The Solvent Extractors' Association of India

Feed & Feed Ingredients Conclave - 2017

ANIMAL FEED SECTOR- CHALLENGES & OPPORTUNITIES

FASAR- Food & Agribusiness Strategic Advisory and Research

July, 2017
Scope of Presentation

Demand Drivers for Animal Protein in India

Animal Feed Sector in India

Incentive Schemes for Animal protein & feed in India
Protein deficit to be filled

- 1/3rd of global population in India and China
- High protein requirement to feed - veg / non-veg
- Approx 200 million in India - hungry

<table>
<thead>
<tr>
<th>Country/Year</th>
<th>2017</th>
<th>2050</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>1.29</td>
<td>1.30</td>
</tr>
<tr>
<td>India</td>
<td>1.33</td>
<td>1.65</td>
</tr>
<tr>
<td>World</td>
<td>7.50</td>
<td>9.25</td>
</tr>
</tbody>
</table>

Population in billion

Source: NIN
Source of protein (Per capita consumption in Kg/Year)

- With per capita income growth increasing, shift from cereals to fruits and veggies, dairy and meat which show 2 digit CAGR of 29%, 25% and 23%)

NSSO, YBL Research, 2010 Version
Food consumption trends in India

1987-88

- Cereals & products: 41.3%
- Gram, pulses & products: 6.6%
- Milk & Products: 13.4%
- Egg, fish, meat: 5.2%
- Fruits, Vegetables, Nuts: 10.6%
- Edible oil: 7.8%
- Sugar: 4.5%
- Salt & spices: 4.5%
- Beverages: 29.3%

2014-15

- Cereals & products: 41.3%
- Gram, pulses & products: 6.6%
- Milk & Products: 16.0%
- Egg, fish, meat: 6.5%
- Fruits, Vegetables, Nuts: 14.6%
- Edible oil: 6.9%
- Sugar: 14.6%
- Salt & spices: 6.9%
- Beverages: 29.3%

Source: NSSO, YES BANK Analysis
Drivers of growth in animal protein consumption

✓ Social trends
  – DINKs, nuclear families, single families – globalised households, well travelled seeking more varieties with high nutrient quality
  – Eating out in fine dine; eamodel delivery (Hola Chef, Cyber Chef)
  – Proliferation of QSR’s – entry of Wendys, Carl’s Jr, Fatburger, Johnny Rockets, Burger King and Barcelos

✓ Food consumption trends
  – Dairy protein, aqua and meat protein growing
India – Food Habits

Summary of Baseline Findings – Census of India 2014

❖ Telangana has the highest proportion of meat-eaters in the country
❖ People in Telangana consume a lot of lamb and chicken for breakfast
❖ West Bengal ranks second after Telangana

❖ 63% of Indian households consumed non-vegetarian food in 2013-14 compared to 58.2 per cent in 2004-05.
Food Luxuries and Indian Mindset

High incomes leading to **high protein** demand
High incomes leading to **highly processed & convenient foods**
High incomes leading to **lifestyle diseases**

NIN food map - [India Food Composition Table](https://ninindia.org/Downloads/IFCT%202017%20Book.pdf)
Animal Protein Consumption

With rise in income, animal protein consumption increases

Lower the income level, greater the % population below the requisite protein intake.

Positive Growth Trend
Increase In Consumption Of Animal Derived Protein Across Income Groups

Huge Upside
Nearly 40% Middle Income And 20% High Income Group Are Still Protein Deficit

Bubble size is proportional to % change in MFE consumption b/w 1983 & 2011

Meat, Fish & Egg Per Capita Consumption in Kg/Annum (2011)
Scope of Presentation

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Incentive Schemes for Animal protein & feed in India
Potential vs actual – what does the future hold

Potential Market Size
117 million MT

Market addressed
21 million MT
Potential vs actual – what does the future hold

### Cattle
- Market Size: 7.5 million tonnes
- Growth Rate: 6%
- Transition from low herd size to commercial dairy farming
- Shrinkage of land for fodder cultivation and open grazing
- Consumer demand for quality milk and focus on animal health
- States: Uttar Pradesh, Rajasthan, Punjab, Haryana, etc.

### Poultry
- Market Size: 12.4 million tonnes
- Growth Rate: 6-8%
- Growth in broiler and layer industry are the key drivers for the poultry feed
- Year round availability across the country; and poultry being one of the cheapest source of protein
- States: Tamil Nadu, Andhra Pradesh, Karnataka, etc.

### Aqua
- Market Size: 1 million tonnes
- Growth Rate: 9%
- Shrimp production is growing at 16 percent and has touched 3 lakh MT
- Aquaculture will be the key growth driver for the fisheries production and exports in India
- States: Andhra Pradesh, Gujarat, West Bengal, etc.
Where is the growth coming from?

✓ Poultry sector
   – Faster growth in poultry sector – however, opportunity for differentiated / innovative products
   – Technological innovations could drive differentiation
   – South and west are key markets
   – 75 % of non-vegetarian food consumed in India is from poultry

✓ Aqua sector
   – Booming aqua sector – high scope to grow with esp exports
   – Disease resistance as a differentiated market?
   – South and east are key markets

✓ Dairy sector
   – Long term opportunity – given the unorganised and small size holdings
   – B2C opportunity for large scale farms specially in North
   – North and West are key markets
Livestock industry - SWOT

**Strengths**

- India is **number one** milk producing country with 138 million tonnes
- **Number two** in freshwater aquaculture
- **Number three** in egg production with 80 billion eggs
- **Number four** in broiler production (3.9 million carcass weight)

**Weaknesses**

- Low penetration of feed across industry viz. poultry-55 percent, aqua 14-percent and cattle-11 percent
- Low impact of the compound feed on productivity of native cattle breed
- Compound feed unaffordable to most of small and marginal farmers

**Opportunities**

- With the changing demographic pattern and high disposable incomes consumption pattern in India driving animal protein growth
- Feed – a sun rise industry

**Threats**

- High vulnerability to disease outbreaks in poultry and aqua industry
- Monsoon vagaries
- Price volatility of the feed inputs like, maize and soyabean
- Import substitution of end products
Animal Feed – Challenges and Opportunities

✓ CHALLENGES

– Affordability
– Disease outbreaks
– Biosecurity issues/ antibiotics misuse
– Volatile livestock product prices (70% of production cost is feed)
– Poor animal genetics/ Indigenous dairy breeds
– Home mixing
– Lack of awareness and low hygiene conditions / Animal hygiene/ upkeep/ rearing
– Clean water availability across value chain
– Veganism / Lab cultured or ‘clean’ meat

✓ OPPORTUNITIES

– Food safety standards/
– Industrialised food production
– High production needed to address QSR, value added products which can come from high yielders who require compound feed
– Exports surge of aqua
– GHG/ high methane from animals provides animal feed sector to come out with innovative feeds

Confidential
Protein to make Protein

✓ Insect-for-feed (IFF) – Higher conversion of protein

– YNSECT, France
– Agriprotein, SA
– Enterra, Canada
– NextProtein, France
– Protix, Netherlands (Collaboration with Buhler in China)
– GoTerra, Australia
– Beta Hatch, USA

✓ Investments in FMCG nonveg brands

– General Mills – EPIC protein bars
– Tyson Foods – Beyond Meat
– Danone – White Wave
– ITC - Masterchef range of frozen nonveg
– Home delivery DIY kits like Burgundy Box, Let’s Chef
Scope of Presentation

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Animal Feed Sector in India

Incentive Schemes for Animal protein & feed in India
# Kisan SAMPADA Yojana

<table>
<thead>
<tr>
<th>Sl</th>
<th>Scheme</th>
<th>Grant (Upto INR Cr)</th>
<th>Grant (% of eligible project cost)</th>
<th>Hub &amp; Spoke model/Standalone</th>
<th>Type of Stakeholders</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Integrated Cold Chain &amp; Value Added Infrastructure</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1a</td>
<td>For storage &amp; transportation infrastructure</td>
<td>10 Cr</td>
<td>35% (37.5 Cr)</td>
<td>50%</td>
<td>Hub &amp; Spoke model</td>
</tr>
<tr>
<td>1b</td>
<td>For value addition and processing infrastructure</td>
<td></td>
<td>50%</td>
<td>75%</td>
<td></td>
</tr>
<tr>
<td>1c</td>
<td>For irradiation facilities</td>
<td></td>
<td>50%</td>
<td>75%</td>
<td>Standalone</td>
</tr>
<tr>
<td>2</td>
<td>Mega Food Parks</td>
<td>50 Cr</td>
<td>50%</td>
<td>75%</td>
<td>Hub &amp; Spoke model</td>
</tr>
<tr>
<td>3</td>
<td>Creation/ Expansion of Food Processing and Preservation Capacities</td>
<td>5 Cr (14.2 Cr)</td>
<td>35%</td>
<td>50%</td>
<td>Standalone</td>
</tr>
<tr>
<td>4</td>
<td>Infrastructure for Agro-Processing Clusters</td>
<td>10 Cr</td>
<td>35%</td>
<td>50%</td>
<td>Standalone cluster closer to production areas. Standalone</td>
</tr>
<tr>
<td>5</td>
<td>Backward and Forward Linkages</td>
<td>5 Cr</td>
<td>35%*</td>
<td>50%*</td>
<td>Standalone</td>
</tr>
</tbody>
</table>

* For Farmer Producer Organizations – 50% and 75% respectively in Backward and Forward linkages scheme

** Difficult areas include - North East States, Himalayan States, ITDP Areas & Islands
# Kisaan SAMPADA Yojana

## ONGOING SCHEMES

<table>
<thead>
<tr>
<th>Sl</th>
<th>Scheme</th>
<th>Timeline to set up and commissioning (in months)</th>
<th>Grant milestones</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Integrated Cold Chain &amp; Value Added Infrastructure</td>
<td>20 months from the date of issue of final approval letter (24 months for NE)</td>
<td>1&lt;sup&gt;st&lt;/sup&gt; inst: 8 months ; 2&lt;sup&gt;nd&lt;/sup&gt; inst: in 14 months ; 3&lt;sup&gt;rd&lt;/sup&gt; inst: in 20 months as 25:40:35</td>
</tr>
<tr>
<td>1a</td>
<td>For storage &amp; transportation infrastructure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1b</td>
<td>For value addition and processing infrastructure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1c</td>
<td>For irradiation facilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Mega Food Parks</td>
<td>30 months from the date of issue of final approval letter</td>
<td>1&lt;sup&gt;st&lt;/sup&gt; inst: 6 months ; 2&lt;sup&gt;nd&lt;/sup&gt; inst: +8 ; 3&lt;sup&gt;rd&lt;/sup&gt; inst: +8 and 4&lt;sup&gt;th&lt;/sup&gt; inst: +8 = 30 months as 30:30:20:20</td>
</tr>
</tbody>
</table>

## NEW SCHEMES

<table>
<thead>
<tr>
<th>Sl</th>
<th>Scheme</th>
<th>Timeline to set up and commissioning (in months)</th>
<th>Grant milestones</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Creation/ Expansion of Food Processing and Preservation Capacities</td>
<td>18 months from the date of issue of final approval letter</td>
<td>1&lt;sup&gt;st&lt;/sup&gt; inst: when 50% equity and debt is consumed ; and 2&lt;sup&gt;nd&lt;/sup&gt; inst: is on commencement of commercial production as 50:50</td>
</tr>
<tr>
<td>4</td>
<td>Infrastructure for Agro-Processing Clusters</td>
<td>20 months from the date of issue of final approval letter</td>
<td>1&lt;sup&gt;st&lt;/sup&gt; inst: on milestones; 2&lt;sup&gt;nd&lt;/sup&gt; inst: on completion in 40:60</td>
</tr>
<tr>
<td>5</td>
<td>Backward and Forward Linkages</td>
<td>12 months from the date of issue of final approval letter</td>
<td>1&lt;sup&gt;st&lt;/sup&gt; inst: 6 months and 2&lt;sup&gt;nd&lt;/sup&gt; inst: +6 = 12 months ; as 50:50</td>
</tr>
</tbody>
</table>
1. Scheme to promote cold chain, value addition and preservation infrastructure

✓ Envisages linking groups of producers to the processors and market through well equipped and adequate cold chain infrastructure

✓ Both horticultural and non horticultural produce (such as dairy, poultry, meat, aqua) are eligible for support under this scheme

➢ Grant-in aid subject to maximum of INR 10 Crores as follows

<table>
<thead>
<tr>
<th>Type of project</th>
<th>Grant in aid (% of total cost of plant &amp; machinery and technical civil works)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>General Areas</td>
</tr>
<tr>
<td>1 a For storage &amp; transportation infrastructure</td>
<td>35%</td>
</tr>
<tr>
<td>1 b For value addition and processing infrastructure</td>
<td>50%</td>
</tr>
<tr>
<td>1 c For irradiation facilities</td>
<td>50%</td>
</tr>
</tbody>
</table>

*Difficult areas include - North East States, Himalayan States, ITDP Areas & Islands

*Cost norms of Mission for Integrated Development of Horticulture (MIDH) issued by Department of Agriculture, Co-operation and Farmers Welfare will be followed wherever available
To avail assistance, the applicant will have to set up (A) Farm Level Infrastructure **AND** any one or both components of (B) and (C) / or standalone (D)

### A: Farm Level Infrastructure

Includes a processing centre situated in the catchment area of targeted produce*

<table>
<thead>
<tr>
<th>Shall have one or more of:</th>
<th>May have one or more of:</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Integrated Pack-house</td>
<td>✓ Pre-cooling units</td>
</tr>
<tr>
<td>✓ Ripening Chamber(s)</td>
<td>✓ Mobile pre-coolers</td>
</tr>
<tr>
<td>✓ Cold Storage Unit(s)</td>
<td>✓ Retail refrigerated carts, temperature</td>
</tr>
<tr>
<td>✓ CA storage</td>
<td>controlled solar powered retail carts (max 10 /</td>
</tr>
<tr>
<td>✓ Frozen Storage/Deep freezers</td>
<td>project)</td>
</tr>
<tr>
<td>✓ IQF line, Tunnel Freezer, Spiral</td>
<td>✓ Reefer boats (max 10 / project)</td>
</tr>
<tr>
<td>Freezer, Blast Freezer, Plate</td>
<td>✓ Refrigerated Containers including</td>
</tr>
<tr>
<td>Freezer</td>
<td>multi-modal container units</td>
</tr>
<tr>
<td>✓ Vacuum Freeze Drying</td>
<td>✓ Renewable/ alternate energy technologies (solar,</td>
</tr>
<tr>
<td>✓ Milk Chilling / Bulk Milk</td>
<td>bio-mass, wind etc.) for the project.</td>
</tr>
<tr>
<td>Cooling/ Milk Processing Unit</td>
<td>✓ Accessories/support infrastructure</td>
</tr>
<tr>
<td>✓ Poultry/Meat/Marine/Fishery</td>
<td>✓ In-house product testing laboratory</td>
</tr>
<tr>
<td>Processing Unit</td>
<td>✓ Any other relevant modern technology (as may be</td>
</tr>
<tr>
<td>✓ Packaging line for chilled/frozen/</td>
<td>decided by IMAC)</td>
</tr>
<tr>
<td>temperature controlled products</td>
<td></td>
</tr>
</tbody>
</table>

*Special conditions apply for Fruits and Vegetables. Please refer guidelines

### B: Distribution Centre

 Shall have a modern multi-product, multi-temperature cold storage. May also include one or more facilities mentioned in A

### C: Transportation

<table>
<thead>
<tr>
<th>Refrigerated vans/trucks/insulated</th>
</tr>
</thead>
<tbody>
<tr>
<td>vans/mobile insulated tanker</td>
</tr>
</tbody>
</table>

### D: Irradiation Facility

*Special conditions apply for Fruits and Vegetables. Please refer guidelines*
3. Scheme for Creation / Expansion of Food Processing and Preservation Capacities

- **Grant-in aid subject to maximum of INR 5 Crores** as follows:
  - 35% of eligible project cost in General areas
  - 50% of eligible project cost in North East States, Himalayan States, ITDP Areas & Islands

<table>
<thead>
<tr>
<th>Eligible projects</th>
<th>In-eligible projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Fruits &amp; Vegetables</td>
<td>✓ Other agri-horticulture sectors including spices, coconut, mushrooms</td>
</tr>
<tr>
<td>✓ Milk</td>
<td>✓ Wines &amp; Hops</td>
</tr>
<tr>
<td>✓ Meat / poultry / fish</td>
<td>✓ Food flavors, Food additives &amp; colors, oleoresins</td>
</tr>
<tr>
<td>✓ Ready to eat / Ready to cook / Breakfast cereals / Snacks / Other food products</td>
<td>✓ Rice milling (Only in East and North Eastern states)</td>
</tr>
<tr>
<td>✓ Flour / pulse / oil mills</td>
<td></td>
</tr>
</tbody>
</table>

Eligible proposals inside MFP will be preferred
4. Scheme for Development of Infrastructure for Agro-Processing Clusters

➢ **Grant-in aid subject to maximum of INR 10 Crores** as follows:
  ✓ 35% of eligible project cost in General areas
  ✓ 50% of eligible project cost in North East States, Himalayan States, ITDP Areas & Islands

➢ **Project requirements**
  ✓ The agro-processing cluster needs to contain 2 components as follows:
    • Basic enabling infrastructure
    • Core infrastructure / common facilities
  ✓ At least 10 acres of land needs to be brought in by the Implementing Agency. Cost of land will not be considered as eligible project cost
  ✓ Land may be purchased by IA or be taken on a 50 year lease
  ✓ Minimum of 5 food processing units with minimum of INR 25 crores investment need to be set up in the agro-processing cluster.
  ✓ Preference will be given to agro-processing clusters in districts with surplus agri / horticulture production
  ✓ Units permitted in the cluster include:
    • Units that produce products fit for human and animal consumption
    • Packaging units
It is expected that each agro-processing cluster will have 5 to 10 agro-processing units.
To support development of these units, the scheme will have two cost components as follows:

<table>
<thead>
<tr>
<th>Basic Enabling Infrastructure</th>
<th>Core Infrastructure / Common Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost of basic enabling infrastructure not exceeding <strong>40% of eligible project cost</strong> will be eligible for grant</td>
<td>Can be developed based on the need of the units</td>
</tr>
<tr>
<td>Includes cost of site development including:</td>
<td>Includes</td>
</tr>
<tr>
<td>Development of industrial plots</td>
<td>• Testing labs</td>
</tr>
<tr>
<td>Roads, drainage, water supply</td>
<td>• Cleaning, grading, sorting, packing facilities</td>
</tr>
<tr>
<td>Power supply and back-up</td>
<td>• Pre-coolers, cold storages, ripening chambers, IQF</td>
</tr>
<tr>
<td>Parking, Weigh bridges, common office space etc</td>
<td>• Steam generation boilers</td>
</tr>
<tr>
<td></td>
<td>• Specialized packaging units</td>
</tr>
</tbody>
</table>

Facilities indicated above are illustrative and the exact nature of facilities may vary from project to project based on requirement of units in the cluster.
5. Scheme for Creation of Forward and Backward Linkages

- **Grant-in aid subject to maximum of INR 5 Crores** as follows:
  - 35% of eligible project cost in General areas
  - 50% of eligible project cost in North East States, Himalayan States, ITDP Areas & Islands
  - For FPOs – 50% and 75% in general and difficult areas respectively

<table>
<thead>
<tr>
<th>Eligible Sectors</th>
<th>Eligible Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Fruits &amp; Vegetables processing</td>
<td>✓ Promoters of existing food processing units</td>
</tr>
<tr>
<td>✓ <strong>Milk processing</strong></td>
<td>✓ Groups of producers (FPOs, Cooperatives SHGs etc) linked to food processing units</td>
</tr>
<tr>
<td>✓ <strong>Meat / poultry / fish processing including meat / fish/ poultry shops</strong></td>
<td>✓ Retailers of processed Food</td>
</tr>
<tr>
<td>✓ Ready to eat / Ready to cook food products</td>
<td>✓ Logistics suppliers</td>
</tr>
<tr>
<td>✓ Logistics Sector</td>
<td></td>
</tr>
</tbody>
</table>

New Scheme
### Backward Linkages

1. Integrated Pack-house(s) (with mechanized sorting & grading line/ packing line/waxing line/ staging cold rooms, etc.)
2. Milk Chilling Centres/ Bulk Milk Coolers
3. Pre Cooling Unit(s)
4. Mobile pre-cooling Vans
5. Reefer boats

### Forward Linkages

1. Ripening Chamber(s)
2. Retail chain of outlets for perishables including Meat Shops with facilities such as frozen storage/deep freezers/Refrigerated display cabinets/cold room.
3. Retail refrigerated carts, temperature controlled solar powered retail carts.

### Transportation

1. Refrigerated /insulated transport / Reefer Vans
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