

Keywords:

Bi-Annual Report On Size & Structure Of The Poultry Processing Industry of India

APTEC Technology Consulting is located at 282, Power Officers' Society Omega 1, Greater
Noida 201310, U.P. India.

This name and APTEC are the registered property of Alok's Poultry Technology Private Limited.
+91 120-4251620 +91 98110 49914 <http://aptec.in> rajalok@gmail.com, alok@aptec.in

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1 Schedule

When this Industry Report was uploaded, the earlier Report dated March 2022 was taken down. We now follow the policy of maintaining four consecutive bi-annual Reports at any time on our website. If you want an older copy, e-mail us. After this upload we aim to upload the next Industry Report in mid-October 2024.

2 Prospects

- 2.1 Mitsui & Co headquartered in Tokyo, released a press note on 27th March about its decision to invest in Sneha Farms Pvt Ltd, a major broiler integrator and the leading processor of broilers in India (See table 2). Following this investment Sneha will become an associated company of Mitsui and it expects to double its production over the next five years.

In the past Mitsui have had interests in poultry and have likewise invested in Japan, Morocco and Egypt in poultry and Vietnam & Ecuador in marine products. Both the Egyptian and Indian investments have come in quick succession within the first quarter of 2024. We understand that a host of global trends and recent events may have motivated Mitsui. These probably include adverse economic and social trends in China, (which Japan used to source a high tonnage of processed poultry from and has progressively moved away from), a clearly visible rise of the Indian economy with new opportunities opening up in agro-processing, and possibly even the lure of the IMEC corridor. Mitsui's press note says that increasing disposable income of India's vast population, already at \$ 2,400, indicates a growing domestic demand for processed chicken.

Interest in agro-processing in India is also indicated by Japanese investments in the milk industry, a sector in which India leads the world. Japanese companies Marubeni & Akiba Farm Holdings are two such recent ventures.

- 2.2 This issue of the Industry Report also notes recent award of capital subsidies to poultry industry players. In table 1 we have noted three companies about which we have definite information. Other companies are also learnt to have been adjudged for award of capital subsidy, but Aptec does not have access to their names yet. These subsidies relate to projects in poultry and egg processing and setting up of cold chains.
- 2.3 APTEC recognizes that together with the expected growth of the poultry industry, we also need to address the long pending and politically sensitive issue of closing down the wet market. To this end we have noted that a number of wet market operators are setting up hybrid poultry processing facilities. In these outfits an overhead line serves the role of a hanging, stunning, halal killing and bleeding. After this, carcasses are manually transferred to a batch scalding and then to a drum plucker. Evisceration is done manually on table tops. There are probably addressed to processors performing 2000 - 3000 slaughters per day. An example video may be watched here¹.

When a major part of the wet market gets replaced by such plants it will mark a major revolution in this industry. It will cause displacement of workers in the wet market and herald a social changes. Aptec believes that also a focus on social engineering and re-education must accompany this change. For all of this to happen. The government needs political courage, for which, we believe the results of the forthcoming elections may be a deciding factor.

Aptec's Handbook (Handbook Chapter Offal Rendering Technology - Evolution & Design Options, posted on the website) carries the story of transformation of animal slaughter over the past two centuries, taking New York, Chicago, Moscow and Ghazipur Mandi in New Delhi as examples. In it we have contrasted the evolution of sociological, ideological, technological, and engineering styles that these urban transformations displayed. Our motivation for this was our belief that it was time for us to learn from the past and act wisely, before we usher in such major transformations in this industry.

- 2.4 YouTube carries a large number of videos on broiler breeders and commercial broiler farms upgrading their facilities to EC sheds. Most of these postings are in the vernacular, indicating that they are catering directly to



the farmers. An examination of some of them shows that with strong competition in equipment supply for EC sheds the price differential between open sheds (which still dominate) and EC sheds, has shrunk. Here are some comparative figures

New construction of open sheds at 1.5 sqft/bird INR 225-275 per bird
 New construction of EC sheds at 0.7 sqft/bird INR 350-400 per bird

These prices predict an acceleration in switchover to EC sheds with its attendant improvement in choice of commercial broiler breeds for broiler farmers.

Speaking to some experts in the EC sheds business, we learnt that there is indeed a surge of interest in them and starting from a 5% share of EC sheds in the broiler commercial farms sector in India some 6 years ago, the share has increased to around 15-20% now. They also expect this trend to continue.

- 2.5 Boards of directors of both JBT and Marel have agreed on modalities by which JBT will acquire all shares of Marel in the month of May 2024. It is not clear yet whether JBT's operations in India, centered in Pune and functioning in the RTE machinery business, may assume full responsibility for sale and service of its customer base here.

3 Size of the Processing Industry, Including History of its Constituents

| Table 1 List of Poultry Processing Plants Existing and those Expected on Stream by third quarter of 2025 in India. (This list includes existing units and those based on orders released and/or work already initiated at site and or manifest news or information about individual company's plans). | | | | |
|---|--|-------------|-----------------|---|
| A The Organized Sector Comprising Plants of 1000 BPH or Higher Capacities | | | | |
| A | Plant, location | Make | Capacity | Remarks |
| 1 | Alchemist Foods & Hospitality Ltd, Kurali, Punjab (leased to Star Foods) http://www.alchemist.co.in/ This link is no longer functional. | Meyn | 2000 | Commissioned in 2004. Since 2017 it has been operated by Star Foods under a lease agreement. Also leased is the 135 t per month RTE capacity of Alchemist. Within the premises Alchemist operates a manual dressing unit to service web orders for their <i>Republic of Chicken</i> brand. The Star Foods plant will be commissioned in the second quarter of this year and this plant will then be available for processing its own brand or may again be available for lease. |
| 2 | Al Golden, Dera Bassi, Punjab | - | 2500 | Being set up by a commission agent at Ghazipur Mandi who operates under four identities viz Aizal Foods Pvt Ltd, Al Golden Foods Pvt Ltd, Golden Foods Specialities Pvt Ltd and Labib Foods Pvt Ltd. This group of entities has purchased land and erected the compound wall. Their plant may be on stream by mid 2025. |
| 3 | AOV Agro Foods Pvt Ltd, Khasra Nos. 20, 21, 22, Village Tapkan, Tehsil Nuh, Haryana 122107. HQ at C-22/25 Sector 57 Noida 201301 | Meyn | 4000 | Promoted by O. P. Arora of AOV Group (mainly in red meat), who acquired the Nuh facilities from Moin Akhtar Qureshi, one time biggest buffalo meat exporter in India. It was an RND line, commissioned in 2016. Then modified to 2000 BPH in 2017. Replaced with a 4000 BPH line from Meyn in 2 nd quarter, 2022. |
| 4 | AV Ventures, Plot Number-72 A, Panchkula Industrial Area Phase 1, Panchkula, Haryana. (Also known as Chandigarh Poultry Centre) | Storm | 1200 | Initially AOV operated Nagpal Frozen Foods, Barwala, Haryana, a 1000 BPH plant set up by RND in 2007. After its closure on non-compliance with zoning laws, AV Ventures set up a new 1200 BPH poultry & 100 goats per day plant on industrial estate land in Panchkula. Both lines came into operation in January 2023. Mainly serving the defence sector. |
| 5 | Ayishas Foods Methala, Eriyad, Kandamkulam P.O, Kodungallur, Thrissur, Kerala 680669. info@ayishasfoods.com . | Deccan | 1500 | Starting in 2016 as a wheat and rice miller, this company transformed itself into a seller of ready to cook pre-mixes and in 2022 set up the poultry processing plant to expand its product mix. |



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|----|--|-----------|-------------|---|
| | | | | They sell under the brand name Ayisha's Tasty Magic. |
| 6 | Baraka Overseas Pvt Ltd , Kallai, 1st Cross Road Oddedagully, Harekala, Mangalore. | Deccan | 1500 | Established as a partnership firm in 1979 and incorporated in 2006. This company has extensive national and international presence is processed seafood. In 2022 its poultry processing plant came on stream. |
| 7 | Baramati Agro , Baramati, Maharashtra Baramati Agro Ltd. 4th Floor, Farena Corporate Park , Kharadi Bypass Rd., Hadapsar, Pune- 411028, India. Plant at Pimpri, Baramati. https://www.baramatiagro.com/ | RND/Storm | <u>2000</u> | Baramati is owned by the family of politician Sharad Pawar. Their first 300 BPH plant was commissioned around 2002, rebuilt to 750 BPH in 2009, doubled to 1500 BPH in 2020 by RND. It was finally expanded to 2000 BPH in end 2022 by Storm. They also operate a CFS facility for RTE products- around 80 t/month. |
| 8 | Bhagyashree Chicks , Rajguru Nagar, Pune | Deccan | <u>1000</u> | This company is a broiler integrator with 18000 Cobb breeders. The plant is under installation and expected on stream by this year end. |
| 9 | Bharat Agrovet , Plant at Ganjimutt, Mangalore, Karnataka. HQ behind Annapoorneshwari Building, Mahaveer Circle, Pumpwell, Mangalore, Karnataka. | RND/Storm | 2000 | Bharat Agrovet started with the old plant of Lifeline Feeds built by RND. Was reconditioned & reinstalled by Storm in Nov 2015 with a capacity of 1500 BPH. Now expanded to 2000 BPH. The group has plans for a modern 3000 BPH imported plant for which land has already been purchased and capital subsidy approved. This facility will come under the Provit name. See also Provit and Ideal Chicken |
| 10 | Charoen Pokhand India Pvt Ltd (CP) . Plant at Chittoor, Andhra Pradesh. HQ at CPF Tower, 1, 100-Foot Road, Stage 2, Hoysala Nagar, Indiranagar, Bengaluru, Karnataka https://cpbrandindia.com | Meyn | <u>2000</u> | Commissioned in January 2016. It is the only air-chilling plant in India. Planned expansion went into abeyance for lack of space. Their RTE sold as <i>Fine Star Chicken</i> (ref part B of this table). In early 2023 they were learnt to face short supply of breeding stock. Are now in the process of revamping their operation & plant. |
| 11 | Coastal Farms , Plant at Kannur, Mangalore, Karnataka. HQ near Navdurga Bus Garage, Mangalore, Karnataka | Marel | 2000 | Partnership started in 1996 by P. S. Prakash Shetty and his wife. Initially had a drum plucking plant from RND which is listed in part B of this table Existing plant was commissioned in 2021. Learnt to be planning revamping it. |
| 12 | Doon Valley Poultry , 54 A Race Course Dehradun. | Storm | 1500 | Ordered in first quarter 2023. Under fabrication, expect to be in operation by mid 2024 |
| 13 | Fresh Culture , Plot No 30 Jasmine Sri Ganesh Nagar 625/1b Mannur Koot Road Mannur, Sriperumbudur Tamil Nadu 602105 | Deccan | 1000 | Operate a hand dressing facility producing fresh and frozen chicken and portions which they sell from their own store. Their plant is expected to be on stream by last quarter 2024 |
| 14 | Godrej Tyson Foods . Plant at Taloja, Maharashtra https://www.godrejagrovet.com/godrej-tyson-foods | Marel | 3000 | Expanded from original 2000 BPH of 2001 to 3000 BPH. It is located in an industrial estate that lies between two nearby village whose inhabitants regularly protest against the smell nuisance. May be planning relocation. |
| 15 | Godrej Tyson Foods . Plant at Hoskote, Karnataka https://www.godrejagrovet.com/godrej-tyson-foods | Marel | <u>3000</u> | Set up in 1999 as a 1000 BPH RND plant which was scrapped in 2007 after an Aptec audit. A 2000 BPH Marel plant was set up in an adjacent plot of land. Expanded in 2012. In 2008 Godrej tied up with Tyson. Their brand is <i>Real Good</i> . They also produce RTE products on a 400Kg/hour used line sourced from The Waterbase of Nellore, a failed fish RTE unit. Falling within a smart city zone, the plant now under pressure to relocate. |
| 16 | Goel Foodworld , Plot no 23A, Industrial Area, Shogi, Shimla, Himachal Pradesh Plant at Khasara No.-22, 47, 48 UP Mohal Bumbli, Tehsil- Ghanari, District Una 177201, Himachal Pradesh. | Storm | 3000 | A replacement of the existing 500 BPH plant by Dhopeswar commissioned over a 5 years back. First expansion executed by Storm. Now relocated to industrial area. This plant includes existing machines, old Meyn machines from European refurbishers, and new machines from |



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| | | | | Storm. The plant was commissioned early this year. |
| 17 | Goldchick Hatcheries and Foods Ltd. Plant at Sadashivpet near Hyderabad, Telangana. HQ at Plot No.151, Kavuri Hills, Madhapur, Hyderabad, Telangana http://goldchick.in | Marel | 2000 | Commissioned in Sept 1998, and in intermittent operation since then. First to export Indian processed chicken and also first in the world to install an automatic re-hanging machine and continuous rendering plant at 2000 BPH capacity. |
| 18 | Golden Hatcheries Pvt Ltd, Plant at Davangere, Karnataka. HQ at Golden Hatcheries Building #3, Queen's Road Cross near Congress Committee office, Bangalore, Karnataka. http://goldengrp.co.in/ | Meyn | 3000 | Part of the Golden Group companies started in 1985 and incorporated in 1988. Placed order on Meyn in 2021 for setting up a green field unit close to VH in Davangere. Their manual slaughterhouse within Bangalore city is expected to have been closed with commissioning of this plant in August 2023. |
| 19 | Healthy Choice Poultry, village and post Wadala, Tehsil Majitha, Distt Amritsar, Punjab | Meyn | 1300 | Plant owned by Gurguran Singh Randhawa. Commissioned in end 2023. |
| 20 | Hitech Hatch, Metropolitan Co-Op. Housing Society Ltd., Sector B Plot 28, Canal South Road, Kolkata 700 105. West Bengal. help@hitechhatchfresh.com https://hitechhatchfresh.com/ | - | 2500 | A major integrator in West Bengal, owned by Radheyshyam Roy. This company entered the contract farming business in 2004-05. It now produces 5 lakh eggs per week, the DOCs hatched from which are distributed among 6000 contract farmers. It has already purchased land for its processing facility and been awarded capital subsidy by the government. |
| 21 | Huda Foods Pvt Ltd. Plant at Kondhwa. HQ at FL-I-403 Unity Park, SN-43 Kondhwa Kd, behind Sheetal Petrol Pump, Pune, Maharashtra. | Deccan | 1500 | Incorporated in 2020 by Sarfraz & Aijaj Momin. The plant processes around 10,000 BPD, with live birds procured from their own integration of 6 lakh per month.. The company proposes a second slaughterhouse of 3000 BPH at Sukhed near Satara in Maharashtra. |
| 22 | Ideal Chicken Highlands, Falnir Road, Mangalore http://www.idealchicken.in | RND/Bayle | 1000 | A 500 BPH plant from RND commissioned in 2013, later to be replaced by a 1000 BPH plant from Bayle was purchased by Ideal Chicken, owned by Vincent Cutinha around 2017. Ideal Chicken runs its own home delivery and also processes for Fresh-To-Home and Licious. |
| 23 | Japfa Comfeeds Pvt Ltd, 91 Sakore Nagar Vimannagar, Pune 411014, India https://japfaindia.com/ | Marel | 3000 | Work on constructing a 3000/6000 BPH plant at Village Pedgaon, Tal Daund, Distt Pune in Maharashtra is expected to end with the commissioning of the plant in the first quarter 2024. Hitherto they used to sell raw chicken sourced from their 1000 BPH leased plant of Maval Agro at Talegaon and Penn Foods at Karjat. RTE chicken was sourced from Hybro Foods, Thane in the past but that has been discontinued with the closure of Hybro. |
| 24 | KPF Chicken Kavumkandam Junction, Kadanad P.O Kavumkandam, Pala, Kadanad Meenachil, Kottayam – 686653. Kerala kpfcicken@gmail.com https://www.kpfcicken.co.in/home | RND | 1000 | Operate a manual or semi-manual processing shop and are setting up a 1000 BPH processing plant supplied by RND, expected to be on stream by end 2024. The company was started in 1985 by Shaju Sebastian as an integrator of Cobb. |
| 25 | Kuljas Rai Poultry, Amritsar. Also known as Rai Poultry. Plant at Wadala Viram Majitha, Amritsar -143601, Punjab | Storm | <u>3000</u> | Kuljas Rai Poultry set up a <u>300</u> BPH Dhopeswar plant at Chamrang Road, Amritsar, Punjab. Under orders to exit municipal limits, they shut this plant and put it up for sale. The new Storm plant near Amritsar, is in operation from first quarter 2020. Also make RTE poultry products for local markets. |
| 26 | KGN Processed Poultry, Pimpri, Maharashtra. Dehu Alandi Road, Shelar Basti, Chikhali, District Pune 412114. | Storm | 1500 | This is a franchise operator and commercial broiler farmer who sells processed chicken through its franchise stores and Big Basket. Its processing activities started with a manual plant |



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| | | | | of 300 BPH. The Storm plant was commissioned in 2018. |
| 27 | Khazir Agro. Plant I.G.C. Lassipora, Srinagar, Srinagar U.T. HQ 4 th Floor, Opp New Era School, Rai Bagh, Srinagar, Srinagar U.T. | RND | 1000 | Production commenced in January 2021. Production is irregular and output is at minimal capacity, mainly owing to problems of live bird procurement logistics. |
| 28 | Kwality Animal Feeds Pvt Ltd. Plant 763/19, A/P-Rajgoli, Chandgad, District Kolhapur, Maharashtra. HQ 12, Kwality House Machhe, Industrial Area, Belgaum, Karnataka http://kwalityhouse.in/ | Meyn | <u>3000</u> | Ordered as a 2000 BPH plant in Dec 2014. Commissioned in June 2016. Expanded to 3000 end 2018. Sell under the brand name <i>Belchick</i> . |
| 29 | Lifeline Feeds (India) Pvt Ltd. HQ at Shri Manjunatha Chambers, Ratnagiri Road, Chikmagalur, Karnataka. Plant at nearby industrial estate in 8 acres occupying four adjacent industrial plots separated by 3 roads. https://www.lifelinefeeds.com | Meyn | 3500 | Owned by K. Kishore Kumar Hegde. 300 BPH RND plant commissioned in 2002; sold to Amrit Feeds and replaced by 1900 BPH RND plant around 2005. Again replaced by a Meyn 3000 BPH plant in June 2015. Sell through over 40 company-owned retail outlets in Karnataka. They have now expanded to the present capacity of 3500 BPH. |
| 30 | Maval Agro , Talegaon, Maharashtra | Deccan/ Storm | 1000 | Leased from their owners (Premium Chick Feeds) by Japfa. Expanded from the original to 1000 BPH in 2023 by Storm under orders from Japfa. |
| 31 | Mayuri Broiler Breeding Farms Pvt Ltd at Sy 537/A, 537/E, Village Yellikal, Kalwakurthy Mandal, Nagarkurnool District, Telangana 509324 | Storm | 1000 | Mayuri Farms, owned by Harsha Poultry, operated a manual dressing plant of 400 BPH in Telangana. Their new plant has recently been commissioned in early 2024. |
| 32 | Meat & Eat , (incorporating Kavi Proteins & Feed Pvt Ltd), 26, Sindhi Colony, 1 st Cross, J C Road, Bengaluru 560002, Karnataka. gcc@kavigroup.in | Storm | 1000 | Meat And Eat is a franchisee of home delivery RTE/RTC products. The processing is done at Kavi Proteins plant which has a 1000 BPH Storm plant. The operations suffered business loss during the Covid lockdown but now appear to have stabilised |
| 33 | Nafees Poultry Plot No 129, East Marredpally, Hyderabad 500026, Near Delhi Public School, Shanthi Niketan Society, Mahindra Hills, Hyderabad. | RND | <u>1000</u> | Operated by Sarabiyot Singh, son-in-law of Harbans Singh, one time owner of Starchick (see Sethwala). This plant started around 2013. |
| 34 | Nice Meat Factory, 86 Surabhi Nagar West ,8th Phase , Sadduguntepalya, Bangalore | Deccan | <u>1000</u> | Wholesaler of commercial cold storage, chicken, fish & meat. Their 1000 BPH plant is being set up by Deccan Automation and is expected to be on stream this year. |
| 35 | Penn Foods Pvt Ltd. Plant at Karjat, Maharashtra. HQ at Clucky's Products LLP, 294, S. Bhagat Singh Road, Fort, Mumbai https://cluckysfriedchicken.com/ | Bayle | 1500 | Commissioned in 2016. Is functioning as a merchant processor, slaughtering for Licious and McDonalds under their brands at around 14000 BPD. A similar arrangement with CP is learnt to have been terminated. Also selling through Licious, Japfa, Barbecue Nation at Sayaji. Brand name is <i>Clucky's</i> . |
| 36 | Perfect Poultry Pvt Ltd. Plant and HQ at 27 Ft Road, Chowk Green Field, Majitha Road, Amritsar, Punjab. | Meyn | 4000 | Commissioned at 1000 BPH in July 2015 by Storm Engineering. Has been replaced by Meyn's 4000 BPH plant which was commissioned in December 2021. |
| 37 | Premium Chick Feeds Pvt. Ltd 401-404, C Wing, Nyati Millenium, Datta Mandir Chowk, Pune 411014, Plant at Yeral Gut No. 330 Near Rockhill Hotel Sutarwadi, Kolad-Pune Road 402308 https://www.premiumchickfeeds.in/ Plant at Sutarwadi, Alibaug, Maharashtra | Storm | 1500 | Premium Chick Feeds is an integrator with operations all over India. Construction of their plant in Raigad district commenced in early 2022 after Maval Agro, which they had been using earlier, was snapped up by Japfa. The plant was commissioned in end 2023 |
| 38 | Pragati Broilers , Krishnagiri, Karnataka | Meyn | 2500 | This plant, for a 2500/4500 BPH capacity is expected to be commissioned by mid 2024 |
| 39 | Premier Breeding Farm , Tirupur | Deccan | 1500 | Commissioned in 2022. |
| 40 | ProTAC Foods International Pvt Ltd , Plant and HQ at 115 Allasandra, behind | Meyn | 4400 | Commissioned in June 2016 at 2000 BPH. Planned as a merchant processor with <i>mandi</i> sourced live birds. Operating now on contract at |



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| | RTO Check Post, NH4, Mulbagal Taluk, Karnataka | | | 24,000 BPD for Tri Star (Kerala), Nandus, Licious, Shanti (Fortune) and Fresh to Home. Commissioning to 4400 BPH was completed in mid 2023. Next planned expansion is to 7000 BPH |
| 41 | Provit Foods Private Limited. Payannoor Kerala. | Deccan | 1000 | This is one of three locally built plants under the Vincent Coutinha family. |
| 42 | Provit Foods Private Limited. Payannoor Kerala. https://www.provitfoods.com/ | - | 3000 | Provit Foods is the flagship company of Vincent Cutinha, encompassing Bharat Agrovet and Ideal Chicken. Also operates as an integrator under the banner of Anupama Feeds & Farms. It retails processed poultry through over 20 retail outlets in Kerala and Karnataka. Under the name Provit the group now plans setting up a 3000 BPH imported plant, when all will be located close to each other near Mangalore. |
| 43 | RM Delicious Foods, Khatoni No 102, Khewat No 92, VPO Seenk, near Bus Stand Tehsil Israna, Panipat, Haryana 132103, | Meyn | 1300 | Owned by Rakesh Malik as part of his RM Agro Group of Companies. Plant was commissioned in 2023. |
| 44 | Royal Foods/Ave Miriam, plant at Salsette, Goa. HQ at Mario Valladares, 142/2, Near Metastrip, Nauta, Cortalim, Goa | RND | 1500 | Originally 500 BPH. Expanded in 2009 to 1000 BPH, later again to 1500 BPH. Suffered losses during the Covid lock-down. Recently resumed operations in a limited way. |
| 45 | Sabir Qureshi (formerly Sneha Farms) | RND | 1000 | Mohd Sabir Qureshi, one time employee of Phoenix Poultry, bought the 2011 RND plant of Sneha Farms, relocated and re-commissioned it at Jabalpur in 2019. |
| 46 | Safa Foods, 535 Fathima Manzil 1st Floor, Near Old Kavitha Theatre, Dr Nanjappa Road, Gandhipuram-Coimbatore 641012 | RND | 1000 | Under fabrication. Expected to be on stream by 2024 end. |
| 47 | Samrans Fresh Meat Products Pvt Ltd. Kothamangalam, Ernakulam Kerala | RND | 1000 | Samrans was incorporated in 2022 by Najeeb Salim who is a Logistics & Supply chain professional with experience in Kuwait |
| 48 | Sethwala Foods Pvt Ltd, plant at Talasari, Palghar, Maharashtra. | Marel/RND/Storm | <u>2000</u> | Stork imported and installed a refurbished, used 500 BPH plant in the 1990s for Shiraz Hotels, Agra. Shiraz sold it to Harbans Singh of Starchick, Hyderabad, who operated it as Star Chicks and later sold it to Hanifbhai of Sharon Broilers, who in turn sold it to Sethwala in 2012. Installed by Dhopeswar shortly thereafter; expanded and re-commissioned with inputs from RND and Storm. The brand name is <i>Seth's</i> |
| 49 | Shalimar Corporation, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata http://shalimarcorp.in | Meyn | 6000 | Commissioned in Sept 2014 at 2000 BPH. Expanded to 2600 in 2018. Expanded to 6000 BPH in mid 2023. Shalimar sells under the brand name <i>Total Chicken</i> . |
| 50 | Shalimar Corporation, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata http://shalimarcorp.in | Meyn | 2500 | This new plant of initial capacity of 2500 BPH is coming up at Una in Himachal Pradesh. Commissioning was expected by mid 2024, but has been delayed. |
| 51 | Shanthi Feeds. Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore http://shanthifeeds.com | Meyn | <u>12000</u> | Originally a 1000 BPH Meyn plant commissioned in 2009. Expanded in 2 stages to 3000 BPH till 2014. Then expanded and re-commissioned at 6000 BPH in Feb 2016. Expanded to 12000 BPH in first quarter of 2021. |
| 52 | Sivasakthi Agro Foods, plant at Udumalpet, Tamil Nadu. HQ 793/18, Kumaralingam West Village, Rudrapalayam Post, Madathukalam Taluk, Tirupur Dist. Tamil Nadu http://www.sivasakthifoods.com | Marel | 5000 | Originally planned as a 1000 BPH facility in mid 2012. Changed to 2000 BPH in 2013 and came into production in early 2016. Expansion to 3000 BPH commenced in May 2019. By 2022 they had expanded to the present capacity. Brand name is <i>Supriya</i> |



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| 53 | SKM Feeds (earlier known as VKS Farms). Plant at Dindigul, Tamil Nadu. HQ Nanjai Uthukuli, Modakurichi Tamil Nadu https://www.skmpornafoods.com | Meyn | <u>8000</u> | Original capacity of 2000 BPH commissioned in Sept 2009 by VKS. Company changed hands in Jan 2015 and became SKM. Expansion to 4000 BPH done by mid 2019. Further expansion to 8000 BPH was commissioned in 3 rd quarter 2022. |
| 54 | Sky Foods , 402/82 Kiluvankattur, Andiyagoundanoor, Udumalpet, Tiruppur Dist, TN 842154 skyfoodagrofarm.com | Deccan | 1500 | Incorporated in 2018 by Ram Prasad, an ex-plant manager of Shanthi Feeds. This company is an integrator and sells live broilers, processed chicken and portions under the brand name <i>Sky Fresh</i> . |
| 55 | Skylark Foods , plant at Rai Food Park, Sonapat, Haryana. HQ at Dharamgarh Road, Safidon, Distt. Jind, Haryana http://skylarkfoods.com | Meyn | <u>1000</u> | Commissioned March 2006 on an 1800 SqM piece of food park land with no room for expansion or growth. They have added an RTE plant in a nearby plot of land. Sell through Walmart and to many premium hotels and their franchisee outlets under the brand name <i>Nutrich.</i> Skylark is a major layer integrator. |
| 56 | Sneha Farms Pvt Ltd , plant at Addakul, Hyderabad-Bangalore Highway, Telangana. HQ at Plot No 30, Survey No. 22, 17AA, Kondapur, Hyderabad http://snehagroup.co | Marel/Meyn | <u>12000</u> | Ordered initial 6000 BPH plant from Marel in March 2014. Commissioned in April 2016. Procured equipment from Meyn for doubling their capacity. Commissioned in end 2021. Have recently joined hands with Mitsui of Japan. |
| 57 | Srinivasa Farms Private Limited , plant at Taniki Village, Kowdipally Mandal, Medak District, Andhra Pradesh. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. https://www.srinivasafarms.com | Bayle | 1000 | Ordered May 2015. Commissioned in Sept 2017. Operating at 1500 BPH. |
| 58 | Star Foods Pvt Ltd , proposed plant at Ladhawal Food Park, Ludhiana. HQ at Sampoorna Feeds, Phagwara, Punjab http://sampoornafeeds.com | Marel | 4000 | Construction in progress at site. Commissioning expected by mid 2024 |
| 59 | Star Poultry , Johrawar Singh, Jammu | Storm | 1000 | Fabrication in progress. May be in operation by mid 2024 |
| 60 | Suguna Foods Pvt Ltd , Vyalur, Tamil Nadu HQ at Unitea Building, No 3, Savithri Shanmugam Road, Race Course, Coimbatore. https://www.sugunafoods.co.in | Meyn Marel | 3000 1000 | Commissioned 2000 BPH in Aug 2002. Grew in 2009 to 3000 BPH. This plant has been reconfigured for increased value added products. Equipment for current expansion to 4000 BPH was sourced from Marel and it was commissioned in 2023 |
| 61 | Suguna Foods Pvt Ltd acquisition of Alpha Agro & Cold Storage Pvt Ltd), Belgaum, Karnataka | Meyn | 1000 | Commissioned in April, 2014, as a Meyn 1000 BPH plant to function as a merchant processor mainly for the armed forces, Goa and local markets by promoters Alpha Agro who sold the facility to Suguna in 2019. |
| 62 | Suguna Foods Pvt Ltd acquisition of SHL Foods Private Ltd (Sagri) Plant at Lalru, Punjab. | Meyn | 2500 | Originally a 1000 BPH plant set up in 2009 at Chanalon Industrial Park, on a mere 1000 SqM plot of land by Surjit S. Kohli. Relocated, expanded, re-commissioned in Feb 2014. Sold in 2018 to Suguna and refurbished. |
| 63 | Swami Feeds . Plant at Dharapuram. HQ SF 324/2C Nathapalayam, Mulanur, Dharmapuri, Tamil Nadu | Marel | 3000 | During construction parts of the structure were gutted in a fire in mid-2020. Came on stream in mid 2021. They are now planning more automation in the cut-up portioning department. |
| 64 | Syra Foods . (Redefining Taste) W-8/L, Industrial Area, Yamunanagar, 135001, Haryana, India. | Linco | 2500 | Ran into local resistance successively at two proposed plant sites. They later re-located to a site near Mohali in Punjab. The plant is now in production. |
| 65 | Venkateshwara (VH) Plant at Kamshet near Pune. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. http://venkys.com | Meyn/Marel | <u>3000</u> | Oldest operating plant since 1986 in India. It was commissioned as a 1000 BPH Meyn plant. Expanded to 3000 BPH by Marel during the early 1990's. Old Marel equipment has been progressively replaced by Meyn's Walvekar consignment. See Walvekar in part B of this table. |



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| 66 | Venkateshwara. Plant at Davangere, Karnataka. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. http://venkys.com | Linco | 6000 | Commissioned in March 2012. Since the commissioning of this unit they have preferred to focus on RTE instead of primary processing. VH has large RTE facilities at both locations. |
| 67 | West Bengal Livestock Dev Corp, Haringhata. | RND/Storm | 1000 | Order taken from WBLDC by Dr Froeb (India) Pvt Ltd, then the agent of Linco and sub-contracted to RND/Storm, Commissioned in 2015. |
| 68 | West Bengal Livestock Dev Corp, Siliguri | Linco | 1000 | Combined poultry, goat, beef and pork slaughterhouse commissioned in 2022 |
| 69 | West Bengal Livestock Dev Corp, Haringhata. | Meyn | 4000 | Machinery has been received at site and construction is on for a 4000/8000 BPH plant at their Haringhata location. Commissioning expected by early 2025 |
| Integrated processing capacity expected by mid 2025 based on current orders, on-stream and under-construction projects | | | 1,74,700 | Average plant capacity is 2525 BPH. |
| Capacities are mentioned in birds per hour (BPH). For calculating market shares, of the total capacity of (174700-8000 of Provit, Hitech Hatch and Al Golden) 1,66,700 BPH expected on stream by mid 2025, Meyn's market share is 78,500 (47.1%), Marel's is 34,000 (20.4%), Storm Engineering's is 19,200 (11.5%); Deccan's is 12,000 (7.2%), RND's is 10,500 (6.3%); Baader-Linco's is 9,500 (5.7%), Bayle's is 3,000 (1.8%); [Total 1,66,700 (100%)] [Sethwala's capacity divided >> 500 to Marel, balance 750 each to RND and Storm] | | | | |
| The following proposed projects have been removed from the above table and taken to part B because of ongoing uncertainties about their future: | | | | |
| <ol style="list-style-type: none"> 1 Anjaneya 2500 BPH project at Mavin Honda. Project delayed as they continue to await approval of grant of capital subsidy from the government. Civil work initiated at site. No equipment ordered so far. 2 Srinivasa Farms Pvt. Ltd, 2000 BPH, Mega Food Park, Kurichedu, Prakasam district. Equipment delivered to the site over six years ago by Marel. No response to Aptec's repeated reminders seeking information on their plans for installation and commissioning. Equipment supplier Marel is equally unaware of any plans related to commissioning. 3 RFK Green, Pulwama, J&K. HQ at C-37, First Floor NSM, Azadpur New Delhi. The 2500 BPH plants was ordered in July 2017 and installation was completed in 2019. Commissioning is delayed due to social unrest in the area. | | | | |
| B | This Table lists (1) small un-organized sector processing plants with manual dressing, drum plucking and conveyerized or partially conveyerized poultry processing plants with capacities under 1000 BPH (2) closed and scrapped poultry processing plants of all sizes – many of which were re-sold and subsequently grew to become organized sector processing houses- at which time they cease to be listed in this section, (3) Plants on which some work has been done but commissioning remains under abeyance for several years, (4) RTE plants who source chicken meat from processing plants, and even if their repertoire only marginally includes chicken, they have the machinery, experience and general potential to follow market trends and become noteworthy for poultry processors (4) Web based poultry and poultry based RTE order suppliers, many of which have also acquired, or lease idle facilities and are either reviving them or setting up <i>cloud kitchens</i> for captive use. Also, while compiling this list we have dwelled on historical past of potential big players in the processed food and QSR sectors in the belief that history is a great teacher and may eventually direct their steps towards this industry. Plants possessing RTE capacities are indicated with <u>underlined</u> capacity figures. | | | |
| 70 | Agritech Hatcheries Ltd promoted by Damania brothers, started with a 1000 BPH Meyn plant in early 1990's at Ahmadnagar, Maharashtra. It then expanded in 1995 to 4500 BPH and at that time was the most advanced and the largest facility in India. It then closed when the group became insolvent around 1997. Leased for a year from the State Bank of India by C&M with a view to re-commission it, they failed and surrendered it in 1999. Later the plant was scrapped. | | | |
| 71 | Al Arif Poultry is an integrator at Vakwady Road, Kumbhashi Post Kundapura Taluq, Udupi District – 576257 Karnataka. Operate a <u>500</u> BPH manual dressing plant sourced from Storm Engineering who are now upgrading it to 700 BPH. Installation is in progress and the plant ought to get commissioned this year. They have a 2 TPD RTE plant at Gulbarga for which they seek a lease partner. | | | |
| 72 | Al Halal Foods , Thane, Maharashtra. A 1000 BPH plant by RND. This plant was commissioned in 2016. Plant is not in operation and may be available for sale. | | | |
| 73 | Al Kabeer Group has been in processed foods in the Middle East since 1978, establishing a unit in India with a processing facility in Hyderabad, Cascade Marine Foods in Sharjah and Falcon Foods in the U.K. In Hyderabad it produces, besides other products, RTE items with chicken sourced from nearby processors. http://www.al-Kabeer.in | | | |
| 74 | Allana Sons was founded in 1865 as a ship chandler. As part of its planned foray into processed meats, including chicken meat, in recent years it has participated in industry exhibitions at Hyderabad (2022), New Delhi (2022 & 2023), Kolkata (2023), Greater Noida (2024), and launched its Meat-On-Wheels project to deliver Goat & Sheep Meat to various stores in Mumbai in 2022. It is now planning five large poultry slaughterhouses in India and to this end and to set up vertical integrations, it has recruited retired poultry industry manager Dr C.R. Behl on its board. https://allana.com/ | | | |
| 75 | Amalgam Group , Cochin, Kerala (Innovative Foods – Sumeru brand) was started in 1977 as a family owned seafood and spice exporting company. Later in 1989 they diversified into processed foods – partnering with Nissin Foods of Japan for freeze drying and with Mitsubishi and Unilever to develop cold chains, besides Ristic GmbH, Saudi Fisheries and others, consolidating their business around Innovative Foods, a clearing and forwarding agency for Hindustan Lever ice cream. Headquartered at Bangalore. Their first attention was to frozen vegetables, followed by <i>parathas</i> and finally to RTE chicken based products under the 'Buffet' range, offering sausages, nuggets and popcorns, <i>samosas</i> , spring rolls and burger patties in | | | |



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| | chicken and pork. Production is distributed between two plants – at Cochin and Chittoor where they have breeding, battering, frying, IQF and soup making machinery. Lacking a primary processing plant, they source chicken and pork from nearby processors which exceeds INR 60 million. They also produce cup chicken noodles using dehydrated chicken. Recently they launched innovative recipes curated by Michelin Star Chef Alfred Prasad and now propose to venture into vegetarian and meat based momos. http://www.sumeru.net |
| 76 | Ambica Chicken , Deumol Shirvai Quepam, Near Peace Valley, South Goa, 403705. Operated a 1200 BPH plant commissioned by Storm Engineering in 2016. Suffered financially during the 2020 lock-down, particularly as most of their business was with hotels. This plant is now closed and may be available for sale. |
| 77 | Amrit Feeds , Jangalpur, Howrah, West Bengal, bought original RND plants from Lifeline Feeds and Ave Mariam and installed the combination as a 300 BPH unit at Jangalpur. Later expanded to 700 BPH in 2009. Along with this primary processing facility they also set up a sausage and ham plant in 2010 with an investment of around INR 30 million for sale under the brand name <i>Fresco Pollo</i> . Now all facilities are closed. Planned relocation of this plant to Assam in 2016 was dropped. |
| 78 | Amrit Feeds , Beldanga Mouza, Raghunathpur, PO Bonkati KanksaI, Panagarh, West Bengal. A Linco plant of 4000 BPH plant commissioned in first quarter 2014 and promptly closed a year later on June 1, 2015. This facility has been available for sale ever since but is unlikely to find buyers because the asking price is too high. |
| 79 | Arambogh Hatcheries . Plant at Birbhum, West Bengal. HQ at 59 B Chowringhee Road, Kolkata. Plant at Bolpur, Singhbhum District, West Bengal. Commissioned as 1000 BPH in Sept 1999, expanded to 2000 BPH in 2002 and 4000 in 2004. In 2023 the plant was closed by banks for failure to service their loans. |
| 80 | AOV old plant with 2000 BPH machinery from both RND and Storm may be on sale. |
| 81 | Arthur's Food Company , Bangalore. This RTE plant retails through Big Basket, Food Basket, Foodhall, Foodworld, Metro Cash & Carry, Nature's Basket, Scootsy, Spar, Spencer's and Star Bazar. http://www.arthursfood.com |
| 82 | Assam livestock & Poultry Corporation , Panjabari Road Khanapara, Guwahati 781022. Ordered a 500 BPH plant from Storm which was installed and commissioned in 2023. |
| 83 | Barafwala Co , 11 High Street, Camp, Belgaum, Karnataka. Had so far been confined to the red meat industry. Recently they have set up a pilot plant for processing poultry using some Deccan Automation Technology machines and some made by themselves and are slaughtering 2000-3000 birds daily. |
| 84 | Brahmagiri Dev Society , Wynad, Kerala, 500 BPH by RND in 2010. |
| 85 | Broiler Master , Punjab, 200 BPH by RND in 2011. This is a semi-manual processing plant, having neither scalding nor plucking and does wet market style evisceration. |
| 86 | Caris Pure Processing Company Pvt Ltd. Plant at Paramankeni Village, Kancheepuram, Tamil Nadu. HQ at 23 C, Kohinoor Complex, East Coast Road, Village Vettuvankeni, Injambakkam, Chennai, Tamil Nadu. Tae-Jin supplied the 3000 BPH plant which is now closed and available for sale. Promoted by one Prince Jacob, an NRI from Korea and Madavan Nair in May 2013. Operated for some time by a hotel chain. Purchase bid by Suguna, Shanthy and others failed to get transfer of local PCB approval to any new owner. In Nov 2019 the banker issued an auction notice. The promoters were charged with non-payment of GST, which is mandatory for organized sector processors but not levied on the wet market |
| 87 | Central Avian Research Institute , (IVRI) Bareilly, 200 BPH by Dhopeswar. |
| 88 | Century Farm Products , incorporated in 2008 at Erampalli, P.O. Shivalli Udipi Taluka & District- 576102 Karnataka operates a 500 BPH plant built by Storm Engineering since 2015. |
| 89 | Chatha Foods , launched by P.S. Chatha in 1998 at village Chaundheri, Dapper, on the Chandigarh - Ambala highway in the Mohali district of Punjab, market their RTE products under the brand names <i>Gusto</i> and <i>Swiss Naturen</i> . With their retort packaged products being shelf-stable at ambient temperature, they beat the hurdle of the inadequate cold chain. They source chicken meat from SHL Agro (now Suguna) and Shanthy. Their institutional customers include about 80 five star hotels besides Taj Air Caterers, Sugar and Spice and ITC Welcomegroup. They also retail through some 1100 outlets http://cfpl.net.in |
| 90 | Chicken Factory , Anjananagar, Bangalore – 560091. Has a semi manual operation doing 1000 BPD with Deccan Automation equipment |
| 91 | Coastal Farms , Mangalore, 500 BPH by RND. Scrapped and probably available for sale. |
| 92 | College of Vet & Animal Sciences , Kerala, 200 BPH by RND in 2003. |
| 93 | College of Vet & Animal Sciences , Parbhani, 500 BPH plant by Deccan Automation Technology. Commissioned in 2020 |
| 94 | Contai Golden Hatcheries Pvt. Ltd, Contai, E. Midinapore, West Bengal, 300 BPH by RND in 2003. It is owned by Shalimar Hatcheries and probably available for sale. |
| 95 | CP India , Chennai, 500 BPH by RND in 2002. Scrapped and probably available for sale. |
| 96 | Darshan Foods or Meatzza . Established in 1969 as a buffalo meat exporter. Started an RTE division in 1996 with facilities for delicatessens, Indian products like <i>seekh kabab</i> , <i>shami kabab</i> , <i>samosa</i> , <i>tikka</i> etc. and breaded products for retail & institutional customers. Now operate through their own plant at Lawrence Road Delhi, several leased premises at Udyog Vihar, Gurgaon and a purpose-built plant at Behror, in Rajasthan. It has a combined capacity of 750 tonnes per month from chicken, pork & mutton/lamb. It sources whole dressed birds from many plants listed in Section A of this table as well as from Ghazipur <i>Mandi</i> . Possesses a Meyn cone de-boner line for portioning and deboning chicken carcasses. The company is run by Narinder and Rajiv Jaisinghani. http://www.meatzza.com . |
| 97 | Deepan Foods LLP , Pune, 2024. A 500 BPH plant supplied by Deccan Automation is under installation and ought to be on stream by this year end. |
| 99 | Dr Srinivasa , promoter of the decommissioned and eventually scrapped 500 BPH Bayle plant called Pragathi Broilers at Doddaballapur in a disused feed mill shed, is planning another facility in Karnataka, this time with an ambitious capacity of 1000 BPH but there is no news of any progress. |



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| 100 | Empire Foods , Taloja, Maharashtra. 1000 BPH plant purchased from RND some 15 years ago, not yet installed. It has probably been resold to and installed by another company, or listed here under a different name. |
| 101 | Farmer Choice , Pune A 500 BPH plant supplied by Deccan Automation is under installation and ought to be on stream by this year end. |
| 102 | Farm Suzanne , 64, Montieth Road, Egmore, Chennai 600008, Tamil Nadu. Established in 1984 by Eric and Mary Rodriguez at Siruseri, near Chennai with a capacity of 1.5 tonnes per day, as a branch of a larger sea-foods company. They sell to institutions and through retail chains and also perform as ship chandlers. Procure chicken meat from several processors listed above in section A. They partnered with Pizza Hut to make pepperoni for the first time when the Indian Government banned its import in 2006. In 2015 they were planning a pan India presence. Adding new manufacturing unit soon. http://www.farmsuzanne.com |
| 103 | Farm Value Foods Private Limited owned by Anshu Sibbal Chatli runs an RND plant of 350 BPH capacity at Barnala. It was commissioned in 2014. |
| 104 | Five Star was founded in 1985 as an RTE chicken franchise in Ladprao, Thailand and now has presence in 9 countries with 8000 outlets. This franchise leverages the vertical integration of its parent company CP and adapts its menu to cater to local preferences and tastes. Brought to India in 2012 with in-house production of RTE fried chicken products for sale through franchise outlets to cater to a QSR market, then valued in 2016 at INR 60 billion, Five Star quickly opened some 350 outlets across states like Andhra Pradesh, Goa, Karnataka, Kerala, Tamil Nadu and Telangana and cities like Bangalore, Hyderabad, Mumbai and Pune within 2-3 years. They also used delivery websites of Food Panda, Ola, Road Runners, Swiggy and Zomato. Chicken was initially sourced from a small processor in Bangalore, to be cooked at a pilot facility in Hoskote. Commencing 2016, sourcing moved to their own 2000 BPH Meyn processing plant at Chittoor where they also set up an RTE plant. That same year they shut 133 non-performing outlet, because of sluggish market growth, bringing their total down to around 270. They also terminated lease of Penn Foods in Maharashtra and ProTAC contract-processing. Five Star and CP are now learnt to be reviving and revamping their presence in India. https://www.fivestarchicken.com |
| 105 | Food and Flavours , Bangalore. Produces dehydrated chicken meat with raw meat sourced from Godrej, Hoskote. The facility has a 3 tonne per day dehydrating capacity which it divides between vegetables and chicken meat for customers like Indo Nissin Foods, Bangalore; International Bestfoods, Mumbai; Arinor, London; CPC Agrifoods, Colombo & CPC/AJI, Malaysia. Nissin Foods in turn was formed by a partnership between Itochu Corporation of Japan and Sumeru, part of the Amalgam Group to establish India's first freeze drying facility to produce food ingredients. |
| 106 | Gitwako Farms , headquartered at Jangpura Extension, New Delhi, is owned by Ajay Beri at Ferozepur Jirka. They operate an RND plant of unknown capacity and also process goat meat. Mainly produce RTE products for which they possess a retort. |
| 107 | Godrej Tyson , Hoskote, Karnataka, 1000 BPH plant from RND in 1999, which was scrapped in 2007 and replaced by a Marell 2000 BPH plant, which was later expanded to 3000 BPH. They have a 400 Kg/hour formed products line and a sausage, salami and cold cuts lines – part of which was reconditioned and procured from The Waterbase Nellore facility of the Ballarpur group – a fish further processing facility that failed. |
| 108 | Golden Hatcheries Bangalore, operate a manual dressing facility of 500 BPH within municipal limits. Under orders to relocate. Have set up a 3000 BPH Meyn plant at Davangere. |
| 109 | Hayagreeva Poultry Solution has a 500 BPH RND plant located at Doddaballapur near Bangalore which was commissioned in 2020. The plant was earlier owned by Chicken Stop, sold to another owner, then shifted to its present location. |
| 110 | Hybro Foods Pvt Ltd . Plant at Lahe, Taluka Shahpur, District Thane, Maharashtra. HQ at 8, Shah Industrial Estate, Opposite Veera Desai Road, Andheri West, Mumbai. The plant was built by RND initially installed in 2004 as a 1800 BPH plant, then expanded to 3000 BPH. The plant is closed at present under pressure from the banks for non payment of dues. |
| 111 | Higrow Chicken , owner Deepak Raj Garg, runs an RND plant of 500 BPH at Ludhiana, which was commissioned in 2017. |
| 112 | Hygienic Chickens , 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, 300 BPH by RND. |
| 113 | Ideal Chicken The Vincent Coutinho family owns three locally built processing plants – Bharat Agrovet, Provit Foods and Ideal Chicken. Under Ideal Chicken, the family commenced processing around 2017 with a locally sourced plant of unknown capacity which runs its own home delivery and also process for Fresh-To-Home and Licious http://www.idealchicken.in |
| 114 | Indian Broilers (IB Group, Rajnandgaon) located at Nagpur, Madhya Pradesh. It is a 500 BPH plant by RND, started in 2016. They are planning a major foray into poultry processing, with several 6000 BPH plants at several locations. |
| 115 | Indian Hospitality Company Group was registered in Caymen Islands in 2006 to make investments in hospitality and QSR sectors. To help them do so, they recruited the founder of Barista and CEO of Yum and acquired Adelie Foods of UK, who are contract caterers and suppliers to airlines, in 2012. Subsequently they acquired Skygourmet, Mars Restaurant chain, Birdy's, Dosa Diner, Roti, Pizzeria & Pasta Bar, and Tendulkar's. Owing to these, IHC is now fully into QSR and RTE foods businesses, and given the market potential, may make an entry into the chicken RTE sector. |
| 116 | International Food Products , Chandigarh. Small RTE producer in chicken and other meats. |
| 117 | Irani Chicken Products LLB, Daman, Gujarat, 500 BPH plant by Bayle, commissioned Dec, 2013. |
| 118 | ITC Welcomegroup made its entry into the branded & packaged foods business in August 2001 with inspiration from its successful restaurants Bukhara and Dum Pukht. In June 2003 they launched their <i>Kitchens of India</i> brand comprising a range of heat-and-eat Aashirvaad brand RTE meals. This range was available in heat-resistant packaging form, produced using a retort process at Chatha Foods. Their Indian meal packs are sold in Australia, Canada, Germany, Japan, New Zealand, South Korea and USA. Although this range contributed only 1% of group sales, it sold 6 times as much in USA than in India in 2012 and was the second most sold Indian meal in USA after <i>Tasty Bites</i> . It set up a new plant for these product lines at Bangalore. |
| 119 | Khushbaksh Poultry , Near Kashmir Glass House, Phase 3RD, Industrial Estate, Srinagar- 190001, Jammu & Kashmir. A 500 BPH plant under order from one Mr Bashir under fabrication by Storm Engg and slated for commissioning by mid 2023 |



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| 120 | Kudumbashree Broiler Farmers Producer Company Ltd at Trivandrum, Kerala. Is a 500 BPH plant supplied by xxx |
| 121 | Knowledge Foods , Neral. Manual-dressing 300 BPH. Also making RTE products. |
| 122 | Ku Koo Ch Ku Poultry Farm Pvt Ltd was set up by Kunal Pathre together with his brother Prashant in October 2020 at Alibag in Raigad, Maharashtra. Is a vertical integration with a background of contract farming with operations in breeder farming (VH breeds), hatching eggs, broiler DOCs and live chicken. In operates commercial farms with a total installed capacity of a lakh broiler chickens per week as in March, 2021. The operations are at Gat No. 230 Mapgaon Road, Alibag, Alibag, Raigad, Maharashtra. During the Kovid panic, they invited financially distressed commercial broiler farmers to come into their fold and offered them stability. This allowed them to expand rapidly. They started poultry processing in 2017 at Pali Alibag with 500 birds per day, followed it up with 1000 birds per day at Kalad Pen in 2019 which they expanded to a 500 BPH processing plant supplied by Deccan Automation Technology. |
| 123 | Kongu Herbal Chicken Pvt Ltd was incorporated in December 2015 by a trio of brothers (A Arjunan, A Senthil Kumar and A Boopathi) at Thirunagar Colony, Erode, TN. It is vertically integrated with a quarter century of poultry farming experience and serves a network of commercial farms in that area. The 700 BPH plant was supplied by Deccan Automation. The company claims to have launched India's first antibiotic free chicken as frozen whole carcasses and frozen parts through its own restaurant service activity from their shop at Mogappair West, Opposite Dindigul Thalappakatti. |
| 124 | KSIDC , Kerala, 300 BPH by RND in 2005. |
| 125 | Maa Integrators founded by K. S. Ashok Kumar & Mrs Manjula Ashok Kumar in 2007 with interest in poultry, feed, fruit farming, all under the contract farming model. They have plans to venture into poultry processing. |
| 126 | Malabar Agro Industries P Ltd was registered in Nov 2018 at Ernakulam in Kerala. It operates a 500 BPH plant supplied by RND and commissioned by Storm Engg. |
| 127 | McDonalds India , now owned by OSI, set up their first plants at Taloja in 1995 as Vista Foods and Kitran Foods to cater separately to non-vegetarian and vegetarian products respectively. Recently they set up a vegetarian products facility in Punjab and acquired the facility of Global Nutri Foods Ltd at Madanapalle in AP. Altogether they possess an RTE capacity of 625t/m at Taloja and 1750t/m at Madanapalle. They get approximately 95% of their supplies from 38 local sources – with raw chicken coming from the Godrej Taloja plant. Have recently installed a cone de-boner sourced from Meyn. https://vistafood.com |
| 128 | Miki Exports International , Taloja, Maharashtra. RND 2000 Established in 1950 as Miki Food Stuffs, for export of frozen buffalo meat from a plant at Muzaffarnagar, U.P. In 2015 they commissioned this poultry plant. It was shut down during the Covid lock-down and is now probably available for sale. Domain name http://mikichicken.com has expired. |
| 129 | MTR . Started in 1924 as a restaurant called Brahmanara Coffee Club and later in 1951, changed to Mavalli Tiffin Room in Bangalore. During the Emergency, unable to conform to the prescribed pricing orders of Indira Gandhi, they diversified into packaged convenience foods. Around 2008 they were acquired by Norway's Orkla Foods. They produce seasonings, RTE foods, curries and RTE meals. In 2012 the original owner P.S. Maiya, no longer encumbered by the agreement with Orkla, re-entered the RTE foods segment with a new company. Given the dynamism of Maiya and Orkla, they are both quite likely to enter the RTE chicken sector, given its growth potential. |
| 130 | Meat Masters . Incorporated in 2000, a producer & supplier of frozen vegetarian & non-vegetarian (fish, mutton and chicken) and RTE products in retort pouches and filled products like sausages. They have set up a new processing facility for further processed meat products at Ladhawal Food Park near Ludhiana in Punjab. Meat Masters sells through own stores BigNMeat, other retailers, and directly to hotels and restaurants in that region http://www.meatmasters.co.in . |
| 131 | Meat Products of India , a Kerala government company established in 1973, operating in Chalakudy and Edayar, with bought-out chicken meat and pork from own farms. Produce feed and RTE products. Accumulated losses exceed 3 years' turnover. In mod May 2003 they were planning a captive 1000 BPH primary processing facility. |
| 132 | MP Pashudhan Nigam , Bhopal, 500 BPH by RND in 1997. Scrapped. When newly commissioned, this plant inspired Dr Anaokar, then MD of Godrej Agrovvet, to model his Hoskote unit on it. Eventually his Hoskote facility was also scrapped. |
| 133 | Mohan Breeding Farm , 1/259, Tiruchy Road, K.S.N. Puram(PO), Palladam, Tirupur (Dt), Tamil Nadu- 641 662. https://mbfgroup.in/contact-us.php . Operate a broiler integration selling broiler hatching eggs, broiler chicks, broiler meat & broiler pellet feeds. |
| 134 | Monrovia Agro Foods , Bhandgaon, Pune, Maharashtra, 500 BPH by Storm Engg in Jan 2014. |
| 135 | Nagpal Frozen Foods , Barwala, Haryana, 1000 BPH plant commissioned by RND in 2007 and operated by Nagpal's relative Mulk Raj and his sons under the name of Chandigarh Poultry, suppliers to the armed forces. Chandigarh Poultry was later renamed AV Ventures. Nagpal Frozen was closed in 2017 for non-compliance with pollution control laws and has probably been scrapped. Following this, AV Ventures decided to set up their own plant in Panchkula. It is listed in table 1, part A. |
| 136 | Navi Nutrix , 750 BPH by RND at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Sriya Foods |
| 137 | Nandus Foods Pvt Ltd. Headquartered at Bangalore, the Nanda Group, comprises 11 small companies promoted by P. S. Nandakumar, an old business associate of Rao of VH. As integrators, Nandus skipped the processing stage, venturing directly into RTE in 1989 with a 400mm Koppens forming-frying line and a 32 tonne frozen store. They initially ran it themselves, and at one stage even fought and lost a legal battle in 2007 with the international restaurant chain Nandos Indage Restaurants P. Ltd over brand ownership. The RTE line was leased to Suguna in 2007 for a five year period. At the turn of the century they acquired a small Linco slaughterhouse, which had been closed down and mothballed for sometime by its previous owners in UAE, in collaboration with Godrej Agrovvet and Sheikh Hamed bin Butti under the name of Al Rahba. Around 2015 they turned their attention to processing with a used RND line in Karnataka which is now closed. Planned a 2000 BPH processing plant, placing an order with Marel. Later abandoned the project to work instead as a Spoke facility in Bangalore, integrating it with their existing RTE kitchen. They get 6000 birds from their farms contract-processed every day by ProTAC and distribute raw and RTE chicken products through 55 stores within the city. Run by Nandakumar's two sons Naveen & Narendra Pasuparthi. |



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| 138 | Nensey's Poultry , Valsad, Gujarat, 300 BPH by RND around 2002. It is learnt to have been sold to an unknown party. |
| 139 | Parsekar Foods , 615, Devafather Bethoda, Ponda, Goa - 403401. Established in the year 1983 as retailers. Operate a 700 BPH plant supplied by Deccan |
| 140 | Peninsula Foods Pvt Ltd , a division of DeeJay Group, Bangalore, owned by David Lobo, set up a 1000 BPH Meyn plant in the late 1990's. For tax benefits it was run by a complex arrangement of four DeeJay companies. Closed around 1998 following labour unrest which coincided with Lobo's unsuccessful foray into broiler pure-lines with Ross – in direct competition with his one-time partner Dr B. V. Rao of VH. The plant was scrapped. |
| 141 | Perfect Poultry Pvt Ltd . Plant and HQ at 27 Ft Road, Chowk Green Field, Majitha Road, Amritsar, Punjab. Earlier 1000 BPH Storm plant which was replaced by Meyn's 4000 BPH plant. For the expansion they retained only one plucker, screw chillers and some secondary processing machines. Storm equipment, suitable after balancing, for 1000 BPH is probably available for sale. |
| 142 | Pioneer , Hyderabad, Andhra Pradesh, 500 BPH by Dhopeswar. It has been scrapped. |
| 143 | PL-480 plants . Even before VH set up their first poultry processing plant in India in 1986, several carousel track type prototypes from Diamond of USA arrived as grant to the Indian Government under the PL-480 scheme. As far as we are able to ascertain, they were installed in Chandigarh, Mumbai, Aligarh, Orissa, Kerala and Andhra Pradesh. We have seen the one at Chandigarh (CPDO) and the one of Mafco , Mumbai, the latter being bought in an auction by VH and mothballed at Kamshet. The Mafco plant is probably scrapped by now, but the remaining machines may yet be put to use if auctioned by the government. |
| 144 | Prabhat Foods . Established in the year 1963. They sell Chicken RTE products directly to some institutions and also retail through half a dozen outlets in Mumbai. Mhatre, the owner, is related to J. Desai of VH. The website https://www.prabhatpoultry.com is for sale |
| 145 | Ratnagiri Cooperative , Chiplun, Maharashtra, 300 BPH by RND in 2003. Now closed and possibly scrapped. |
| 146 | Riverdale Foods , Somatne, Maharashtra, 1000 BPH by Meyn around 1995 installed for Harianawala brothers, ex-employees of VH. It closed around 2003 when its arrangement with McDonalds became unprofitable. Was bought by ANC Holdings, Dubai for its prime location near the Mumbai-Pune expressway. The plant has been scrapped. |
| 147 | RFK Green RFK Green, Pulwama, J&K. HQ at C-37, First Floor NSM, Azadpur New Delhi. The 2500 BPD plants was ordered in July 2017 and installation was completed in 2019. Commissioning is delayed due to social unrest in the area. |
| 148 | Ruchi Agro Industries Ltd , Chikmagalur. It is an RND manual plant of unknown capacity. |
| 149 | Royal Agro Fresh LLP , Chennai, TN. Royal Agro Fresh LLP (RAFL) was incorporated as a limited liability partnership in July 2018 and operates from M. C. Nichols Road 55/21 Buckingham Terrace, Nowroji Road East, West Chetpet, Chennai, TN. It set up a 500 BPH plant supplied by Deccan Automation Technology in 2019 and sells portions through Big Basket |
| 150 | Royal Foods Pvt Ltd/Shakir Shaikh , Lohegaon, Pune, Maharashtra, 500 BPH by Storm in Nov 2013. |
| 151 | Saaras Breeding Farms , Odisha, a 500 BPH plant, currently under fabrication by Storm |
| 152 | Sai Agri , Kakinada, Andhra Pradesh, 500 BPH used Linco plant imported and installed around 2001 to cater to nearby oil platform workers. Closed shortly thereafter. Bought and mothballed by Srinivasa Hatcheries Ltd, Vizag. |
| 153 | Sandip Mukherjee , One time plant manager of Arambagh Hatcheries , is operating a 500 BPH manual processing plant at Gariahat, near Kolkata in West Bengal. |
| 154 | Shivaa Chicken , 2/418, Palladam Main Road, Opp. Microwave Station, Puliampatty, Pollachi, Coimbatore, TN. Manual dressing of unknown capacity admin@shivaachicken.com http://www.shivaachicken.com |
| 155 | Shiva Farms , Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery |
| 156 | Shiva Poultry Equipment , Barnala city, is operating a 500 BPH processing plant supplied by RND at GADVASU University in Ludhiana. Their brand name as “ <i>Hygrow Chicken</i> ” |
| 157 | Sirsa Foods , at 2, Lavkush Dharamshala, Balmiki Chowk, Opp. Khunger Sweets, Sirsa, Haryana. A 500 BPH plant supplied by Storm. Commissioned by first quarter of 2024. |
| 158 | S.M. Feeds & Farms Pvt. Ltd , No. 294, Thiruvallur High Road, Alamaty Village, CCBF Post, Redhills Chennai – 600052. A 500 BPH plant commissioned by Storm in 2017 |
| 159 | Sood Poultry at Jullunder, Punjab. A 500 BPH plant commissioned by Storm in 2020. |
| 160 | Souza Hatcheries , Mangalore, Karnataka. HQ at Souza Commercial Complex, Highlands, Falnir Road, Mangalore http://www.souzahatch.com . Purchased a local RND plant of 500 BPH, then bought a 1000 BPH plant from Bayle. Both older plants were sold to Ideal Chicken, who revamped the machinery and operate a plant as listed in Part A of this table. |
| 161 | Srinivasa Farms Private Limited . Plant at Mega Food Park, Kurichedu, Prakasam, AP. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. https://www.srinivasafarms.com . Order for the 2000 BPH plant was placed on Marel in late 2017. The plant is delivered but seven years on we still have no information on its commissioning schedule. |
| 162 | Sriya Farms and Feeds Pvt. Ltd., 208 B, 3rd Floor, 80 Feet Road, IndusInd Bank buildings, 2nd Block, HBR Layout, Bangalore- 560043 admin@sriyafarm.com |
| 163 | S.S.S Hatcheries , 258/1-1, N.S.R.Road, Venkitapuram, Coimbatore-641025, Tamil Nadu. A 500 BPH plant set up by Storm in 2023 |
| 164 | Star Agrovet Marketing , Manjri, Pune, 700 BPH set up by Deccan Automation in 2022. They process chicken under contract with Shalimar Corporation. |
| 165 | Sujay Feeds , SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, 200 BPH manual slaughter. |
| 166 | Swift Foods , Dadri, Uttar Pradesh. An automatic Stork 4000 BPH processing plant commissioned in the early 1990's by Jagdish Prasad, in competition with VH's Kamshet plant of 1000 BPH. It had an RTE section. Closed around 1995, then scrapped. |

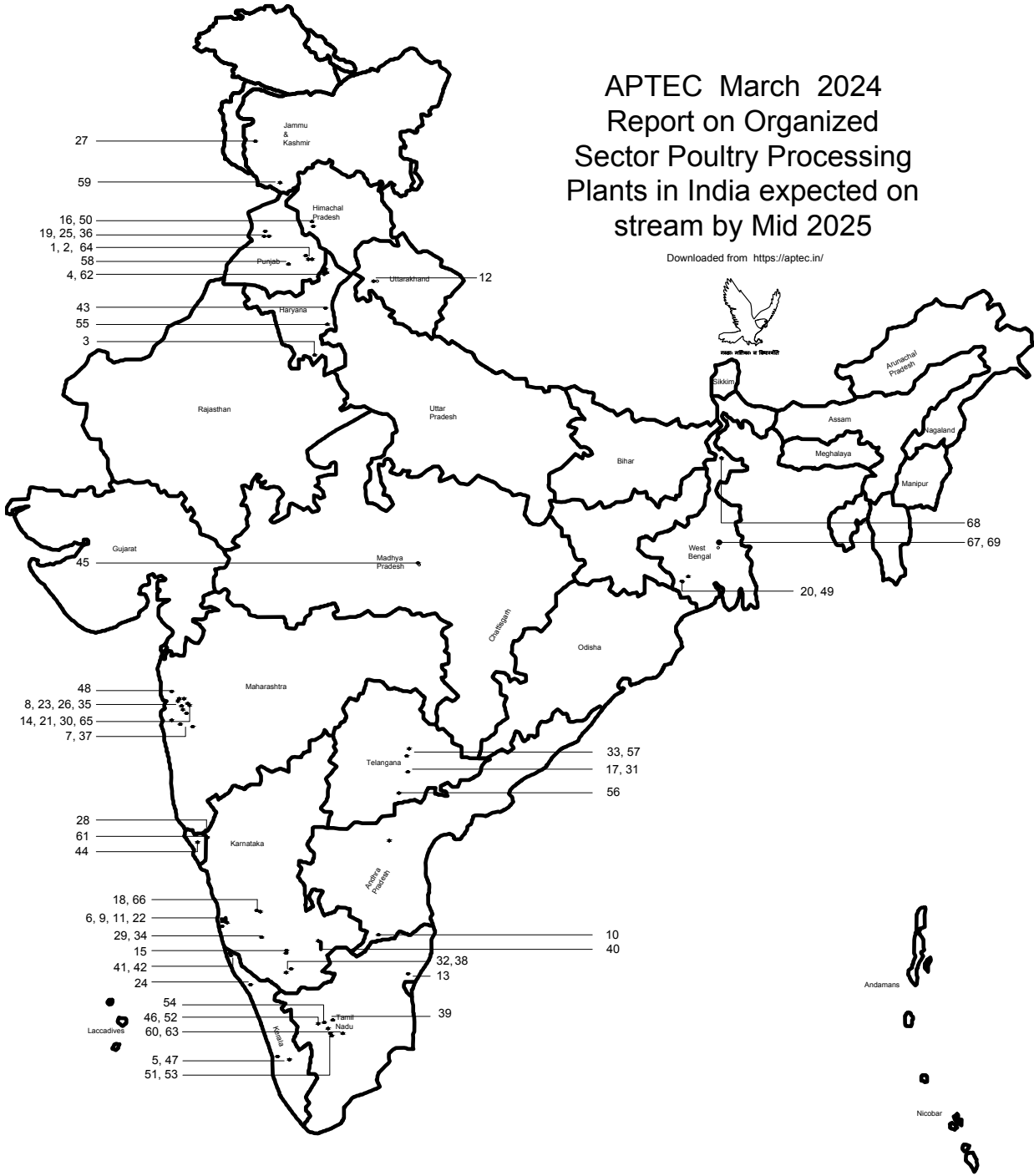


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|---|--|
| 167 | Taurus Foods was set up in the mid 1990's. It produces marinated, smoked and cooked chicken RTE products at its plant at EPIP, Kasna Site 5 Greater Noida, for which it sources raw chicken meat from SHL Agro (now Suguna) and others. It has a capacity of 25 tonnes of RTE products per month https://www.taurusfoods.in |
| 168 | Thai Thirunaal Agro Foods Pvt Ltd. A 500 BPH plant commissioned by Deccan Automation Technology at Coimbatore in 2022. |
| 169 | Unitas Foods Pvt. Ltd M. G. Road, Ghitorni, Delhi. Was incorporated in 2004 and operates QSR and food kiosks business as well as serving bulk buyers. It offers chicken meat, vegetable frozen <i>dimsums</i> or <i>momos</i> , rolls and <i>samosas</i> and claims to be the largest producer of <i>dimsums</i> in India. http://www.unitasfoods.com |
| 170 | Unnat Feeds , Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana. An order was placed on Lark Engineering. Learnt to be under fabrication from early 2021, but lack important approvals from the government, therefore commissioning date is unknown. The project may have been scrapped. |
| 171 | Violet Industries/Souza Hatcheries , Mangalore, 500 BPH by RND. Not yet commissioned. |
| 172 | Vista Agriculture & Food Products , Khurdah Road, Bhubaneswar, Odisha, 750 BPH by Storm Engg in 2013. Plant is closed |
| 173 | Walvekar Hatcheries Ltd, Pune. 1000 BPH plant was confiscated by the Mumbai Customs due to some irregularities. When auctioned several years later, the lot was picked up by Dr C. R. Behl of VH with a view to install it near Bangalore. Later, most of the machines were used by VH to replace run-down Marel machines at their Kamshet facility. |
| 174 | WBFCSL/R. K. Doloi , MLA, Midinapore, West Bengal, 300 BPH by RND in 1998, ostensibly for the economic up-lift-ment of local tribals. It was never commissioned. Meanwhile the owner tried selling the equipment or the company, first to Amrit Feeds and then on 15 Jan 2020 to VH but failed each time. |
| 175 | Web based delivery platforms for order booking and order tracking using purpose-designed apps and QSR service. Or D2C These include (1) Amazon https://www.amazon.in/gp/bestsellers/grocery/ ; (2) Food Panda https://www.foodpanda.com/ ; (3) Fresh-to-Home https://www.freshtohome.com/ ; (4) Licious https://www.licious.in/ ; (5) Meat And Eat https://meatandeat.in/ ; (6) Road Runners https://www.meatigo.com/ ; (7) Swiggy https://www.swiggy.com/ ; (8) Zapp Fresh https://www.zappfresh.com/ ; (9) Zomato https://www.zomato.com/india |
| 176 | Zorabian , Khopoli, Maharashtra, Originally a drum plucker manual dressing facility, upgraded to 500 BPH by RND in 2007. Following the death of Khorram Zorabian, the plant is now run by his daughter Perzad. |
| <p>Note: This list is as exhaustive as we could make it and covers slaughter operations in the un-organized sector. Counting from within this list, we arrive at a total capacity of 60,400 BPH, of which scrapped capacity plus potentially re-deployable capacity is 37,250 BPH and operating capacity is 23,150 for primary slaughter.</p> | |



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|----|-----------------|----|---------------------|----|---------------------|----|------------------|----|----------------|----|-------------------|----|-----------------|
| 1 | Alchemis | 11 | Coastal Farms | 21 | Huda Foods | 31 | Mayuri Broiler | 41 | Provit Foods | 51 | Shanathi Feeds | 61 | Suguna, Belgaum |
| 2 | AI Golden | 12 | Doon Valley D'oor | 22 | Ideal Chickert | 32 | Meat And Eat | 42 | Provit Foods | 52 | Sivasakthi Agro | 62 | Suguna, Lalru |
| 3 | AOV Agro | 13 | Fresh Culture | 23 | Japfa Comfeed | 33 | Nafees Poultry | 43 | RM Delicious | 53 | SKM Feeds | 63 | Swami Feeds |
| 4 | AV Ventures | 14 | Godrej Tyson Talaja | 24 | KPF Chickert | 34 | Nice Meat | 44 | Royal Foods | 54 | Sky Foods | 64 | Syra Foods |
| 5 | Ayishas | 15 | Godrej Tyson Hosk | 25 | Rai Poultry | 35 | Penn Foods | 45 | Sabir Qureshi | 55 | Skylark Foods | 65 | VH, Kamsheet |
| 6 | Baraka Overseas | 16 | Goel Foodworld | 26 | KNV Processed | 36 | Perfect Poultry | 46 | Safa Foods | 56 | Sneha Farms | 66 | VH, Davangere |
| 7 | Baramati Agro | 17 | Goldchick | 27 | Khazir Poultry | 37 | Premium Chick | 47 | Samrans Fresh | 57 | Srinivasa, Taniki | 67 | WBLDC, Harin |
| 8 | Bhagyashree | 18 | Golden Hatcheries | 28 | Kwality Animal Feed | 38 | Pragati Broilers | 48 | Sethwala Foods | 58 | Star Foods | 68 | WBLDC, Siligur |
| 9 | Bharat Agrovet | 19 | Healthy Choice | 29 | Lifeline Feeds | 39 | Premier Breeding | 49 | Shalimar Galsi | 59 | Star Foods Jammu | 69 | WBLDC, Harin II |
| 10 | CP India | 20 | Hitech Hatch | 30 | Maval Agro | 40 | ProTAC Foods | 50 | Shalimar Una | 60 | Suguna, Vayalur | | |



4 Big Ticket Processing

Often in the past I have been asked why the listing of plants in table 1 of my bi-annual Reports do not carry production figures in place of capacity figures. There is a very logical reason for this. Capacity figures can be verified and resolved by processing experts but production data cannot be verified in retrospect. I have myself changed some claimed capacity figures in the past based on my experience. Several years ago I downgraded VH Pune plant capacity from their claimed figure of 4000 BPH to 3000 BPH because the layout is severely constricted, being expanded from the initial capacity of 1000 BPH of 1986 to a claimed 4000 BPH some years later. On the converse side, for the other VH plant at Davangere, although I have received market inputs from time to time that they operate fairly consistently at 5000 BPH, the figure mentioned in table 1 is always the installed capacity of 6000 BPH.

Recently Siva Sakthi claimed a capacity figure of 6000 BPH on the grounds that they were capable of processing at that rate. I verified this claim with Marel and they admitted that while this was indeed so, the official installed capacity was 5000 BPH as mentioned in table 1.

Poultry processing plants are able to operate at higher and lower speeds than their official capacities. This is possible because the overhead transport chain is controlled by a VLT, an electronic speed regulator that allows this within certain limits. Most plants may be sped up, again within limits, imposed not only by the electrical circuit, but more importantly by other hooked-up pieces of equipment, working space in the layout design and skill of workers. This regulation helps process more during live bird gluts and less during price peaks. It is also the most important feature contributing to profitability – it being a fact that there are periodic price gluts and peaks during a year in this industry, and plants having adequate blast freezing capacities make money during gluts.

In designing plants I have always paid special attention to this by overdesigning the critical pieces of equipment that impose a limit on product quality when lines are sped up during gluts to improve the bottom line. That is why my plants do not give up the ghost and break down when overdriven – at precisely the time when they are required to show their colour.

But I do agree that it is useful to verify production data, particularly of the industry leaders, from time to time, to know the health of this industry. To do so, I have listed the top five processors in table 2.

| Rank | Plant owned/operated by | Nominal capacity in BPH | Estimated monthly output in lakh BPM | Plant supplier |
|------|---|-------------------------|--------------------------------------|----------------|
| 1 | Sneha, Hyderabad, Telangana | 12000 | 26 to 32 | Marel + Meyn |
| 2 | Shanthi Feeds, Pappampatti, TN | 12000 | 26 to 28 | Meyn |
| 3 | Suguna Foods (three plants - Vayalur, Ambala and Belgaum) | 7500 | 16 to 18 | Meyn |
| 4 | SKM Feeds, Dindigul, TN | 8000 | 12 to 13 | Meyn |
| 5 | Lifeline Feeds, Chikmagalur, Karnataka | 3500 | 9 to 10 | Meyn |

5 Capital Subsidies Granted To The Industry

For several years past the Union government has been issuing lists of companies in this industry which have been adjudged suitable for receiving capital subsidy for processing poultry and/or setting up cold chains. Three of them find mention in table 1 and although there are probably more, but as I am not yet in full possession of details, I have not listed them in table 1. They will be listed in my next issue of the Report.

Disclaimer: The author, Alok Raj, is Director APTEC, an independent technical consultancy company for the poultry and meat processing industries with nearly a quarter century of practical experience. He may be reached at +91 98110 49914 or rajalok@gmail.com and alok@aptec.in. The views expressed here are the author's own and have been so expressed in the interest of the processed broiler industry and meat industry in India. They do not necessarily reflect ideas or interpretations attributable to any other person or organization. In so much as readers seek to excerpt sections of this article for discussion or



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Endnotes:

ⁱ https://www.youtube.com/watch?v=1AKM7_4rjRg

