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आज़ादी का
अमृत महोत्सव



**INVEST
MADHYA
PRADESH**

GLOBAL INVESTORS SUMMIT

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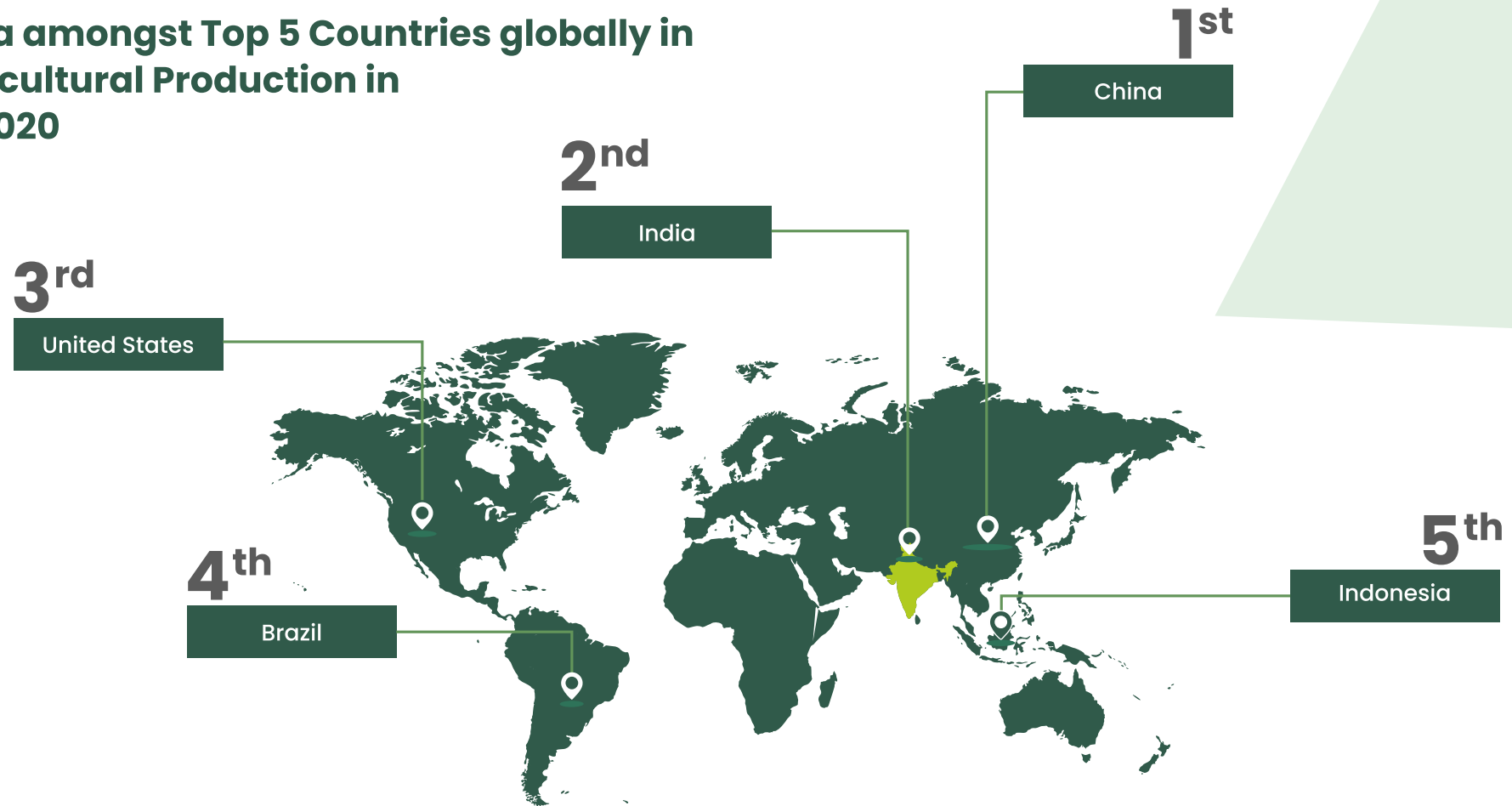
Agriculture, Food & Dairy Processing

MADHYA PRADESH THE FUTURE READY STATE

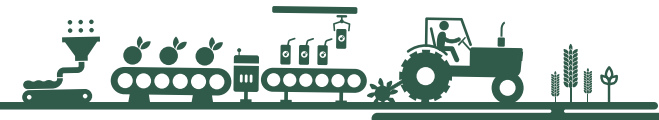


Global Overview

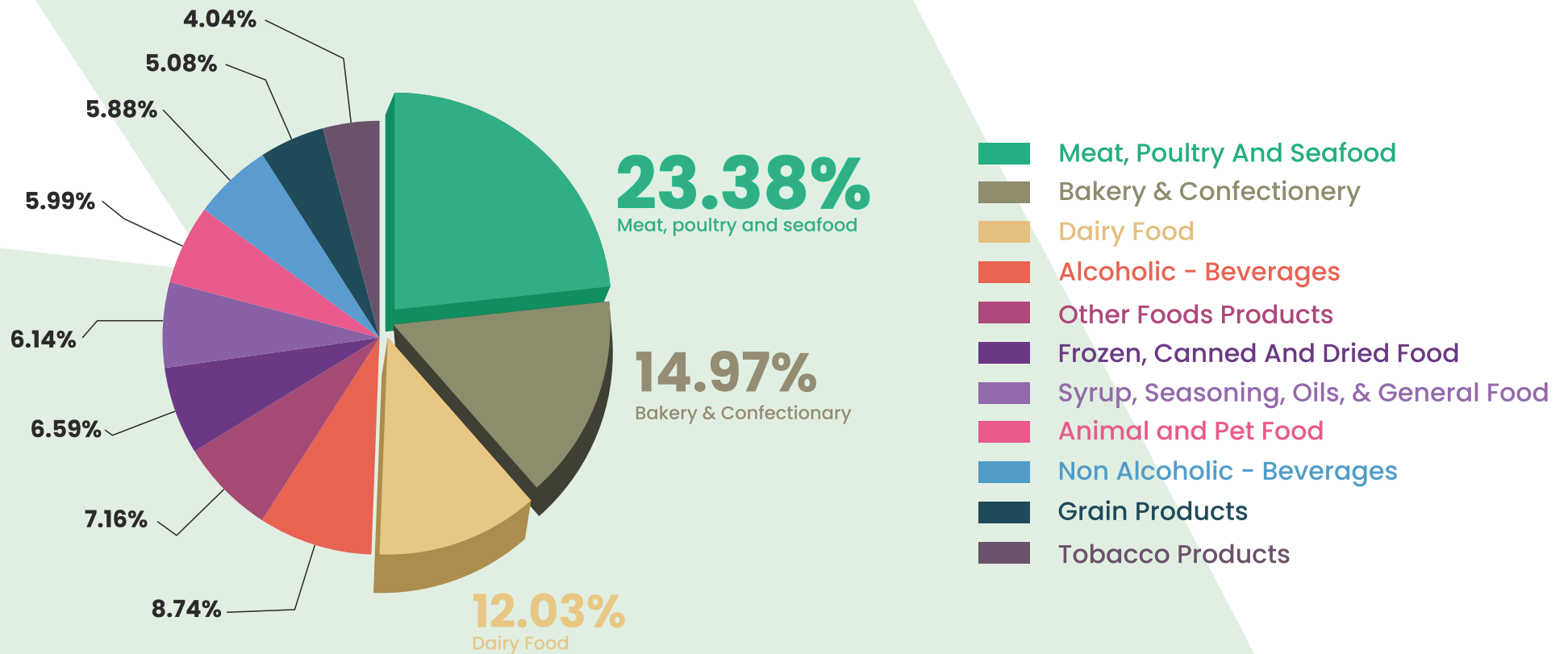
India amongst Top 5 Countries globally in Agricultural Production in FY 2020



- ▶ Globally, Agriculture and Processed Food is the 10th largest traded commodity
- ▶ Top 5 Exporters: USA, Netherlands, Germany, France, Italy



Global Food Processing market was worth \$5.7 Trillion in 2021



Global Food and Beverages Market sub-segments

Overview of Indian Industry

Industry Outlook

- ▶ India's food processing sector is expected to reach by \$535 Bn by 2025-26
- ▶ India's food sector attracted \$ 4.18 Bn in foreign direct investment between April 2014-March 2020
- ▶ 90% of the food processing market is untapped, hence huge opportunity in the sector
- ▶ Only 25% of the food processing sector is currently organized providing tremendous opportunity for backward and forward integration
- ▶ 11.6% of the employment share
- ▶ 10.4% of the country's total exports
- ▶ The food processing sector is the 5th largest manufacturing in the country

Global Ranking

India in Global Agriculture Production

1st
Ranked

In Millet, Spice
Production

Milk Production

2nd
Ranked

In Agriculture &
Allied Sector
Production

In Fruits &
Vegetables
Production

5th
Ranked

In Consumer Foods Market



Government of India Schemes for Supporting Agriculture, Food & Dairy Processing Sector

➤ Pradhan Mantri Kisan Sampada Yojna (PMKSY)

➤ Mega Food Parks Scheme

➤ Food Safety and Quality Assurance Infrastructure

➤ Integrated Cold Chain & Value Addition Infrastructure

➤ Human Resources and Institutions

➤ Creation of infrastructure for Agro Processing Clusters

➤ Creation of Forward and backward Linkages

➤ Expansion of Food Processing & Preservation capacities

Implementation of Scheme by Ministry of Food Processing Industries (MoFPI)

Pradhan Mantri Kisan SAMPADA Yojana (Scheme for Agro-Marine Processing and Development of Agro-Processing Clusters) With an allocation of INR 4600 Cr till 31.03.2026

Expected to benefit 28,49,945 farmers and generate 5,44,432 employment by the year 2025-26

Government of India Schemes for supporting Agriculture, Food & Dairy Processing sector

Mission for Integrated Development of Horticulture (MIDH) (INR 16,000 Cr)

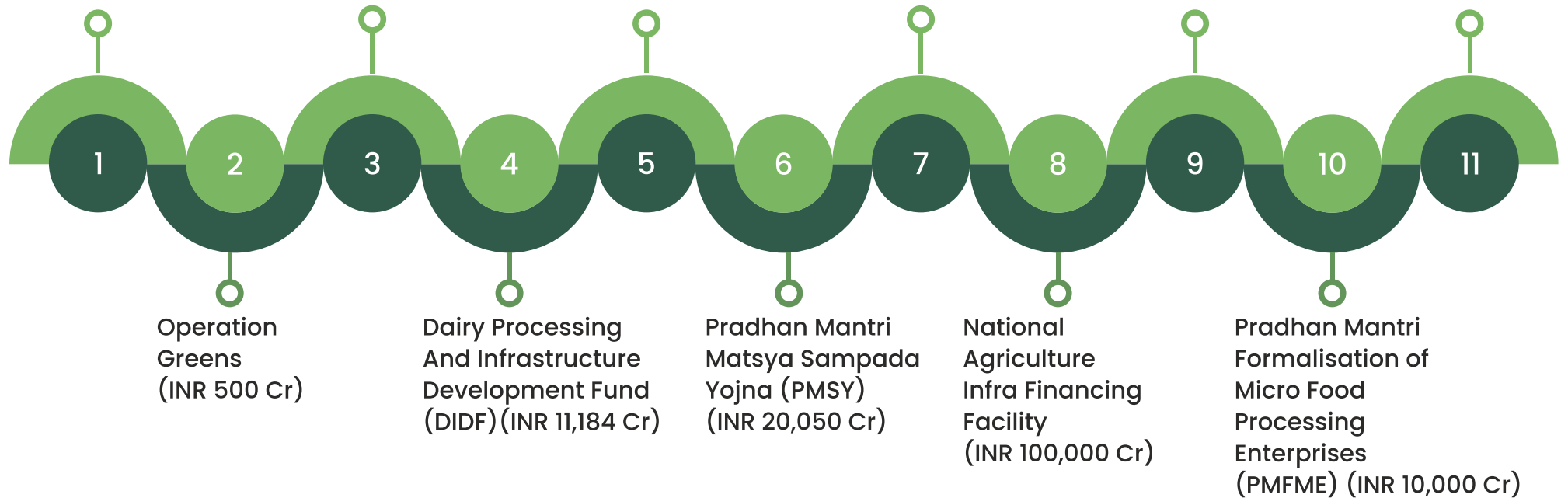
Animal Husbandry Infrastructure Development Fund (AIDF) (INR 15,000 Cr)

National Program for Dairy Development (NPDD) (INR 1790)

Fisheries and Aquaculture Infrastructure Development Fund (FIDF) (INR 7,522 Cr)

Production Linked Incentives (PLI) (INR 10,900 Cr)

Rashtriya Krishi Vikas Yojana (RKVY) (INR 10433 Cr)



Madhya Pradesh India's Food Basket

1st

In production of Oranges, spices, Garlic, Ginger, Gram & total pulses

1st

wrt area under Organic cultivation
27% of nation's area under organic cultivation

2nd

In production of soyabean, wheat, maize, citrus fruits, onion & flowers

5th

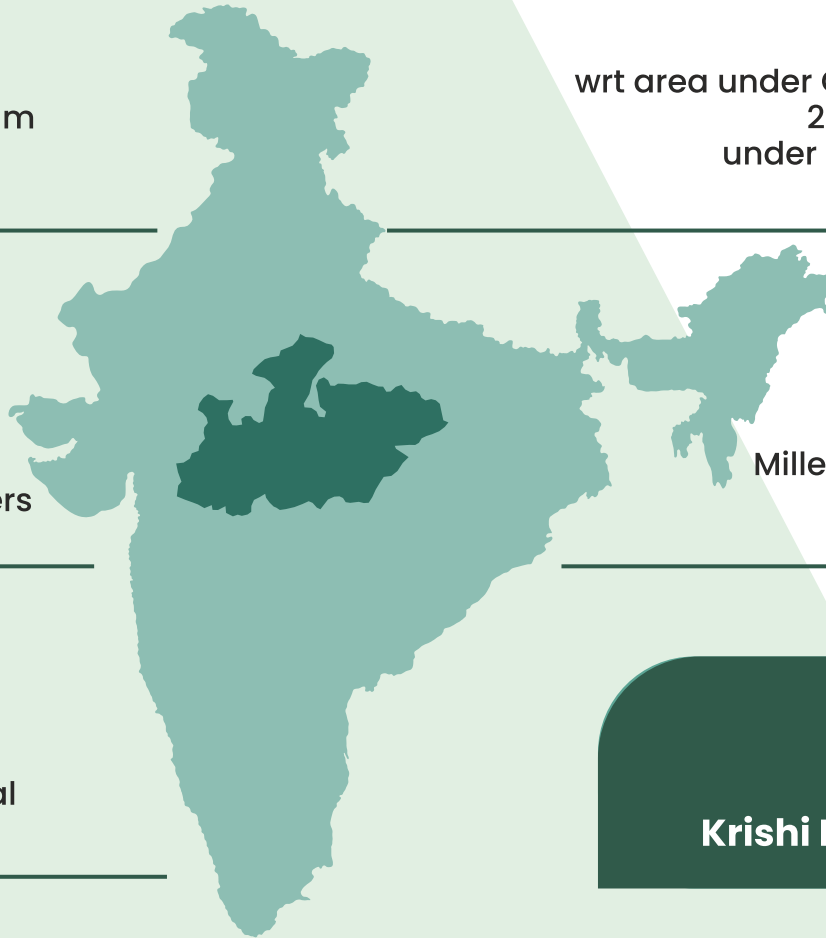
In production of Millets & Potato in India

3rd

In production of Oilseeds, chilly, aromatic, medicinal plants & Milk

7

Times winner of
Krishi Karmanya Award



Madhya Pradesh Promising Agricultural Scenario

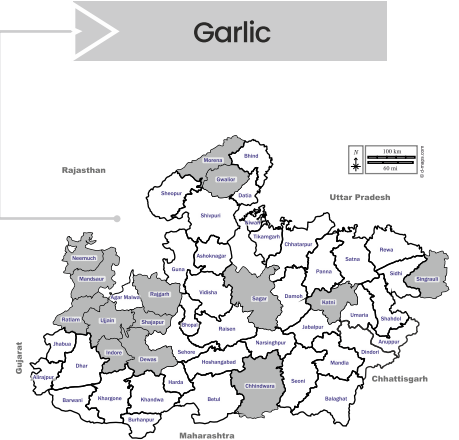
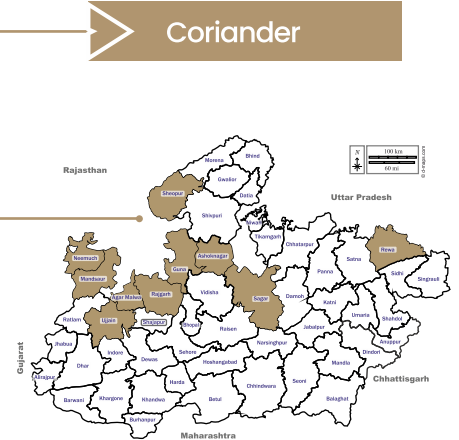
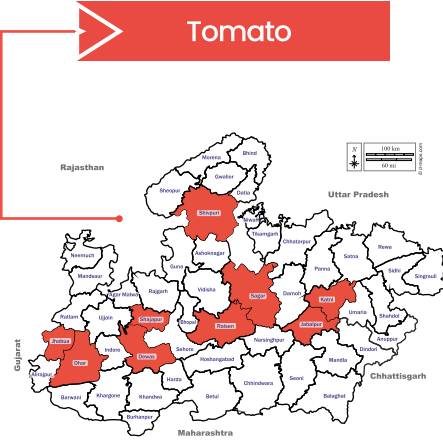
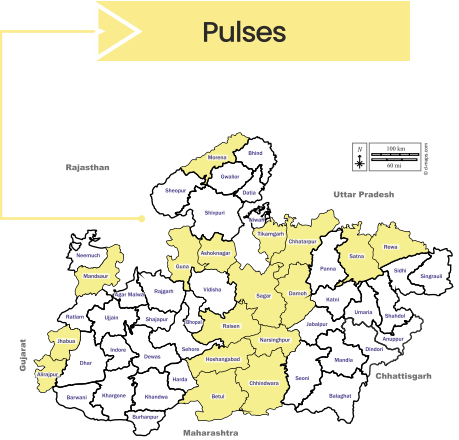
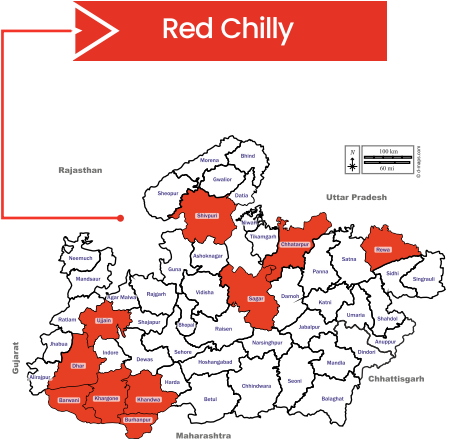
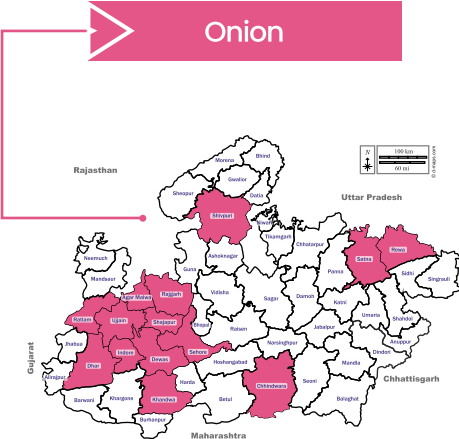
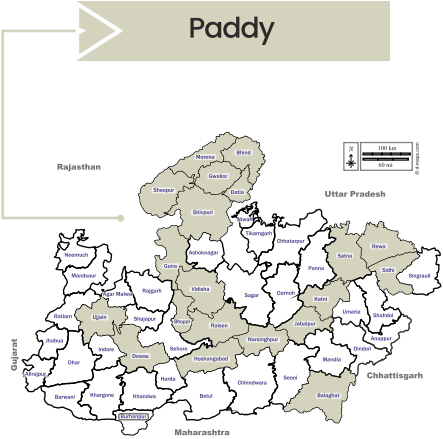
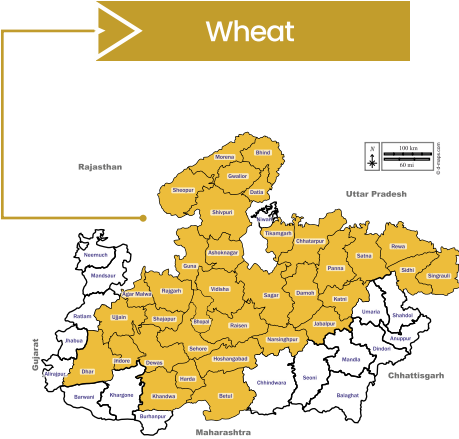
Crop	Production (in LMT) for 2020-21
▶ Pulses	41.08
▶ Wheat	196.07
▶ Paddy	47.78
▶ Maize	40.69
▶ Oilseeds	64.51
▶ Garlic	21.08
▶ Red Chilly	3.20
▶ Coriander	3.97

Crop	Production (in LMT) for 2020-21
▶ Oranges	23.52
▶ Banana	21.73
▶ Guava	9.30
▶ Mango	8.41
▶ Onion	51.38
▶ Potato	39.05
▶ Tomato	31.39
▶ Green Peas	12.06



Madhya Pradesh

11 Agro-climatic zones ensuring production of wide variety of raw materials



Madhya Pradesh White Revolution in the making

Milk Production
Rank in India (FY20)

3rd

6th

in per capita
availability of milk
(591 gm per day)

Largest domestic
dairy market in India

8th

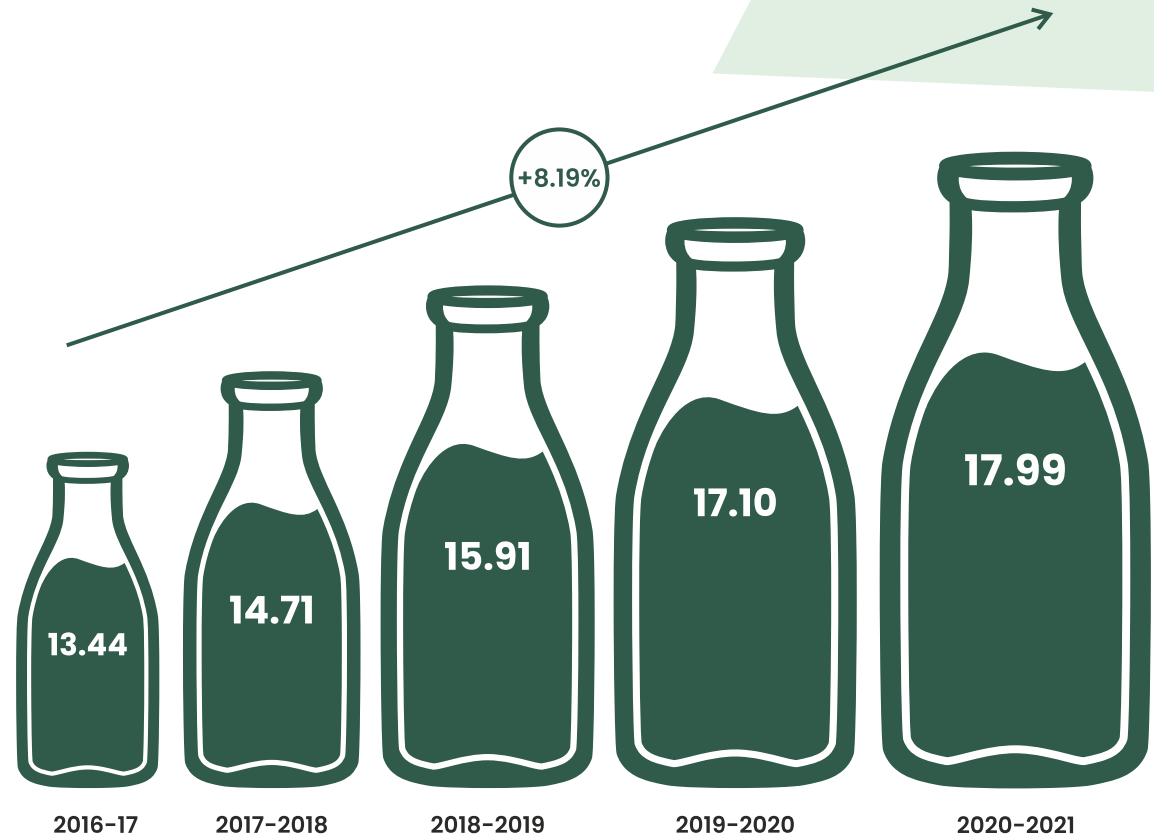
8.57%

Share of country's
production (FY20-21)

CAGR compared to
National CAGR-6.18%

8.19%

MP milk production



Milk Production in Million Ton

Agri & Food processing Available Infrastructure

Agricultural Infrastructure:

- ▶ Well irrigated state with 10 major river basins
- ▶ Area under irrigation: 45 Lakh Hectare
- ▶ Rivers & Canals: 17,088 Kms
- ▶ Tanks & Ponds: over 60,000 Ha
- ▶ Highly fertile soil with medium level content of nitrogen and phosphorous and is rich in potassium

Warehousing and Logistics:

- ▶ Warehousing Capacity: 40 MMT
- ▶ Cold Storage: 13.2 MMT

Abundant Skilled Manpower:

- ▶ Hosts 2 Government agriculture and 1 Veterinary University
- ▶ CIAE, IISS & IISR; National Research Centres for Wheat, and Fisheries

Dedicated infrastructure for Food Parks

8

Government Food Parks spread in an area of 545.5 acres

2

Private Mega Food Parks spread in an area of 115.7 acres

4

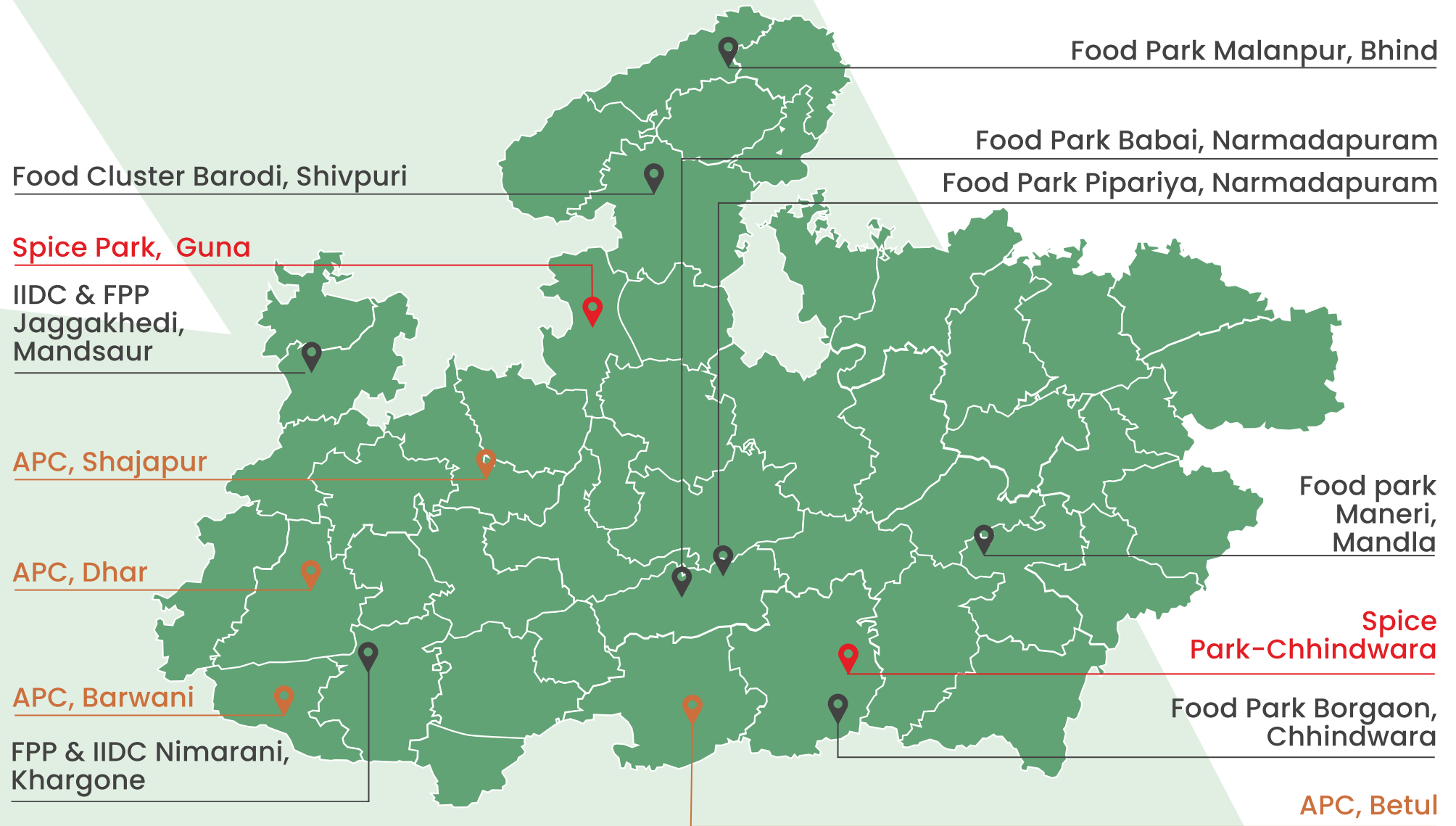
Agro Processing Clusters sanctioned Under APC scheme

Dairy Investment Accelerator to support across the entire investment cycle

Dairy Investment Accelerator is a cross-functional dedicated support system to help you navigate your dairy investment journey in MP



Food Processing Ecosystem Of Madhya Pradesh



Agro Export Zones

AEZ Project Details

Potatoes, Onion and Garlic

Export Area Districts

Malwa, Ujjain, Indore, Dewas, Dhar, Shajapur, Ratlam, Neemuch, Mandsaur and Khandwa

Seed Spices

Guna, Mandsaur, Ujjain, Rajgarh, Ratlam, Shajapur and Neemuch

Wheat (including sharbati wheat for Bhopal Zone)

Ujjain Zone (Neemuch, Ratlam, Mandsaur and Ujjain), Indore Zone (Indore, Dhar, Shajapur and Dewas) and Bhopal Zone (Sehore, Vidisha, Raisen, Hoshangabad, Harda, Narsinghpur and Bhopal)

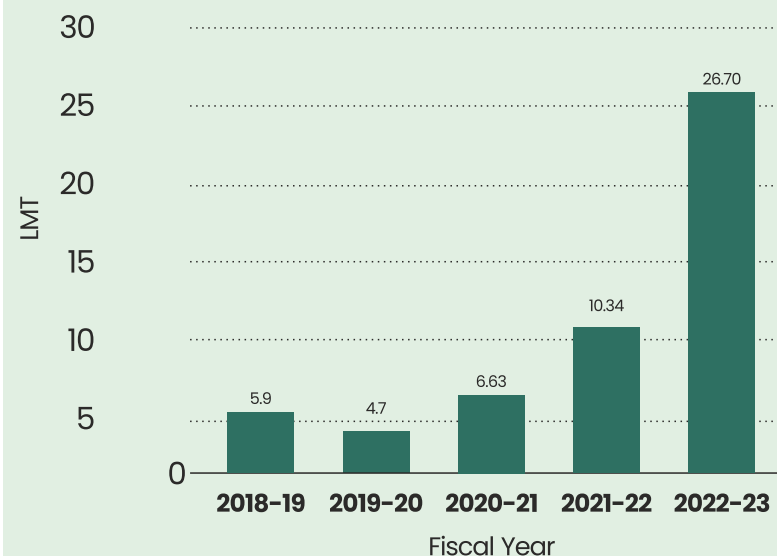
Lentil and Grams

Shivpuri, Guna, Vidisha, Raisen, Narsinghpur, Chhindwara

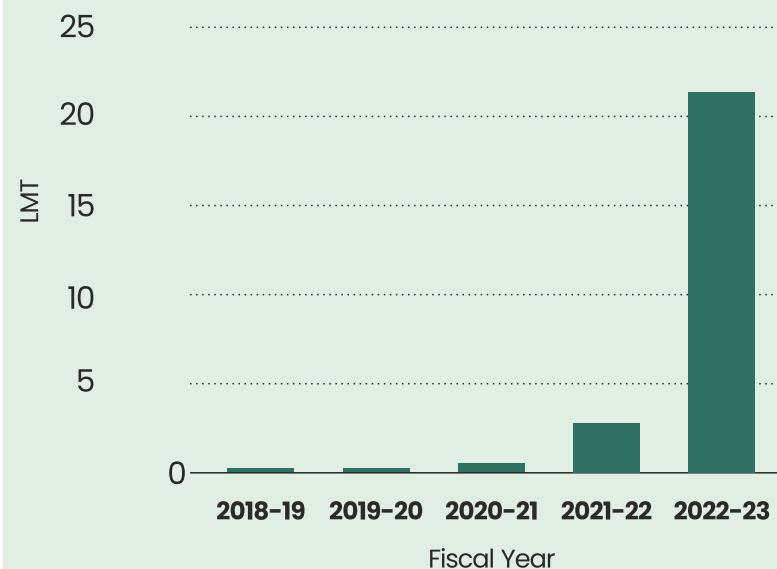
Oranges

Chhindwara, Narmadapuram, Betul

Agriculture Export of MP



1st Rank in Wheat Export



Agriculture focused Educational and Skill Development

Central Institute of Agricultural Engineering, Bhopal

- ▶ Courses: M.Tech and PhD courses in Agricultural Engg.
- ▶ Houses premium research centres such as Centre of Excellence for Soya Processing & Utilization, Indian Institute of Soil Sciences
- ▶ Facilities: Production Prototype Facility, Instrumentation Cell, CIAE Research Farm

Rajmata Vijayaraje Scindia Krishi Vishwa Vidyalaya, Gwalior

- ▶ Focus Area: Horticulture
- ▶ Courses: Bachelors, Masters and PhD in Agriculture and Horticulture
- ▶ Affiliated to ICAR and UGC

Central Farm Machinery Training and Testing Institute, Budhni

- ▶ Trainings: Academic and Management Training for Farm Equipment Testing, Technician Trainings
- ▶ Houses a Irrigation Equipment Lab, Plant Protection Equipment lab & 6 other specialized testing labs

ICAR- Indian Institute of Soyabean Research

- ▶ Established in 1978
- ▶ **Facilities:** Research farm, Labs, Instrumentation facility, Tofu Plant, Library
- ▶ **Thrust Areas:** Crop variety improvement, Crop protection and Crop mechanization

Jawaharlal Nehru Krishi Vishwa Vidyalaya- Jabalpur

- ▶ Courses: B.Sc, M.Sc and MTech and PhD courses in agriculture, Agriculture Engg. And Forestry
- ▶ Recognized and accredited by ICAR and UGC
- ▶ Caters to production constraints of the farmers in the following seven agro-climatic zones and 26 districts of the state

▶ New Developments

- ▶ World Economic Forum (WEF) has collaborated with GoMP to develop a Food Innovation Hub
- ▶ National Seed Corporation (NSC) has established an organic seed farm in Morena to develop organic oilseed seeds and train farmers on modern farming techniques

Incentives for Large Scale Food Processing Industries

For Investment more than INR 50 Crores in P&M

- ▶ Basic Investment Promotion Assistance (BIPA) - Upto 60%
- ▶ Incentive on Employment generation - Upto 1.5x BIPA
- ▶ Benefits to Export Oriented units - Upto 1.2x BIPA
- ▶ Infrastructure Development Assistance for Power, Water and Road
- ▶ Green Industrialization Assistance for ETP, STP, ZLD etc
- ▶ Financial assistance for Food Processing Infrastructure Cold Chains & Warehouse
- ▶ Rebate in Power Tariff
- ▶ Electricity Duty Exemption
- ▶ Mandi Fee Reimbursement
- ▶ Reimbursement of Patent charges

Customized Package Available for Investments for Mega Scale Industrial units



Incentives for Food Processing MSMEs

- ▶ **Industrial Development Subsidy up to 40% on plant and machinery**
- ▶ **Upto INR 5 Lakhs for patents/IPR registration**
- ▶ **Food Park : 15% of project cost (Max. INR 5 Cr.) & Stamp Duty Reimbursement**

Additional Incentives for Investment up to INR 10 Cr in P&M

- ▶ **Additional Subsidy @8% for SC/ST/Women on IPA**
- ▶ **Additional incentives @12% for Exporting Units**
- ▶ **Financial assistance - up to Rs 5 Lakhs for quality certifications (Upto Rs 25 Lakhs investment)**
- ▶ **Energy audit expenses - INR 5 Lakhs**
- ▶ **Infrastructure Development Assistance (upto Industrial Premises) - up to INR 25 Lacs**
- ▶ **Setting up ETP- up to INR 25 Lacs**

Additional Incentives for Investment INR 10-50 Cr in P&M

- ▶ **Power Tariff Rebate @ INR 1/Unit or 20% whichever is less**
- ▶ **Mandi Fee Exemption - up to 50% of P&M for 5 years**
- ▶ **Infrastructure Development Assistance (upto Industrial premises) - up to INR 3 Cr.**
- ▶ **Setting up ETP - up to INR 1 Cr.**



Investment Opportunities in Madhya Pradesh

PRIMARY INPUTS

Seed

Fertilizer

Fodder

Agricultural machinery and equipment

Irrigation Projects



PRODUCTION & PROCESSING

Milling

Dehydrated products

Seed and seed Powder

Pulping and Juicing

Fermentation

Confectionary

Value added dairy

Food Packaging



TRANSPORTATION AND INFRASTRUCTURE

Quality Control Labs

Cold Chain infrastructure

Food Parks

E-Marketing

Green Houses



Ecosystem: Major Players



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