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

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1 Schedule

When this Industry Report was uploaded, the earlier Industry Reports dated October 2022 was taken down. Regrettably there was no Report dated October 2024 for reasons beyond our control. You will now find the Industry Reports dated March & October 23, March 24 and the present one for March 25 on the website. After this issue we aim to upload the next Industry Report around mid-October 2025. If you have a comment, you are welcome to share it with us.

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2 Size Of The Processing Industry, Including History Of Its Constituents

Table 1 List of Poultry Processing Plants - Existing And Those Expected On Stream By Mid 2026 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 an individual company's plans).				
A	The Organized Sector - Comprising Plants Of 1000 BPH Or Higher Capacities.			
	Plant, location	Make	Capacity	Remarks
1	Abis Proteins P Ltd , Aurangabad, Maharashtra. https://www.ibgroup.co.in/	Meyn	12000	Part of the IB Group of Rajnandgaon. Contract signed in 2024, plant may be ready by Q2, 2026.
2	Abis Proteins P Ltd , Chittoor, Andhra Pradesh. https://www.ibgroup.co.in/	Meyn	12000	Part of the IB Group of Rajnandgaon. Contract signed in 2024, plant may be ready by Q2, 2026.
3	Al Arif Foods , Vakwady Road, Kumbashi Post, Kundapur Taluka, Udupi Dist., Karnataka 576257 https://www.alariffoods.com/	Storm	1000	Started by Haji Hamza as a fish trader in Uttara Kannada district, they moved into broiler farming in 1993 and eventually became a broiler integrator under the flagship Al-Arif Poultry Company. Originally a 500 BPH plant, it was expanded to 700 and now to 1000 BPH. They also operate a 2TPD RTE plant.
4	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 is likely to be commissioned in Q2 of 2025, after which this plant may be available for processing its own brand or may again be available for lease.
5	Al Golden Foods , Dera Bassi, Punjab. https://www.exportersindia.com/al-golden-foods-pvt-ltd/	Meyn	2500	A Ghazipur Mandi commission agent operating under four identities (Aizal Foods Pvt Ltd , Al Golden Foods Pvt Ltd , Golden Foods Specialities Pvt Ltd & Labib Foods Pvt Ltd), proposes a Rs 33.7 crores processing plant for which a govt capital subsidy of Rs 4.2 crores has been granted. The plant may be on stream by Q4, 2025.
6	Al Halal Foods , 1098, Dohole Village, Kalamboli, Padgha, Taluka Bhiwandi, Dist. Thane, Maharashtra. https://www.exportersindia.com/al-halal-foods-company3354292/	RND/Deccan	2000	Originally built and commissioned by RND in 2016 with a capacity of 1000 BPH. It subsequently closed down and was thought to be up for sale. But it is being repaired and expanded to 2000 BPH for operation by Q4, 2025.
7	Annai Poultry , No. 5-B, ASRN Complex, Palayamkottai Market, MKP Hospital Road- Tirunalavelli, Tamil Nadu 627001.	Storm	1000	The plant may be in operation by end 2025.
8	AOV Agro Foods Pvt Ltd , Khasra Nos. 20-22, 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. Originally an RND line, commissioned in 2016,



				then modified to 2000 BPH in 2017. Replaced with a 4000 BPH line from Meyn in Q2 of 2022.
9	AV Ventures , Plot 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 this plant's 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.
10	Ayisha Foods , Methala, Eriyad, Kandamkulam P.O, Kodungallur, Thrissur, Kerala 680669.	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 during 2022-23 set up the poultry processing plant to expand their product range. They sell under the brand name <i>Ayisha's Tasty Magic</i> .
11	Baraka Overseas Pvt Ltd , Kallai, 1st Cross Road Oddedagully, Harekala, Mangalore Karnataka.	Deccan	1500	Established as a partnership firm in 1979 and incorporated in 2006. This company has extensive national and international presence in processed seafood. Its poultry processing plant came on stream in 2022.
12	Baramati Agro Ltd. , HQ 4th Floor, Farena Corporate Park , Kharadi Bypass Rd., Hadapsar, Pune- 411028, India. Plant at 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 and 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.
13	Bhagyashree Chicks , Rajguru Nagar, Pune.	Deccan	<u>1000</u>	This company is a broiler integrator with 18000 Cobb breeders. Their plant is under installation and expected to be on stream by mid 2025.
14	Bharat Agrovet , Plant at Ganjimutt, Mangalore, Karnataka. HQ behind Annapoorneshwari Building, Mahaveer Circle, Pumpwell, Mangalore, Karnataka.	RND/Storm	2000	Started with the old plant of Lifeline Feeds built by RND, which was reconditioned & reinstalled by Storm in Nov 2015 with a capacity of 1500 BPH. Later expanded to 2000 BPH. The group has plans for a modern 3000 BPH imported plant at a project cost of Rs 55.4 crores for which capital subsidy of Rs 9.9 crores has been approved. This facility will come under the Provit name. See also Provita & Ideal Chicken .
15	Cedar Integrated Food Tech Pvt Ltd. , 7/732/9-11 Green Tower, Mannuthy-Nadathara Road, Pattalakunnu, Thrissur, Kerala 680651.	-	3000	Earlier known as ESAF Retail , it was established in 2008 to bypass middlemen in FMCG retail, electronics and fibre trade. Now operating in poultry and cattle feeds. The company proposes a poultry slaughterhouse at a project cost of Rs 66.6 crores for which a govt capital subsidy of Rs 10 crores has been sanctioned.
16	Charoen Pokphand 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 brand sold as <i>Five Star Chicken</i> (ref part B of this table). It was learnt that they faced short supply of breeding stock in early 2023. Are now in the process of revamping their operations & plant.
17	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. Existing plant, started in 2021, was operating intermittently, but lately they are learnt to have revamped their facility for more regular operation.
18	Delicious Foods , No 17, Doddballapura Taluk, Sneha Clinic Tubagere Hobli, Masthimmanahalli, Bengaluru Rural, Karnataka, 561205	Fabtech	3000	Owner is one Laxmi Sagar. Plant was commissioned in Dec 2024. See also Hayagreeva Food Processing , also located in Doddballapura Taluk.
19	Doon Valley Poultry (Savoury Delights) , 54 A Race Course, Dehradun, Uttarakhand.	Storm	1000	Expected to be commissioned by mid 2025.



20	Food Lovers (Hitech Hatch), Metropolitan Co-Op. Housing Society Ltd., Sector B, Plot 28, Canal South Road, Kolkata 700 105. West Bengal. https://hitechhatchfresh.com/	Meyn	1500	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 are distributed among 6000 contract farmers. For its Rs 37 crore project the company has been awarded govt capital subsidy of Rs 7.3 crores. Expect commissioning by Q3 of 2025.
21	Fowl Fusion Kerala Pvt Ltd, 13/634, Rayonpuram Post, Perumbavoor, Ernakulam, Kerala 683543	Marel	2000	Incorporated in Oct 2023. Plan a 2000 BPH plant at a capital cost of Rs 29.1 crores, for which they have been awarded govt subsidy of Rs 9.3 crores. Expect to be on stream by end 2025.
22	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 came on stream in Q4 2024
23	Fresko Choice Meat Products Pvt Ltd, Shops at various locations in Bangalore. Plant at Mallur, Karnataka	RND	2000	The company has a warehouse in Nagondahalli near Hosur and sell through several outlets in Bangalore. Their plant was commissioned end 2024.
24	Godrej Foods, Plant at Taloja, Maharashtra https://www.godrejagrovet.com/businesses/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 villages whose inhabitants regularly protest against the smell nuisance. Tyson have exited the 2008 partnership and Godrej Agrovet have bought back their 49% stake in Aug 2024.
25	Godrej Foods, Plant at Hoskote, Karnataka https://www.godrejagrovet.com/businesses/godrej-tyson-foods	Marel	3000	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 under the brand name <i>Yummies</i> on a 400Kg/hour used line bought off The Waterbase of Nellore, a failed fish RTE unit. Falling within a smart city zone, the plant is now under pressure to relocate. Tyson have exited the 2008 partnership and Godrej Agrovet have bought back their 49% stake in Aug 2024.
26	Goel Foodworld, HQ at Plot no 23A, Industrial Area, Shogi, Shimla, Himachal Pradesh. Plant at Khasara No.-22, 47, 48 UP Mohal Bumbli, Tehsil- Ghanari, District Una, Himachal Pradesh 177201	Storm	3000	A replacement of the existing 500 BPH plant by Dhopeswar. First expansion executed by Storm. Now relocated to industrial area. This plant includes existing machines, old Meyn machine look-alikes and new machines from Storm. The plant was commissioned early 2024.
27	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, this plant has been in intermittent operation. First to export Indian processed chicken and also first in the world to install an automatic re-hanging machine and continuous rendering plant at this capacity.
28	Golden Fresh, HQ at Golden Hatcheries Building #3, Queen's Road Cross near Congress Committee office, Bangalore, Plant at Sy No 37/7, Hanumanahalli Village, Kuppelur Hubli, Haveri, Karnataka. 581119 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 plant. Their manual slaughterhouse within Bangalore city is expected to have been closed with commissioning of this plant in August 2023.
29	Hayagreeva Food Processing, Plant at Dodballapur, Karnataka	RND/Fabtec	1000	Originally a 500 BPH RND plant owned by Chicken Stop , commissioned in 2020. After passing through several hands it is now owned by one Mr Laxmi Sagar. The plant was refurbished, expanded and re-commissioned by Fabtec in 2022. Performs merchant processing for Anjaneya and Shalimar .



30	Healthy Choice Poultry , village and post Wadala, Tehsil Majitha, Dist Amritsar, Punjab	Meyn	1300	Plant owned by Gurpuran Singh Randhawa. Commissioned in end 2023.
31	H M A Agro , HQ at 18A/5/3, Tajview Crossing, Fatehabad Road, Agra, Uttar Pradesh 282001. Plant is at Jabalpur, Madhya Pradesh	RND	1000	The plant was originally owned by Sneha Farms who sold it to Mohd Sabir Qureshi, one time employee of Phoenix Poultry and the plant was relocated and re-installed at Jabalpur in 2019. Qureshi then sold it to H M A Agro , an established Agra based buffalo meat processor who also conducts overseas trade in cereals and vegetables with over 40 countries.
32	Huda Foods Pvt Ltd . Plant at Kondhwa. HQ at FL-I-403 Unity Park, SN-43 Kondhwa, behind Sheetal Petrol Pump, Pune, Maharashtra.	Deccan	2500	Incorporated in 2020 by Sarfraz & Aijaz Momin. who have an integration of 6 lakh broiler DOCs per month. The initial capacity of 1500 BPH was later expanded to 2000 BPH. The company now proposes a second slaughterhouse of 3000 BPH at Sukhed near Satara in Maharashtra.
33	Ideal Chicken , Highlands, Falmir Road, Mangalore http://www.idealchicken.in Also known as Provita Foods .	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 around 2017 by Ideal Chicken, owned by Vincent Cutinha. See also Ideal Chicken in part B of this table.
34	Indian Chicken , Salafi Centre in Kankanady, Mangaluru, Karnataka	Deccan	1500	Popularly known as <i>An-aam's Indian Chicken</i> , which was established in 2018. This plant came into operations during 2022-23.
35	Japfa Comfeeds Pvt Ltd , 91 Sakore Nagar Vimannagar, Pune 411014, Maharashtra. Plant at village Pedgaon, Daund, Pune, Maharashtra. https://japfaindia.com/	Marel	3000	This 3000/6000 BPH plant was commissioned in Q4, 2024. Hitherto RTE chicken was sourced from Hybro Foods , Thane in the past but now discontinued with the closure of Hybro.
36	Indian Poultry Alliance , Kishanganj, Bihar	-	9000	Two integration projects of 75000 BPD at investments of Rs 300 crores each at these locations has been announced by Mr Moiz Chunawala, MD of IPA. They expect to make these projects operational by end of 2025
37	Indian Poultry Alliance , Zaheerabad, Telangana	-	9000	
38	Kasturi Poultry Farms , HQ at G-14 Galaxy, Nanjundapuram Road, Coimbatore - 641 036. Tamil Nadu. Plant at Puspathul Village, Palani, Dindigul, Tamil Nadu. https://kasturipoultry.com/	Marel	6000	Partnership established in 1998. Operates a broiler breeder operation with a hatch size of 7.5 lakh eggs/week serving 2000 contract farmers. Entering processing with a 6000/9000 BPH plant at a capital cost of Rs 77.8 crores for which a govt capital subsidy of Rs 9.7 crores has been awarded. The plant is to be built and commissioned by Marel by Q2, 2026. Kasturi has entered the Indian Poultry Alliance (with the Allana Group).
39	KGN Processed Poultry , Dehu-Alandi Road, Shelar Basti, Chikhali, District Pune, Maharashtra 412114	Storm	1500	This is a franchise operator and commercial broiler farmer who sells processed chicken through its franchise stores and Big Basket. Processing started with a manual plant of 300 BPH which was expanded by Storm in 2018.
40	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.
41	KM Feeds & Chicken Agencies , 7/916, Koomanchira, Mannarkkad, Ariyakundu Road, Alanallur, Kerala.	Deccan	1500	A proprietorship firm registered in 2021, it operates poultry hatcheries. This plant was commissioned in Q4, 2024
42	KPF Chicken , Kavumkandam Junction, Kadanad P.O Kavumkandam, Pala, Kadanad Meenachil, Kottayam – 686653. Kerala. https://www.kpfchicken.co.in/home	RND	1000	Operate a manual processing shop and are setting up a 1000 BPH processing plant supplied by RND, expected to be on stream by mid 2025. The company was started in 1985 by Shaju Sebastian as an integrator of Cobb.
43	Kuljas Rai Poultry , Also known as Rai Poultry, Amritsar. Plant at Wadala Viram Majitha, Amritsar -143601, Punjab	Storm	3000	Set up initially as a 300 BPH Dhopeswar plant at Chamrang Road, Amritsar. Under orders to exit municipal limits, they shut this plant and put it up for sale. The new Storm plant is in



				operation from Q1, 2020. Also make RTE poultry products for local markets.
44	Kupanna Poultry Farm. No 18/1, Kalapatti to Kurumbapalayam road, Near Kadarkarai Restaurant. Plant at No 18/1, Kalapatti, near Kadarkarai Restaurant, Kurumbapalayam SSKulam, Tamil Nadu 641017.	RND	1000	Established in 1989, this Tamil Nadu company is engaged in poultry breeding with 90000 birds setting 325000 eggs per week for hatch. Owned by A. S. Ramalingam, a politician. They now propose a 4000/8000 BPH plant at a project cost of Rs 52.3 crores with a govt capital subsidy of Rs 10.4 crores. The plant is expected to be on stream by Q4, 2025.
45		Meyn	4000	
46	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> <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 Belchick . After recent acquisition by Indian Poultry Alliance , it now proposes to double its capacity.
47	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, initially a 300 BPH RND plant commissioned in 2002 which was sold to Amrit Feeds and replaced by 1900 BPH RND plant around 2005. This was in turn replaced by a Meyn 3000 BPH plant in June 2015. Later expanded to 3500 BPH. Lifeline is now expanding its integration so as to facilitate its plant expansion to 7000 BPH, the maximum that the location can hold. Their processed poultry is sold through over 40 company-owned retail outlets in Karnataka.
48	Maval Agro, Talegaon, Maharashtra	Deccan/ Storm	1000	Leased for the present from their owners (Premium Chick Feeds) by Japfa pending commissioning of the latter's own plant. Expanded from the original to 1000 BPH in 2023 by Storm under orders from Japfa.
49	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. Their new plant has been commissioned in early 2024.
50	Meat & Eat, (incorporating Kavi Proteins & Feed Pvt Ltd), 26, Sindhi Colony, 1 st Cross, J C Road, Bengaluru 560002, Karnataka. Plant in Hosur	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 capacity facility. The operations suffered business loss during the Covid lockdown but now appear to have stabilised.
51	Meatin Farms and Foods LLP, Kerala, Office: 15/809 E, Panchami Complex, Perumpilavu, Karikkad, Thrissur District, Kerala, 680519	QuMach	1000	The team comprising Ashraf, Vaikunthan, Mohamed. Mohanan & Ashique set up the facility sold by Qumach, with government capital subsidy, at Pallakad. The plant is expected to be commissioned by mid 2025
52	Nafees Poultry, Plot No 129, East Marredpally, Hyderabad, Telangana, 500026	RND	<u>1000</u>	Operated by Sarabjyot Singh, son-in-law of Harbans Singh, one time owner of Starchick (see Sethwala). This plant started around 2013.
53	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 set up by Deccan Automation came on stream in Q4 2024.
54	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 Japfa , Barbecue Nation at Sayaji. Brand name is Clucky's .
55	Perfect Poultry Pvt Ltd, Plant and HQ at Khasra No 29/13 and 29/18, village Vichhoa, Tehsil Ajnala, Amritsar, Punjab	Meyn	4000	Commissioned at 1000 BPH in July 2015 by Storm Engineering and expanded over the years to 3000 BPH. This was replaced by Meyn's 4000 BPH plant which was commissioned in Dec 21.
56	Premium Chick Feeds Pvt Ltd, Plant at Yeral Alibaug, Maharashtra. Office Gat No.	Storm	1500	Premium Chick Feeds is an integrator with operations all over India. Construction of their



	330 Near Rockhill Hotel Sutarwadi, Kolad-Pune Road 402308 https://www.premium chickfeeds.in/			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.
57	Pragati Broilers , HQ no 32, MMDA Colony, Ashoka Nagar, Arumbakkam, Chennai, Tamil Nadu and plant at Krishnagiri, Karnataka.	Meyn	2500	This plant, for a 2500/4500 BPH capacity is expected has been commissioned in Q1 2025.
58	Premier Breeding Farm , HQ 337/2b Trichy Road Opp Police Quarters Palladam, Coimbatore-641664, Tamil Nadu. Plant at Palladam, Tamil Nadu	Deccan	1500	The plant was commissioned in 2022.
59	ProTAC Foods International Pvt Ltd , Plant and HQ at 115 Allasandra, behind RTO Check Post, NH4, Mulbagal Taluk, Karnataka.	Meyn	4500	Commissioned in June 2016 at 2000 BPH. Planned as a merchant processor with <i>mandi</i> sourced live birds. Operating now on contract at 24,000 BPD for Tri Star (Kerala), Nandus , Licious , Shanti (Fortune) and Fresh-to-Home . Commissioning to 4500 BPH was completed in mid 2023. Next expansion will be to 7000 BPH
60	Provit Foods Pvt Limited . Payannoor Kerala. https://www.provitfoods.com/	Deccan	1000	Provit Foods is the flagship company of Vincent Cutinha family, encompassing Bharat Agrovet and Ideal Chicken . This family is also an integrator operating under the banner of Anupama Feeds & Farms . It retails processed poultry through over 20 outlets in Kerala and Karnataka. Besides Provit's existing 1000 BPH plant Marel is now building a 3000/6000 BPH plant near Mangalore (awarded govt capital subsidy), to be commissioned by Q1, 2026.
61		Marel	3000	
62	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 Q1 2025.
63	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.
64	Saaras Breeding Farms Pvt Ltd , NH26, Patnagarh, Balangir, Odisha 767001 https://ovofarm.in/	Meyn	1500	This company originally had a 500 BPH Storm plant, which is to be replaced by a 1500/4000 BPH Meyn plant by Q4, 2025. The project involves an investment of Rs 36.3 crores, with a govt capital subsidy of Rs 5.5 crores.
65	Safa Foods , 535 Fathima Manzil 1st Floor, Near Old Kavitha Theatre, Dr Nanjappa Road, Gandhipuram-Coimbatore 641012	RND	1000	Commissioned mid 2024.
66	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 work experience in Kuwait.
67	Sethwala Foods Pvt Ltd , plant at Talasari, Palghar, Maharashtra.	Deccan	<u>3000</u>	The original 2000 BPH consisting of Marel's 500 BPH and its relocation and expansion was replaced by Deccan Engg in Nov 2018 with this 3000 BPH capacity. Their brand name is <i>Seth's</i> .
68	Shahran Poultry Deonar, Mumbai.	QuMach	<u>1000</u>	This 1000 BPH plant was commissioned in January 2023 for Hanif Shahron, a poultry trader. Unable to meet demand, he has leased a 1000 BPH Deccan plant at Rajguru Nagar, Chakaan, near Pune and now plans a greenfield venture near Khapoli.
69	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 2500 in 2018. Expanded to 6000 BPH in mid 2023. Shalimar sells under the brand name <i>Total Chicken</i> .
70	Shalimar Corporation , Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata	Meyn	2500	This new plant of initial capacity of 2500 BPH was to come up at Una in Himachal Pradesh. Commissioning was expected by mid 2024, but



	http://shalimarcorp.in			has been delayed for want of approvals and they eventually moved out of Una. Meanwhile Shalimar Corp gets contract processing done by Star Agrovet Marketing at Manjri in Pune and Hayagreeva Food Processing at Dodballapur, Karnataka.
71	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.
72	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> .
73	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 Q3, 2022.
74	Sky Foods , 402/82 Kiluvankattur, Andiyagoundanoor, Udumalpet, Tiruppur Dist, Tamil Nadu 842154 http://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> from their Deccan plant commissioned during 2021-22
75	Skylark Foods , plant at Rai Food Park, Sonapat, Haryana. HQ at Dharamgarh Road, Safidon, Dist. 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 franchise outlets under the brand name <i>Nutrich</i> . Skylark is also a major layer integrator.
76	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.
77	Star Foods Pvt Ltd , Plant at Ladhawal Food Park, Ludhiana. HQ at Sampoorana Feeds, Phagwara, Punjab http://sampoornafoods.com	Marel	4000	Construction in progress at site. Commissioning expected by Q2, 2025.
78	Star Poultry , Johrawar Singh, Jammu	Storm	1000	Fabrication in progress. Expected to come into operation in Q3 of 2025.
79	Strategic Hitech Processing LLP , Dharapuram, Tamil Nadu	-	3000	Promoted by the Broiler Coordination Committee , Coimbatore. Land has already been bought and water supply assured. This plant is expected to be commissioned by mid 2026.
80	Suguna Foods Pvt Ltd , Vyalur, Tamil Nadu HQ at Unitea Building, No 3, Savithri Shanmugam Road, Race Course, Coimbatore. Plant at Vayalur 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 last expansion to 4000 BPH was sourced from Marel and it was commissioned in 2024.
81	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 of Alpha Agro who sold the facility to Suguna in 2019.
82	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 Kohli. Relocated,



				expanded, re-commissioned in Feb 2014. Sold in 2018 to Suguna and refurbished.
83	Sumangal Poultry Farm , Shiv Tirth, Gat no 137/1, near Ravalgaon Fata, Belgaon-Ravalgaon Road, Belgaon, Tal Malegaon (Nashik) Maharashtra. https://www.sumangalgroups.com/	Deccan	1500	The company belongs to Sumangal Group head quartered at Nashik. The plant came on stream during 2023-24.
84	Swami Chickens Pvt Ltd , (Swami Group) Plant ar 261,272 - Kottathurai Village, Perichipalayam (Post), Thappampatti Union, Palani Taluk, Dindigul District, Tamil Nadu - 624617	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 expansion with more automation in the cut-up portioning department and RTE.
85	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 in operation from Q2 2024.
86	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.
87	Venkateshwara (VH) , Plant at Davangere, Karnataka. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. http://venkys.com	Linco	<u>6000</u>	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.
88	Vimla Feeds Plant at Tuniki Village, Kowdipally Mandal, Medak District, Telangana. HQ at Chalimeda Vimla Devi Building, Sy. 93/B, NH 7, Kompally, Petbasheerabad, Quthbullapur, Medchal-Malkajgiri Distt, Telangana	Bayle/QuMach	4000	Bought original 1000 BPH Bayle plant of Srinivasa Farms which was operating at 1500 BPH, in Sept 2017 and got it recommissioned at 2000 BPH by Qumach. This plant's next expansion to 4000 BPH expected to be completed in Q3, 2025.
89	West Bengal Livestock Dev Corp , Haringhata, West Bengal.	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.
90	West Bengal Livestock Dev Corp , Siliguri, West Bengal.	Linco	1000	Combined poultry, goat, beef and pork slaughterhouse commissioned in 2022.
91	West Bengal Livestock Dev Corp , Haringhata, West Bengal.	Meyn	4000	Construction is on for a 4000/8000 BPH plant at their Haringhata location. Commissioning expected by early 2026.
92	Z & M Foods Pvt Ltd , Apeejay House Mumbai Samachar Marg, Kala Ghoda, Fort, Mumbai, Maharashtra 400001. Plant at Gat No. 12 Jategaon Khurd, Tal Shirur, Dist Pune, 412208	-	1500	Promoted by Umair Menon, an ex-banker, later a processed poultry merchant purchased the old Bayle plant of Pragathi Broilers and relocated it to Jategaon Khurd. Now planning to scrap the Bayle equipment and replace it with a 1500/3000 BPH plant at the same location.
Integrated processing capacity expected by mid 2026 based on current orders, on-stream and under-construction projects.			2,67,800	Average plant capacity is 2900 BPH.
Capacities are mentioned in birds per hour (BPH). For calculating market shares, of the total capacity of 2,37,800 (2,67,800-30,000 of Cedar Integrated, Indian Poultry Alliance - both plants, Kwalitiy expansion, Strategic Hitech and Z&M Foods)= 2,37,800 BPH) expected on stream by mid 2026, Meyn's market share is 109,100 (45.9%); Marel's is 46,500 (19.6%); Deccan's is 21,500 (9.0%); Storm Engineering's is 19,950 (8.4%); RND's is 14,250 (6.0%); QuMach's 10,500 (4.4%); Baader-Linco's is 9,500 (4.0%); Fabtech 3500 (1.5%) and Bayle's is 3,000 (1.2%); [Total 2,37,800 (100%)]				
The following proposed projects have been removed from the above table and taken to part B because of ongoing uncertainties about their future:				
1 Anjaneya 2500 BPH project at Mavin Honda. Project delayed as they waited for approval of grant of capital subsidy from the government. Indications are that they will relocate their project and finance it on their own now. No equipment ordered yet.				
2 Srinivasa Farms Pvt. Ltd, 2000 BPH, Mega Food Park, Kurichedu, Prakasam district. Equipment delivered to the site over seven years ago by Marel. No response to Aptec's repeated mail seeking information on their installation plans. Equipment supplier Marel is equally unaware of any plans.				
3 RFK Green, Pulwama, J&K. HQ at C-37, First Floor NSM, Azadpur New Delhi. Installation of this 2500 BPH plant was completed in 2019. Commissioning is delayed due to social unrest in the area.				
B	Part B of the table lists (1) small un-organized sector processing plants with manual dressing, drum plucking and conveyORIZED or partially conveyORIZED poultry processing plants with capacities under 1000 BPH and (2) closed and scrapped poultry			



	processing plants of all sizes and (3) Plants on which some work has been done but commissioning remains under abeyance for long periods and (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 and (5) web based poultry and poultry based RTE order suppliers, many of which have also acquired, or leased 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.
93	Agriotech Hatcheries Ltd , promoted by Damania brothers, started with a 1000 BPH Meyn plant in early 1990s 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.
94	Al Amani Foods Pvt Ltd , incorporated in Dec 2016 and located at Hissa Number 538, Naigoan Taluka Haveli, Pune, Maharashtra, 412202 operates a 500 BPH plant of unknown make and sells his processing offal to a merchant renderer.
95	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
96	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 spearheaded Indian Poultry Alliance which now has at least four members. https://allana.com/
98	Amalgam Group , Cochin, Kerala (Innovative Foods – Sumeru brand) was started in 1977 as a family owned seafood and spice exporting company. Diversified into processed foods in 1989 – 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. This group is headquartered at Bangalore. Their first attention was to frozen vegetables, followed by <i>parathas</i> and finally to RTE chicken based products under the ' <i>Buffet</i> ' range, offering sausages, nuggets and popcorns, <i>samosas</i> , spring rolls and burger patties in chicken and pork. Production is distributed between two plants – at Cochin and Chittoor where they have breadding, battering, frying, IQF and soup making machinery. Lacking a primary processing plant, they source chicken and pork in excess of Rs 6 crores from nearby processors. Also produce dehydrated cup chicken noodles. Recently 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
99	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.
99	Amrit Feeds , Jangalpur, Howrah, West Bengal, bought used RND plants from Lifeline Feeds and Ave Miriam and installed the combination as a 300 BPH unit at Jangalpur. 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 Rs 30 million for sale under the brand name <i>Fresco Pollo</i> . Planned relocation of this plant to Assam in 2016 was dropped. Now all facilities are closed and available for sale.
100	Amrit Feeds , Beldanga Mouza, Raghunathpur, PO Bonkati KanksaI, Panagarh, West Bengal. A Linco plant of 4000 BPH, 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.
101	Arambagh Hatcheries , 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 bank loans.
102	AOV old plant with 2000 BPH machinery from both RND and Storm may be on sale.
103	Arthur's Food Company , Bangalore. This RTE plant retails through Bigbasket, Food Basket, Foodhall, Foodworld, Metro Cash & Carry, Nature's Basket, Scootsy, Spar, Spencer's and Star Bazar. http://www.arthursfood.com
104	Assam Livestock & Poultry Corporation , Panjabari Road, Khanapara, Guwahati 781022. A 500 BPH plant from Storm was installed and commissioned in 2023.
105	A-One Agro , Pune, unknown capacity, reportedly commissioned in 2024 by Amank Engineering.
106	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 machines and some made by themselves and are slaughtering 2000-3000 birds daily.
107	Big Bird , Bangalore, unknown capacity, reportedly commissioned in 2020 by Amank Engineering.
108	Brahmagiri Dev Society , Wynad, Kerala, 500 BPH plant by RND in 2010.
109	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.
110	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, Shanthi 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.
111	Central Avian Research Institute , (IVRI) Bareilly, 200 BPH by Dhopeswar.



112	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.
113	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 Shanthi. 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. Following on the heels of having joined the Indian Poultry Alliance, Chatha are learnt to be negotiating for takeover of a recently established poultry processing plant in their neighbourhood to ensure steady supply of raw poultry meat for their operations. http://cfpl.net.in .
114	Chicago Foods , Coimbatore. Unknown capacity poultry slaughterhouse, reportedly commissioned in mid 2024 by Amank.
115	Chicken Factory , Anjananagar, Bangalore 560091. Has a semi manual operation doing 1000 BPD with Deccan equipment.
116	Coastal Farms , Mangalore, Old 500 BPH plant by RND. Scrapped and probably available for sale.
117	College of Vet & Animal Sciences , Kerala, 200 BPH plant by RND in 2003.
118	College of Vet & Animal Sciences , Parbhani, 300 BPH plant by Deccan Automation. Commissioned in 2020.
119	Contai Golden Hatcheries Pvt. Ltd , Contai, E. Midinapore, West Bengal, 300 BPH plant by RND in 2003. It is owned by Shalimar Hatcheries and probably available for sale.
120	CP India , Chennai, 500 BPH plant by RND in 2002. Scrapped and probably available for sale.
121	Darshan Foods (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 RTE/ 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 Mandi. Possesses a Meyn cone de-boner line for portioning and deboning chicken carcasses. http://www.meatzza.com .
122	Deepan Foods LLP , Pune, 2024. A 500 BPH plant supplied by Deccan & commissioned at Taloja in 2022-23.
123	Pragathi Broilers , owned by Dr Srinivasa, promoted a 500 BPH Bayle plant at Doddaballapur in a disused feed mill shed, which he sold to Z & M Foods. It is planning another facility in Karnataka, this time with an ambitious capacity of 1000 BPH but there is no news of any progress.
124	Empire Foods , Taloja, Maharashtra. 1000 BPH plant purchased from RND some 20 years ago, not yet installed. It has probably been resold to and installed by another company, or listed here under a different name.
125	Farmer Choice , Pune A 500 BPH plant supplied by Deccan who commissioned it during 2023-24
126	Farm Suzanne , 64, Montieith Road, Egmore, Chennai 600008, Tamil Nadu. Established in 1984 by Eric and Mary Rodriguez at Siruseri, near Chennai with a capacity of 1.5 TPD for RTE products, 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. May be adding a new manufacturing unit soon. http://www.farmsuzanne.com
127	Farm Value Foods Pvt Ltd , owned by Anshu Sibbal Chatli runs an RND plant of 350 BPH capacity at Barnala. It was commissioned in 2014.
128	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, their 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 outlets, 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
129	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.
130	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.
131	Godrej Foods , Hoskote, Karnataka, 1000 BPH plant from RND in 1999, which was scrapped in 2007 and replaced by a Marel 2000 BPH plant, which was later expanded to 3000 BPH.
132	Golden Hatcheries (Now Golden Fresh) , 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.
133	Henny Fresh , Odisha, 500 BPH plant by RND expected commissioning in Q2, 2025.
134	Hilary Fluff Pvt Ltd , Lucknow, 500 BPH plant by RND, expected to be ready for shipment in Q1, 2025
135	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.
136	Higrow Chicken , owner Deepak Raj Garg, runs an RND plant of 500 BPH at Ludhiana, which was commissioned in 2017.



137	Hygienic Chickens , 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, 300 BPH by RND.
138	Ideal Chicken , The Vincent Coutinho family owns three locally built processing plants – Bharat Agrovets, 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
139	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.
140	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 in 2012 acquired Adelie Foods of UK, who are contract caterers and suppliers to airlines. 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.
141	International Food Products , Chandigarh. Small RTE producer in chicken and other meats.
142	Irani Chicken Products LLB , Daman, Gujarat, 500 BPH plant by Bayle, commissioned Dec, 2013.
143	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.
144	Karma Protein P. Ltd , Haryana, A 500 BPH Storm plant being built by Storm slated for commissioning in Q2 2025.
145	Kenchick Foods , Erode, Tamil Nadu, A Deccan supplied 700 BPH plant commissioned in Q4, 2024.
146	Khushbaksh Poultry , Near Kashmir Glass House, Phase 3, Industrial Estate, Srinagar- 190001, Jammu & Kashmir. A 500 BPH plant under order from one Mr Bashir was installed and commissioned in Q4 2024 by Storm Engg.
147	Kudumbashree Broiler Farmers Producer Company Ltd , at Trivandrum, Kerala. Is a 500 BPH plant supplied by RND. Commissioning expected Q2 2025.
148	Knowledge Foods , Neral. Manual-dressing 300 BPH. Also making RTE products.
149	Ku Koo Ch Ku Poultry Farm Pvt Ltd , was set up by Pathre brothers in October 2020 at Gat No. 230 Mapgaon Road, Alibag in Raigad, Maharashtra. Is a VH breeds vertical integration with contract farming operations and live bird sale. 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 with a 500 BPH processing plant supplied by Deccan Automation.
150	Kongu Herbal Chicken Pvt Ltd , was incorporated in December 2015 by three brothers at Thirunagar Colony, Erode, TN as an integration. Their 700 BPH plant was supplied by Deccan Automation and commissioned during 2018-19. The company claims to have launched India's first antibiotic free chicken as frozen whole carcasses and parts through its own restaurant service activity from their shop at Mogappair West, Opposite Dindigul Thalappakatti.
151	KSIDC , Kerala, 300 BPH plant by RND in 2005.
152	Limra Chicken , Coimbatore, Qumach did modifications on the 500 BPH plant.
153	Malabar Agro Industries Pvt Ltd , was registered in Nov 2018 at Ernakulam in Kerala. It operates a 500 BPH plant supplied by RND and commissioned by Storm Engg.
154	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
155	Miki Exports International , Established in 1950 as Miki Food Stuffs, for export of frozen buffalo meat from a plant at Muzaffarnagar, U.P. In 2015 they commissioned their 2000 BPH poultry plant sourced from RND at the export processing zone in Taloja, Maharashtra. It was shut down during the Covid lock-down and is now probably available for sale. Domain name http://mikichicken.com has expired.
156	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. MTR produces 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.
157	Meat Masters . Incorporated in 2000, a producer & supplier of frozen vegetarian & non-vegetarian (fish, mutton and chicken) and RTE formed and filled products like sausages in retort pouches. 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 <i>BigNMeat</i> , other retailers, and directly to hotels and restaurants in that region http://www.meatmasters.co.in .
158	Meat Products of India , a Kerala government company established in 1973, operating in Chalakudy and Edayar, with bought-out raw chicken and pork sourced from its own farms. They produce animal feed and RTE products. Accumulated losses exceed 3 years' turnover. In mid May 2003 they were planning a captive 1000 BPH poultry processing facility.
159	Meatyns Farmer Producer Co Ltd , incorporated in Dec 2021 and located at 1156 E, Unit No.10 Manik Chamber, Karvir Kolhapur (M Corp.) Maharashtra 416001 Operates a 300 BPH plant supplied by Tornado Engineering.
160	MP Pashudhan Nigam , Bhopal, 500 BPH by RND in 1997. Scrapped. When newly commissioned, this plant inspired Dr Anaokar, then MD of Godrej Agrovets, to model his Hoskote unit on it. Eventually his Hoskote facility was also scrapped.
161	Mohan Breeding Farm , 1/259, Trichy Road, K.S.N. Puram (PO), Palladam, Tirupur, Tamil Nadu- 641662. Operate a broiler integration selling broiler hatching eggs, broiler chicks, meat & pellet feeds. https://mbfgroup.in/contact-us.php

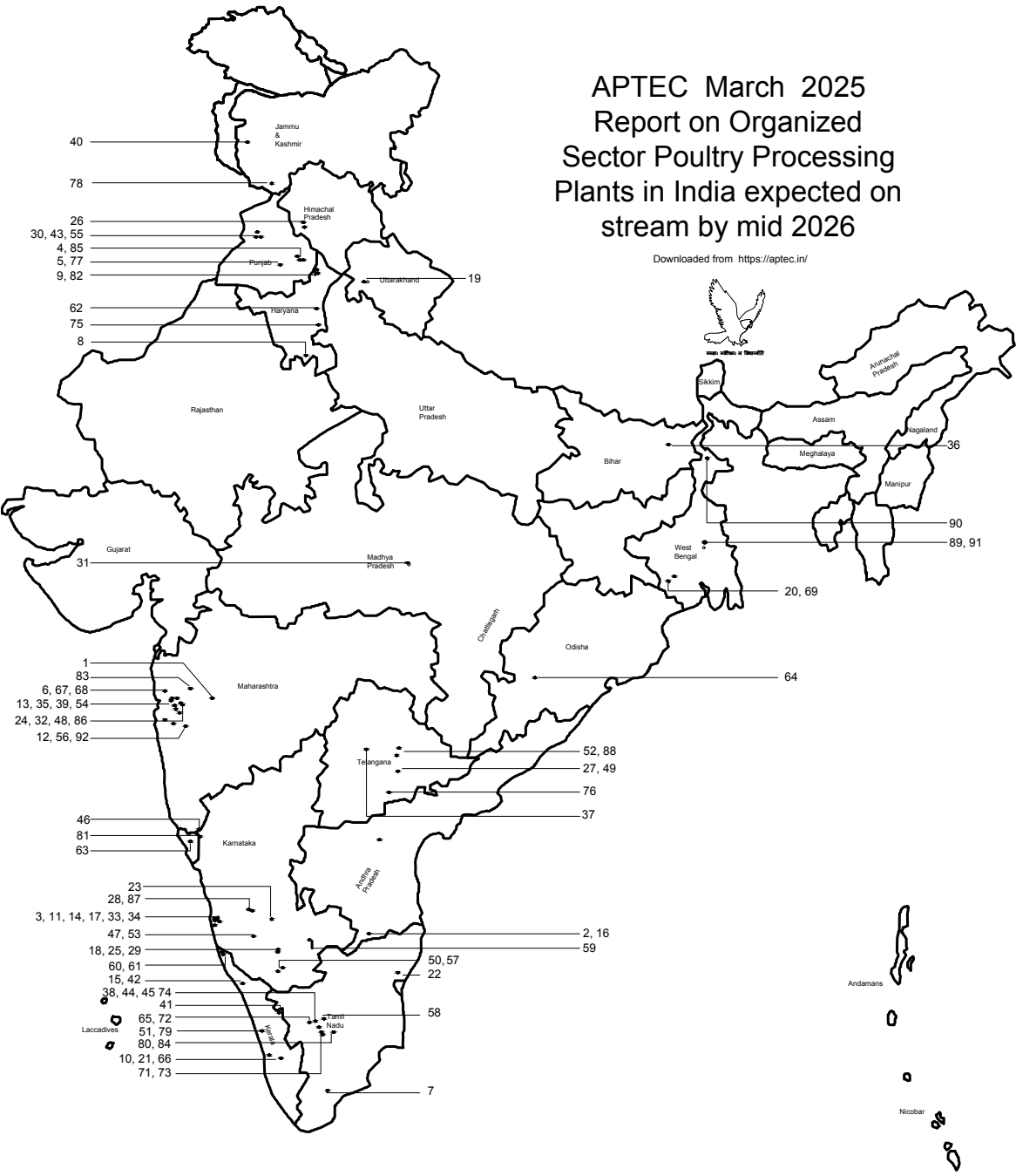


162	Monrovia Agro Foods , Bhandgaon, Pune, Maharashtra, 500 BPH plant by Storm Engg in Jan 2014.
163	Mulpuri Foods & Feeds Pvt Ltd , Ramannagudem, Vattigudipadu, Nuzvid, Andhra Pradesh. In fish, animal feeds & poultry.
164	Nagpal Frozen Foods , Barwala, Haryana, 1000 BPH plant commissioned by RND in 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.
165	Navi Nutrix , 750 BPH plant by RND at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Sriya Foods .
166	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 Agrovet 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 Naveen & Narendra Pasuparthi.
167	Nensey's Poultry , Valsad, Gujarat, 300 BPH plant by RND around 2002. It is learnt to have been sold to an unknown party.
168	Nutri Feeds & Farms started by MCR Shetty, this broiler integration in Bangalore with a capacity of 6 lakh birds per week has bought a piece of land for setting up a processing plant.
169	Nutrivit Innovation , Hyderabad, unknown capacity, reportedly commissioned in 2023 by Amank Engineering.
170	Ovo Farms , Odisha has been awarded government capital subsidy for setting up an egg powder plant in Odisha.
171	Parsekar Foods , 615, Devafather Bethoda, Ponda, Goa 403401. Established in the year 1983 as retailers. Operate a 700 BPH plant supplied by Deccan. They have plans to expand to 1000 BPH.
172	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 later scrapped.
173	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 or more, is probably available for sale.
174	Pioneer , Hyderabad, Andhra Pradesh, 500 BPH plant by Dhopeswar. It has been scrapped.
175	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 aid scheme. As far as we are able to ascertain, they were installed in Chandigarh, Mumbai, Aligarh, and some locations in Odisha, 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.
176	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. https://www.prabhatpoultry.com
177	Ratnagiri Cooperative , Chiplun, Maharashtra, 300 BPH plant by RND in 2003. Now closed and possibly scrapped.
178	Riverdale Foods , Somatne, Maharashtra, 1000 BPH plant 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.
179	RFK Green RFK Green, Pulwama, J&K. HQ at C-37, First Floor NSM, Azadpur New Delhi. The 2500 BPD plant was ordered in July 2017 and installation was completed in 2019. Commissioning is delayed due to social unrest in the area.
180	Ruchi Agro Industries Ltd , Chikmagalur. It is an RND manual plant of unknown capacity.
181	Royal Agro Fresh LLP , Chennai, TN. Was incorporated as a 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 in 2019 and sells portions through Big Basket.
182	Royal Foods Pvt Ltd /Shakir Shaikh, Lohegaon, Pune, Maharashtra. 500 BPH plant by Storm set up in Nov 2013.
183	Sai Agri , Kakinada, Telangana. 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.
184	Sandip Mukherjee , One time plant manager of Arambagh Hatcheries , is operating a 500 BPH manual processing plant at Gariahat, near Kolkata in West Bengal.
185	Sethwala Foods Pvt Ltd , 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 and later sold it to Hanif Shahran of Sharon Broilers, who in turn sold it to Sethwala in 2012. Installed by Dhopeswar shortly thereafter at 1000 BPH and later expanded to 2000 BPH with inputs from RND and Storm. This plant was replaced by a 3000 BPH Deccan plant.
186	Shivaa Chicken , 2/418, Palladam Main Road, Opp. Microwave Station, Puliampaty, Pollachi, Coimbatore, TN. Manual dressing of unknown capacity. http://www.shivaachicken.com .
187	Shiva Farms , Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery.



188	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> ”.
189	Simran Farms Ltd , (SFL) is a poultry integration that was incorporated in 1984 and became a public limited company in 1993. The company has breeding farms near Indore in Madhya Pradesh, and its parent company is involved in farming animals. SFL has a fully automated poultry feed pellet/crums manufacturing arrangement.
190	Sirsa Foods , at 2, Lavkush Dharamshala, Balmiki Chowk, Opp. Khunger Sweets, Sirsa, Haryana. A 500 BPH plant supplied by Storm. Commissioned in Q1 2024.
191	S. K. Chicken , Coimbatore, unknown capacity, reportedly commissioned in 2023 by Amank Engineering.
192	S.M. Feeds & Farms Pvt Ltd , No. 294, Thiruvallur High Road, Alamathy Village, CCBF Post, Redhills, Chennai 600052. A 500 BPH plant commissioned by Storm in 2017.
193	Sood Poultry at Jullunder, Punjab. A 500 BPH plant commissioned by Storm in 2020.
194	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.
195	Srinivasa Farms Pvt Ltd , Plant at Mega Food Park, Kurichedu, Prakasam, AP. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. 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. https://www.srinivasafarms.com .
196	Sriya Farms and Feeds Pvt Ltd. , 208 B, 3rd Floor, 80 Feet Road, IndusInd Bank buildings, 2nd Block, HBR Layout, Bangalore- 560043.
197	S.S.S Hatcheries , 258/1-1, N.S.R.Road, Venkitapuram, Coimbatore-641025, Tamil Nadu. 500 BPH plant by Storm in 2023.
198	Star Agrovet Marketing , Manjri, Pune, 700 BPH plant set up by Deccan Automation in 2022. They process chicken under contract with Shalimar Corporation.
199	Subsara Poultry , Coimbatore, Tamil Nadu. A 700 BPH plant installed by Deccan and commissioned during 2021-22
200	Sujay Feeds , SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, 200 BPH manual slaughter.
201	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. Closed around 1995, then scrapped.
202	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 .
203	Thai Thirunaal Agro Foods Pvt Ltd. A 500 BPH plant commissioned by Deccan Automation at Coimbatore in 2022.
204	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
205	Unnat Feeds , Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana. An order was placed on Lark Engineering. Learnt to be fabricating the plant themselves from early 2021.
206	Villa Sita Farm , Hyderabad, unknown capacity, reportedly commissioned mid 2024 by Amank Engineering.
207	Violet Industries/Souza Hatcheries , Mangalore, 500 BPH plant by RND. Not yet commissioned.
208	Vista Agriculture & Food Products , Khurdah Road, Bhubaneswar, Odisha, 750 BPH by Storm Engg in 2013. Plant is closed.
209	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 and defunct Marel machines at their Kamshet facility.
210	WBFCSL , set up by Mr R. K. Doloi, MLA, Midinapore, West Bengal. A 300 BPH RND plant sold in 1998, ostensibly for the economic benefit 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.
211	Web based D2C delivery platforms for order booking and order tracking using purpose-designed apps and QSR service. 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
212	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.





1 Abis Proteins Aurang.	13 Bhagyashree	25 Godrej Foods Hos.	37 IPA Zaheerabad	49 Mayuri Broilers	61 Provit Foods I	73 SKM Feeds	85 Syra Foods
2 Abis Proteins Chitt.	14 Bharat Agrovet	26 Goel Foodworld	38 Kasturi Poultry	50 Meat & Eat	62 RM Delicious	74 Sky Foods	86 VH Kamshet
3 Al Arif Foods	15 Cedar Integrated	27 Goldchick	39 KGN Processed	51 Meatin Farms	63 Royal Foods	75 Skylark Foods	87 VH Davangere
4 Alchemist Foods	16 C P India	28 Golden Fresh	40 Khazir Agro	52 Nafees Poultry	64 Saaras Breeding	76 Sneha Farms	88 Vimla Feeds
5 Al Golden Foods	17 Coastal Farms	29 Hyagreeva Food	41 KM Feeds	53 Nice Meal	65 Safa Foods	77 Star Foods Phag	89 WBLDC, Harin I
6 Al Halal Foods	18 Delicious Foods	30 Healthy Choice	42 KPF Chicken	54 Penn Foods	66 Samrans Fresh	78 Star Poultry Jammu	90 WBLDC, Siliguri
7 Anna Poultry	19 Doon Valley	31 HMA Agro	43 Kuljas Rai Poultry	55 Perfect Poultry	67 Sethwala Foods	79 Strategic Hitech	91 WBLDC, Harin II
8 AOV Agro	20 Food Lovers	32 Huda Foods	44 Kupanna Poultry	56 Premium Chickfeed	68 Sahran Poultry	80 Suguna Vayalur	92 Z & M Foods
9 A V Ventures	21 Fowl Fusion	33 Ideal Chicken	45 Kupanna Poultry II	57 Pragati Broilers	69 Shalimar Galsi	81 Suguna Belgaum	93
10 Ayisha Foods	22 Fresh Culture	34 Indian Chicken	46 Kwality Anima	58 Premier Breeding	70 Shalimar Una	82 Suguna Lalru	94
11 Baraka Overseas	23 Fresko Choice	35 Japfa Comfeeds	47 Lifeline Feeds	59 ProTAC Foods Int.	71 Shanthi Feeds	83 Sumangal Poultry	95
12 Baramati Agro	24 Godrej Foods Tal.	36 IPA Kishanganj	48 Maval Agro	60 Provit Foods I	72 Sivasakthi Agro	84 Swami Chickens	96



3 Is Poultry Processing Coming Of Age In India?

3.1 Growth Rate Calculations

In the Industry Report of March 2021 we had calculated the rate of build-up of processing capacity in India as 12.3% per annum CAGR over the nearly twenty year (2002-2020) period. These and the present calculations have been reproduced in Chapter 2 on “*Design of Poultry Slaughterhouse – Land and Location*” which can be downloaded from the Aptec website.

Given the passage of 5 years since we last calculated this figure, do we need to verify it? And is there merit in the not unreasonable criticism that this figure has received – that it loses its significance because it was calculated on a very small processing capacity base of 13,000 BPH existing in Q3 of 2002? We will now put these misgivings to the test. We can now re-calculate the growth rate on a more reasonable base year capacity and then project a more credible growth trend of over a longer period of nearly a quarter century (2002-2026).

We have re-calculated the growth rate for the initial sixteen years starting at 2002 and then projected growth over the remaining eight years, using the 2018 capacity as the base year. Assuming that there may be some slip-ups in installation and commissioning of new plants till 2026, taking a safe growth rate of 15.5% CAGR would seem fair. Would it not? And it is worth noting that the last few years have seen an acceleration in growth rate. Check out section 3.3 for our take on the fundamentals.

Table 2 Growth Of Poultry Processing Capacity In India			
		Growth Rate per annum (CAGR)	References (Also see endnotei)
1	Capacity build-up over the period 2002 to end 2018, with growth calculated using base year data for 2002	12.29 %	Aptec Bi-annual Report of Feb 2018
2	Expected capacity build up over the period 2018 to mid 2026, with growth calculated using base year data for 2016	15.75 %	Aptec Bi-annual Report of Mar 2025
3	Overall growth rate for the quarter century 2002 to 2026	13.43 %	Endnote

The next valid criticism relates to Aptec's estimate of the size of the wet market. When we calculated this metric we had the option to use published livestock census statistics, but we did not because we have always doubted this source. Instead we used a simple logic. Given a negligible foreign trade in poultry, the poultry livestock population was the sum of DOC placements plus backyard chicken plus layer culls – (there being only a negligible pet food industry which takes up the latter as feedstock in most countries). We got hold of broiler breeder placement data from the Broiler Breeders' Association. There were three sources of broiler breeds operating in India those days –Aviagen, Hubbard and VH (VenCobb). Each of them placed a number of broiler breeders in breeder farms which eventually produced the commercial DOCs that grew into the crop of broilers which were then slaughtered in processing plants and wet markets and formed the bulk of the poultry meat eventually consumed. Naturally, we accounted for a reasonable loss through the laying, growing and hatching stages.

What about the other sources of poultry meat? First among these is a small backyard chicken farming activity in Indian villages using local poultry breeds and dual purpose varieties bred specially for this sector by government avian research laboratories. This sector is very small. And what about layer culls? As mentioned above, in mature markets layer are exclusively used for the manufacture of pet foods. Not so in India. We use processing waste such as soft offal for this purpose. Almost all layer culls enter the poultry meat market, falsely mis-labelled “jungle fowl”, a premium product category which pampers to the palates of game bird lovers!

Because these two sectors are small in India, we guesstimated their contribution to the overall availability of poultry meat meant for human consumption. And using this method, we estimated the **current size of the wet market as approximately 85%**. Back in those days we could use the breeder placement data as foundational statistic because we had access to credible annual placement data from the Broiler Breeders' Association. We now lack access to breeder placement data and even have grave doubts as to its reliability, even if it were available at all. Why?



3.2 Is Agricultural Macrodata Reliable?

Agricultural income is outside the purview of income tax in India. Besides, sub-sectors within agriculture may fall within the definition of industry or agriculture (and may or may not attract labour laws, GST or income tax etc. for that reason) change from state to state, depending on crop or nature of agriculture (whether it is plantation or horticulture or animal husbandry) and other factors. Poultry industry verticals are particularly fraught with these vexing contradictions. Industrial scale farming contrasts with back yard farming and overall integration involving slaughter tends to be viewed as an industrial activity.

Compound this confusion with the prospects of a poultry integration spread over different states, each of which defines poultry integration differently and you have plenty of incentive for fudging data to reduce tax burden. Broiler farming is twice blessed for this nefarious activity because not only is there confusion regarding inputs, you cannot rightly estimate the output either because most of the sale is in the wet market which is entirely in the informal sector. For the same reasons, if you operate in the poultry industry, you become a natural magnet for people wishing to park their illegal wealth in your operations.

For all these reasons agricultural macrodata in India tend to be unreliable because much of agricultural activity is largely confined to the informal sector and provides ample space for money laundering. In addition to all this, because there is now a duopoly of broilers breeders (following the acquisition of Hubbard by Aviagen in July 2017), competition has heated up further and genuine data relating to market share are hard to come by.

We therefore made the current estimate based on historical data and used the present level of processing capacity build-up from our own Industry Reports. As far as growth rate projection is concerned, besides these reassuring figures, do we also see changes or major trends in the industry? We attempt a qualitative answer here.

3.3 Major Trends

- 3.3.1 A major international player in the red meat space the **Allana Group** has recently entered the poultry meat space and created the **Indian Poultry Alliance (IPA)**. Existing players **Chatha Foods** (RTE products), **Kasturi Poultry Farms** (broiler vertical including a new proposed broiler processing facility in TN) and **Kwality Animal Feeds** (broiler vertical including a 3000 BPH processing capacity which is to be doubled), have already joined the Alliance. It is learnt from reliable sources that membership to the Alliance is to be expanded soon.
- 3.3.2 IPA has announced that it will set up two new poultry processing plants in Kishanganj in Bihar and Zaheerabad in Telangana with Rs 300 crore investment in each, to process 75,000 BPD at each location. More poultry players are expected to join the Alliance.
- 3.3.2 Increasing competition in the broiler breeder space – a duopoly and likely to remain so for the foreseeable future. Competition could further improve if the government started subsidizing upgradation of open commercial broiler sheds into EC sheds to level the playing field between them. EC Shed subsidy may be the most fiscally efficient subsidy for this industry and may impact all sectors of the poultry agronomy.
- 3.3.3 At the turn of this century supermarkets and QSRs were expected to catalyze the growth of processing. Instead, growth followed the clean-up of municipalities and the consumer's own negative shopping experience in the wet market. This, despite the price disadvantage processed and packaged poultry bore in contrast with the wet market produce, which remained outside the GST purview. The emergence of Direct to Consumer Companies (D2C companies, see item 211 in table 1B) further attests to our belief that wet market monopoly has been a long-standing constraint on demand for poultry in India.
- 3.3.4 FDI has barely contributed to growth in the processing sector, perhaps because of the failure of even the few instances when outside investment did come into this industry. Nevertheless amidst continuing policy ambiguity on FDI in poultry, negative political signals against unfettered proliferation of buffalo slaughter capacity of the past has caused a strategic shift among corporates towards consolidation and growth in the poultry vertical as against the red meat space. Action by the **Allana Group & H M A Agro** endorse this belief.



- 3.3.5 The future holds great growth potential for poultry processing in India – both on account of increasing awareness of protein deficit in the traditional India diet and the increasing disposable income to pay for this transition. Meanwhile favourable conditions for international trade in processed poultry originating in India have emerged. A long standing problem – that of shortage of water for poultry processing, particularly in the peninsular regions, is likely to be addressed by the ambitious river-linking project, work on which has now been initiated.
- 3.3.6 More and more Indian fabricators have sprung up, to cater to the growing demand for processing machinery. Table 1 shows that 29.3% of gross capacity is accounted for by local fabricators as against 71.7% by overseas vendors. Their individual market shares in India have been recorded in table 1 of this Report.

Aptec has a document called **Poultry Processing Step by Step, for Small Plants - Rev 7** on the **Tools** page of the website. This document covers two main topics: a brief primer that attempts to cover the subjects of our **Handbook On Design & Operation Of Poultry Slaughterhouse** in a precis format and a directory of vendors of machinery and supplies for poultry processing. The recently revised version of **Step By Step - Rev 7** now carries names and addresses of 11 vendors of poultry processing machinery & equipment. If you seek equipment you must consult each of them!

- 3.3.7 Over the years only three plants – Alpha Agro, GoldChick and Skylark have failed to expand capacity: all others in table 1 have expanded within a few years of commissioning their initial capacities. Therefore it can be no one's argument that processing is a losing business or that there is not enough demand for mechanization in poultry processing.

4 Intellectual Property In The Digital Age - Implications For Our Industry

This topic emerged as we were compiling part of our *Handbook On Design & Operation Of Poultry Slaughterhouse – Chapter 7 – Contamination, Microbes, Solutions & Standards*. We did not intend to compile all the standards, national and international – such an attempt would be impossible simply because Standards, by their very nature, tend to be put in the public domain for free and easy access by all. No, for this Chapter we were merely tracing the context and historical need for creating and disseminating standards for the benefit of trade and betterment of life in general. We also hoped that in narrating the historical context we might succeed in encouraging our readers to take a wholistic interest in referring to Standards as SOP whenever they were in doubt about something, rather than in putting Standards aside to be read later with the electricity bill.

During our work we came across the curious case of **Carl Malamud versus BIS** – the latter being our own institution earlier known as Indian Standards Institution or ISI, tasked with preparing standards. Public spirited Malamud faced legal action from a government of India entity in 2014, for having violated the Copyright Act by digitizing and uploading, for free public access, standards and codes published by the BIS, on his not for profit website. He eventually won the legal case in 2023, not because the court judged in his favour, but because BIS realized the absurdity of their case.

We believe this case brings into focus the need to redefine intellectual property and copyright in the context of the digital age and information revolution. Therefore not only have we made it a part of the Chapter in our Handbook, we are also airing our thoughts to a wider audience – readers of the Industry Report.

Wikipedia writes about Malamud (born July 2, 1959) that he is an American technologist, an early Internet pioneer, author, and public domain advocate, known for his foundation **Public.Resource.Org**. He has spent most of his life trying to convince governments worldwide to allow free public access of the information generated by the very act of governance, instead of treating such dissemination as a new source of tax revenue by selling it under the fig-leaf protection of the Copyright Act.

Malamud purchased a CD containing the complete set of Indian Standards from BIS in June 2013, and made them available online for public non-commercial use. In the process he had to convert the information and retype much else, besides redrawing 202 diagrams into SVG vector format, retype and reformat the entire National Building Code of India and over 700 other standards into valid XHTML code to make it key-word searchable and in general make it compatible with modern search engines. All-in-all Malamud had to take all this trouble because BIS had completely fallen behind the modernizing influence of computerization. By way



of modernizing their activities, BIS had merely scanned their publications onto a CD and thereafter sold in CD format what they had earlier been selling in print format.

Malamud's work for India is not confined to BIS. He has also co-created an archive of the Official Gazettes of India. These gazettes contain the latest laws, executive orders, rules and notifications issued by the Centre and the states. Till now, Malamud has digitised 2,17,38,932 Indian records that make up around 341 terabytes of dataⁱⁱ.

Malamud has been contesting many legal cases for making European and American standards public and has won them one after another. Legal cases are weighed against him in USA because most standards-setting-organisations there are private bodies. Examples are the American Society for Testing and Materials (ASTM) and the National Fire Protection Association (NFPA). They contest Malamud because standards they made in the past were later made compulsory by law. Naturally private bodies must retain their income stream, else how can they fund the effort?

In India, the situation is different. Here, a statutory body such as BIS is tasked with laying out standards. However, not all their standards are mandatory, rather only those notified under Section 14 are required to be mandatorily followed. And BIS earned a total income of Rs. 324 crores, with a surplus of Rs. 44 crores in the year 2014 from the sale of publication containing these standardsⁱⁱⁱ. To this surplus, the small contribution Malamud made by purchasing their CD in 2013 cannot be overlooked.

So it was surprising when BIS charged that since they had spent time and effort to generate the information, by posting it on his website Malamud had violated the Copyright Act and the terms of purchase of the CD. In 2015, along with Sushant Singh, the founder of the website *Indian Kanoon*, and researcher-activist Srinivas Kodali, Malamud filed a PIL in the Delhi High Court demanding that the Bureau voluntarily publish all its standards online^{iv}.

And in 2023 while preparing for the next hearing in the case, Malamud found out to his utter surprise that the Bureau had gone ahead and actually published most of its standards on its website. And the screen displayed 'Free Downloads' in a prominent way. BIS had finally read the writing on the wall and capitulated!

But we have yet to understand the principles involved in this capitulation and why Aptec thought it necessary to bring this story to light. We believe this story is sure to give us a good founding in the techno-legal context in which we operate.

- When a statutory or private body makes standards, it absolutely **NEEDS** to copy existing standards unless local conditions and local usage demand that the text be modified. There is no merit in reinventing the wheel. No doubt, the act of copying may have involved plenty of deliberation, but certainly not any creative work needing protection under copyright! The plain fact is, that **standard-compilers themselves copy from existing standards!**
- When a standard is to be implemented under the law of the land, you cannot prevent citizens from access to it. The mere act of putting a price on it is tantamount to denying access to the law (unless the price just covers the cost of paper and printing or the price of a blank CD and the cost of burning it). The legal principle that was violated by a public institution like BIS in this case was that they made a massive profit from the sale of their standards. This transgression of legal principles is expressed as *ignorantis juris non-excusat*. Meaning ignorance of law (by its violator) is no excuse for violating it. And if the government promotes ignorance, it lacks the moral right to enforce compliance.
- If a statutory body has made the standard, its expenses have already been covered by tax money. Unless there are checks and balances in public spending and against government's appetite for taxing at every excuse, we will turn into an inefficient, high cost economy. Exactly the kind that DOGE is exposing every day in USA.
- After it is uploaded to a website, the standard-compilers incur no further cost for downloads. Continuing to earn income from the documents makes government-funded-standard-compilers rent-seekers of the lowest kind.



- As the information age dawned, ushering in the Internet and personal computers, hopes rose in the hearts of positive thinking men that with easier sharing of information worldwide, social progress and economic prosperity would follow. If you had no computer, you could still visit reading rooms and internet cafes...

Instead we see that information is being progressively centralized (making it easier for neo-imperialists to turn off the tap), and public libraries (which, in any case, were too scattered to lend themselves to centralized control and censorship), are vanishing. Which makes us wonder:

Is monopoly over information the last remaining avarice of neo-imperialism?

We at Aptec strongly believe in the principles listed above. That is why we observe the spirit of the international Copyright Act by acknowledging and displaying, in a prominent way, the sources of information we use. We further caution the reader that if he uses such, possibly copyrighted, matter without himself repeating the source name, then he may be in violation of the Act. We publish content for free-of-cost use by our readers. So we are enthused by the information age and wish to contribute to it rather than use the Act to camouflage any attempt to augment our income.

This is also the reason why we chose, in contradistinction to the prevailing tradition enshrined by the founding fathers of the Indian poultry industry, to publish information about it in the public domain without fear or favour. And above all, having earned our livelihood in the poultry processing business for a long time, we believe it is payback time now.

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Endnotes:

i Calculation of operating capacity and growth rate of poultry processing plants in India at 2018 end, based on Aptec Bi-annual Reports dated February 2018 and March 2025

1	Operating capacity in Q3, 2002 (The 2002 capacity comprised Arambagh-Bolpur, West Bengal 2000; Godrej-Hoskote, Karnataka 1000; Goldchick-Hyderabad 2000; Riverdale-Somatne, Pune 1000; Toubro (Alchemist) Kurali 2000; Suguna-Vayalur 2000; Venkys-Kamshet, Pune 3000 =13000 BPH)	13000
2	Projected capacity by end 2018 (vide Aptec Feb 2018 Bi-annual Industry Report)	95600
3	Less capacities that failed to materialize/delayed	
	Srinivasa Prakasam unit	2000
	Coastal Farms, Mangalore	2000
	Goel Foods	2000
	Nanda Group, Bangalore	2000
	RFK Green, Pulwama	2500
	VKS expansion delayed	2000
	Subtotal	12500
4	Total operating capacity in 2018	83100
5	Calculated growth rate over the 14 year period (2018-2002) = 12.29% [(13000x1.1229) ¹⁶ =83109~83100]	
6	Projected capacity by Q2, 2026 (vide current Bi-annual Industry Report)	267800
7	Calculated growth rate over the 8 year period (2018-2026) = 15.75 % [(83100x1.1575) ⁸ =266297~267800]	
8	Calculated growth rate over the 24 year period (2002-2026) = 13.43 % [(13000x1.1343) ²⁴ = 267782~267800]	

ii How an American activist helped make Indian standards available for free. Vineet Bhalla, Nov 19, 2023 · 09:00 am in ACCESSIBILITY.

iii Copyright in "Standards": Taking a look at the PIL by Malamud, Sinha & Kodali against BIS – SpicyIP. 8 minutes of reading / By Prashant Reddy / February 17, 2017 / Open Standards.

iv Carl Malamud's letter of 25/10/14 countering the charges against him stated "The legal principle that ignorance of the law is no defence presumes that all citizens have access to the laws."

