10	Cereals	74.20	56.42	87.46	18%	1.89%
	Total	**387.64**	**433.17**	**638.36**	**64.68%**	**1.88%**

- It is observed from the above statistics that the Netherlands majorly imported Edible fruit and nuts; peel of citrus fruit or melons (USD 203.44 million), Fish and crustaceans, molluscs and other aquatic invertebrates (USD 146.67 million) and Animal or vegetable fats and oils and their cleavage products; prepared edible fats (USD 104.23 million) from India in CY 2022.

- The Netherlands' imports of food products from India increased by 64.68% and stood at USD 638.36 million in CY 2022.

- India's share (%) in the Netherlands' imports of the food market is 1.88% in CY 2022.

- India's agricultural and food exports to the Netherlands amount to a substantial USD 974.1 million. Within this figure, the value of processed food products stands out at USD 224.6 million, contributing significantly with a notable 23% share. On the flip side, India's imports of agri-food products from the Netherlands total USD 587.94 million. Among these imports, processed food items account for USD 108.3 million, composing an appreciable 18% share of the total.

10 AREAS OF COLLABORATION

As examined in the aforementioned sections, India and the Netherlands share strong trade relations in the food sector. This relation can be further strengthened by exploring investment opportunities in India in food sub-sectors of mutual interest. These sub-sectors have been identified based on the existing trade (import-export) share (of ingredients and finished products) and domestic market strength in India.
India and the Netherlands do not have a bilateral trade agreement as the Netherlands is bound by EU regulations. However, both countries are keen to push forward the EU-India Broad-based Trade and Investment Agreement (BTIA) to boost the quantum of bilateral trade. Significant opportunities may emerge for the Netherlands to increase its investment in India as new trade opportunities are offered by the BTIA.

10.1 DAIRY PRODUCTS

India is the largest producer and consumer of milk in the world, with an annual production of around 210 million metric tonnes in 2020-21[17].

10.1.1 TECHNOLOGY & MACHINERY

India has the potential to be the global hub of dairy processing technology and processing machinery. Technologies incorporating the Internet of Things, Blockchain technology, 3D printing can revolutionise the dairy processing landscape and address issues related to food safety concerns, traceability etc.

[17] Basic Animal Husbandry Statistics, Ministry of Fisheries, Animal Husbandry & Dairying, Government of India

10.1.2 SUSTAINABLE PACKAGING SOLUTIONS

With a growing impetus on sustainability and reducing plastic, cost-effective innovative packaging solutions for processed dairy products exhibit great potential for large-scale adoption in India.

10.2 FRUITS AND VEGETABLES

India is the world's second-largest producer of fruits and vegetables, behind China. India produced[18] 107.10 million metric tonnes of fruits and 204.61 million metric tonnes of vegetables in 2021-2022.

The Indian fruit and vegetable processing industry experiences a conducive growth environment, owing to the abundant supply of raw materials and favourable government policies. Rise in disposable income and rapid urbanization resulted in lifestyle changes, owing to which the preference for processed fruits and vegetables has witnessed a paradigm shift and the demand has been increasing over the years.

10.3 FISHERIES

India is the third-largest fish producer in the world accounting for 7.96 percent of the global production. The total fish production during FY 20-21 is estimated at 14.73 million Metric Tonnes (MMT) with a contribution of 11.25 MMT from Inland sector and 3.48 MMT from Marine sector.[19]

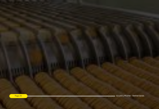
Indian fish and crustacean constitute more than 3% of the Netherlands' domestic market. This provides a scope to increase trade and investment opportunities in India as The Netherlands can bring in its fish processing technologies to India benefitting the 100% FDI in the sector. This will also help India in achieving its goals of increasing production capacity and strengthening bilateral trade between the two countries.

[18] Second Advanced Estimates of Area and Production 2021-22, Department of Agriculture and Farmers Welfare
[19] Annual Report 2021-22, Department of Fisheries, Ministry of Fisheries, Animal Husbandry and Dairying

10.4
PROCESSED FOOD

Promising avenues for exports lie in the realm of processed food products, particularly encompassing items such as meticulously Prepared/Preserved shrimp and prawn, an assortment of fishes, refined sugar, delectable sugar confectionery, as well as indulgent chocolate or cocoa preparations. Additionally, the market holds potential for sought-after products like malt extracts, delectable sweet biscuits, a diverse array of bakery creations, and flavour-rich vegetable sauces.

Furthermore, export prospects extend to enticing blends of nuts and seeds, extracts derived from the likes of tea and coffee, uniquely crafted beer originating from malt, and premium-quality whiskies. The list of opportunities also encompasses commodities such as oilcakes and residues, along with nourishing feeds intended for domestic pets and other animals.



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