

Farmico Cold Chain & logistics Ltd

From farm to plate ..

A wide range of (IQF)Frozen Fruits & Vegetables !!

Location : Nagpur,Maharashtra

Range of Products : One stop shop for all FFV

- GLOBAL FROZEN FRUITS AND VEGETABLES IMPORT/EXPORT TRENDS The following 11 frozen product categories were taken into account after global analysis.
- 1. Potatoes –French Fries & other cuts.
- 2. Legumes
- 3. Spinach
- 4. Sweet corn
- 5. Peas
- 6. Beans
- 7. Mix Vegetables (Different blends of Veggies as per country specific requirement)
- 8. Other Frozen vegetables (Okra, Cauliflower, beans, Carrot, etc)
- 9. Strawberries
- 10. Raspberries
- 11. Frozen fruits and nuts
- We can much more product to our portfolio as per season & availability for the given product.

Indian market scenario:-

- The Indian frozen foods market reached a value of around **INR 74 Billion in 2018**. The market is further projected to reach a value **INR 188 Billion by 2024**, expanding at a CAGR(Compound Annual Growth rate) of around **17%** during **2019-2024**.
- The market consists of **frozen vegetables**, frozen fruits, frozen vegetable snacks and frozen meat products.
- The market for frozen foods has been gaining traction in India owing to their convenience as they do not need any additional preparation and culinary expertise.
- Another reason for the increasing demand for frozen foods in India is the fact that these products are available year-round regardless of the season.
- Furthermore, end-users can buy these products through various distribution channels such as supermarkets and hypermarkets, convenience stores, departmental stores, etc.

Maharashtra – Cold Chain Network & processing

- It is one of the centralised location as per Indian Geography.
- One of most developed state in terms of producing fresh fruits & Vegetables.
- Lots of Government initiative to improve the cold chain & processing in Maharashtra.
- . JNPT Port, Kandla & Mundra Port- It gives an edge to export the products.
- . Various SEZ & Industrial zones developed near JNPT such as MIDC – . .
- .We have our cold store in MIDC Turbhe & Nagpur.
- .We have our IQF plant located in Nagpur.

Indian Frozen Foods Market Drivers/Constraints:

- **Improving living standards** in confluence with rising disposable incomes have driven the growth of the market. Moreover, India's working population is preferring **convenient food products** that offer less meal preparation time and ease of consumption.
- Rising urbanization has resulted in the growth of the organized retail sector in India. These modern grocery and food stores are equipped with cold chain facilities which have led to the availability of a variety of frozen food products in the market.
- India's large **young population and influence of western food culture** have changed their food habits and lifestyles, in turn, augmenting the demand for frozen food products in the region.
- In order to expand their consumer-base, manufacturers are constantly coming up with new product variants, **such as frozen fruits and vegetables, frozen snacks, frozen poultry, meat and seafood products, frozen ready-to-eat meals, etc.**
- India's booming e-commerce sector has further propelled the growth of the market. Online platforms offer high product visibility and product listing at nominal costs in comparison to traditional retail platforms, thereby facilitating greater market penetration of frozen food products in India.

Key player & domestic competition:-

- McCain Foods
- Venky's
- Mother Dairy
- Godrej Tyson Ltd.
- Hyfun Foods
- Al Kabeer Group
- Innovative Foods (Sumeru)
- KLA
- Safal

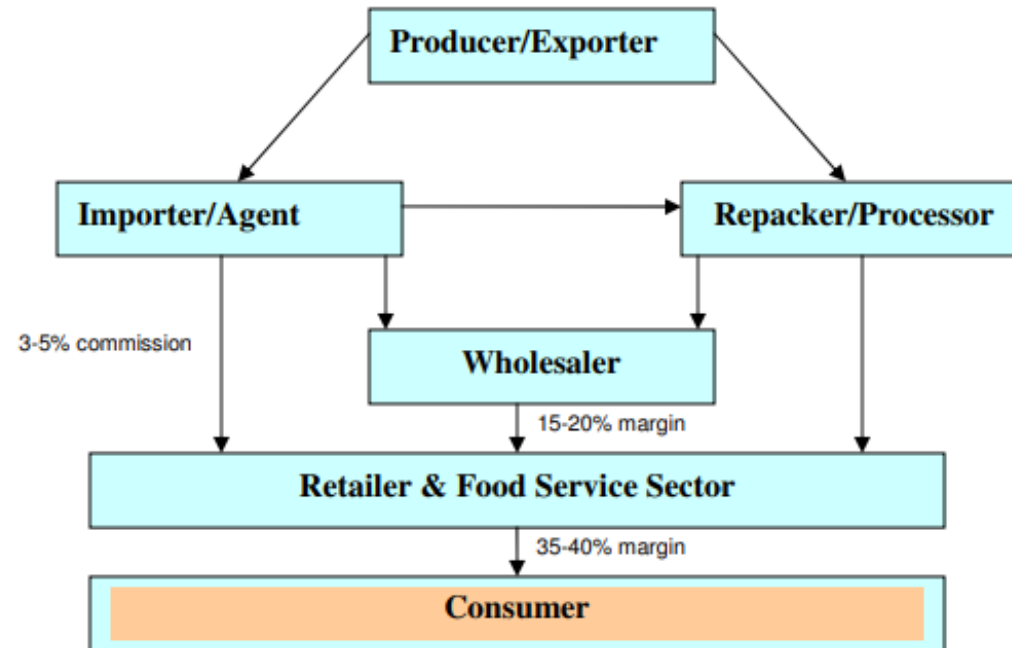
Domestic distribution :-

- Contract manufacturing :- We can do the contract manufacturing for the Local Indian brands & Indian Exporters of FFV in their brands.
- Further creating our brand for Local market in retail packaging.(Small Packing starting from 250 gm,400 gm, 1kg & 5 kg .
- Follow various distribution such as Wholesale, Traditional ,HORECA, CNF, Super Stockist
- Indirect distribution.
- Direct distribution.
- Intensive Distribution.

Distribution Channels :-

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Distribution channels for other preserved fruit and vegetables

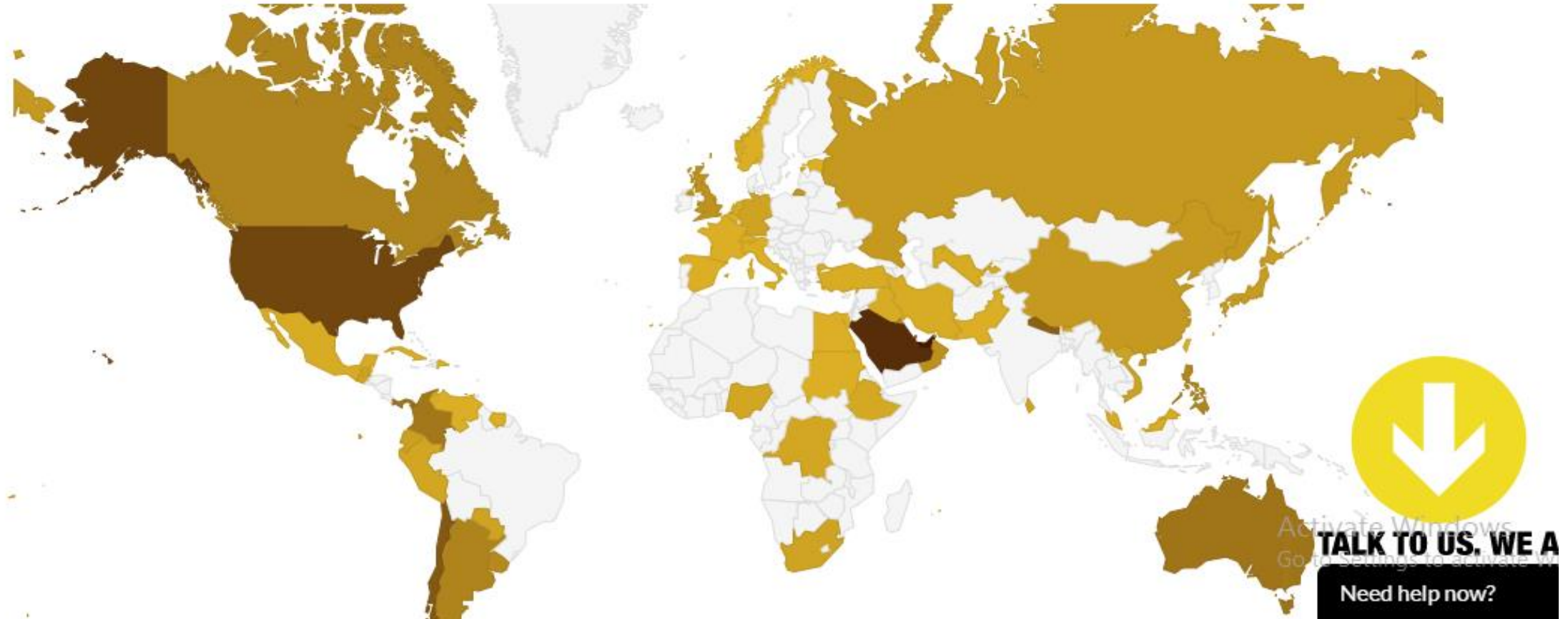


The distribution channel for fruit & vegetables has relatively less number of intermediaries than that of fruit juice concentrate. This nature of channel becomes more important on

World Map as per FFV Exports :-

for buyers of 07102100  Filter by: Countries All Continents

Maps



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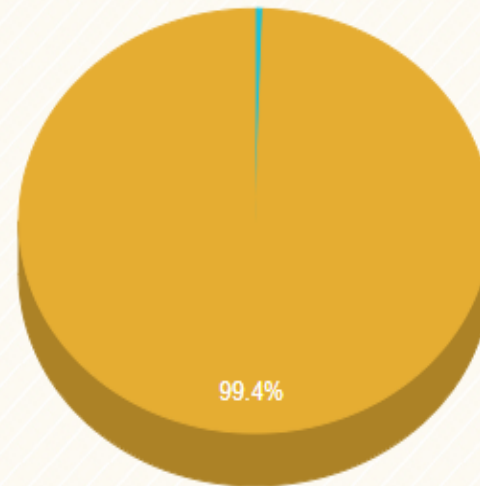
Opportunity Index (2019):-

OPPORTUNITY INDEX

INDIA'S ANNUAL EXPORT OF VEGETABLES (UNCOOKED OR COOKED BY STEAMING OR BOILING IN WATER), FROZEN VS. WORLD CONSUMPTION

There is an opportunity of increasing India's VEGETABLES (UNCOOKED OR COOKED BY STEAMING OR BOILING IN WATER), FROZEN exports to the world by 177.06 times. The product presents potential export opportunity of \$6,830.76 million for India exporters.

● India Exports ● World Imports



**INDIA'S EXPORTS
\$38.58 MN**

**DEMAND SUPPLY GAP
\$6,830.76 MN
OPPORTUNITY INDEX
177.06**



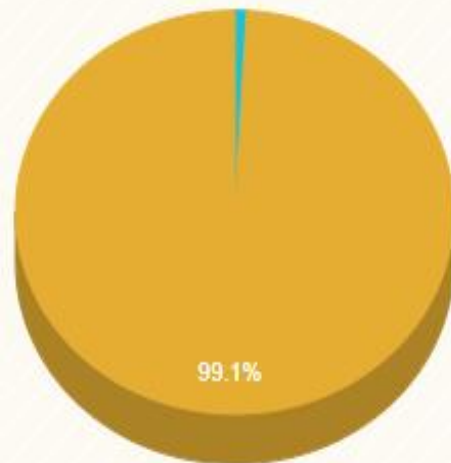
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World Market Analysis as per countries-1 :-

MEASUREMENT OF INDIA'S EXPORT POTENTIAL OF VEGETABLES (UNCOOKED OR COOKED BY STEAMING OR BOILING IN WATER), FROZEN TO WORLD'S TOP 10 IMPORTERS OF THE PRODUCT

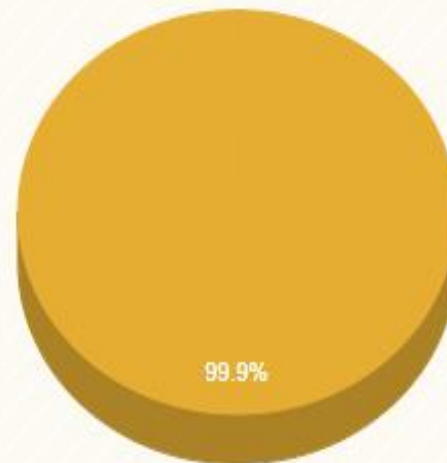
USA OI: 111

● India 10016 ● USA 1122181.38



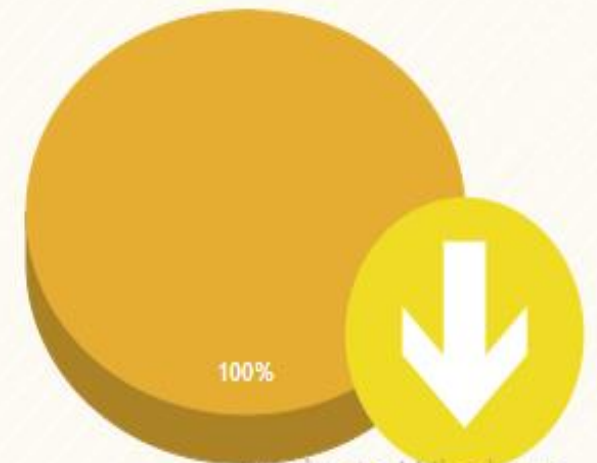
Japan OI: 885

● India 1074 ● Japan 951644.61



Germany OI: 2423

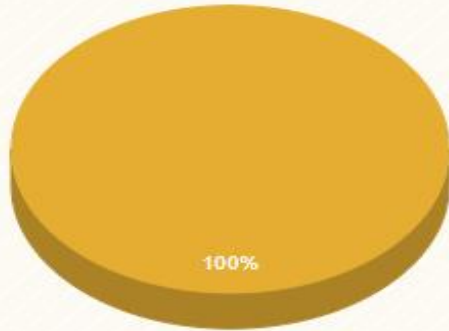
● India 253 ● Germany 613251.65



Analysis -2 :-

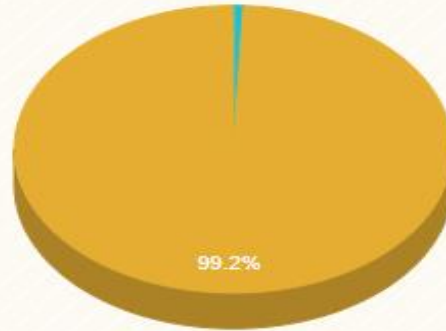
France OI: 7484

India 75 France 561396.54



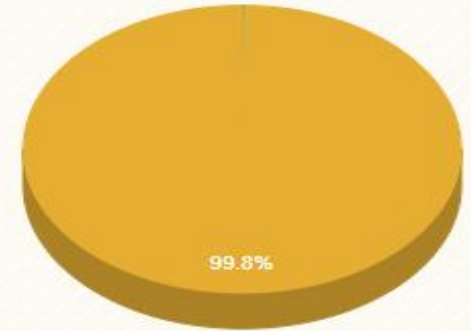
United Kingdom OI: 130

India 3504 United Kingdom 459...



Belgium OI: 572

India 753 Belgium 431538.85



Italy OI: 299585

India 1 Italy 299585.79



Rep. of Korea OI: 253351

India 1 Rep. of Kore...



Netherlands OI: 2395

India 76 Netherland...



Canada OI: 311

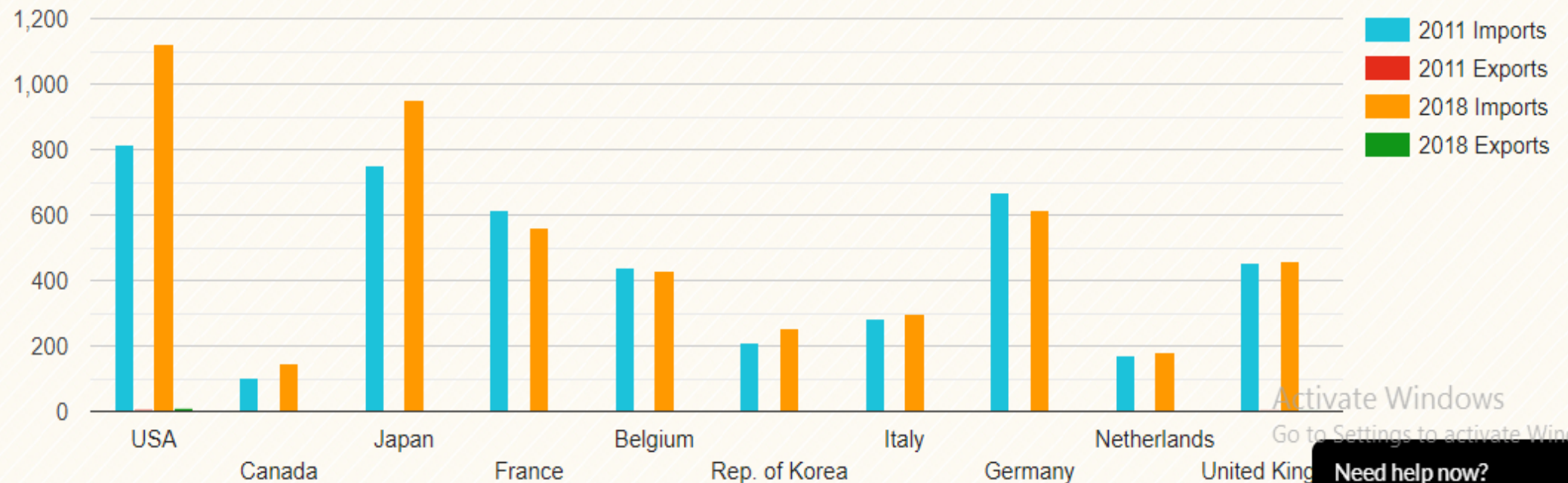
India 311 Canada 311



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Import Analysis of some markets :-

PROSPECTS FOR MARKET DIVERSIFICATION OF VEGETABLES (UNCOOKED OR COOKED BY STEAMING OR BOILING IN WATER), FROZEN

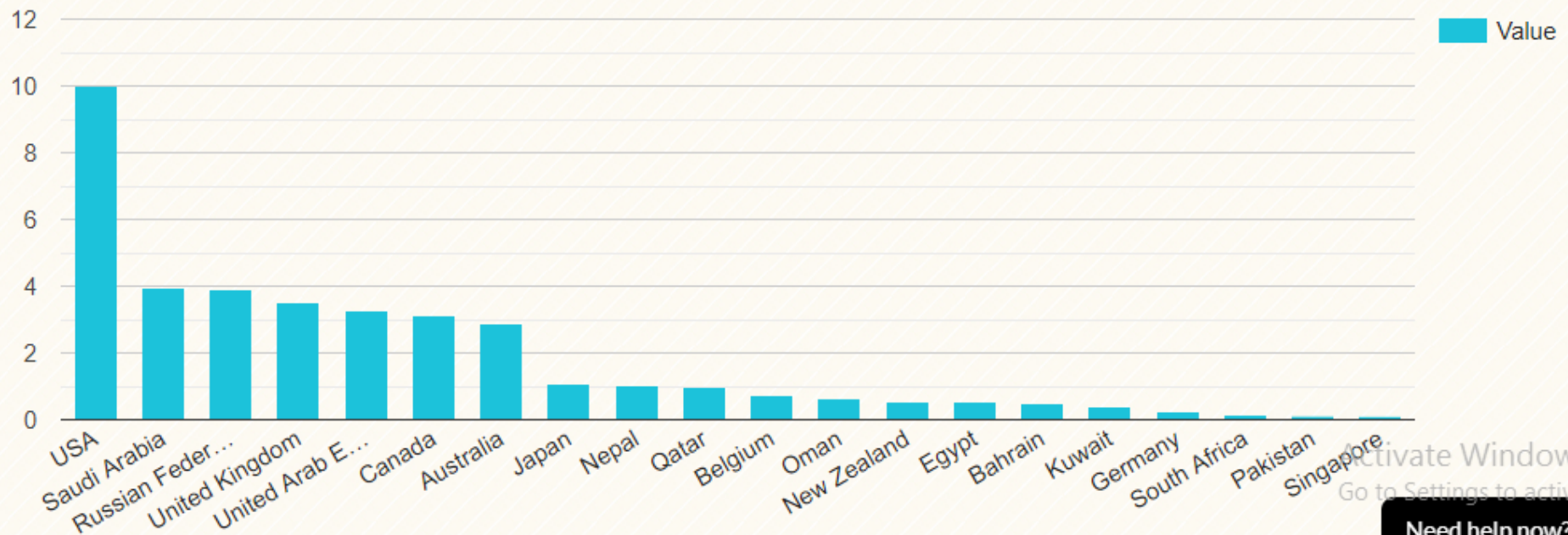


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Focus Market :-

INDIA'S TOP FOCUS MARKETS FOR VEGETABLES (UNCOOKED OR COOKED BY STEAMING OR BOILING IN WATER), FROZEN COUNTRY-WISE SHARE IN INDIA'S EXPORTS (IN VALUE TERMS)



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Top Importing Countries

- The top 5 importers of frozen mix vegetables to the global market are; Germany, France, USA, Japan, UK ,Saudi Arabia, UAE, Algeria, etc.
- Germany is the largest importer of frozen mix vegetables in the world, both in terms of value and volume
- Japan has the highest UVR amongst all importing nations
- The top 5 importers of frozen peas to the global market are; Italy, UK, Germany, USA, Japan
- Italy is the largest importer of frozen peas in the world, both in terms of value and volume

Top Exporting companies in world for FFV :-

- H.J. Heinz (USA)
- Ardovries N.V. (Belgium)
- Bekescsaba Deepfrozen Foods (Hungary)
- Bonduelle Italia (France)
- Christian Salvesen (Scotland)
- Dean Foods (USA)
- Frigodan (Denmark)
- Froza (Greece)
- Frudesa (Spain)

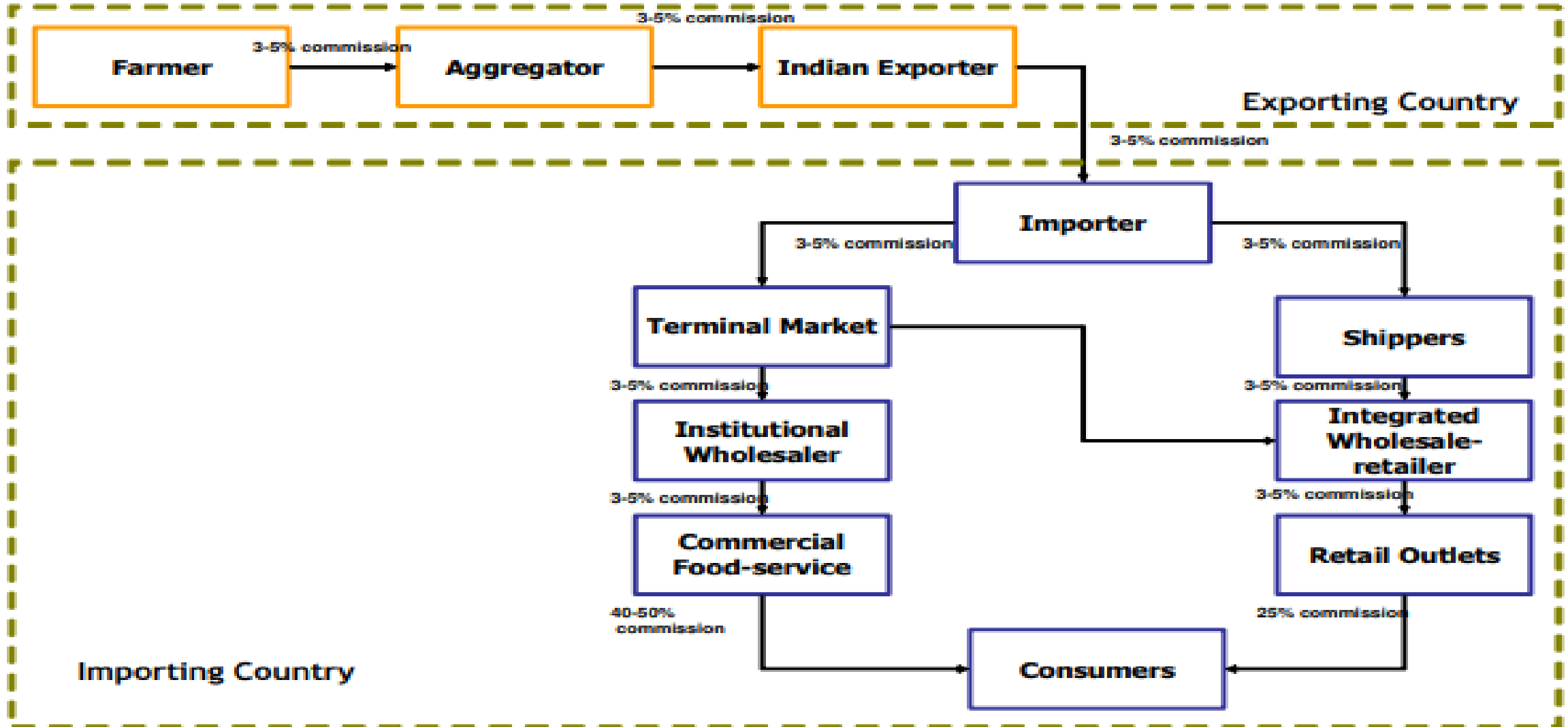
Top Exporters of FFV globally

- Geest (UK)
- Gelagri Bretagne (France)
- Green Giant (USA)
- Hajdufreeze (Hungary)
- Merko (Turkey)
- Mirsa Refrigerating Industrial (Hungary)
- NG Fung Hong Limited (Hong Kong)
- Simplot Australia Pty Ltd. (Australia)
- Unifrost (Belgium)

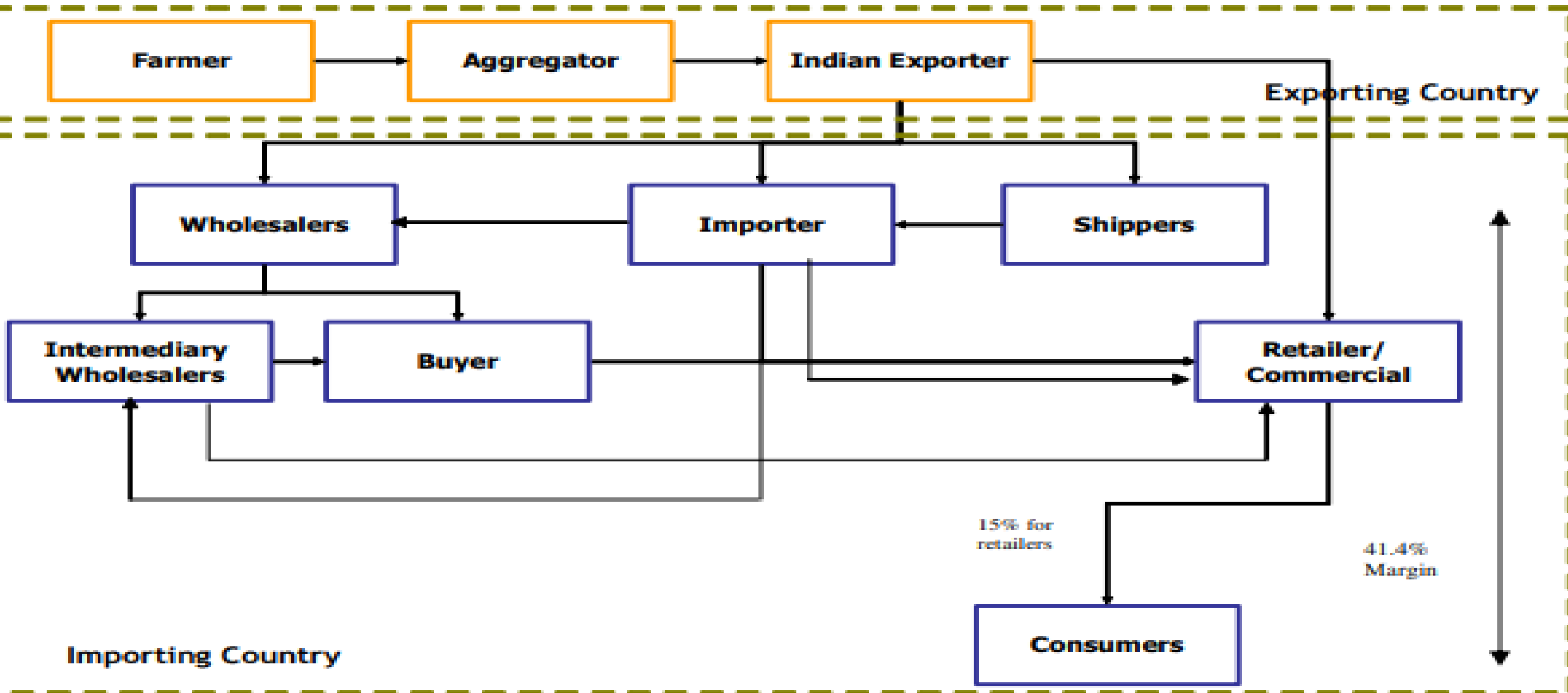
Key Player in FFV Value Chain :-

- Agent
- Importer
- Processing Industry
- End product manufacturer
- Retail food service organization
- Packers

Value Chain



Value Chain-2



Government Organization Helping Indian FFV

Exports :-

- For handling the channelized imports and exports of commodities, undertaking development of exports generally, and for providing assistance and services to the export trade, the following Corporations/organizations are functioning:-
- The State Trading Corporation of India Ltd.
- The Projects and Equipment Corporation of India Ltd.
- The Export Credit and Guarantee Corporation Ltd.
- India Trade Promotion Organization.
- APEDA.
- FIEO.
- MDA- Market Development Assistance.

Thanks !!!