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



- 1 Delay in posting this current edition is regretted. We now follow the policy of maintaining four latest consecutive bi-annual Reports at any time on our website. We have been preparing and posting Reports on our website for the past dozen years. If you want an older copy, e-mail us. If you have a comment, you are welcome to share it with us.

Miss Sonali Raj who has qualifications in mass communication, creative writing and experience in journalism has now joined the Aptec team in assisting with uploads onto the website, editing documents with the aim to make them more readable and handling general correspondence about Aptec's uploads.

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 2027 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 And 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 Q3, 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 Q4, 2026 or early 2027.
3	Al Arif Foods , Vakwady Road, Kumbashi Post, Kundapur Taluka, Udipi Dist., Karnataka 576257 https://www.alariffoods.com/	Local	<u>1000</u>	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 2 TPD 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	<u>2000</u>	Commissioned in 2004. From 2017 it had been operated by Star Foods under a lease agreement. Also leased was 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. It was understood that following commissioning of Star Foods' own plant in mid 2025 this facility may revert to the owner. However, the owner is considering exiting the poultry business, having already sold both his commercial farms.
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 Q3, 2026.
6	Al Halal Foods , 1098, Dohole Village, Kalamboli, Padgha, Taluka Bhiwandi, Dist. Thane, Maharashtra. https://www.exportersindia.com/al-halal-foods-company/	Local	2000	Originally built and commissioned by a local fabricator 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	Anmol Feeds , Unit No. 609,612, 6th Floor, opp. Home Town, Sub-Central Business District(Action Area 1), Action Area I, New Town, West Bengal 700163. Plant at Beldanga Mouza, Raghunathpur, PO Bonkati Kanksal, Panagarh, West Bengal. https://www.nouriture.in/home/	Local	3000	Purchased closed unit of Amrit Feeds, originally supplied by Baader-Linco as a fully automatic 4000 BPH facility with an RTE division, commissioned in the first quarter 2014 and promptly closed on June 1, 2015. Anmol Feeds hopes to refurbish & commission this facility under their Nouriture Division, initially as a semi-automatic 3000 BPH plant by mid 2027.



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8	Annai Poultry , No. 5-B, ASRN Complex, Palayamkottai Market, MKP Hospital Road-Tirunalavelli, Tamil Nadu 627001	Local	1000	
9	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 a locally fabricated line, commissioned in 2016, then modified to 2000 BPH in 2017. Replaced with a 4000 BPH line from Meyn in Q2 of 2022.
10	AV Ventures , Plot 72-A, Panchkula Industrial Area, Phase 1, Panchkula, Haryana. (Also known as Chandigarh Poultry Centre).	Local	1200	Initially AOV operated Nagpal Frozen Foods , Barwala, Haryana, a 1000 BPH plant set up by a local fabricator 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.
11	Ayisha Foods , Methala, Eriyad, Kandamkulam P.O, Kodungallur, Thrissur, Kerala 680669	Local	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> .
12	Baraka Overseas Pvt Ltd , Kallai, 1st Cross Road Oddedagully, Harekala, Mangalore, Karnataka.	Local	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.
13	Baramati Agro Ltd. , HQ 4th Floor, Farena Corporate Park , Kharadi Bypass Rd., Hadapsar, Pune- 411028, India. Plant at Baramati. https://www.baramatiagro.com/	Local	<u>2000</u>	Baramati is owned by the family of retired 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. It was finally expanded to 2000 BPH in end 2022. They also operate a CFS facility for RTE products- around 80 t/month.
14	Bhagyashree Chicks , Rajguru Nagar, Pune.	Local	<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.
15	Bharat Agrovet , Plant at Ganjimutt, Mangalore, Karnataka. HQ behind Annapooreshwari Building, Mahaveer Circle, Pumpwell, Mangalore, Karnataka.	Local	2000	Started with the locally built old plant of Lifeline Feeds, which was reconditioned & reinstalled 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 Provit & Ideal Chicken .
16	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. Project delayed
17	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 Five Star Chicken (ref part B of this table). It was learnt that they faced short supply of breeding stock in early 2023. Facing these operational difficulties CP leased the plant to Mr Arun Naidu within a tripartite agreement involving yet another entity for a while. Naidu is now setting up his own processing plant - See Subhiksha Feeds .



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18	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 local drum plucking plant. The existing plant, started in 2021, was operating intermittently, but lately they have revamped their facility for more regular operation.
19	Delicious Foods , No 17, Doddballapura Taluk, Sneha Clinic Tubagere Hobli, Masthimmanahalli, Bengaluru Rural, Karnataka, 561205	Local	3000	Owner is Mr Laxmi Sagar. Plant was commissioned in December 2024. See also Hayagreeva Food Processing , also located in Doddballapura Taluk. Performs merchant processing for Anjaneya and Shalimar .
20	Food Lovers (Hitech Hatch) , Metropolitan Co-Op. Housing Society Ltd., Sector B, Plot 28, Canal South Road, Kolkata, West Bengal. 700 105 https://hitechhatchfresh.com/	Meyn	1500	A major integrator in West Bengal, owned by Radheysyam 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 2026.
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. Was expected to be on stream by end 2025 but the present status is not known.
22	Fresh Culture , Plot No 30, Jasmine Sri Ganesh Nagar 625/1b Mannur-Koot Road Mannur, Sriperumbudur. Tamil Nadu 602105	Local	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.	Local	2000	The company has a warehouse in Nagondahalli near Hosur and sells 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 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 locally fabricated 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 bought back their 49% stake in August 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	Local	3000	A replacement of the existing locally built 500 BPH plant. Now expanded and relocated to an industrial area. This plant includes existing machines, old Meyn machine look-alikes and new locally built machines. 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 small capacity.
28	Golden Fresh , HQ at Golden Hatcheries Building #3, Queen's Road Cross near Congress Committee office, Bangalore, Plant	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.



	at Sy No 37/7, Hanumanahalli Village, Kuppelur Hubli, Haveri, Karnataka 581119 http://goldengrp.co.in/ .			Their manual slaughterhouse within Bangalore city may have been closed following commissioning of this plant in August 2023.
29	Hayagreeva Food Processing , Plant at Dodballapur, Karnataka.	Local	1000	Originally a 500 BPH local plant owned by Chicken Stop , commissioned in 2020. After passing through several hands it is now owned by Mr Laxmi Sagar. The plant was refurbished, expanded and re-commissioned in 2022.
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.	Local	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.	Local	2500	Incorporated in 2020 by Sarfraz & Aijaj 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, Falnir Road, Mangalore http://www.idealchicken.in Also known as Provit Foods .	Local/Bayle	1000	A 500 BPH local plant commissioned in 2013, later to be replaced by a 1000 BPH plant from Bayle. It 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.	Local	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.	Baader-Linco	3000	Three integration projects of 25000 BPD each at these locations has been announced by IPA. They expect to make these projects operational between mid to end 2027.
37	Indian Poultry Alliance , Punjab.	-	3000	
38	Indian Poultry Alliance , Zaheerabad, Telangana.	-	3000	
39	Kasturi Poultry Farms , HQ at G-14 Galaxy, Nanjundapuram Road, Coimbatore 641 036. Tamil Nadu. Plant at Pusphathul Village, Palani, Dindigul, Tamil Nadu. https://kasturipoultry.com/	Baader-Linco	3000	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. Kasturi had initially joined but later pulled out of the Indian Poultry Alliance. The plant was to be built by Linco on a plot of land adjacent to Suguna Vyalur in Coimbatore District but of late the project has been both delayed and the capacity halved to 3000 BPH.
40	KGN Processed Poultry , Dehu-Alandi Road, Shelar Basti, Chikhali, District Pune, Maharashtra 412114	Local	1500	This is a franchise operator and commercial broiler farmer who sells processed chicken through Big Basket & its franchise stores. Processing started with a manual plant of 300 BPH which was expanded in 2018.
41	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.	Local	1000	Production commenced in January 2021. Production is irregular and output is at minimal capacity, mainly owing to logistics of live bird procurement.
42	KM Feeds & Chicken Agencies , 7/916, Koomanchira, Mannarkkad, Ariyakundu Road, Alanallur, Kerala.	Local	1500	A proprietorship firm registered in 2021, it operates poultry hatcheries. This plant was commissioned in Q4, 2024.



43	KPF Chicken , Kavumkandam Junction, Kadanad P.O Kavumkandam, Pala, Kadanad Meenachil, Kottayam, Kerala – 686653 https://www.kpfchicken.co.in/home	Local	1000	Operate a manual processing shop and are setting up a 1000 BPH local processing plant, expected to be on stream by mid 2025. The company was started in 1985 by Shaju Sebastian as an integrator of Cobb.
44	Kuljas Rai Poultry , Also known as Rai Poultry, Amritsar. Plant at Wadala Viram Majitha, Amritsar, Punjab 143601	Local	<u>3000</u>	Set up initially as a 300 BPH local plant at Chamrang Road, Amritsar. Under orders to exit municipal limits, they shut this plant and put it up for sale. The new local plant is in operation from Q1, 2020. Also make RTE poultry products for local markets.
45	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	Meyn	4000	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 commissioned by mid-2026.
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 <i>Belchick</i> . After recent acquisition by Indian Poultry Alliance , it now proposes to double its capacity by end 2026.
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 Baader-Linco	3500 6500	Owned by K. Kishore Kumar Hegde. Initially a 300 BPH local plant commissioned in 2002 and then sold to Amrit Feeds. Replaced by a 1900 BPH local plant around 2005. This was in turn replaced by a Meyn 3000 BPH plant in June 2015. Later expanded to 3500 BPH. Aptec had drawn up plans for its expansion to 7000 BPH, the maximum possible for the site, but the company has chosen a seamless target of 10,000 BPH (ensuring no shutdown of operations), based on technology from Baader-Linco.
48	Maval Agro , Talegaon, Maharashtra	Local	1000	Expanded from the original to 1000 BPH in 2023.
49	Mayuri Broiler Breeding Farms Pvt Ltd , at Sy 537/A, 537/E, Village Yellikal, Kalwakurthy Mandal, Nagarkurnool District, Telangana 509324	Local	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, Karnataka 560002. Plant in Hosur.	Local	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 facility. The operations suffered business losses during the Covid lockdown but now appears to have stabilised.
51	Meatin Farms and Foods LLP , Kerala, Office: 15/809 E, Panchami Complex, Perumpilavu, Karikkad, Thrissur District, Kerala, 680519	Local	1000	The team comprising Ashraf, Vaikunthan, Mohamed, Mohanan & Ashique set up the locally built plant, with government capital subsidy, at Pallakad in mid 2025.
52	Nafees Poultry , Plot No 129, East Marredpally, Hyderabad, Telangana, 500026	Local	<u>1000</u>	Operated by Sarabjot 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.	Local	<u>1000</u>	Wholesaler of commercial cold storage, chicken, fish & meat. Their 1000 BPH local plant 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 <i>Clucky's</i> .



55	Perfect Poultry Pvt Ltd , Plant and HQ at Khasra No 29/13 and 29/18, village Vichhoa, Tehsil Ajnala, Amritsar, Punjab.	Meyn	6000	Commissioned at 1000 BPH in July 2015 by a local fabricator and expanded over the years to 3000 BPH. This was replaced by Meyn's 4000 BPH plant which was commissioned in Dec 21. Propose expansion to 6000 BPH by end 2026
56	Premium Chick Feeds Pvt Ltd , Plant at Yeral Alibaug, Maharashtra. Office Gat No. 330 Near Rockhill Hotel Sutarwadi, Kolad-Pune Road 402308 https://www.premiumchickfeeds.in/	Local	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.
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 has been commissioned in Q1 2025.
58	Premier Breeding Farm , HQ 337/2b Trichy Road Opp Police Quarters Palladam, Coimbatore, Tamil Nadu 641664. Plant at Palladam, Tamil Nadu.	Local	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	4300	Meyn Commissioned this plant with a capacity of 2000 BPH in June 2016 and from mid 2023 it operates with an installed capacity of 4300 BPH. This facility was planned as a merchant processor dependant on sourcing live birds from the market and began operations with a 24,000 BPD processing contracts for supply in Kerala, and to some B2B customers in Bangalore. Later the company expanded into third party processing contracts with Nandus, Licious, Shanti (Fortune), CP Foods, Fresh-to-Home, Crest Foods and others. Recently they have begun integrating backwards - having set up a 10 TPH pellet feed mill and an farms for 80,000 broiler DOC placement per week. These are initial steps towards shedding their unique identity as the first purely merchant processing facility.
60	Provit Foods Pvt Ltd . Payannoor Kerala. https://www.provitfoods.com/	Local	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 Mr Rakesh Malik as part of his RM Agro Group of Companies. Plant was commissioned in Q1 2025. Darshan Foods (see Darshan Foods/Meatzza in part B of this table) are sourcing processed poultry from this plant on a regular basis and are considering purchase of this plant.
63	Royal Foods/Ave Miriam , plant at Salsette, Goa. HQ at Mario Valladares, 142/2, Near Metastrip, Nauta, Cortalim, Goa.	Local	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 local plant, which is to be replaced by a 1500/4000 BPH Meyn plant to be commissioned by mid 2026. 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	Local	1000	Commissioned mid 2024.



66	Samrans Fresh Meat Products Pvt Ltd. Kothamangalam, Ernakulam, Kerala.	Local	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.	Local	<u>3000</u>	The original 2000 BPH consisting of Marel's 500 BPH and its relocation and expansion was by local fabricators in November 2018. Their brand name is <i>Seth's</i> .
68	Shahran Poultry Deonar, Mumbai.	Local	<u>1000</u>	This 1000 BPH plant was commissioned in January 2023 for Mr Hanif Shahran, a poultry trader. Unable to meet demand, he has leased a 1000 BPH local 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		Meyn	2500	This new plant of initial capacity of 2500 BPH was to come up at Una in Himachal Pradesh, but was delayed for want of approvals till they eventually moved out of Una to Punjab near Dera Bassi. Meanwhile Shalimar Corp gets contract processing done by Star Agrovet Marketing at Manjri in Pune, Hayagreeva Food Processing at Dodballapur, Karnataka and in Punjab.
71		Marel	2500	Setting up a new facility at Goalpara in Assam. Construction work is in progress and they expect to commission the plant in first quarter of 2027.
72	Shanthi Feeds , Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore. http://shanthifeeds.com	Meyn	<u>14000</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 February 2016. Expanded to 12000 BPH in first quarter of 2021. Small expansion to 14000 BPH to be concluded by end 2026.
73	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> .
74	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 September 2009 by VKS . Company changed hands in January 2015 and became SKM. Expansion to 4000 BPH done by mid 2019. Further expansion to 8000 BPH was commissioned in Q3, 2022.
75	Sky Foods , 402/82 Kiluvankattur, Andiyagoundanoor, Udumalpet, Tiruppur Dist, Tamil Nadu 842154 http://skyfoodagrofarm.com/	Local	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 local plant commissioned during 2021-22.
76	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>Nutrib</i> . Skylark is also a major layer integrator.
77	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 and may go in for another large processing plant.



78	Star Foods Pvt Ltd , 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 Q2, 2025. Came into operation in 3 rd quarter, 2025.
79	Star Poultry , Johrawar Singh, Jammu.	Local	1000	Fabrication in progress. Was expected to come into operation in Q3 of 2025.
80	Strategic Hitech Processing LLP , Dharapuram, Tamil Nadu.	-	3000	Promoted by the Broiler Coordination Committee , Coimbatore. Land has already been bought and water supply assured. Schedule for this plant is unknown.
81	Subhiksha Feeds , Mulbaghal, Karnataka.	JBT-Marel	3000	Arun Naidu , a small broiler farmer is setting up a new facility of 3000 BPH, expandable to 4000 BPH at Mulbaghal, 8 Km from the ProTAC facility. The plant is expected to be in operation by mid 2027. He has also taken over the operation of the CP plant.
82	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 commissioned in 2024 came from Marel. The company had purchased a 10 acre plot in Mandya district for its 4 th project which is now dropped and this piece of land is for sale. See Suguna entry in part B of this table.
83	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.
84	Suguna Foods Pvt Ltd , acquisition of SHL Foods Private Ltd (Sagri) Plant at Laru, 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 Mr Surjit Kohli. Relocated, expanded, re-commissioned in February 2014. Sold in 2018 to Suguna and refurbished.
85	Sumangal Poultry Farm , Shiv Tirth, Gat no 137/1, near Ravalgaon Fata, Belgaon-Ravalgaon Road, Belgaon, Tal Malegaon (Nashik) Maharashtra. https://www.sumangalgroups.com/	Local	1500	The company belongs to Sumangal Group head quartered at Nashik. The plant came on stream during 2023-24.
86	Swami Chickens Pvt Ltd , (Swami Group) Plant at 261, 272 - Kottathurai Village, Perichipalayam (Post), Thappampatti Union, Palani Taluk, Dindigul District, Tamil Nadu 624617	Marel	9000	During construction parts of the structure were gutted in a fire in mid-2020. Came on stream in mid 2021. They are now expanding their facility to 9000 BPH with more automation in the cut-up portioning department and addition of an RTE section. Commissioning is expected in first quarter of 2027.
87	Syra Foods (Redefining Taste) , W-8/L, Industrial Area, Yamunanagar, Haryana, 135001	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. Are in talks with Chatha Foods (which is no longer a part of the Indian Poultry Alliance) for business cooperation.
88	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 (See part B of this table) consignment.
89	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.
90	Vimla Feeds Plant at Tuniki Village, Kowdipally Mandal, Medak District,	Bayle/Local	4000	Bought original 1000 BPH Bayle plant of Srinivasa Farms which was operating at 1500



	Telangana. HQ at Chalimeda Vimala Devi Building, Sy. 93/B, NH 7, Kompally, Petbasheerabad, Quthbullapur, Medchal-Malkajiri Distt, Telangana.			BPH, in September 2017 and got it re-commissioned at 2000 BPH. This plant's next expansion to 4000 BPH was expected to be completed in Q3, 2025.
91	West Bengal Livestock Dev Corp, Haringhata, West Bengal.	Local	1000	Order taken from WBLDC by Dr Froeb (India) Pvt Ltd, (then the agent of Linco) and sub-contracted to local fabricators. Commissioned in 2015.
92	West Bengal Livestock Dev Corp, Siliguri, West Bengal.	Baader-Linco	1000	Combined poultry, goat, beef and pork slaughterhouse commissioned in 2022.
93	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 mid 2026.
94	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	-	3000	Promoted by Umair Memon, an ex-bank employee, later a processed poultry merchant, purchased the old Bayle plant of Pragathi Broilers of Doddballapur and relocated it to Jategaon Khurd. Shikrapur, near Pune. Now planning to scrap the Bayle equipment and replace it with a 3000 BPH plant at the same location. The target date is end-2027
Integrated processing capacity expected by mid 2026 based on current orders, on-stream and under-construction projects.			2,74,100	Average plant capacity is ~2900 BPH.
<p>Capacities are mentioned in birds per hour (BPH). For calculating market shares, of the total capacity of 2,59,100 (2,74,100-15,000 of Cedar Integrated, Indian Poultry Alliance - two plants, Strategic Hitech and Z&M Foods= 2,59,100 BPH) expected on stream by mid 2027, Meyn's market share is 115,900 (44.7%); Locals' is 68,200 (26.3%); Marel's is 50,000 (19.3%); Baader-Linco's is 22,000 (8.5%); and Bayle's is 3,000 (1.2%); [Total 2,59,100 (100%)]</p> <p>For the past several issues we have had to spend a disproportionate amount of time compiling this table. The main reason was that several local fabricators claimed overlapping credit for purchase orders booked and equipment supplied by them. Whereas Aptec's biannual report was meant to usher in some transparency in this industry, misreporting by local fabricators took it as a vehicle for free publicity. Therefore we give collective credit to the local fabrication industry instead of assigning credit to individuals.</p>				
B	<p>Part B of the 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 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.</p> <p>Also, while compiling this list we have dwelt on the 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.</p>			
95	Agritech 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. C&M leased it for a year from the State Bank of India with a view to re-commission it, but they failed and surrendered it in 1999. Later the plant was scrapped.			
96	Al Amani Foods Pvt Ltd , incorporated in December 2016 and located at Hissa Number 538, Naigoan Taluka Haveli, Pune, Maharashtra, 412202 operates a 500 BPH plant of local make and sells processing offal to a merchant renderer.			
97	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			
98	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. They are now planning several poultry slaughterhouses in India. To this end they propose to set up vertical integrations. They have spearheaded Indian Poultry Alliance. https://allana.com/			
99	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>Buffel</i> ' range. This range offered sausages, nuggets, popcorns, <i>samosas</i> , spring rolls and other items in chicken. 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 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			



100	Ambica Chicken , Deumol Shirvai Quepam, Near Peace Valley, South Goa, 403705. Operated a 1200 BPH plant commissioned by a local fabricator 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.
101	Amrit Feeds , Jangalpur, Howrah, West Bengal, bought used local made 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 may be available for sale.
102	Amrit Feeds , A closed and defunct Baader-Linco plant of 4000 BPH. Sold to Amit Sarzogi of Anmol Feeds. See Anmol Feeds.
103	Arambogh Hatcheries , HQ at 59 B Chowringhee Road, Kolkata. Meyn plant at Bolpur, Singhbhum District, West Bengal. Commissioned as 1000 BPH in September 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. The defunct plant may shortly be on sale.
104	AOV old plant with 2000 BPH local machinery. May be on sale.
105	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
106	Assam Livestock & Poultry Corporation , Panjabari Road, Khanapara, Guwahati 781022. A local 500 BPH plant. Was installed and commissioned in 2023.
107	A-One Agro , Pune, unknown capacity, reportedly commissioned in 2024 by a local fabricator.
108	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 fabricators' machines and some made by themselves and are slaughtering 2000-3000 birds daily.
109	Big Bird , Bangalore, unknown capacity, reportedly commissioned in 2020 by a local company.
110	Brahmagiri Dev Society , Wynad, Kerala, 500 BPH plant by a local company in 2010.
111	Broiler Master , Punjab, 200 BPH in 2011. This is a semi-manual processing plant, having neither scalding nor plucking and does wet market style evisceration.
112	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.
113	Central Avian Research Institute , (IVRI) Bareilly, 200 BPH plant by a local fabricator.
114	Century Farm Products , incorporated in 2008 at Erampalli, P.O. Shivalli Udupi Taluka & District- 576102 Karnataka operates a 500 BPH plant built by a local fabricator, since 2015.
115	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>Gustito</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 .
116	Chicago Foods , Coimbatore. Unknown capacity poultry slaughterhouse, reportedly commissioned in mid 2024 by a local fabricator.
117	Chicken Factory , Anjananagar, Bangalore 560091. Has a semi manual locally built operation doing 1000 BPD.
118	Coastal Farms , Mangalore, Old 500 BPH local plant. Scrapped and probably available for sale.
119	College of Vet & Animal Sciences , Kerala, 200 BPH plant by a local fabricator in 2003.
120	College of Vet & Animal Sciences , Parbhani, 300 BPH plant by a local fabricator. Commissioned in 2020.
121	Contai Golden Hatcheries Pvt. Ltd , Contai, E. Midinapore, West Bengal, 300 BPH plant by a local fabricator in 2003. It is owned by Shalimar Hatcheries and is probably available for sale.
122	CP India , Chennai, 500 BPH plant by a local fabricator in 2002. Scrapped and probably available for sale.
123	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 the plant of RM Delicious Foods. Possesses a Meyn cone de-boner line for portioning and deboning chicken carcasses. Besides, over the past they have been looking for a site to set up a captive poultry slaughterhouse. http://www.meatzza.com .
124	Deepan Foods LLP , Pune, 2024. A 500 BPH locally fabricated plant, commissioned at Taloja in 2022-23.
125	Doon Valley Poultry (Savoury Delights) , 54 A Race Course, Dehradun, Uttarakhand. This 1000 BPH plant, last reported to be operational in 2025, based on misinformation provided by the plant vendor. It has been learnt in August 2025 through an interview of Mr Gurkirat Bhasin, to be in the planning stage yet.
126	Dr Meat . See Lotus Farms
127	Empire Foods , Taloja, Maharashtra. 1000 BPH plant purchased from a local fabricator 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.
128	Farmer Choice , Pune A 500 BPH plant supplied a local fabricator who commissioned it during 2023-24
129	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 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
130	Farm Value Foods Pvt Ltd , owned by Anshu Sibbal Chatli runs a locally fabricated plant of 350 BPH capacity at Barnala. It was commissioned in 2014.
131	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
132	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.
133	Gitwako Farms , headquartered at Jangpura Extension, New Delhi, is owned by Ajay Beri at Ferozepur Jirka. They operate a local plant of unknown capacity and also process goat meat. Mainly produce RTE products for which they possess a retort.
134	Godrej Foods , Hoskote, Karnataka, 1000 BPH plant from a local fabricator in 1999, which was scrapped in 2007 and replaced by a Marel 2000 BPH plant, which was later expanded to 3000 BPH.
135	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.
136	Henny Fresh , Odisha, 500 BPH plant by a local fabricator.
137	Hilary Fluff Pvt Ltd , Lucknow, 500 BPH plant by a local fabricator.
138	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 a local fabricator 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.
139	Higrow Chicken , owner Deepak Raj Garg, runs a local plant of 500 BPH at Ludhiana, which was commissioned in 2017.
140	Hygienic Chickens , 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, 300 BPH by a local fabricator.
141	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
142	Indian Broilers , (IB Group, Rajnandgaon) located at Nagpur, Madhya Pradesh. It is a 500 BPH local plant, started in 2016. They are planning a major foray into poultry processing, with several 12000 BPH plants at several locations.
143	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.
144	International Food Products , Chandigarh. Small RTE producer in chicken and other meats.
145	Irani Chicken Products LLB , Daman, Gujarat, 500 BPH plant by Bayle, commissioned Dec, 2013.
146	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 in Bangalore.
147	Karma Protein P. Ltd , Haryana. A 500 BPH local plant being built by a local company.
148	Kenchick Foods , Erode, Tamil Nadu, A locally supplied 700 BPH plant commissioned in Q4, 2024.
149	Khushbaksh Poultry , Near Kashmir Glass House, Phase 3, Industrial Estate, Srinagar, Jammu & Kashmir 19000. A 500 BPH plant under order from Mr Bashir was installed and commissioned in Q4 2024 by a local fabricator.
150	Kudumbashree Broiler Farmers Producer Company Ltd , at Trivandrum, Kerala. Is a 500 BPH plant supplied by a local company.
151	Knowledge Foods , Neral. Manual-dressing 300 BPH. Also making RTE products.
152	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 locally fabricated plant.
153	Kongu Herbal Chicken Pvt Ltd , was incorporated in December 2015 by three brothers at Thirunagar Colony, Erode, TN as an integration. Their 700 BPH locally fabricated plant was supplied 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.
154	KSIDC , Kerala, 300 BPH local plant in 2005.
155	Limra Chicken , Coimbatore. A 500 BPH local plant.
156	Lotus Farms , 3 & 4, 19th Main, 3rd Cross Rd, 5th Block, 1st Stage, Hennur Gardens, Bengaluru, Karnataka 560043. A partial processing plant of unknown capacity, contains an overhead conveyor, scalding tank, and drum plucker and table top manual evisceration. Sells under brand name Dr Meat , a name registered under the name Sukos Foods Private Limited . In 2023 the company comprising all three names was acquired by Zappfresh.
157	Malabar Agro Industries Pvt Ltd , was registered in November 2018 at Ernakulam in Kerala. It operates a 500 BPH plant supplied by a local fabricator.
158	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
159	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 a local fabricator 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.
160	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.
161	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 its own stores, <i>BigNMeat</i> , other retailers, and directly to hotels and restaurants in that region. http://www.meatmasters.co.in .
162	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.
163	Meatyns Farmer Producer Co Ltd , incorporated in December 2021 and located at 1156 E, Unit No.10 Manik Chamber, Karvir Kollhapur (M Corp) Maharashtra 416001. Operates a 300 BPH plant supplied by a local fabricator.
164	MP Pashudhan Nigam , Bhopal, 500 BPH by a local fabricator in 1997. Scrapped. When newly commissioned, this plant inspired Dr Anaokar, then MD of Godrej Agrovet, to model his Hoskote unit on it. Eventually his Hoskote facility was also scrapped.
165	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.phpri
166	Monrovia Agro Foods , Bhandgaon, Pune, Maharashtra, 500 BPH local plant in Jan 2014.
167	Mulpuri Foods & Feeds Pvt Ltd , Ramannagudem, Vattigudipadu, Nuzvid, Andhra Pradesh. In fish, animal feeds & poultry.
168	Nagpal Frozen Foods , Barwala, Haryana, 1000 BPH local plant commissioned in 2007 and operated by Nagpal's relative Mulik 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.
169	Navi Nutrix , 750 BPH local plant at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Sriya Foods .
170	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 Pvt 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 local plant 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. Of late they are planning a captive processing capacity of their own. The company is run by Naveen & Narendra Pasuparthi, sons of the promoter Nandakumar.
171	Nensey's Poultry , Valsad, Gujarat, 300 BPH local plant around 2002. It is learnt to have been sold to an unknown party.
172	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.
173	Nutrivit Innovation , Hyderabad, local plant of unknown capacity, reportedly commissioned in 2023.
174	Ovo Farms , Odisha has been awarded government capital subsidy for setting up an egg powder plant in Odisha.
175	Parsekar Foods , 615, Devafather Bethoda, Ponda, Goa 403401. Established in the year 1983 as retailers. Operate a 700 BPH local plant. They have plans to expand to 1000 BPH.
176	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.
177	Perfect Poultry Pvt Ltd , Plant and HQ at 27 Ft Road, Chowk Green Field, Majitha Road, Amritsar, Punjab. Earlier 1000 BPH local plant was replaced by Meyn's 4000 BPH plant. For the expansion they retained only one plucker, screw chillers and some secondary processing machines. The plant is suitable, after balancing, for 1000 BPH or more, and is probably available for sale.
178	Pioneer , Hyderabad, Andhra Pradesh, 500 BPH local plant. It has been scrapped.
179	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.
180	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
181	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.
182	Ratnagiri Cooperative , Chiplun, Maharashtra, 300 BPH local plant in 2003. Now closed and possibly scrapped.
183	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.
184	RFK Green RFK Green, Pulwama, J&K. HQ at C-37, First Floor NSM, Azadpur New Delhi. The 2500 BPH Meyn plant was ordered in July 2017 and installation was completed in 2019. Commissioning is delayed due to social unrest in the area.
185	Ruchi Agro Industries Ltd , Chikmagalur. It is a manual plant of unknown capacity.
186	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 local plant supplied in 2019 and sells portions through Big Basket.
187	Royal Foods Pvt Ltd /Shakir Shaikh, Lohegaon, Pune, Maharashtra. 500 BPH local plant set up in Nov 2013.
188	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.
189	Sandip Mukherjee , One time plant manager of Arambagh Hatcheries , is operating a 500 BPH manual processing plant at Gariahat, near Kolkata in West Bengal.
190	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 and expanded by local fabricators to 3000 BPH in stages.
191	Shivaa Chicken , 2/418, Palladam Main Road, Opp. Microwave Station, Puliampatty, Pollachi, Coimbatore, TN. Manual dressing of unknown capacity. http://www.shivaachicken.com
192	Shiva Farms , Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery.
193	Shiva Poultry Equipment , Barnala city, is operating a 500 BPH local processing plant at Gadvasu University in Ludhiana. Their brand name as " <i>Hygrow Chicken</i> ".
194	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.
195	Sirsa Foods , at 2, Lavkush Dharamshala, Balmiki Chowk, Opp. Khunger Sweets, Sirsa, Haryana. A 500 BPH local plant commissioned in Q1 2024.
196	S. K. Chicken , Coimbatore, unknown capacity local plant, reportedly commissioned in 2023.
197	S.M. Feeds & Farms Pvt Ltd , No. 294, Thiruvallur High Road, Alamathy Village, CCBF Post, Redhills, Chennai 600052. A 500 BPH local plant commissioned in 2017.
198	Sood Poultry at Jullunder, Punjab. A 500 BPH local plant commissioned in 2020.
199	Souza Hatcheries , Mangalore, Karnataka. HQ at Souza Commercial Complex, Highlands, Falnir Road, Mangalore Purchased a local 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. http://www.souzahatch.com
200	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 eight years on we still have no information on its commissioning schedule. https://www.srinivasafarms.com .
201	Sriya Farms and Feeds Pvt Ltd. , 208 B, 3rd Floor, 80 Feet Road, IndusInd Bank buildings, 2nd Block, HBR Layout, Bangalore 560043.
202	S.S.S Hatcheries , 258/1-1, N.S.R.Road, Venkitapuram, Coimbatore, Tamil Nadu 641025. 500 BPH local plant set up in 2023.
203	Star Agrovet Marketing , Manjri, Pune, 700 BPH local plant set up in 2022. They process chicken under contract with Shalimar Corporation.
204	Subsara Poultry , Coimbatore, Tamil Nadu. A 700 BPH local plant commissioned during 2021-22
205	Suguna Foods Pvt Ltd . Had acquired 10 acres of industrial land plot number 49, Favorich Mega Food Park, Bannenahalli village, Bookanakere, KR Pet, Mandya district, Karnataka 571423 for setting up its fourth poultry processing plant. The company now wants to sell the land. Mr S Jaiprakash, Sr GM, +91 7339666383 who gave Aptec this information seeks an asking price of Rs 1.8-2 crores per acre. The property remains available for sale.
206	Sujay Feeds , SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, 200 BPH manual slaughter.

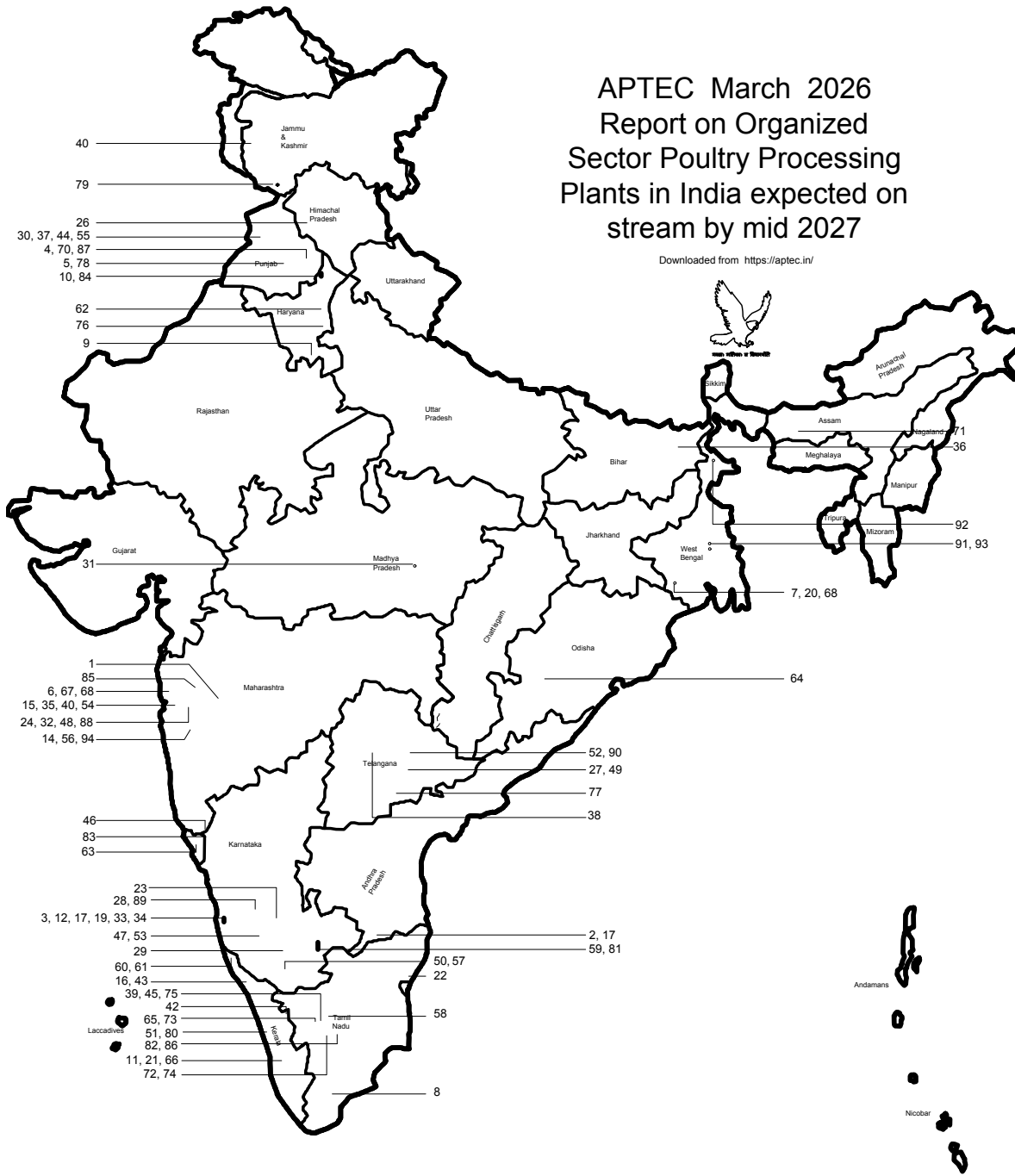


207	Sukos Foods Private Limited. See Lotus Farms.
208	Swift Foods , Dadri, Uttar Pradesh. An automatic Stork 4000 BPH processing plant commissioned in the early 1990's by Jagdish Prasad, in competition with VH's Kamshet plant of 1000 BPH. Closed around 1995, then scrapped.
209	Taurus Foods was set up in the mid 1990's. It produces marinated, smoked and cooked chicken RTE products at its plant at EPIP, Kasana 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
210	Thai Thirunaal Agro Foods Pvt Ltd. A 500 BPH local plant commissioned at Coimbatore in 2022.
211	Unitas Foods Pvt Ltd , M. G. Road, Ghitorni, Delhi. Was incorporated in 2004 and operates QSR and food kiosks business and also serves bulk buyers. It offers chicken meat, vegetable frozen dimsums or momos, rolls and <i>samosas</i> and claims to be the largest producer of dimsums in India. http://www.unitasfoods.com
212	Unnat Feeds , Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana. Learnt to be fabricating the plant themselves from early 2021.
213	Villa Sita Farm , Hyderabad, local plant of unknown capacity, reportedly commissioned mid 2024.
214	Violet Industries/Souza Hatcheries , Mangalore, 500 BPH local plant. Not yet commissioned.
215	Vista Agriculture & Food Products , Khurdah Road, Bhubaneshwar, Odisha, 750 BPH local plant supplied in 2013. Plant is closed.
216	Walvekar Hatcheries Ltd , Pune. 1000 BPH Meyn plant was confiscated by the Mumbai Customs due to some documentation 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.
217	WBFCSL , set up by Mr R. K. Doloi , MLA, Midinapore, West Bengal. A 300 BPH local 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 January 2020 to VH but failed each time.
218	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
219	Zorabian , Khopoli, Maharashtra, Originally a drum plucker manual dressing facility, upgraded to 500 BPH local plant in 2007. Following the death of Khorram Zorabian, the plant is now run by his daughter Perzad.



APTEC March 2026 Report on Organized Sector Poultry Processing Plants in India expected on stream by mid 2027

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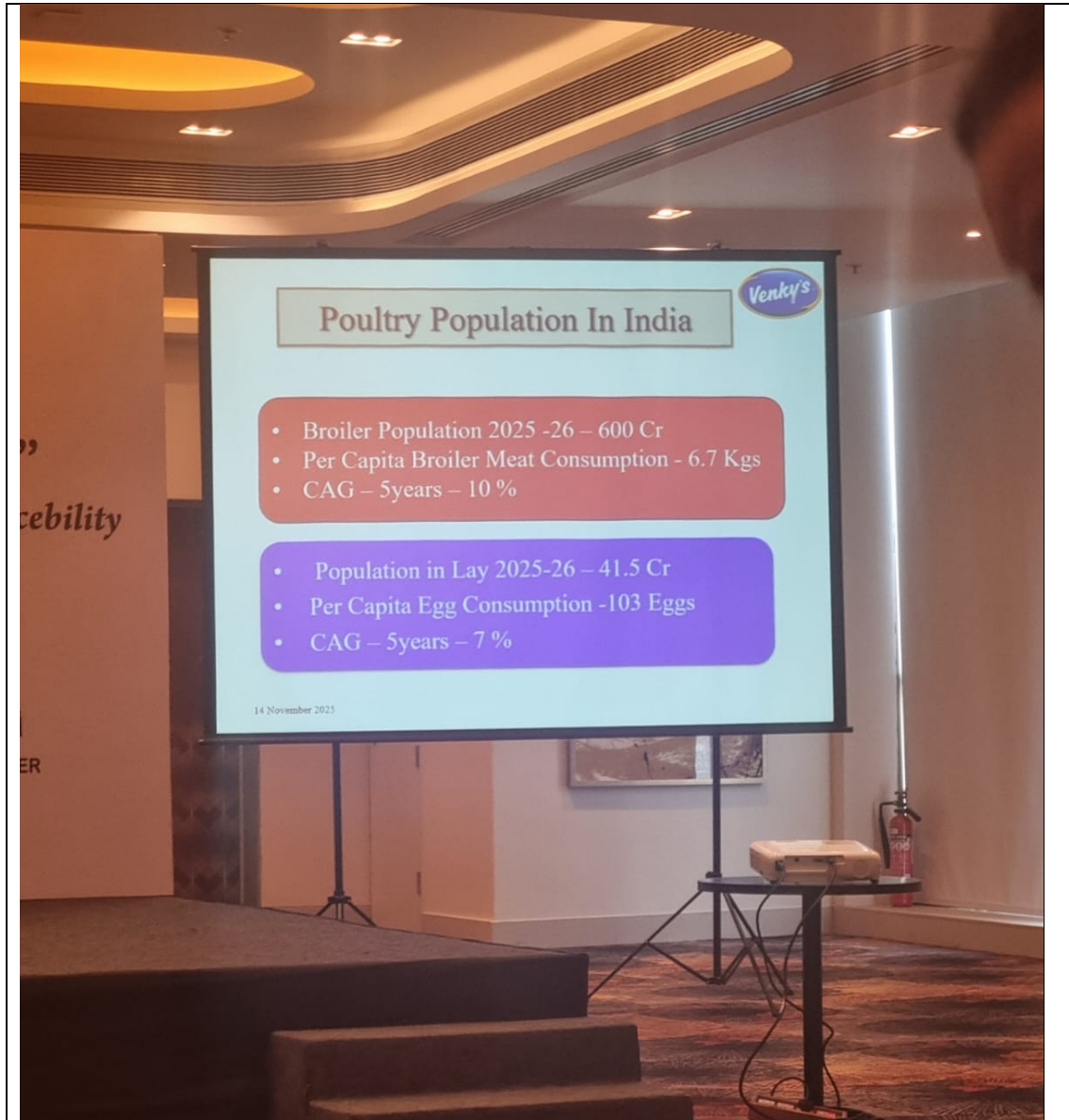


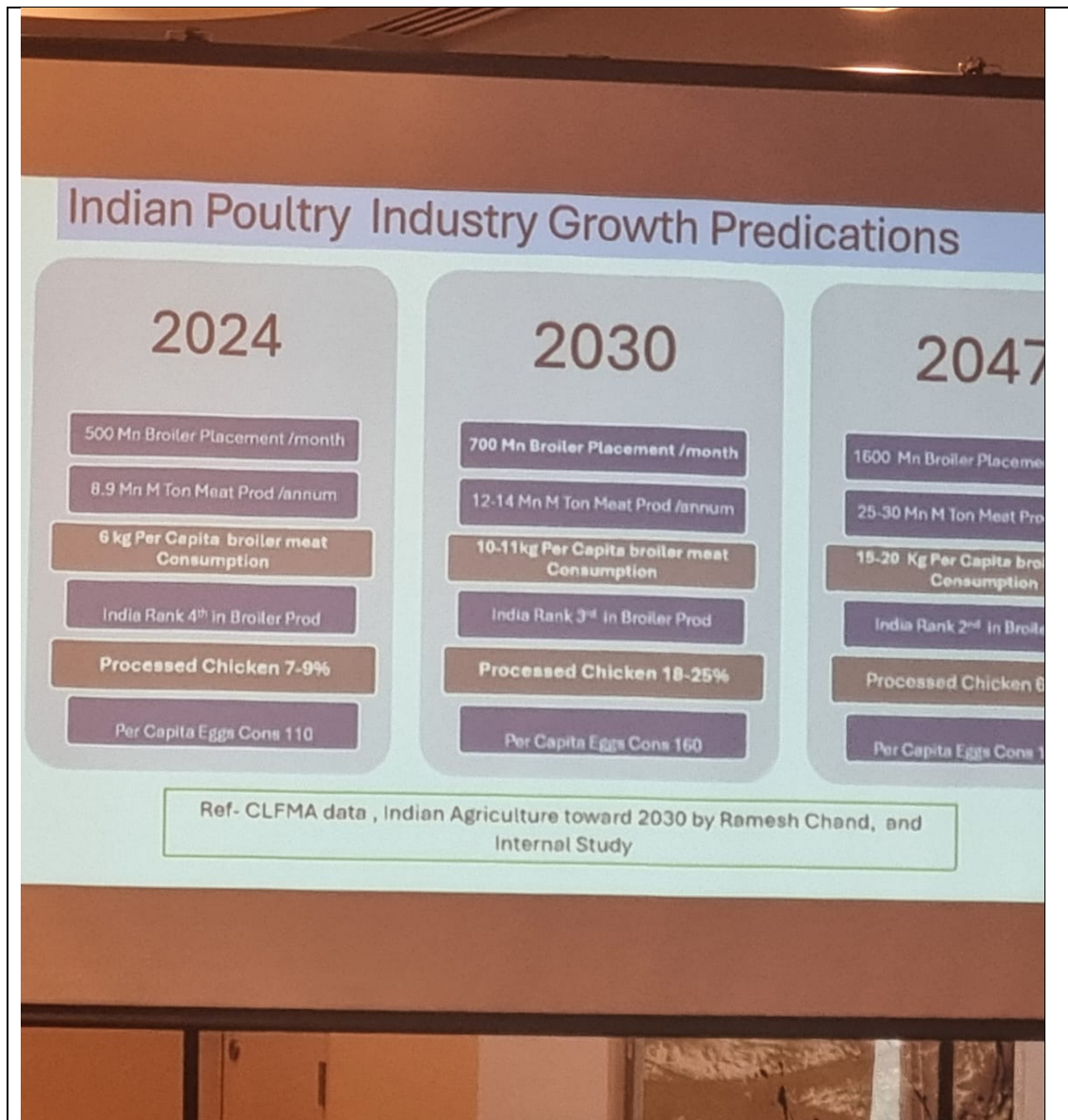
1 Abis Proteins Aurang	13 Baramati Agro	25 Godrej Foods Hos	37 IPA Punjab	49 Mayuri Broilers	61 Provit Foods I	73 Sivasakthi Agro	85 Sumangal Poultry
2 Abis Proteins Chitt	14 Bhagyashree	26 Goel Foodworld	38 IPA Zaheerabad	50 Meat & Eat	62 RM Delicious	74 SKM Feeds	86 Swami Chickens
3 Al Arif Foods	15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



3 Broiler Industry Statistics

But for the publication of basic macrodata for this industry in our October 2025 issue, there has been a notable and studied silence from the Broiler Breeder Association for well over a decade and the industry has largely been in the dark. We had hinted at our suspicion in past Reports that this policy of maintaining a deliberate silence was perhaps beneficial to the principal breed houses. We may be wrong in believing so – perhaps the Association has had other, logical reasons for keeping the industry in the dark.





But by a strange coincidence a seminar was held in Mumbai on November 13, 2025, just two days after Aptec had uploaded the October 2025 issue of the Industry Report which revealed much information on the subject. In that seminar two well known industry stalwarts, Drs Vijay Tijare (retired executive of VH) and Dinesh Bhosale (CLFMA) made presentations which contained macrodata on the broiler situation. We have access to just two photographs shot at the seminar which reveal some information on their content, but if interested readers seek complete copies of the presentations from these gentlemen, they may note substantial corroboration of Aptec's figures.

4 Reminiscing And Crystal-Gazing

Aptec has been associated with broiler processing since the mid 1990's and as we complete three decades of this association we feel a strong urge to reminisce. As agents of Meyn since 1998, what we first set out to do was open the windows and let in some fresh air. The industry suffered from the government-assisted dominance of a pigeon-breasted, low dressing yield, poor FCR, reverse-bred layer masquerading as an indigenous broiler species to the exclusion of superior imported breeds and a draconian suppression of information and data, implemented as a barrier to entry.

Planning of slaughterhouses was also faulty. By 1998 six processing facilities had been set up and by the turn of the Century all but one had failed. The one that did not, was the VH plant at Kamshet near



Pune. Those that failed were (1) Peninsula Foods of David Lobo at Bengaluru, (2) Riverdale, set up by the erstwhile project chief of VH, at Somatne, as if to cock a snook at the pioneering facility at neighbouring Kamshet, (3) Jagdish Prasad's Dadri venture which was so poorly planned that it could serve as a textbook example of how not to plan, (4) maverick Damani's facility in arid Nagar, set up just seven kilometres from a large perennial dam and (5) the stillborn project of Walvekar whose plant consignment was impounded by the port authorities.


What was lacking in all these ventures, we felt, was sound project planning, an ability to leverage local skills in engineering and full-fledged hand-holding during the implementation period. Devoid of these, every new plant's commercial demise would ring a cautionary bell denouncing processing technology itself. So, before we took up the representation of Meyn in India, we proposed that intimate hand-holding of the buyer be made the cornerstone of Meyn's presence here. As a manufacturing principal, Meyn would not do these things for fear of diluting their main business interests, but they did facilitate Aptec to manage change in the industry in the manner we felt necessary.

What emerged, was our emphasis on local construction skills, technological adaptation to suit local conditions, cheap and effective economic solutions, skills and techniques to modify and expand plants and perform major engineering "surgeries" on running plants without taking major shut-downs. We also upgraded technologies and married local machinery with imported ones. In short we supplied a compliant engineering service where none had existed before. So, when we parted with Meyn in June 2018, we built on our engineering skills while the principal overseas vendors – JBT-Marel, Meyn and Baader-Linco competed amongst themselves and with the local fabricators for market share. Meanwhile Aptec endeavours to supply those services as an independent entity, perhaps only inadequately, given our resource limitations.

We believe that after studying the Aptec experience, these overseas plant vendors may agree that when comprehensive engineering services are packaged with a plant sale proposition as a lure, the best business deals happen. But are they, as vendors, able to fill these gaps? Apparently one of these vendors does appear to promise just that!

So it is with great interest that we read Baader's recent post on Linked-in. It would appear that Baader offered direct competition to JBT-Marel and Meyn by offering to perform an "open-heart-surgery" on the existing 3500 BPH plant of Lifeline at Chikmagalur and expand it to 10000 BPH without shutting it down and causing interruption in supply of processed chicken. Is this such a difficult task? We believe it is.

Expanding a plant capacity or making major structural and technological changes generally calls for a major plant shut down. If shut downs are short, say up to two days, spread into several shut-downs over consecutive week-ends, shipments from the plant do not suffer. A prolonged shut down on the other hand can result in loss of customers and subsequent financial losses or even closure of the business. This is particularly true because most process houses in India have just one plant so they are unable to service their customers if that single facility shuts down for a period exceeding two or three days.



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 India's rising demand for poultry meat is reshaping how processing plants operate. In response, **Life Line feeds (India) Pvt. Ltd.** partnered with BAADER to upgrade its processing line - tripling capacity from 3,500 to 10,000 birds per hour.

Increased capacity goes hand in hand with smarter automation, supporting workers in the most labour-intensive areas, from crate handling to evisceration. Manual transfer is eliminated between slaughter and evisceration, improving hygiene, consistency, and overall efficiency. New scalding and picking technology ensures product quality meets evolving market expectations.

Wishing Life Line Feeds (India) Pvt Ltd continued success as they scale their operation - supporting India's growing demand for poultry with efficient, high-quality, and future-ready production.

#PoultryProcessing #India #LifelineFeeds #BAADER

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Exhibit 5 Post on Linked-in



As an engineering and planning company, over 2016 and 2017 we had proposed this particular plant's expansion to 7000 BPH as we felt there wasn't enough space to do any better. This expansion could be accomplished without a major shut-down. In other words the engineering equivalent of an "open heart surgery" would be performed by us.

Furthermore, this plant is specially disadvantaged because its operations span four adjacent plots of industrial land near Chikmagalur. These plots are separated, one from the other, by public roads. The facility was initially planned by R&D to operate, first at 1000 BPH and later at 1900 BPH and in doing so they had made sub-optimal use of the already meagre bit of land that existed. So we continue to maintain that expanding this plant to 10000 BPH without taking a prolonged shut-down is not feasible. But in contrast to our opinion, as exhibit 5 shows, Baader has promised to perform these feats by the use of "superior new technology".

We await developments in this context and hope to learn from Baader because we are convinced that a positive outcome of this novel "open-heart-surgery technique" will mark a major change in the industry paradigm – namely that finally a major plant vendor accepts the barrier to dominance in the Indian market – by bundling project planning and engineering services as a freebie. If Baader succeeds, Aptec will have lost its relevance as an independent engineering company and JBT-Marel and Meyn will be compelled to follow Baader, the new leader.

Other events in the industry underline the role of engineering services. We will mention two here. Item 7 in table 1 relates to Anmol Feeds having recently acquired the defunct properties of the erstwhile Amrit Feeds of Harish Bagla at Panagarh, West Bengal. This was a Linco plant of 4000 BPH set up in early 2014 and closed shortly thereafter. Anmol Feeds now has legal possession of the facility and has appointed Aptec to revive it. Because the facility has been closed for eleven years and has been intensively vandalized and looted, it cannot be restored and revival will call for a change in strategy. We are implementing the change. We believe several more defunct industrial facilities, marked as NPAs (Non-Performing Assets) in bank ledgers may need to be re-purposed. NPAs enter the re-sale market with several assets which are increasingly in short supply – large tracts of land, access to water, approval for discharge of treated wastewater, existing buildings and government approvals.

Repurposing requires engineering and planning skills, and above all – fearless out-of-the-box-thinking. If JBT-Marel and Meyn follow in the lead provided by Baader-Linco, in their Linked-in declaration, the poultry processing industry will be able to leverage these NPAs efficiently.

In the coming years we may see (1) whether by the use of superior technology and bundled planning, engineering and project implementation services a plant vendor can grab a dominant position in the market and (2) whether the use of these services from an independent engineering company can salvage, revive, and profitably re-purpose defunct NPAs. Success or failure of Baader and Aptec in these two projects will herald these changes. The industry will do well to pay heed.

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