

GROWTH AND PROBLEMS OF FOOD PROCESSING INDUSTRY IN INDIA

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ABSTRACT

The food processing sector is key job for the general advancement of an economy as it gives an essential linkage and participation between the farming division and modern area. It spreads and promotes developing; improve pay of works; produce markets for toll of food things similarly as make more noteworthy business openings. Through the closeness of such ventures, an increasingly broad extent of food things could be sold and scattered to the far away positions. India is the world's second most noteworthy producer of food close to China and has the ability of being the best with the food and rustic portion. The food processing industry (FPI) is one of the greatest business is India. It has fifth situated similar to creation, use and exchange and foreseen advancement. The FPI spreads works out, for instance, agribusiness, development, house, animal cultivating and fisheries. It moreover consolidates various organizations that usage, cultivating commitments for gathering of tasteful things. Around the world, the interest for handled food is on the ascent brought about by an expansion in urbanization and increment in the extra cash of buyers around the world. The food and beverage internet business deals are another creating pattern in the food retail area, which introduces an unfathomable chance to fulfil the needs of the time-squeezed urban purchaser.

Keywords: Agribusiness, Processed Food, Food Industry, Food & Beverage

INTRODUCTION

The term 'food processing' is mainly defined as “a process of value added to the agricultural sector produce by different ways like grading, sorting and packaging. In other words, it is a technique of manufacturing and preserving food substances in an effective manner with a view to enhance their shelf life; improve quality as well as make them functionally more useful”. It covers size of items from sub-segments involving agribusiness, cultivation, estate, creature farming and fisheries. It has begun creating different new things like prepared to-eat sustenance,

refreshments, handled and solidified leafy foods foodstuffs, meat and marine items, and so forth. It likewise incorporates foundation of post-gather framework for preparing of different nourishment things like cold storerooms, sustenance parks, bundling focuses, esteem included focuses, light offices and modernized abattoir.

The food processing industry incorporates an alternate gathering of organizations associated with the handling of items like fish, meat, milk, yields and water. It incorporates a great many Small and Medium Enterprises (SMEs) worldwide and furthermore probably the greatest organizations on the planet. A significant number of these organizations convey items legitimately to customers, while others have practical experience in business-to-business exercises. A few organizations straightforwardly take part in every aspect of sustenance generation, from cultivating exercises through to conclusive creation and retail. Others are gathered more at the best end of the generation chain or purchase through item advertises.

The Indian food and grocery market is the world's sixth greatest, with retail contributing 70 percent of the deals. The Indian food preparing industry represents 32 percent of the nation's all out food showcases one of the greatest enterprises in India and is positioned fifth as far as generation, utilization, send out and anticipated development. It contributes around 8.80 and 8.39 percent of Gross Value Added (GVA) in manufacturing and agriculture individually, 13 percent of India's fares and 6 percent of complete modern speculation. The Indian gourmet food advertises is directly esteemed at US\$ 1.3 billion and is developing at a Compound Annual Growth Rate (CAGR) of 20 percent. India's natural food showcase is required to increment by multiple times by 2020. The study investigated the growth and problems of food processing industry in India.

Food Processing

The food processing industry (FPI) procedure can be sorted into three kinds:

1. *Primary Processing*: It incorporates essential cleaning, reviewing and bundling as foods grown from the ground.
2. *Secondary Processing*: It incorporates change of the essential items to a phase just before the last readiness as if there should be an occurrence of processing paddy to rice.
3. *Tertiary Processing*: It prompts a high esteem added prepared to eat nourishment like pastry kitchen items like Biscuits, Chocolates and so on.

The Ministry of Food Processing, Government of India demonstrates the accompanying sections inside the FPI:

- Dairy, natural products and vegetable handling;

- Grain handling;
- Meat and poultry handling; and
- Fisheries and Consumer nourishments, including bundled sustenance's, refreshments and bundled drinking water.

METHODOLOGY

This study is based on secondary data. The essential data were composed from different reports like the Ministry of Food Processing Industry, Government of India, DGCIS (Directorate General of Commercial Intelligence and Statistics (DGCIS), the RBI's Handbook of Indian Economy, IBEF, ASSOCHAM etc.

REVIEW OF LITERATURE

Vijay Choudhary. (2000), He identified the increasing demand for food products in India and the implications for the prospects of the agro-based food processing industry in the country. It is suggested that the outlook is promising

Vashisht, G.D. and Pathania, M.S. (2004), they surveyed on the import and export of vegetables. They found that India is the real maker of vegetables on the planet just alongside China. At present, the major importers of fresh vegetables from India are UAE and Bangladesh which together import fresh vegetables to the extent of 65 per cent.

Manjari Desai (2014) study, "The Food processing units play a dynamic character in founding the farm sector's formal connections that result in high income and creates employment n while minimizing the wastages. According to the Economic Survey of Maharashtra 2011-12, out of the total 4221 FDI proposals (from August 1991 to September 2010) approved by the Government of Maharashtra, 173 proposals are from the Food Processing sector, that is 4.1% of the total proposals. An investment amount of ₹1039 cores are expected which is 1.2% of the total investment in the present year.

Tyagi, and Vandana (2014) broke down that the development of sustenance handling organizations has been imperfect in light of staggering expense, low dimension of efficiency, high wastage and absence of intensity of Indian nourishment items in the worldwide market. In this manner, to completely use the development capability of the division, current difficulties that are being looked by the business should be appropriately tended to and steps should be taken to evacuate the bottlenecks hampering the sectorial development. The FICCI review has accordingly gone about as an initial phase in recognizing these sorts of difficulties, in this manner giving a guide to every one of the partners to take a shot at, and in this way contributing in understanding the huge capability of in these enterprises. India is the second spot greatest

produce of nourishment on the planet. Regardless of whether it is canned nourishment, handled food, sustenance grains, dairy food, fish, meat, solidified nourishment, poultry, the Indian agro industry has an immense potential, the hugeness and development of which will never stop.

Hussain, Akil and Rahul Ranjan Yadav (2016) examined that sustenance handling Industries are vital for the development of assembling segment in India. Since it makes the immediate linkages among essential and assembling parts so for the improvement of sustenance preparing businesses there is a need to build up the agribusiness segment and discover the issue of the farming segment and evacuate it in light of the fact that without the adequate crude material the FPI can work easily. The most recorded issue of the horticulture area, just as FPI, is the credit offices in light of the fact that the credit is accessible at an exceptionally high loan fee which a poor rancher and little producers can't bear. So policymakers should endeavor to take care of this issue. The recently actualized plan for example Mudra Yojana and Make In India are working extremely great to determine the issues of assembling Industries with respect to credit and remote direct speculation the policymakers ought to propose that they should attempt to accomplish something which makes solid showcasing condition of sustenance prepared items in India.

Growth of FPIs

India's asset base gift as far as different agricultural harvests, which comprise the supply base for things like handled products of the soil, is rich and changed. Its diverse agro-climatic zones and soil pervasive in different pieces of the nation are perfect for growing a wide assortment of tropical just as mild products of the soil. Indian natural product processors have their activities in home scale, cabin scale and little scale class with the introduced limit going from 50 tons to 250 tons in a year and just few extensive scale Indian and worldwide organizations have bigger introduced limit in the scope of 12000 to 72000 tons for each year. However, it is as yet ruled by substantial number of little scale processors.

As indicated by the Ministry of Food Processing Industry, post-collect misfortunes represent US\$1.5 billion yearly. Generally speaking, less than 10% of the all-out food delivered is handled into esteem included items in India. In examination, the US and China process 65% and 23% of their produce, separately. Essentially, other creating nations, for example, Thailand, Philippines, and Brazil process as high as 30, 78, and 70 percent of their produce, individually. India's immense rural assets alone make enormous potential for interests in its food processing and gear industry. Real zones holding extension for esteem included preparing are in the canning, bundling, dairy and food processing, solidified sustenance, and thermo-handling ventures. As per a 2017 report by the Associated Chambers of Commerce and Industry of India (ASSOCHAM), the nation's food preparing industry is relied upon to reach US\$482 billion by

2020, driven by development in composed retail, changing customer conduct and expanding commercialization in level II and level III urban areas. Key players in India's food processing industries are Haldiram's, Glaxo-SmithKline (GSK), Mapro Foods, Dabur, Parle, Nestlé, Frito-Lay and PepsiCo.

The worldwide fares of handled sustenance were anticipated at US\$ 750.9 billion amid the year 2014. Fares have recorded a CAGR of 7.8 percent amid the period 2010 to 2014. The USA was the main exporter of handled sustenance with fares esteemed at US\$ 62.2 billion amid the year 2014. Germany was the second biggest exporter of prepared nourishment with an offer of 7.7 percent. India be that as it may, held the seventeenth position in the fares of prepared sustenance on the planet and had an offer of pretty much 2 percent in the total worldwide fares (Table-1). The USA was likewise the main shipper of prepared nourishment on the planet, representing 11.5 percent of worldwide imports amid 2014. Table 2 demonstrates the other significant shippers of prepared sustenance on the planet included Germany (7.3%), the United Kingdom (6.2%), Japan (5.7%), France (5.3%), the Netherlands (4.4%), China (4.1%), Italy (3.6%), Canada (3.1%) and Belgium (3.1%).

Table 1: Major Exporters of Processed Food

| Rank | Country | US\$ billion | | Percentage | |
|-----------|------------------------------|--------------|-------------|-------------|------------|
| | | 2010 | 2014 | CAGR | Share |
| 1 | The United States of America | 41.8 | 62.2 | 10.5 | 8.3 |
| 2 | Germany | 44.4 | 58.0 | 6.9 | 7.7 |
| 3 | The Netherlands | 38.1 | 53.5 | 8.8 | 7.1 |
| 4 | France | 38.5 | 46.1 | 4.6 | 6.1 |
| 5 | China | 28.0 | 41.5 | 10.3 | 5.5 |
| 6 | Italy | 23.9 | 30.5 | 6.2 | 4.1 |
| 7 | Belgium | 23.3 | 29.5 | 6.1 | 3.9 |
| 8 | The United Kingdom | 19.1 | 25.4 | 7.3 | 3.4 |
| 9 | Spain | 17.9 | 24.2 | 7.9 | 3.2 |
| 10 | Brazil | 17.8 | 22.0 | 5.3 | 2.9 |
| 17 | India | 5.9 | 15.2 | 26.5 | 2.0 |

Source: Exim Bank Research, International Trade Centre, Geneva.

Table 2: Major Importers of Processed Food

| Rank | Country | US\$ billion | | Percentage | |
|------|------------------------------|--------------|--------------|------------|--------------|
| | | 2010 | 2014 | CAGR | Share |
| 1 | The United States of America | 57.3 | 81.6 | 9.2 | 11.5 |
| 2 | Germany | 41.5 | 51.9 | 5.8 | 7.3 |
| 3 | The United Kingdom | 36.1 | 43.8 | 4.9 | 6.2 |
| 4 | Japan | 36.3 | 40.4 | 2.7 | 5.7 |
| 5 | France | 31.2 | 37.4 | 4.7 | 5.3 |
| 6 | The Netherlands | 22.0 | 31.1 | 9.1 | 4.4 |
| 7 | China | 14.0 | 29.4 | 20.3 | 4.1 |
| 8 | Italy | 22.9 | 25.7 | 2.9 | 3.6 |
| 9 | Canada | 16.5 | 22.2 | 7.7 | 3.1 |
| 10 | Belgium | 16.8 | 21.9 | 6.9 | 3.1 |
| | World | 537.7 | 708.1 | 7.1 | 100.0 |

Source: Exim Bank Research, International Trade Centre, Geneva.

Worldwide, the demand for processed food is on the rise caused by an increase in urbanisation and increase in the disposable income of consumers worldwide. Food and beverage e-commerce sales is another developing trend in the food retail sector, which presents an incredible opportunity to meet the demands of the time-pressed urban consumer. Table 3 and Fig. 3 present the fixed capital in food processing industries in India during 1998-99 to 2014-15. In 1998-99 it was ₹26756 crores and it increased up to ₹191984 crores in 2014-15. Table 4 and Fig. 2 shown that the contribution of employment in food processing industries during 1998-99 to 2013-14. In 1998-99, there were 13.46 lakhs of persons engaged in registered food processing industries in India. Similarly, the number increased up to 17.41 lakhs of person's secured employment in FPIs in India.

Table 3: Fixed Capital in Registered FPIs from 1998-99 to 2014-15

| Years | Fixed Capital in crores |
|--------------|--------------------------------|
| 1998-99 | 26,756 |
| 1999-00 | 31,642 |
| 2000-01 | 31,887 |
| 2001-02 | 33,907 |
| 2002-03 | 37,627 |
| 2003-04 | 37,412 |
| 2004-05 | 41,388 |
| 2005-06 | 45,357 |
| 2006-07 | 57,460 |
| 2007-08 | 68,335 |
| 2008-09 | 81,156 |
| 2009-10 | 99,482 |
| 2010-11 | 1,20,705 |
| 2011-12 | 1,45,047 |
| 2012-13 | 1,58,865 |
| 2013-14 | 1,68,380 |
| 2014-15 | 191984 |

Sources: Annual Survey Industries 2008-09 to 2014-15, MoFPI, GOI, New Delhi.

Figure 1: Fixed Capital in Registered FPIs from 1998-99 to 2014-15

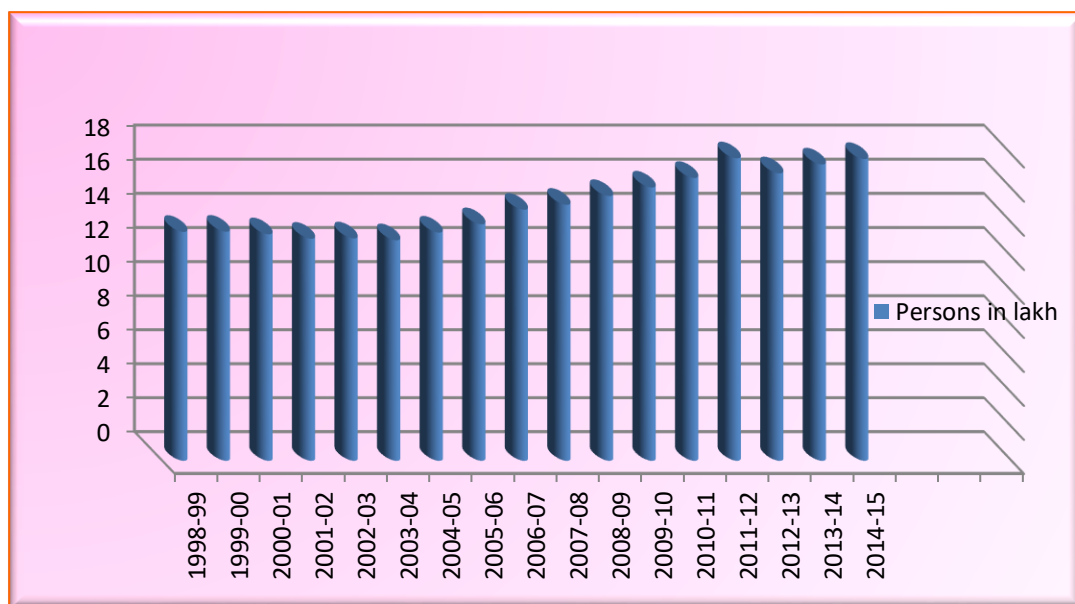


Table 4: Persons Employed in Registered FPIs from 1998-99 to 2014-15

| Years | Persons in lakh |
|---------|-----------------|
| 1998-99 | 13.46 |
| 1999-00 | 13.47 |
| 2000-01 | 13.32 |
| 2001-02 | 13.06 |
| 2002-03 | 13.08 |
| 2003-04 | 12.97 |
| 2004-05 | 13.42 |
| 2005-06 | 13.91 |
| 2006-07 | 14.76 |
| 2007-08 | 15.05 |
| 2008-09 | 15.56 |
| 2009-10 | 16.06 |
| 2010-11 | 16.62 |
| 2011-12 | 17.77 |
| 2012-13 | 16.89 |
| 2013-14 | 17.41 |
| 2014-15 | 17.73 |

Sources: Annual Survey Industries 2008-09 to 2014-15, MoFPI, GOI, New Delhi.

Figure 2: Persons Employed in Registered FPIs from 1998-99 to 2014-15



Exports of Food Processing Allied Commodities

All agricultural produce when exported undergo an element of processing. Hence all edible agricultural commodities exported are included in the export data. The Table 5 indicates the export values of food processing sector from 2012-13 to 2017-18. Table 6 and Fig. 3 shown the export of processed food and related commodities (US \$ Million) from 2009-2017. Table 7 and Fig. 4 represent the export of spices from 1996-97 to 2017-18.

Table 5: India's Export of Food Products

| Sl. No. | Commodity | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 (Apr-May) |
|---------|--|---------|----------|---------|---------|---------|-------------------|
| 1 | Meat And Edible Meat Offal. | 3286.87 | 4475.53 | 4929.27 | 4209.98 | 4059.72 | 559.98 |
| 2 | Fish And Crustaceans, Molluscs And Other Aquatic Invertebrates. | 3322.71 | 4823.02 | 5249.51 | 4486.28 | 5516.44 | 945.21 |
| 3 | Dairy Produce; Birds' Eggs; Natural Honey; Edible | 410.01 | 705.07 | 379.03 | 328.48 | 295.12 | 52.79 |
| 4 | Prod. Of Animal Origin, Not Elsewhere Spec. Or | 1037.38 | 1356.07 | 1180.8 | 1261.4 | 1294.33 | 217.7 |
| 5 | Edible Fruit And Nuts; Peel Or Citrus Fruit Or Melons. | 1412.37 | 1623.29 | 1610.71 | 1584.68 | 1741.18 | 351.67 |
| 6 | Coffee, Tea, Mate And Spices. | 2742.92 | 2746.62 | 2871.86 | 2954.87 | 3236.06 | 575.86 |
| 7 | Cereals. | 9655.41 | 10562.89 | 9550.98 | 6272.02 | 6059 | 1253.05 |
| 8 | Products Of The Milling Industry; Malt; Starches; Inulin; Wheat Gluten. | 226.61 | 299.05 | 305.55 | 299.47 | 218.32 | 38.57 |
| 9 | Oil Seeds and Oleo. Fruits; Misc. Grains, Seeds And Fruit; Industrial Or Medicinal Plants; Straw And Fodder. | 1728.06 | 1709.41 | 2213.94 | 1673.53 | 1818.2 | 256.01 |
| 10 | Lac; Gums, Resins And Other Vegetable Saps And Extracts. | 4321.32 | 2414.86 | 1947.54 | 868.99 | 843.46 | 191.33 |
| 11 | Animal Or Vegetable Fats And Oils And Their Cleavage | 958.79 | 857.33 | 973.29 | 877.27 | 895.55 | 229.99 |
| 12 | Products; Pre. Edible Fats; Animal Or Vegetable Molluscs Or Other Aquatic Invertebrates | 94.27 | 119.68 | 155.39 | 211.97 | 318.77 | 63.27 |
| 13 | Sugars And Sugar Confectionery. | 1750.11 | 1354.89 | 1075.16 | 1763.61 | 1511.72 | 210.11 |
| 14 | Cocoa And Cocoa Preparations. | 54.03 | 93.96 | 138.87 | 193.31 | 162.66 | 24.67 |
| 15 | Preparations Of Cereals, Flour, Starch Or Milk; Pastry cooks Products. | 406.5 | 463.31 | 489.85 | 506.24 | 520.28 | 84.2 |

| | | | | | | | |
|----------------------------------|---|-----------------|-----------------|-----------------|-----------------|-----------------|----------------|
| 16 | Preparations Of Vegetables, Fruit, Nuts Or Other Parts Of Plants. | 383.91 | 449.66 | 504.71 | 488.25 | 493.76 | 79.23 |
| 17 | Miscellaneous Edible Preparations. | 508.99 | 540.13 | 587.5 | 568.83 | 630.88 | 110.68 |
| 18 | Beverages, Spirits And Vinegar. | 361.98 | 408.96 | 377.84 | 320.51 | 313.42 | 54.8 |
| 19 | Residues And Waste From The Food Industries; Prepared | 3235.82 | 3047.7 | 1630.12 | 802.68 | 1106.96 | 197.67 |
| India's Total Food Export | | 35898.06 | 38051.43 | 36171.92 | 29672.37 | 31035.83 | 5496.79 |

Source: Directorate General of Commercial Intelligence and Statistics (DGCI&S) 2017, Ministry of Commerce and Industry, GOI, New Delhi.

Table 6: Export of Processed Food & Related Commodities (US \$ Million)

| Year | FPI-Exports | Growth (%) |
|---------|-------------|------------|
| 2009-10 | 14,787 | -9.35 |
| 2010-11 | 20,427 | 38.14 |
| 2011-12 | 31,762 | 55.49 |
| 2012-13 | 35898.06 | 14.11 |
| 2013-14 | 38051.43 | 6.00 |
| 2014-15 | 36171.92 | -4.94 |
| 2015-16 | 29672.37 | -17.97 |
| 2016-17 | 30871.47 | 4.04 |

Source: Directorate General of Commercial Intelligence and Statistics (DGCI&S) 2017, Ministry of Commerce and Industry, GOI, New Delhi.

Figure 3: Export of Processed Food & Related Commodities (US \$ Million)

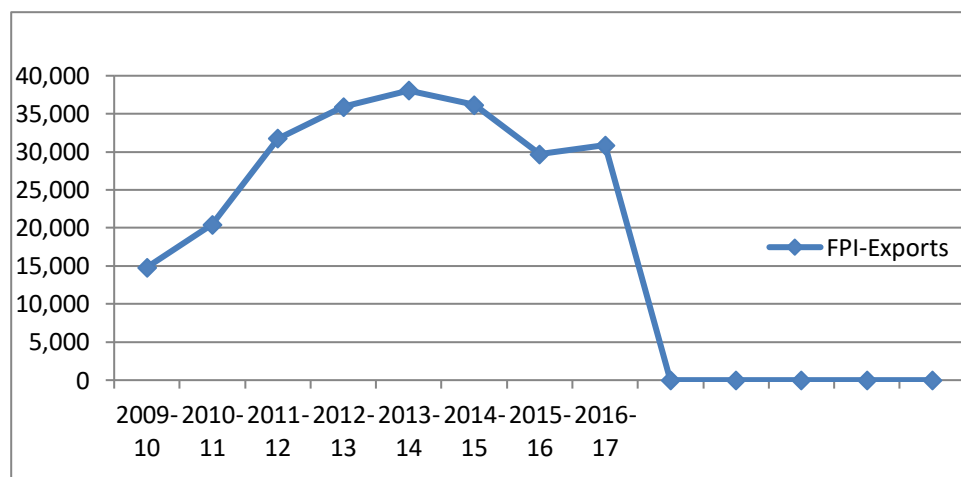
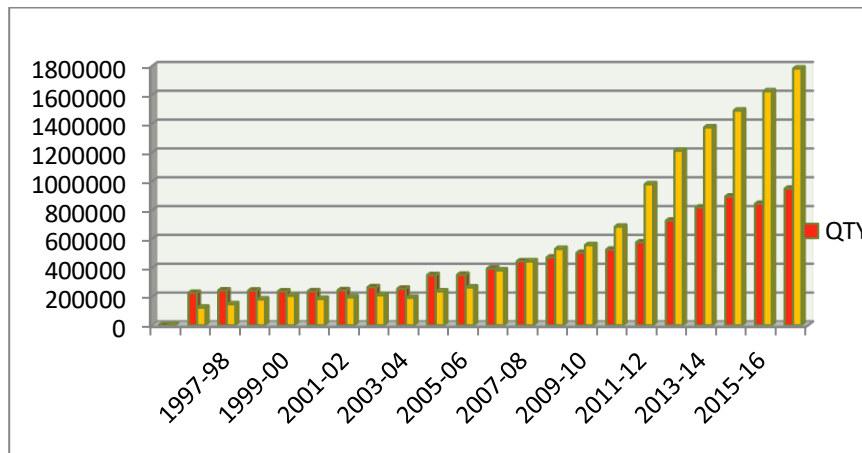


Table 7: Export of Spices from 1996-97 to 2017-18

| Year | QTY | VALUE |
|---------|---------|------------|
| | (MT) | (RS.LAKHS) |
| 1996-97 | 225295 | 123071.77 |
| 1997-98 | 242071 | 146681.6 |
| 1998-99 | 240862 | 179609.77 |
| 1999-00 | 235611 | 204367.87 |
| 2000-01 | 235917 | 183352.91 |
| 2001-02 | 243203 | 194054.88 |
| 2002-03 | 264107 | 208671.02 |
| 2003-04 | 254382 | 191160.19 |
| 2004-05 | 348524 | 235051.87 |
| 2005-06 | 350363 | 262762.45 |
| 2006-07 | 393692 | 380604.75 |
| 2007-08 | 444250 | 443550.00 |
| 2008-09 | 470520 | 530025.50 |
| 2009-10 | 502750 | 556050.00 |
| 2010-11 | 525750 | 684070.70 |
| 2011-12 | 575270 | 978342.48 |
| 2012-13 | 726613 | 1211275.80 |
| 2013-14 | 817250 | 1373539.26 |
| 2014-15 | 893920 | 1489967.5 |
| 2015-16 | 843255 | 1623822.99 |
| 2016-17 | 947790 | 1781223.59 |
| 2017-18 | 1028060 | 1798016.24 |

Source: Directorate General of Commercial Intelligence and Statistics (DGCI&S) 2017, Ministry of Commerce and Industry, GOI, New Delhi.

Figure 4: Export of Spices from 1996-97 to 2017-18



Problems of FPIs

The FPI is upright hard for rapid growth but there are plentiful problems impeding its growth. In view of firm changers in market demand the industry has to exert for increasing its competitive strength. The problems faced by exporters in respect its competitive strength. The problems faced by exporters in respect of processed food products are really very noteworthy. Many different food products and perishable items have acquired export potential and their exports are being made through sea and air routes. There are basic problems in getting space in ship/air craft when needed. Such delays adversely affect export trade and the reputation of the exporters. India is main producer of fruits, and vegetables in the world. The problems of FPIs can be broadly classified into internal and external causes. The internal causes are mainly at the unit level due to paucity of product management and these problems are well within the control of the management if sufficient care is taken at the right time. To mention some of these are:

- Inadequate technical know-how;
- Location disadvantage – improper layout;
- Passé machinery;
- Out dated production process;
- High cost of inputs;
- Defective pricing policy;
- High cost of inputs;
- Weak market organization;
- Lack of market feedback and market research;
- Promotional techniques;
- Unimpressive brand and packaging;
- Poor sales;
- Poor equity base;
- Overtrading;
- Siphoning away of funds;
- Adverse debt equity ratio;
- Over centralization;
- Poor collection policy; and
- Poor industrial relations.

These problems gradually turn the units economically non-viable and consequently make the units 'sick'. The external problems are those on which the management of the units virtually do

not have any control and as such are beyond the control of the management. Such causes could be -

- Non-availability of critical raw materials on time;
- Infrastructural bottle-necks;
- Power shortage and failure;
- Government controls and policies;
- Fixed duties;
- Inflationary and recessionary trends in the economy;
- Procedural delays in sanctioning licenses;
- Lack of co-ordination among agencies; and
- Natural calamities, wars, sympathetic strikes.

Hence, the problems in food industry are manifestations of several maladies associated with the working units which could be further grouped into finance, marketing, raw-materials, labour, technical infrastructure and personnel management.

CONCLUSION

India has had the most astounding GDP development advertise on the planet for the second back to back year, and is evaluated to keep on doing as such in the maintainable future because of its solid large scale economy. The World Bank has anticipated a development rate of 7.2 percent for India in 2017 (against 6.8% in 2016). Further, India's development is anticipated at 7.5 percent in 2018 and 7.7 percent in 2019. Another time of auxiliary changes in India has started, achieving another development driving force, with numerous States having modernized guidelines and regulatory methodology and others exploring different avenues regarding changes of land obtaining and work guidelines. With the usage of GST expected to make India an increasingly coordinated market, a goad in efficiency, speculation, intensity, work creation and wages in the nation is normal. Further, with the abolishment of the FIPB, the technique for outside financial specialists to enter the Indian market has moved toward becoming moderately smoother, and is likewise expected to positively affect the officially developing FDI in India. With India's characteristic sustenance preparing advantage, statistic request and vigorous administrative condition overseeing nourishment in the nation, India's nourishment handling and sustenance retail enterprises are picking up consideration universally, and are required to develop at a quick pace in the coming years.

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