

# India's Food Processing & Blue Economy: Growth Opportunities Across the Value Chain

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Background	Objective
<p>India's food processing market stands at USD 339 billion (2024) and is projected to reach USD 726 billion by 2033, growing at 8.38% annually. India ranks first globally in milk and livestock production and second in fish production yet processing levels across key sub-sectors remain well below their potential, creating significant headroom for investment and technology partnership.</p> <p>The India-EFTA TEPA, which formalised a commitment of USD 100 billion in FDI from EFTA member states, provides a strong policy foundation for deepening sectoral collaboration. EFTA countries bring strengths in food technology, cold chain systems, sustainable aquaculture, and precision dairy processing that are highly complementary to India's requirements.</p>	<p>This webinar provides a focused platform for engagement between EFTA companies and Indian stakeholders. It seeks to:</p> <ul style="list-style-type: none"><li>• Present India's food and allied sector scale, growth trajectory, and investment climate</li><li>• Highlight specific opportunities in fisheries, aquaculture, and dairy processing</li><li>• Showcase government incentives and ready infrastructure supporting foreign investment</li><li>• Identify avenues for EFTA companies to partner in R&amp;D, manufacturing, and supply chain development</li></ul>

Sub-sectors Covered	
<p><b>Food &amp; Allied Sector Overview</b></p> <ul style="list-style-type: none"><li>• With over 320 designated food parks, over 390 cold chain projects, and 100% FDI permitted, India's wider food processing ecosystem is well-equipped for foreign partnership. Key opportunities include:</li><li>• Frozen, ready-to-cook, and functional food processing (fruits and vegetables)</li><li>• Food safety, testing, and quality assurance technologies</li><li>• Packaging and logistics for export-ready products</li><li>• Incentives under PMKSY (central govt. Agri scheme), Agriculture Infrastructure Fund, and Cluster Development Programme</li></ul>	<p><b>Aquaculture</b></p> <p>One of the world's fastest-growing aquaculture markets, with strong government focus on sustainable expansion, disease management, and export quality. Key opportunities include:</p> <ul style="list-style-type: none"><li>• Shrimp and finfish hatchery technology</li><li>• Feed formulation and disease diagnostics</li><li>• Seaweed cultivation for food, pharma, and biofuel applications</li></ul>

## Sub-sectors Covered

### Dairy

India produces roughly 25% of global milk output (239.3 MMT in 2023-24). The value-added dairy segment remains underdeveloped relative to this scale. Key opportunities include:

- Value-added processing: cheese, yogurt, functional dairy, and whey
- Integrated cold chain from farm to retail
- Milk testing, quality assurance, and traceability technology
- Support under the Animal Husbandry Infrastructure Development Fund

### Fisheries & Blue Economy

India is the world's second-largest fish producer (19.7 MMT, USD 7.45 Bn exports in 2024-25), yet only ~15% of fish is currently processed. Key opportunities include:

- Integrated seafood processing (RTE/RTC tuna, shrimp, seaweed)
- Cold chain and post-harvest infrastructure
- Traceability and circular economy solutions
- Support via PMMSY (flagship government scheme to revolutionize India's fisheries sector) and Fisheries Infrastructure Development Fund

## Expected Outcomes

- Improved awareness among EFTA companies of India's food processing and blue economy landscape, including government schemes, industrial clusters, incentives, and market scale
- Identification of investment and partnership opportunities across fisheries, aquaculture, dairy, and food processing
- Strengthened institutional links between Invest India, the EFTA Secretariat, and industry stakeholders in EFTA member states
- Facilitation of follow-on bilateral engagements and investment opportunities in priority sub-sectors