



FOOD PROCESSING VISION 2047

WHITE PAPER



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Sector Background

The food processing sector is a key sector for India's economy, given that it has been one of the largest employment creators. It provides a boost to farm incomes, reduces massive Agri-produce wastage, enables value creation, and plays a key role in managing supply-side food inflation.

Backed by a steady growth in agriculture production, the Food Processing sector has been growing and is expected to reach US\$ 535 billion by 2025-26. It has also emerged as an important segment of the Indian economy in terms of its contribution to GDP, employment, and investment.

The sector has been able to attract a cumulative FDI of approx. US\$ 10201.18 Mn (INR 74,500 Crores) till Sep'20 with more than US\$ 1000 Mn (INR 7300 Crores) coming in the preceding 18 months. In terms of employment, the segment constituting 12.4% of all employment generated in registered factories and 14.2% of employment in the unregistered manufacturing sector.

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<sup>1</sup> MoFPI data
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India leads production worldwide in several commodities, including shrimps, spices, fruits such as mango, papaya, banana, is the second largest producer of rice and has the largest population of buffaloes. However, India currently processes less than 10%¹ of its agri output (only around 2% of fruits and vegetables, 6% of poultry, 21% of meat, 23% of marine and 35% of milk).

In terms of exports as well, India has a higher share of raw commodities than processed goods, with processed foods only constituting 24% of India's agriculture exports.

Meanwhile, 14 per cent of India's population is undernourished, according to 'The State of Food Security and Nutrition in the World, 2020' report. The report states 189.2 million people are undernourished in India and 34.7 per cent of the children aged under five in India are stunted. In addition to all this, as per Global Hunger Index (GHI) 2019, India has been ranked 102 out of the qualifying 117 countries that were assessed.

With the country's population surpassing 1 billion the challenge of providing nutritious food increases. Food processing industry can be positioned to be a vital part of the solution, as on one hand it can enable better income for the rural population and also create a shift towards consumption of more nutritious food.

Currently, the country's consumption and food processing baskets are skewed towards cereals. This is primarily due to policy support which is more conducive to cereal production through assured procurement systems. While these policies were indeed the need of the hour before mid-1960s India was heavily dependent on imports and food aid to meet domestic requirements; with the scenario changing now to India being food surplus, there is a need to focus on more nutritious food such as fruits, vegetables, dairy, meat, etc.

A well-developed food processing sector with higher level of processing will help in the reduction of wastage, improve value addition, promote crop diversification, ensure better return to the farmers, and also address critical issues of food security, food inflation and providing wholesome, nutritious food to the masses.

Thus, Growth in Food Processing can help India move ahead towards meeting several SDGs including

- Zero Hunger by improving access to foods and reducing wastages
- No Poverty & Decent Work and Economic Growth given its employment intensive nature and linkage between agri and industry
- Good Health and Well Being by allowing access to nutrition



Key Food Trends

Given the immense impact of food and agriculture on the environment, a shift towards green farming practices is on the rise globally. Coupled with this, post-pandemic there has been a significant shift in consumer patterns towards heathier and more nutritious foods.

Growing consumer awareness has led to a focus on traceability and sustainable sourcing options. Currently, traceability solutions are limited to large players focused on exports; however, there is rising demand for traceability even for domestic consumption.

Innovations in the processed food segment is also growing backed by changing lifestyles, higher disposable incomes, better market connectivity (convenience stores, retail markets, e-commerce platforms) and focus on nutrition. Innovations are being witnessed in terms of products, packaging materials, technologies for increasing shelf life, system automations, food machinery etc.

According to UBS Global Wealth Management, the 'food innovation' industry currently has a market value of about USD135 billion, and this is expected to grow at a CAGR of 15% to reach USD700 billion by 2030.



Towards increasing shelf life of processed food, new technologies such as high-pressure processing (HPP) are being developed, which can increase the life of food on the shelf by 10 times. Meanwhile, focus is also shifting towards biodegradable packaging, which is a crucial need for the food industry. Technologies such as turning the chitin from the shells of shellfish into chitosan, which serves as a biodegradable plastic wrap are being looked at; however, these are still in pilot phases and need more consorted efforts from food players.

Towards reducing carbon footprints from food industry, alternate sources of protein are being looked at. According to the Adam Smith Institute, moving away from traditional animal farming and slaughter could reduce greenhouse emissions by up to 96% and free up to 99% of the land used in animal farming worldwide. Cultivated meat and plant-based proteins serve towards mitigating this issue.

Cultivated meat, also known as Vitro animals or clean meat, is grown from the cells of stems that are gathered by biopsy from farm animals and after that processed in

a lab for a few days. At present, this technology is quite expensive when compared to the traditional way of growing meat. Nonetheless, astechnology keeps on developing, the efficiency of this technology will also improve.

A more prominent change has been seen in the uptake of Plant-Based Proteins which include products of chickpeas, lentils, barley, almonds, etc. Tofu and tempeh are common plants-based meat alternatives. However, there are certain limitations for plantbased proteins such as not every plant-based contains amino acids which are vital for growth, and also plant-based proteins are harder to digest compared to meat.

While India is still nascent in this segment, it is pertinent to keep working towards food innovations which are picking up pace globally.





Advantage India

India has several segments/commodities where it has the potential of becoming global champions. Backed by strong production numbers, India can become world leader in several horticulture commodities and their processed products such as Mango, Potato, Citrus, Banana and Pomegranate.

Further, the packaged food segment has been reporting double digit growth since 2018 with bakery products and dairy products accounting for a major share. The growth in the segment is also supported by shift in consumer preference for branded packaged products, amid rising awareness of healthy living. The growth is further fuelled by increasing competition in the segment with new product launches and new entrants leading to increased choices for consumers and the strong growth is expected to continue till 2047.

Moving forward, the segments of cultivated meats and alternative proteins are expected to gain focus, in tandem to global trends. Further, rising health concerns are leading to growth in retail volume and current value sales for organic packaged food in India and globally.

Annexure 1 gives a deep dive of these growth potential segments.



Vision 2047

The vision for 2047 will be leverage India's food processing sector towards delivering better income sources for the rural population, enabling employment generation, reducing wastages, allowing access to more nutritious foods by improving share of F&V processing, and increasing the share of value added products in India's export basket. The quantitative vision will be to

- Improving processing and reducing wastages: Increase levels of processing from 10% current levels to 30% by 2047 (with a focus on high value processing of horticulture, meat, poultry, dairy, etc.), and thereby reduce levels of post-harvest wastages in line with the SDGs with a focus on processing higher value.
- **Improving global market share:** Create 'Brand India' for value-added agro products with global recognition in terms of food safety, quality and sustainability parameters; and increase share of processed products in India's export basket from 24% in 2021 to over 50% by 2047.
- **Generating employment and supporting rural livelihoods:** Food Processing is already the largest employment generator among industries (11.4%) followed by Textiles (10.8%) as per the Annual Survey of Industries 2017-18. The sector employed 1,772,399 people as of 2017-18, growing at a CAGR of 2.8% since 2012-13 (1,547,183 people). At this rate, the sector will employ around 2,666,385 people by 2047. The vision should be for the employment generated to grow at atleast 5% CAGR and employ atleast 4 million people in registered factories by 2047.



Enablers towards achieving vision 2047

Supply Side Enablers

Towards scaling up India's food processing basket, there is a need to strengthen primary processing at the farm level including sorting/grading, packaging, drying, etc.; while focus on higher levels of value addition is also required.

Along with moving up the value chain in processed food products, establishing efficient backward linkages is key to contribute to nation's food security as well as proving healthy processed foods towards mitigating the country's malnutrition rates.

The key supply-side enablers needed are as below-

• Focus needs to be on shifting cropping patterns to processable varieties of horticulture produce and improving productivity levels for longer availability for processing. This needs to be supported by



- Research on developing processable varieties suitable to the Indian climate. e.g.
 The current processable variety of potato for French fries, the highest growing segment of processable potato, is suitable for cultivation in Gujarat
- Research on optimising production (Mango harvest cycle is 60 days for India, vs 120 days for Peru and 180 days for Thailand; meanwhile for mango, average productivity for India is 6 MT/Ha compared to 10.9 MT/ Ha of Indonesia and 16.8 MT/Ha of Brazil)
- There needs to be awareness regarding the benefits for a farmer for growing processable varieties, including better price realisation. This needs to be enabled by a price discovery platform for perishables, backed by strong quality parameters and concurrent assessing infrastructure at markets.
- Supporting farmers and farmer groups on sustainable agriculture practices such as use of appropriate inputs, sustainable use of natural resources, organic fertilizers etc. towards meeting international standards on compliance and increasing market share as well as farmers revenues backed by better quality products.
- Focus needs to be on creating infrastructure towards ensuring year long availability of seasonal perishables for processing, such as village level/cluster level collection centers, community cooling facilities, common primary processing facilities, district-level pre-cooling centers, etc. The infrastructure should be sustainable and energy efficient.
- Create an integrated cold chain infrastructure database up to district level, and also at ports, airports, farm gate, distribution channel etc., utilized capacity, projects being supported by various agencies. This will enable optimum utilisation and cross sectorial usage of infrastructure. The database can be linked to a digital platform to support national and global initiatives.
- Creation of progressive SME & MSME support program of financing with subsidies geared to focus on Value Addition & Employment Generation

Enabling Access to Credit

- The Reserve Bank of India vide its circular (RBI/2017-18/175 DCBR.BPD (PCB). Cir.No.07/09.09.002/2017-18) dated 10th May 2018 while issuing the Revised guidelines on lending to Priority Sector for Primary (Urban) Co-operative Banks (UCBs) has mentioned that Bank loans to food and agro processing units will form part of Agriculture.
- It is suggested to create a separate allocation of 10% to food processing within the 40% quota for priority sector (similar to the compulsion on Banks to lend a minimum 18% of total credit to agriculture); and removal of the cap of Rs 100 crores per borrower for being classified as priority sector.



- In the Long term, it is suggested to establish a Bank/Financial Institution for the Food processing industries, with a view to ensure a focus on credit and Finance availability for food processing.
- Creation of dedicated venture capital fund for startups, to stimulate Green field investments.

Ensuring Cost Competitiveness

- India's cost of logistics is currently around 14% of GDP higher than developed country exporters like the US (9.5%). To address the concern around the disproportionate Cost of Logistics vis-à-vis the cost of production, it is suggested that in the short term -the Government of India should restore the Transport and Marketing Assistance (TMA)
- Special initiatives should be undertaken to set up dedicated cargo hubs at the port and the railways of each state for storage of perishables.
- To support India's vision of being a global leader in the food processing industry, there is a need to structure the right incentives to address India's cost competitiveness in the global market.
- Food processing industry is based on seasonal perishables like fruits and vegetables and therefore it should be considered as seasonal industry and electricity charges/duty should be levied for the seasonal period only and not for the whole year.
- The benefit under the TOPS to TOTAL scheme for the transportation of eligible crops under the scheme is available for the Eligible entities, including the Food processor as per the MoFPI Guidelines. This subsidy should be extended to the Semi-processed foods as well. In the short term this will help defray some of the issues of cost competitiveness
- India continues to be dependent on imports of food processing machinery, given limited domestic capability. There is a high cost associated with the import of machinery and technology, additionally there is a need to customize the imported machinery given requirements of Indian food (gravy filled etc) that further adds to the cost structure. The focus needs to be on building domestic capacity. This will require a close working engagement of the industry and the institutions such as the CFTRI and the DRDO.

Fiscal Enablers

• Branding: With a view to position India as the Food factory to the world and promote value added processed food products abroad, a 200% deduction on expenditure incurred on promoting Indian Branded food items, will help enable the realisation of the vision for 'Brand India'.



 GST Rationalisation: To create a demand stimulus in the domestic market, it is important to rationalize the GST rates, since high GST on several processed agrofood items will adversely affect demand growth of the food items. Rationalizing the GST rate at 5 % for Perishable products and at 12% for non-perishable food items can provide a huge impetus. Also the branded and the unbranded food items should be administered a uniform rate of 5%.

Regulatory Enablers

- There is a need for the harmonization of standards across different agencies to ensure uniformity in implementation, facilitate the Ease of Doing business and uniform messaging to the investors
- Build Capacities to generate data that can be effectively leveraged to facilitate trade for representing Indian's position on policy matters at International regulatory forums like Codex.
- For Target Matkets -Non Tariff Barriers arounds Certifications, Sanitary, Phytosanitary issues, MRLs etc. should be eased out with target markets through G2G engagements.

Technology Enablers

- Awareness on Government schemes to support investments into primary processing needs to be scaled up amongst farmers. Towards this, all KVKs may be connected on a digital platform towards better dissemination of information. Also, small videos on schemes may be created and disseminated in regional languages.
- Enabling access and promoting uptake of newer technologies such as Alenabled hand-held devices for sorting/grading, hand-held x-ray devices for pest detection, etc.
- To create the right ecosystem by training on proper post-harvest protocol training including time/technique of harvest, sorting/griding, pre-cooling, packing, etc. extends shelf life of perishables and is crucial for reducing wastage and retaining nutrition.



Enablers towards Global Market Penetration

Supply Side Enablers

International engagement needed towards reaching the vision include enabling tariff negotiations, creating a 'Brand India' and leveraging crop and region specific strategies towards market penetration.

Tariff and Non-Tariff Negotiations

• Government to help negotiate for tariff equalization and non-tariff barriers in target export countries towards making Indian products price competitive and thus help gain market share

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Brand Building

- Create 'Brand India' and undertake Dedicated Marketing Initiatives such as tying up with global retail majors like Tesco, Aldi, Walmart, etc to give space to Indian processed products and allow tasting of the same within the stores
- Strengthen enforcement/ compliance to norms laid down by importing countries to build & protect Brand India image
- Government should support SMEs on matters related to IP in global markets.

Crop Specific Strategies

- Popularise flavours such as Mango, Citrus towards adoption into food and nonfood segments towards generating demand.
- Focus on Health Benefits of products such as Mango, Fish, etc towards demand generation





Strategies towards scaling Human Capital

- Create and Promote FPOs to growing processable varieties of F&V
- Leverage KVKs to disseminate good agriculture practices for quality production
- Connect Start-ups to FPOs for access to technologies for grading, packaging, precooling etc.
- Build capacities for operating and managing cold chain infrastructure for reducing wastages
- With a view to mitigate the skill gap and facilitate the development of relevant skillsets for the future including effective ways of undertaking skilling activities with public and private sector involvement, it is suggested that efforts should be made by the large companies in each sector to leverage their existing resources

 Training methods / systems, that could be used for helping MSME firms in the given sub-sectors



Leveraging India's market size towards Vision 2047

Along the lines of the PLI scheme, a specific scheme targeted towards boosting MSMEs should be formed to provide the necessary catalyst for domestic market growth.

Towards growing the domestic market for processed food there is a need to create awareness about the nutrition value of F&V towards shifting demand from cerealbased processed foods to horticulture-based processed foods through national level campaigns.

Further, there is a need to Promote mindset change of processed food being as good as 'fresh' through focus on food safety.

Government bodies such as Army, Railways, Govt. Canteens should focus on serving Indian processed and ready to eat foods.

The food processing industry can play a very important role in meeting the nutrition requirement of the country. Specific products formulated in conformance to the guidelines of the mid-day meal scheme can be provided by the Industry.

Markets for natural nutritious food products leveraging ingredients like Guava, Jamun, Algae, Seaweeds, etc. which have high amounts of micronutrients should be promoted.



Promoting entrepreneurship & startups

Food processing start-ups account for 30% of the total food related start-ups in India.

Innovations in the processed food segment are also growing backed by changing lifestyles, higher disposable incomes, better market connectivity (convenience stores, retail markets, e-commerce platforms) and focus on nutrition. Innovations are being witnessed in terms of products, packaging materials, technologies for increasing shelf life, system automations, food machinery etc.

New technologies such as high-pressure processing (HPP) are being developed, which can increase the life of processed food on the shelf10 times. Focus is also shifting towards biodegradable packaging, which is a crucial need for the food industry. Technologies such as turning the chitin from the shells of shellfish into chitosan, which serves as a biodegradable plastic wrap are being looked at; however, these are still in pilot phases and need more consorted efforts from food players.



Towards reducing carbon footprints from food industry, alternate sources of protein are being looked at, such as Cultivated meat and Plant-Based Proteins.

The foodtech market in India was valued at INR 289.36 billion in 2019 and is expected to reach INR 1,868.19 billion by 2025, expanding at a CAGR of 39%.

Enablers needed to promote innovation and new technologies for the sector include,

- Creating a dedicated venture capital fund for start-ups, to stimulate Green field investments
- Build PPP frameworks for collaboration between Academia and Industry towards learnings for best practices in food innovation
- Build collaborative research networks between food and not food engineering institutions (such as IIT 's etc) to leverage advances in new emerging technology – such as nano, 3D printing, block chain
- Leveraging KVKs and Agri Universities to demonstrate the available technologies and their benefits to FPOs.
- Create an enabling regulatory framework for production of alternate protein sources
- Focus on developing 'super crops' which are more resilient to vagaries of weather and allow better nutrient retention.





Actions to address regional disparities

A cluster-based approach will allow each region to focus on the best suited commodity for the region and reduce disparities.

Additionally, schemes should be curated specific to the ground realities of the state, looking at parameters such as farmer's income, price realization, natural resources, etc.

State Specific Enablers

Facilitation of allotment of land

- There should be a facility for leasing and acquiring of land to encourage food processing.
- Ceiling on land Lease act should be raised or abolished to encourage entrepreneurs procure lands for bigger units.



Labour laws

- Labour & Employment Department, Government of State should make necessary amendments and declare food processing industry as essential service under State Essential Services Maintenance Act.
- Under all relevant labour laws, food industry should be treated as seasonal industry and benefits available to a seasonal industry be extended to it.

Pollution control

• There is need to relook at the current pollution control requirements and align it with norms that are in conformity with what the food processing units can follow with a strong monitoring mechanism for quality check and compliance and take steps towards considering food processing in the green category.

Promote Food Processing Clusters

It is suggested that State Governments focus on:

- commodity based cluster development based on the production strengths of respective geographies to enable a focused and coordinated approach for developing the food processing industry;
- development and implementation of a Comprehensive Value Chain Development Strategy for each food Cluster;
- supporting clusters and mega food parks with common facilities for all the units to minimize the risk and improve the profitability of individual units.

Strengthen Agriculture Marketing Infrastructure

It is suggested that:

- states that have not modified their AMPC Act may work towards making reforms t enable direct procurement.
- states to ensure that markets are registered in the eNAM platform to promote direct procurement of all raw materials, especially horticulture produce.
- states focus on strengthening the Agriculture Marketing Infrastructure to facilitate engagement of more entrepreneurs in the sector.



Annexure 1

Sector/area (or parts of it) be a global champion by 2047-Horticulture

Commodity/ Segment	Growth Drivers	Enablers	
Mango (Processed)	 Global Mango Pulp Market growing at CAGR 9% 	 Cluster-specific production of processable varieties 	
	 India advantage- high production; best flayour variety 	 Better sorting for price stabilisation of pulp 	
	 Health benefits (Anti- oxidant properties) 	 Research to lengthen harvest period and increase productivity 	
		Rationalise logistics costs	
		 Address non tariff barriers and rationalisation of import duties with target countries-USA, EU, China 	
Potato (Processed)	 The Frozen segment is expected to dominate the processed potato market- led by demand for French 	 Increased production of processable varieties, suitable for frozen products 	
	Fries which grew by 60% over past 10 years	Fries which grew by 60% over past 10 years	 Rationalise storage and logistics costs
	 India's growth will be led by Asian market as no country (except India, China, Pakistan, Bangladesh) cultivates potatoes. 	 Address non-tariff barriers and rationalisation of import duties with target countries-EU, Australia, Bangladesh, Sri Lanka 	

Commodity/ Segment	Growth Drivers	Enablers
Citrus (fresh and Processed)	 Over 300 citrus varieties available; 5 processable varieties. Several natural clusters- Nagpur Orange, Maharashtra Mandarin, Andhra Pradesh Sweet Lime, Mandarin - Assam, Meghalaya, Kinnow- Punjab Indian agro climate is supportive to citrus. 	 Select 2-3 varities compatible for processing and create production and processing clusters for the same. Research to improve juice and Brix content of processable varieties Create Citrus Board with representation and support from both Government and Industry to promote Indian products in target markets through Councils and Embassies.
Banana and Pomegranate (Fresh and Processed)	 Large production base. India is the largest producer of Banana and Pomegranate 	 Focus on quality and Traceability Focus on Good Agriculture Practices to meet export standards Protocols and skilling on post harvest handling, storage and logistics Cluster-based production approach to benefit from economies of scale



Sector/area (or parts of it) be a global champion by 2047-Processed Products

Commodity/ Segment	Growth Drivers
Bakery Products	• The global bakery products market reached a value of almost USD 331.37 billion in the year 2020. The bakery products industry is further expected to grow at a CAGR of 4.6% between 2021 and 2026 to reach a value of almost USD 436.91 billion by 2026.
	• The Indian bakery market stood at a value of nearly USD 7.60 billion in 2020. The market is further estimated to grow at a CAGR of 8.5% between 2021 and 2026 to reach a value of USD 12.39 billion by 2026.
	 The biscuits and cookies industry in India accounts for nearly 72% of the sales in the Indian bakery market.
Ready-to-Eat Meals	 Global RTE market growing at 7.3%, expected to reach USD 172 bn by 2023
	 India accounted only 0.8% of global exports ; however, Indian market to grow at CAGR of 16%
	Huge demand for 'Indian flavours' gloablly
Dairy	• The rising consumption of dairy products and shifting consumer preference from meat to dairy products for protein enrichment are the significant drivers for this market's growth.
	 In India, the demand from the HoReCA segment is driving growth in the dairy segment.
	• The global dairy products market size was valued at USD 481.08 billion in 2019 and is expected to grow at a CAGR of 2.5% from 2020 to 2027.
Plant-based proteins and cultivated meats	 According to the Adam Smith Institute, moving away from traditional animal farming and slaughter could reduce greenhouse emissions by up to 96% and free up to 99% of the land used in animal farming worldwide. Cultivated meat and plant-based proteins serve towards mitigating this issue.
	 While India is still nascent in this segment, it is pertinent to keep working towards food innovations which are picking up pace globally.
	• There are still issues around consumer perception and regulatory issues such as labelling norms which need to be looked at for this segment can take off on a larger scale.

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The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering Industry, Government, and civil society through working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for Industry.

For more than 125 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. The premier busineass association has around 9000 members, from the private as well as public sectors, and an indirect membership of over 300,000 enterprises from around 286 national and regional sectoral industry bodies.

With 62 offices, including 10 Centres of Excellence in India, and 8 overseas offices in Australia, Egypt, Germany, Indonesia, Singapore, UAE, UK, and USA, as well as institutional partnerships with 350 counterpart organizations in 133 countries, CII serves as a reference point for Indian Industry and the international business community.





FACE is CII's Centre of Excellence dedicated to building efficiencies across the agricultural value chain from farm to fork. FACE is charged with the mission of improving competitiveness of India's agriculture and food sectr by catelysing innovation, building capacity and enhancing productivity across the value chain. FACE works with farmers, companies, development institutions and the government to

- Improve on and off-farm productivity through the introduction and dissemination of global best practices and technological innovation
- Improve global competitiveness of India's agriculture by investing in capacity building initiatives and skill development for supply chain participants across the value chain
- Strengthen linkages across the agriculture and food value chain with an objective of reducing spoilage, increasing value addition and enhancing farmer incomes

FACE's service portfolio comprises commodity specific value chain assessments and supply chain advisory services for food and agri businesses, training and consultancy services in food safety and sectoral research across different market segments.