

CONTENTS

Section 1 INDIA'S FOOD ECONOMY: KEY SEGMENTS 22

- 1.1 Market Projections and Trends for India's Food & Grocery Industry 24
By IMAGES Research
- 1.2 Key Components of India's Food Industry: Staples, Rice, Wheat, Sugar, Edible Oils, and Pulses 36
By IMAGES Research
- 1.3 Dairy Sector Boom: India's Milk Production and Dairy Industry Surge Ahead 46
By IMAGES Research
- 1.4 Spicing Up India: Exploring the Dynamic Growth of the Spice Market 54
By IMAGES Research
- 1.5 India's Ever-Growing Non-Veg Food Market: Production, Consumption, Innovation and Market Trends 60
By IMAGES Research
- 1.6 Fresh Produce Challenges and Solutions in Indian Retail: A Comprehensive Overview 70
By IMAGES Research
- 1.7 A Journey Through India's Beverage Landscape 76
By IMAGES Research
- 1.8 India's Food Processing Industry: A USD 535 Billion Powerhouse by 2025 84
By IMAGES Research

Section 2 FOOD & GROCERY: EMERGING TRENDS 94

- 2.1 Enhancing Food Safety in India's Evolving Food Industry 96
By Hanuma Pogaru & Abhijit Dutta, Accenture
- 2.2 The Online F&G Retail Revolution: Navigating Challenges and Growth 110
By Baqar Iftikhar Naqvi
- 2.3 Navigating India's Evolving Food and Grocery Landscape 128
By Ashish Dhir, Kashish Gupta & Sumeesha Dhawan, 1Lattice
- 2.4 Private Label in India: A booming retail phenomenon..... 134
By Madhumita Mohanty
- 2.5 The Evolving Landscape of 138
Private Label in the Retail Sector
By Piyush Sinha

Section 3 FOOD PROCESSING 144

- 3.1 Viksit Bharat by 2047: Role of the food processing sector 146
By Chirag Jain, Naveen Malpani, Nilav Patro & Pratishtha Nangia, Grant Thornton Bharat



CONTENTS

3.2 Behind India's Packaged Food Boom: Industry 4.0 and Beyond 162 <i>By United Nations Industrial Development Organization (UNIDO) & Department of Science & Technology, Government of India</i>	5.2 From Plate to Portfolio: Deep Dive into Funding, M&A & IPO Dynamics in Indian F&B Sector 272 <i>By Pankaj Karna & Maple Capital Advisors - Arman Talwar & Jai Bhargava</i>
3.3 From Tradition to Innovation: Exploring India's Savory Snacks, Sweets, and Papad Markets 182 <i>By Bikaji Foods International Ltd</i>	5.3 On the platter: a golden period for growth in food and beverages in India 280 <i>By Subhendu Roy, Ayush Sharma and Nivedita Sinha, Kearney</i>
3.4 Plant-Based Lifestyle and Industry Evolution in India 192 <i>By Associated Chambers of Commerce and Industry of India (ASSOCHAM)</i>	Section 6 FMCG SECTOR 288
3.5 Behind India's Packaged Food Boom: Healthier Options and Novel Products 204 <i>By M.R. Ganesh, Euromonitor International</i>	6.1 Eight trends shaping India's FMCG industry 290 <i>By Shiv Sharma & Olivier Prexl, Kanvic Consulting</i>
3.6 Cheese brands can expand in India with innovations for kids, snacking, and cooking 210 <i>By Anamika Banerji, Mintel Reports India</i>	6.2 Tracking the rising trajectory of the FMCG sector in India 298 <i>By MARC</i>
3.7 Plant-Based Protein: A New Health Trend Takes Root 214 <i>By Agriculture and Agri-Food Canada (AAFC)</i>	Section 7 FOODSERVICE 304
3.8 Honey, Sweet Spreads, Maple Products: Prospects and Market Trends 224 <i>By Agriculture and Agri-Food Canada (AAFC)</i>	7.1 Insights into the Indian Foodservice Industry 306 <i>By Pakhi Saxena, Wazir Advisors</i>
3.9 Trends and Opportunities in Healthy Food & Beverages Market 232 <i>By Agriculture and Agri-Food Canada (AAFC)</i>	7.2 Overview of the Foodservice Market in India 316 <i>By Ravindra Kumar Yadav & Gurvin Singh Bedi, Technopak</i>
Section 4 FOOD & TECHNOLOGY 240	7.3 Building Tomorrow's Food Brands through Foodservice 328 <i>By P. Rajan Mathews</i>
4.1 Agri-tech and retail innovations transforming the future of food 242 <i>By Anand Ramanathan, Avinash Chandani, Hardik Shah, Harsheen Anand & Shivam Pandey - Deloitte</i>	7.4 Evolving Trends that are Revamping the Restaurant Industry 336 <i>By Kinara Capital</i>
4.2 From Farm to Fork: The Imperative of Transparency in the Food Supply Chain 252 <i>By Honey Singhal, GS1 India</i>	7.5 Indian Foodservice Sector: Market Sizing, Overview, Trends, Opportunities, and Mapping the Sector 342 <i>By K.S Narayanan</i>
Section 5 BUSINESS OF FOOD 258	7.6 India's Resilient Foodservice Industry: Growth Factors and Market Dynamics 346 <i>By USDA Foreign Agricultural Service</i>
5.1 Winning strategies and future trendspotting in Foods 260 <i>By Kanaka Bhagwat, Namrata Gupta, and Shishira Hegde, with additional contributions from Jaishree Agrawal and Abinav Tiwari - NielsenIQ</i>	7.7 India's Foodservice Industry: Trends, Challenges, and the QSR Revolution 352 <i>By Sanjay Kumar</i>