World Food India 2017
3-5 Nov 2017 | Vigyan Bhawan, New Delhi

Meeting with Ambassadors and High Commissioners

27th February 2017 | New Delhi
World Food India 2017

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

Showcasing investment opportunities
in India’s food processing sector.

India immersion
to familiarize global industry with India’s policy environment.

Establishing India as a valued partner
in the global food ecosystem.

Linking the Indian agri-economy
to global value chains
Advantage India
India emerges as top FDI destination

FDI inflows of USD 40 billion in 2015-16

3rd largest economy in terms of Purchasing Power Parity

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

One of the fastest growing economies in the world

GDP Growth Projections

<table>
<thead>
<tr>
<th>Year</th>
<th>Global</th>
<th>India</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>3.2</td>
<td>7.6</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>3.1</td>
<td>6.6</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>3.4</td>
<td>7.2</td>
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<tr>
<td>2018</td>
<td>3.6</td>
<td>7.7</td>
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1.3 billion population ~ 30% of which is middle class having growing disposable income

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

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

Source: IMF’s World Economic Outlook Update, July 2016
There’s never been a better time to MAKE IN INDIA

Supportive government: creating conducive environment

Ease of Doing Business
New Infrastructure
Open Economy
Regulatory Reforms
Fiscal Reforms
India Food Sector Advantage
India offers the largest diversified production base

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

**Fruits & Vegetables**
- 2nd largest global producer
- 254 MT production
- Processing levels currently ~ 2%

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

**Marine**
- 2nd in fish production
- Processing levels of marine products at ~23%
- Offers huge opportunity cold chain, export, packaging innovations, product differentiation etc.

**Egg & Meat**
- 3rd in egg and 5th in meat production
- Trends shifting towards processed, cleaned and frozen meat & poultry products
Proactive Policy support

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

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

Regulatory Reforms
- Food Safety Standards harmonized with international standards
Proactive Policy support

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

Infrastructure support

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

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

Proactive State Investment Policies
- Attractive investment policies across states
Fiscal Incentives

100 % Income Tax Deductions
- on capital expenditure for cold chain / warehouse.
- on profit for new food processing, preservation and packaging units

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

Excise duty reduced from
- 10% to 6% on machinery for food processing
- 12.5 % to 6% on Refrigerated Containers

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

Concessional Customs Duty on imported equipment
Sub sector opportunity

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

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

**Logistics**
- Investments in cold storage, reefers, warehouse, equipment & machinery
Sub sector opportunity

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

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

**R&D and skill development**
- Product innovation based on local food habits
- Skilling the work force in handling processing operations efficiently
Food Retail – the next big opportunity

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

Opportunity
- Largely unorganized - around 92-95%
- Share of organized sector is expected to increase to 24% by 2020
- 15 million mom and pop stores in the country
- Online market is expected to reach 530 million shoppers by 2025
- E-commerce sales are expected to treble, reaching 120 billion by 2020
- Policy support – 100% FDI in food retail for foods manufactured/produced in India
World Food India
Mega International Event
WORLD FOOD India 2017
An opportunity to showcase, connect & Collaborate

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

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

COLLABORATE
- To facilitate public & private engagement to the next level.
- To ensure grounding of investment intentions
- To strengthen Linkage between Industry & Farmers
<table>
<thead>
<tr>
<th>An opportunity for everyone</th>
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<tbody>
<tr>
<td><strong>Growing Market</strong></td>
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<tr>
<td>• Population of 1.32 billion. Increasing disposable income.</td>
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<td>• Preference of youth for processed, branded and ready to eat food</td>
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<td><strong>Sourcing opportunity</strong></td>
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<tr>
<td>• Raw material (f&amp;v, milk, meat etc) available in abundance</td>
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<tr>
<td>• Geographically strategic location and proximity to food importing nations</td>
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<tr>
<td><strong>Make in India</strong></td>
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<tr>
<td>• Improved infrastructure availability in terms of mega food parks, cold chain network etc</td>
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<td>• Slew of incentives to ease setting up of new business</td>
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<tr>
<td><strong>JV &amp; Collaboration</strong></td>
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<tr>
<td>• Opportunity for collaboration with Indian food companies</td>
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<td>• Retail footprint in the country already expanding</td>
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<tr>
<td><strong>Changing face of retail</strong></td>
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<td>• Many neighborhood shops adopting department store / retail format</td>
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<td>• Retail chains growing in India. Booming e-retail segment</td>
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<tr>
<td><strong>Technology &amp; Equipments</strong></td>
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<tr>
<td>• New &amp; emerging technology in F&amp;V processing, cold storage, refers, IQF, pack houses, packaging</td>
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<tr>
<td>• Food testing labs</td>
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Key elements

Conferences

Country sessions

State sessions

Parallel tracks

B2B & B2G Meetings

Awards/Manthan Manch (Hackathon)

Food Street

Exhibition
Parallel Tracks

1. Sub sectoral opportunities in dairy, Fruits & vegetables, meat, fish, poultry etc

2. Promoting traditional food, medicinal herbs, wellness foods – Opportunity for exports

3. Showcasing Progressive Farmers & Farmer Producers Organizations for potential direct sourcing

4. Opportunity for technology and equipments – what India needs?

5. Organic products – potential that India has

6. Showcasing the Indian states – states to pitch in for uniqueness in production, incentives, infrastructure and facilitation

7. Emerging regulatory updates - harmonization with international standards

8. Skill Development

9. Ayurveda - The great Indian opportunity: capturing the new healthy food market

10. India Immersion Programs – that will help India entry
Schedule

Seminars and Business Sessions

Day 1 (3rd Nov, 2017)
- Inauguration by Hon’ble Prime Minister of India
- Sectoral seminars
- B2B, G2B & G2G Meetings

Day 2 (4th Nov, 2017)
- Sectoral seminars
- Country Sessions
- State Sessions
- B2B, B2G & G2G Meetings

Day 3 (5th Nov, 2017)
- B2B, B2G & G2G Meetings
- Manthan Manch
- Closing Ceremony
Food Street

Foods of India

Wellness foods

Desserts of India

International Food

International Food with an Indian Twist/Fusion
Additional Softer Elements

Gourmet food

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

Wine & Cheese tasting sessions

Yoga & Food : The India connection of Food with wellness

Delhi Food walk

DEMOS – Cooking/ Yoga
Participant Profile

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

<table>
<thead>
<tr>
<th></th>
<th>Category</th>
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<tbody>
<tr>
<td>9</td>
<td>Technology &amp; equipment suppliers</td>
</tr>
<tr>
<td>10</td>
<td>Regulatory institutions eg FSSAI &amp; international food regulators</td>
</tr>
<tr>
<td>11</td>
<td>Hotels &amp; restaurants</td>
</tr>
<tr>
<td>12</td>
<td>Agri banks &amp; financial institutions, PE firms</td>
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<tr>
<td>13</td>
<td>Global trade associations</td>
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<tr>
<td>14</td>
<td>Diplomats</td>
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<tr>
<td>15</td>
<td>Government - Central &amp; State</td>
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<tr>
<td>16</td>
<td>Institutes</td>
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Opportunity for partnership
Proposed opportunity

1. Understand the policy environment around the food processing sector
2. Identify specific opportunities during the B2G & G2G meetings
3. Exposure to a shelf of specific projects for investment in processing and retail
4. Exposure to strengths of India in pre-identified food processing sub-sectors
5. Exposure to FPOs’ / Progressive Farmers – potential suppliers
6. Exposure to opportunities in food retail in India
7. Exhibit in the country pavilion
Invitation to Partner

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

Make in India

Invest in India’s food sector

Government of India,
Ministry of Food Processing Industries

Tel: +91-11-26492216/ 26490933/ 26406501
Email: makeinindia-fpi@gov.in
Website: www.mofpi.nic.in
Thank you