

**Keywords:**

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

APTEC Technology Consulting is located at 282, Power Officers' Society Omega 1, Greater Noida 201310, U.P India.  
This name and APTEC are the registered property of Alok's Poultry Technology Private Limited.  
+91 120-4251620 +91 98110 49914 <http://aptec.in> [rajalok@gmail.com](mailto:rajalok@gmail.com), [alok@aptec.in](mailto:alok@aptec.in)

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## 1 Schedule

When this Industry Report was uploaded, the earlier Report dated October 2021 was taken down. We now follow the policy of maintaining four consecutive bi-annual Reports at any time on our website. If you want an older copy, e-mail us. We aim to upload the next Industry Report in mid-March 2024.

## 2 The Handbook Project

Sometime back we at Aptec decided to write and upload a handbook on designing a poultry slaughterhouse suitable for South Asian conditions. For it we have drawn upon nearly a quarter century of our experience. It is written complete with example drawings, data and practical solutions to problems, recommended construction materials & styles, machines and how to choose them and much more. As of this writing seven chapters are already available for downloading free of charge from Aptec's website, Handbook page. The remaining chapters will be uploaded by 2023 end. Here is a listing of topics covered in it.

	Chapter	Uploading status
1	Preface	Uploaded
2	Design of Poultry Slaughterhouse - Land & Location	Uploaded
2	Design of Poultry Slaughterhouse - Engineered Ventilation for Biosecurity & Efficiency	Uploaded
4	Design of Poultry Slaughterhouse - Materials & Safety	Uploaded
5	Design of Poultry Slaughterhouse - Layout, Geometry, Construction Methods & Environments	Uploaded
6	Process & Equipment - From Arrival to Defeathering	End Nov 2023
7	Process & Equipment - Evisceration	Before 2023 end
8	Process & Equipment - Chilling	Uploaded
9	Rendering Design Evolution	Uploaded
10	Management of Microbes	Before 2023 end
11	Manpower & Training	Before 2023 end
12	Diagnosis & Troubleshooting	Before 2023 end

## 3 Developments In The Industry

The broiler industry has posted a generally lackluster performance of the past half year. High live bird prices that prevailed at the beginning of 2023 have remained and this has caused several new ventures to postpone investment. CP is learnt to have reshuffled existing management structure to regain focus on existing assets in India. We have credible reports that Suguna may be reverting to the use of Aviagen breeding stock. This calls to mind earlier experiments carried out in India, with limited success. There was the case of a breed called **Hubchix**, promoted by **C&M** of Nasik and **Kasila**, the latter promoted by the Hyderabad based breeding company of **Sheikh Imam**. Both of them closed down in the early years of this century. The principal reason was the absence of a *true and stable pure line*.

Rumors persist about the proposed entry of Allana Sons and Indian Poultry of Mumbai and Rajnandgaon respectively. Of these the latter is already well entrenched in the poultry sector and operates a small locally fabricated plant in central India. It is looking at building several plants, each of 6000 BPH capacity at different locations. Allana Sons have been in the red meat industry for several decades, and are reported to have turned to poultry processing by way of diversification.

## 4 Size of the Processing Industry, Including History of its Constituents

Table 2 List of Poultry Processing Plants Existing and those Expected on Stream by first quarter of 2025 in India. (This list includes existing units and those based on orders released and/or work already initiated at site).				
A	The Organized Sector Comprising Plants of 1000 BPH or Higher Capacities			
	Plant, location	Make	Capacity	Remarks
1	Alchemist Foods & Hospitality Ltd, Kurali, Punjab (Leased to Star Foods)	Meyn	2000	Commissioned in 2004. Since 2017 it is operated by Star Foods under a lease which is to end shortly, with the brand name <i>Star</i> . 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 <i>Republic of Chicken</i> brand.
2	Al Halal Foods, Thane, Maharashtra	RND	<u>1000</u>	Commissioned in 2016
3	Ambica Chicken, Deumol Shirvai Quepam, Near Peace Valley, South Goa, 403705	Storm	1200	Commissioned in 2016. Suffered financially during the 2020 lock-down, particularly as most of their business was with hotels.
4	AOV Agro Foods Pvt Ltd, Khasra Nos. 20, 21, 22, Village Tapkan, Tehsil Nuh, Haryana 122107. HQ at C-22/25 Sector 57 Noida 201301	Meyn	4000	Promoted by O. P. Arora of AOV Group (mainly in red meat), who acquired the Nuh facilities from Moin Akhtar Qureshi, one time biggest buffalo meat exporter in India. It was an RND line, commissioned in 2016. Then modified to 2000 BPH in 2017. Replaced with a 4000 BPH line from Meyn in 2 <sup>nd</sup> quarter, 2022.
5	Arambagh Hatcheries. Plant at Birbhum, West Bengal. HQ at 59 B Chowringhee Road, Kolkata. Plant at Bolpur, Singhbhum District, West Bengal <a href="https://arambagh.com">https://arambagh.com</a>	Meyn	<u>4000</u>	Commissioned as 1000 BPH in Sept 1999, expanded to 2000 BPH in 2002 and 4000 in 2004. Now the plant is closed by banks for failure to service their loans
6	AV Ventures, Plot Number-72 A, Panchkula Industrial Area Phase 1, Panchkula, Haryana. (Also known as Chandigarh Poultry Centre)	Storm	1200	Initially AOV operated Nagpal Frozen Foods, Barwala, Haryana, a 1000 BPH plant set up by RND in 2007. After its closure on non-compliance with zoning laws, AV Ventures set up a new 1200 BPH poultry & 100 goats per day plant on industrial estate land in Panchkula. Both lines came into operation in January 2023. Mainly serving the defence sector.
7	Baramati Agro, Baramati, Maharashtra Baramati Agro Ltd. 4th Floor, Farena Corporate Park, Kharadi Bypass Rd., Hadapsar, Pune- 411028, India. Plant at Pimpri, Baramati. <a href="https://www.baramatiagro.com/">https://www.baramatiagro.com/</a>	RND/Storm	<u>2000</u>	Baramati is owned by the political family of Sharad Pawar. Their first 300 BPH plant was commissioned around 2002, rebuilt to 750 BPH in 2009, doubled to 1500 BPH in 2020 by RND. It was finally expanded to 2000 BPH in end 2022 by Storm. They also operate a CFS facility for RTE products, producing around 80 t/month.
8	Bharat Agrovet, Plant at Ganjimutt, Mangaluru, Karnataka. HQ behind Annapoorneshwari Building, Mahaveer Circle, Pumpwell, Mangaluru, Karnataka.	RND/Storm	2000	Old plant of Lifeline Feeds built by RND. Was reconditioned & reinstalled by Storm in Nov 2015 with a capacity of 1500 BPH. Now expanding to 2000 BPH. Expect commissioning by mid 2024
9	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 <a href="https://cpbrandindia.com">https://cpbrandindia.com</a>	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. ProTAC. RTE sold as <i>Five Star Chicken</i> (ref part B of this table). In early 2023 they were learnt to face short supply of breeding stock. Are now in the process of revamping their operation & plant.
10	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 was commissioned in 2021. Learnt to be planning revamping their plant.
11	Doon Valley Poultry, 54 A Race Course Dehradun, khand.	Storm	1500	Ordered in first quarter 2023. Under fabrication, expect to be in operation by mid 2024
12	Godrej Tyson Foods. Plant at Taloja, Maharashtra <a href="https://www.godrejagrovvet.com/godrej-tyson-foods">https://www.godrejagrovvet.com/godrej-tyson-foods</a>	Marel	3000	Expanded from original 2000 BPH of 2001 to 3000 BPH. It is located in an industrial estate that lies between two nearby village whose inhabitants regularly protest against the smell nuisance. May be planning relocation.
13	Godrej Tyson Foods. Plant at Hoskote, Karnataka <a href="https://www.godrejagrovvet.com/godrej-tyson-foods">https://www.godrejagrovvet.com/godrej-tyson-foods</a>	Marel	<u>3000</u>	Set up in 1999 as a 1000 BPH RND plant which was scrapped in 2007 after an Aptec audit. A 2000 BPH Marel plant was set up in an adjacent plot of land. Expanded in 2012. In 2008 Godrej tied up with Tyson. Their brand is <i>Real Good</i> . They also produce RTE products on a 400Kg/hour used line sourced from The



				Waterbase of Nellore, a failed fish RTE unit. Falling within a smart city zone, it is now under pressure to relocate.
14	Goel Foodworld, Plot no 23A, Industrial Area, Shogi, Shimla, Himachal Pradesh Plant at Khasara No.-22, 47, 48 UP Mohal Bumbli, Tehsil- Ghanari, District Una 177201, Himachal Pradesh.	Storm	3000	A replacement of the existing 500 BPH plant by Dhopeswar commissioned over a 5 years back. First expansion executed by Storm. Now relocating to industrial area. This plant will include existing machines, refurbished Meyn machines from Europe, and new machines from Storm. To be installed by end 2023 for operation in early 2024.
15	Goldchick Hatcheries and Foods Ltd. Plant at Sadashivpet near Hyderabad, Telangana. HQ at Plot No.151, Kavuri Hills, Madhapur, Hyderabad, Telangana <a href="http://goldchick.in">http://goldchick.in</a>	Marel	2000	Commissioned in Sept 1998, and in intermittent operation since then. First to export Indian processed chicken and also the first in the world to install an automatic re-hanging machine and continuous rendering plant at 2000 BPH capacity.
16	Golden Hatcheries Pvt Ltd, Plant at Davangere, Karnataka. HQ at Golden Hatcheries Building #3, Queen's Road Cross near Congress Committee office, Bangalore	Meyn	3000	Part of the Golden Group companies started in 1985 and incorporated in 1988. Placed order on Meyn in 2021 for setting up a green field unit close to VH in Davangere. Their manual slaughterhouse within Bangalore city is expected to have been closed with commissioning of this plant in August 2023.
17	Healthy Choice Poultry, village and post Wadala, Tehsil Majitha, Distt Amritsar	Meyn	1300	Plant owned by Gурpuran Singh Randhawa. To be commissioned by end 2023
18	Huda Foods Pvt Ltd. Plant at Kondhwa. HQ at FL-I-403 Unity Park, SN-43 Kondhwa Kd, behind Sheetal Petrol Pump, Pune	Deccan	1500	Incorporated in 2020 by Sarfraz Momin. The plant processes around 10,000 BPD, with live birds procured from Japfa Farms. The company proposes a second slaughterhouse of 3000 BPH at Sukhed near Satara in Maharashtra.
19	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	RND	3000	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.
20	Japfa Comfeeds Pvt Ltd, 91 Sakore Nagar Vimannagar, Pune 411014, India <a href="https://japfaindia.com/">https://japfaindia.com/</a>	Marel	3000	Work has commenced constructing a 3000/6000 BPH plant at Village Pedgaon, Tal Daund, Distt Pune in Maharashtra. Expected to be commissioned in first quarter 2024. Meanwhile they continue to sell raw chicken sourced from their 1000 BPH leased plant of Maval Agro at Talegaon and Penn Foods at Karjat. RTE chicken was sourced from Hybro Foods, Thane in the past but that has been discontinued.
21	Kuljas Rai Poultry, Amritsar. Also known as Rai Poultry. Plant at Wadala Viram Majitha, Amritsar -143601, Punjab	Storm	3000	Kuljas Rai Poultry set up a <b>300</b> BPH Dhopeswar plant at Chamrang Road, Amritsar, Punjab. Under orders to exit municipal limits, they shut this plant and put it up for sale. The new Storm plant near Amritsar, is in operation from first quarter 2020. Also make RTE poultry products for local markets.
22	KGN Processed Poultry, Pimpri, Maharashtra. Dehu Alandi Road, Shelar Basti, Chikhali, District Pune 412114.	Storm	1500	Started as a manual plant of 300 BPH. Storm plant was commissioned in 2018.
23	Kavi Proteins, Krishnagiri, Karnataka HQ 26, 1 <sup>st</sup> Cross, Sindhi Colony, behind VISL House, JC Road, Bengaluru	Storm	1000	Suffered closure with the onset of the lock-down. Operated at 700 BPH by Sriya Farms. See also Navi Nutrix in part B of this table.
24	Khazir Agro. Plant I.G.C. Lassipora, Srinagar, Srinagar U.T. HQ 4 <sup>th</sup> 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.



25	Kwality Animal Feeds Pvt Ltd. Plant 763/19, A/P-Rajgoli, Chandgad, District Kolhapur, Maharashtra. HQ 12, Kwality House Machhe, Industrial Area, Belgaum, Karnataka <a href="http://kwalityhouse.in/">http://kwalityhouse.in/</a>	Meyn	<u>3000</u>	Ordered as a 2000 BPH plant in Dec 2014. Commissioned in June 2016. Expanded to 3000 end 2018. Sell under the brand name <i>Belchick</i> .
26	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. <a href="https://www.lifelinefeeds.com">https://www.lifelinefeeds.com</a>	Meyn	3000	Owned by K. Kishore Kumar Hegde. 300 BPH RND plant commissioned in 2002; sold to Amrit Feeds and replaced by 1900 BPH RND plant around 2005. Again replaced by a Meyn 3000 BPH plant in June 2015. Sell through 40 company-owned retail outlets in Karnataka. They are expanding, starting with hatching capacity, now already undertaken.
27	Maval Agro, Talegaon	Deccan/ Storm	1000	Leased from their owners (Premium Chick Feeds) by Japfa. Expanded from the original to 1000 BPH in 2023 by Storm under orders from Japfa.
28	Mayuri Broiler Breeding Farms Pvt Ltd at Sy 537/A, 537/E, Village Yellikal, Kalwakurthy Mandal, Nagarkurnool District, Telangana 509324	Storm	1000	Mayuri Farms, owned by Harsha Poultry, operated a manual dressing plant of 400 BPH in Telangana. Their new plant may be commissioned in early 2024.
29	Miki Exports International, Taloja, Maharashtra Domain name <a href="http://mikichicken.com">http://mikichicken.com</a> has expired.	RND	2000	Established in 1950 as Miki Food Stuffs, for export of frozen buffalo meat from a plant at Muzaffarnagar, U.P. In 2015 they commissioned this poultry plant. It was shut down during the Covid lock-down. The facility now processes for Fresh To Home and Licious. It is not clear whether this facility has been sold or leased.
30	Nafees Poultry Plot No 129, East Marredpally, Hyderabad 500026, Near Delhi Public School, Shanthi Niketan Society, Mahindra Hills, Hyderabad.	RND	<u>1000</u>	Operated by Sarabjyot Singh, son-in-law of Harbans Singh, one time owner of Starchick (see Sethwala). This plant started around 2013.
31	Penn Foods Pvt Ltd. Plant at Karjat, Maharashtra. HQ at Clucky's Products LLP, 294, S. Bhagat Singh Road, Fort, Mumbai <a href="http://cluckys.co/the-processing-plant/">http://cluckys.co/the-processing-plant/</a>	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 Amazon, Metro Cash and Carry, Walmart and others. Brand name is <i>Clucky's</i> .
32	Perfect Poultry Pvt Ltd. Plant and HQ at 27 Ft Road, Chowk Green Field, Majitha Road, Amritsar, Punjab.	Meyn	4000	Commissioned at 1000 BPH in July 2015 by Storm Engineering. Has been replaced by Meyn's 4000 BPH plant which was commissioned in December 2021.
33	Premium Chick Feeds Pvt. Ltd 401-404, C Wing, Nyati Millenium, Datta Mandir Chowk, Pune 411014, Plant at Yeral Gut No. 330 Near Rockhill Hotel Sutarwadi, Kolad-Pune Road 402308 <a href="https://www.premiumchickfeeds.in/">https://www.premiumchickfeeds.in/</a> Plant at Sutarwadi, Alibaug, Maharashtra	Storm Eng.	1500	Construction in Raigad district commenced in early 2022 after Maval Agro, which they had been using earlier, was snapped up by Japfa. Commissioning in progress, expect to come into full production in November 2023
34	Pragati Broilers, Krishnagiri, Karnataka	Meyn	2500	This order, for a 2500/4500 BPH plant is expected to be commissioned by mid 2024
35	ProTAC Foods International Pvt Ltd, Plant and HQ at 115 Allasandra, behind RTO Check Post, NH4, Mulbagal Taluk, Karnataka	Meyn	4400	Commissioned in June 2016 at 2000 BPH. Planned as a merchant processor with <i>mandi</i> sourced live birds. Operating now on contract at 24,000 BPD for Tri Star (Kerala), Nandus, Licious, Shanti (Fortune) and Fresh to Home. Commissioning to 4400 BPH was completed in mid 2023. Next planned expansion is to 7000 BPH
36	RM Delicious Foods, Khatoni No 102, Khewat No 92, VPO Seenk, near Bus Stand Tehsil Israna, Panipat, Haryana 132103,	Meyn	1300	Owned by R Malik as part of his RM Agro Group of Companies. Plant expected to be commissioned by end 2023.



37	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.
38	Sabir Qureshi (formerly Sneha Farms)	RND	1000	Mohd Sabir Qureshi, one time employee of Phoenix Poultry, bought the 2011 RND plant of Sneha Farms, relocated and re-commissioned it at Jabalpur in 2019.
39	Saffa Foods, Coimbatore	Storm	1000	Under fabrication.
40	Sethwala Foods Pvt Ltd, plant at Talasari, Palghar, Maharashtra.	Marel/RND/Storm	<u>2000</u>	Stork imported and installed a refurbished, used 500 BPH plant in the 1990s for Shiraz Hotels, Agra. They sold it to Harbans Singh of Starchick, Hyderabad, who operated it as Star Chicks and later sold it to Hanifbhai of Sharon Broilers, who in turn sold it to Sethwala in 2012. Installed by Dhopeswar shortly thereafter; expanded and re-commissioned with inputs from RND and Storm. The brand name is <i>Setb's</i>
41	Shalimar Corporation, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata <a href="http://shalimarcorp.in">http://shalimarcorp.in</a>	Meyn	6000	Commissioned in Sept 2014 at 2000 BPH. Expanded to 2600 in 2018. Expanded to 6000 BPH and commissioned in mid 2023. Shalimar sells under the brand name <i>Total Chicken</i> .
42	Shalimar Corporation, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata <a href="http://shalimarcorp.in">http://shalimarcorp.in</a>	Meyn	2500	This new plant of initial capacity of 2500 BPH is coming up at Una in Himachal Pradesh. Commissioning is expected by mid 2024
43	Shanthi Feeds. Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore <a href="http://shanthifeeds.com">http://shanthifeeds.com</a>	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.
44	Sivasakthi Agro Foods, plant at Udumalpet, Tamil Nadu. HQ 793/18, Kumaralingam West Village, Rudrapalayam Post, Madathukalam Taluk, Tirupur Dist. Tamil Nadu <a href="http://www.sivasakthifoods.com">http://www.sivasakthifoods.com</a>	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>
45	Skylark Foods, plant at Rai Food Park, Sonapat, Haryana. HQ at Dharamgarh Road, Safidon, Distt. Jind, Haryana <a href="http://skylarkfoods.com">http://skylarkfoods.com</a>	Meyn	<u>1000</u>	Commissioned March 2006 on an 1800 SqM piece of food park land with no room for expansion or growth. They have added an RTE plant in a nearby plot of land. Sell through Walmart and to many premium hotels and their franchisee outlets. Brand is <i>Nutrich</i> .
46	SKM Feeds (earlier known as VKS Farms). Plant at Dindigul, Tamil Nadu. HQ Nanjai Uthukuli, Modakurichi Tamil Nadu <a href="https://www.skmpornafoods.com">https://www.skmpornafoods.com</a>	Meyn	<u>8000</u>	Original capacity of 2000 BPH commissioned in Sept 2009 by VKS. Company changed hands in Jan 2015 and became SKM. Expansion to 4000 BPH done by mid 2019. Further expansion to 8000 BPH was commissioned in 3 <sup>rd</sup> quarter 2022.
47	Sneha Farms Pvt Ltd, plant at Addakul, Hyderabad-Bangalore Highway, Telangana. HQ at Plot No 30, Survey No. 22, 17AA, Kondapur, Hyderabad <a href="http://snehagroup.co">http://snehagroup.co</a>	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.
48	Souza Hatcheries, Mangalore, Karnataka. HQ at Souza Commercial Complex, Highlands, Falnir Road, Mangalore <a href="http://www.souzahatch.com">http://www.souzahatch.com</a>	Bayle	1000	Commissioned 2013 for Lester D'Souza. Fate of RND plant of 500 BPH bought earlier by them is yet not known. A local company called Ideal Chicken operates this facility now.
49	Srinivasa Farms Private Limited, plant at Taniki Village, Kowdipally Mandal, Medak District, Andhra Pradesh. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. <a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a>	Bayle	1000	Ordered May 2015. Commissioned in Sept 2017. Operating at 1500 BPH.





50	Star Foods Pvt Ltd, proposed plant at Ladhawal Food Park, Ludhiana. HQ at Sampoorna Feeds, Phagwara, Punjab <a href="http://sampoornafeeds.com">http://sampoornafeeds.com</a>	Marel	4000	Construction in progress at site. Commissioning expected by mid 2024
51	Star Poultry, Johrawar Singh, Jammu	Storm	1000	Order placed on Storm. Fabrication in progress. May be in operation by mid 2024
52	Suguna Foods Pvt Ltd, Vyalur, Tamil Nadu HQ at Unitea Building, No 3, Savithri Shanmugam Road, Race Course, Coimbatore. <a href="https://www.sugunafoods.co.in">https://www.sugunafoods.co.in</a>	Meyn Marel	3000 1000	Commissioned 2000 BPH in Aug 2002. Grew in 2009 to 3000 BPH. This plant has been reconfigured for increased value added products. Equipment for current expansion to 4000 BPH was sourced from Marel and it is due for commissioning by end 2023
53	Suguna Foods Pvt Ltd acquisition of Alpha Agro & Cold Storage Pvt Ltd), Belgaum, Karnataka	Meyn	1000	Commissioned in April, 2014, as a Meyn 1000 BPH plant to function as a merchant processor mainly for the armed forces, Goa and local markets by promoters Alpha Agro who sold the facility to Suguna in 2019.
54	Suguna Foods Pvt Ltd acquisition of SHL Foods Private Ltd (Sagri) Plant at Lalru, Punjab.	Meyn	2500	Originally a 1000 BPH plant set up in 2009 at Chanalon Industrial Park, on a mere 1000 SqM plot of land by Surjit S. Kohli. Relocated, expanded, re-commissioned in Feb 2014. Sold in 2018 to Suguna.
55	Swami Feeds. Plant at Dharapuram. HQ SF 324/2C Nathapalayam, Mulanur, Dharmapuri, Tamil Nadu	Marel	3000	During construction parts of the structure were gutted in a fire in mid-2020. Came on stream in mid 2021.
56	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 have now started work at a site near Mohali in Punjab. Equipment arrived at site in March 2023 end and the plant by end of 2023.
57	Venkateshwara (VH) Plant at Kamshet near Pune. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. <a href="http://venkys.com">http://venkys.com</a>	Meyn/Marel	<u>3000</u>	Oldest operating plant since 1986 in India. It was commissioned as 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.
58	Venkateshwara. Plant at Davangere, Karnataka. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. <a href="http://venkys.com">http://venkys.com</a>	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.
59	West Bengal Livestock Dev Corp, Haringhata.	RND/Storm	1000	Order taken from WBLDC by Dr Froeb (India) Pvt Ltd, then the agent of Linco and sub-contracted to RND/Storm, Commissioned in 2015.
60	West Bengal Livestock Dev Corp, Siliguri	Linco	1000	Combined poultry, goat, beef and pork slaughterhouse commissioned in 2022
61	West Bengal Livestock Dev Corp, Haringhata.	Meyn	4000	Letter of Credit received for a 4000/8000 BPH plant at their Haringhata location in late April 2023. Commissioning expected by early 2025
<b>Integrated processing capacity expected by early 2025 based on current orders, on-stream and under-construction projects</b>			<b>1,65,400</b>	<b>Average plant capacity is 2711 BPH.</b>
Capacities are mentioned in birds per hour (BPH). For calculating market shares, of the total capacity of 1,65,400 BPH expected on stream by early 2025, Meyn's market share is 82,000 (49.6%), Marel's is 34,000 (20.6%), Storm Engineering's is 20,400 (12.3%); RND's is 14,000 (8.5%), Baader-Linco's is 9,500 (5.7%), Bayle's is 3,500 (2.1%); Deccan's is 2,000 (1.2%). [Total 1,65,400 (100%)] [Sethwala's capacity divided >> 500 to Marel, balance 750 each to RND and Storm]				
The following proposed projects have been removed from the above table and taken to part B because of ongoing uncertainties about their future:				
<ol style="list-style-type: none"> <li>1 Anjaneya 2500 BPH project at Mavin Honda. Project delayed as they continue to await approval of grant of capital subsidy from the government. Civil work initiated at site. No equipment ordered so far.</li> <li>2 Srinivasa Farms Pvt. Ltd, 2000 BPH, Mega Food Park, Kurichedu, Prakasam district. Equipment delivered to the site over six years ago by Marel. No response to Aptec's repeated reminders seeking information on their plans for installation and commissioning. Equipment supplier Marel is equally unaware of any plans related to commissioning.</li> <li>3 RFK Green, Pulwama, J&amp;K. HQ at C-37, First Floor NSM, Azadpur New Delhi. The 2500 BPH plants was ordered in July 2017 and installation was completed in 2019. Commissioning is delayed due to social unrest in the area.</li> </ol>				



B	<p>This 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 (2) closed and scrapped poultry processing plants of all sizes – many of which were re-sold and subsequently grew to become organized sector processing houses- at which time they cease to be listed in this section, (3) Plants on which some work has been done but commissioning remains under abeyance for several years, (4) RTE plants who source chicken meat from processing plants, and even if their repertoire only marginally includes chicken, they have the machinery, experience and general potential to follow market trends and become noteworthy for poultry processors (4) Web based poultry and poultry based RTE order suppliers, many of which have also acquired, or lease idle facilities and are either reviving them or setting up <i>cloud kitchens</i> for captive use. Also, while compiling this list we have dwelled on historical past of potential big players in the processed food and QSR sectors in the belief that history is a great teacher and may eventually direct their steps towards this industry. Plants possessing RTE capacities are indicated with <u>underlined</u> capacity figures.</p>
62	<p><b>Agritech Hatcheries Ltd</b> promoted by Damania brothers, started with a 1000 BPH Meyn plant in early 1990's at Ahmadnagar, Maharashtra. It then expanded in 1995 to 4500 BPH and at that time was the most advanced and the largest facility in India. It then closed when the group became insolvent around 1997. Leased for a year from the State Bank of India by C&amp;M with a view to re-commission it, they failed and surrendered it in 1999. Later the plant was scrapped.</p>
63	<p><b>Al Arif Poultry</b>, Vakwady Road, Kumbhashi Post Kundapura Taluq, Udupi District – 576257 Karnataka. Operate a 700 BPH manual dressing plant. They ordered a 500 BPH processing plant from Storm Engineering recently. Fabrication is in progress.</p>
64	<p><b>Al Kabeer</b> 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. <a href="http://www.al-Kabeer.in">http://www.al-Kabeer.in</a></p>
65	<p><b>Amalgam Group</b>, Cochin, Kerala (Innovative Foods – Sumeru brand) was started in 1977 as a family owned seafood and spice exporting company. Later in 1989 they diversified into processed foods – partnering with Nissin Foods of Japan for freeze drying and with Mitsubishi and Unilever to develop cold chains, besides Ristic GmbH, Saudi Fisheries and others, consolidating their business around Innovative Foods, a clearing and forwarding agency for Hindustan Lever ice cream. Headquartered at Bangalore. Their first attention was to frozen vegetables, followed by <i>parathas</i> and finally to RTE chicken based products under the 'Buffet' range, offering sausages, nuggets and popcorns, <i>samosas</i>, spring rolls and burger patties in 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 from nearby processors which exceeds INR 60 million. They also produce cup chicken noodles using dehydrated chicken. Recently they launched innovative recipes curated by Michelin Star Chef Alfred Prasad and now propose to venture into vegetarian and meat based momos. <a href="http://www.sumeru.net">http://www.sumeru.net</a></p>
66	<p><b>Amrit Feeds</b>, Jangalpur, Howrah, West Bengal, bought original RND plants from Lifeline Feeds and Ave Mariam and installed the combination as a 300 BPH unit at Jangalpur. Later expanded to <b>700</b> BPH in 2009. Along with this primary processing facility they also set up a sausage and ham plant in 2010 with an investment of around INR 30 million for sale under the brand name <i>Fresco Pollo</i>. Now all facilities are closed. Planned relocation of this plant to Assam in 2016 was dropped. <a href="http://www.amritgroup.net">http://www.amritgroup.net</a>.</p>
67	<p><b>Amrit Feeds</b>, Beldanga Mouza, Raghunathpur, PO Bonkati Kanksal, Panagarh, West Bengal. A Linco plant of 4000 BPH plant commissioned in first quarter 2014 and promptly closed a year later on June 1, 2015. This facility has been available for sale ever since but is unlikely to find buyers because the asking price is too high. <a href="http://www.amritgroup.net">http://www.amritgroup.net</a>.</p>
68	<p><b>AOV</b> old plant with <b>2000</b> BPH machinery from both RND and Storm may be on sale after commissioning of the Meyn plant</p>
69	<p><b>Arthur's Food Company</b>, Bangalore. This RTE plant retails through Big Basket, Food Basket, Foodhall, Foodworld, Metro Cash &amp; Carry, Nature's Basket, Scootsy, Spar, Spencer's and Star Bazar. <a href="http://www.arthursfood.com">http://www.arthursfood.com</a></p>
70	<p><b>Assam livestock &amp; Poultry Corporation</b>, Panjabari Road Khanapara, Guwahati 781022. Ordered a 500 BPH plant from Storm which was installed and commissioned in 2023.</p>
71	<p><b>Barafwala Co</b>, 11 High Street, Camp, Belgaum, Karnataka. Had so far been confined to the red meat industry. Recently they have set up a pilot plant for processing poultry using some Deccan Automation Technology machines and some made by themselves and are slaughtering 2000-3000 birds daily.</p>
72	<p><b>Brahmagiri Dev Society</b>, Wynad, Kerala, <b>500</b> BPH by RND in 2010.</p>
73	<p><b>Broiler Master</b>, Punjab, <b>200</b> BPH by RND in 2011. This is a “dry processing” plant, having neither scalding nor plucking and does wet market style evisceration.</p>
74	<p><b>Caris Pure</b> 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 <b>3000</b> 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<sup>1</sup></p>
75	<p><b>Central Avian Research Institute</b>, (IVRI) Bareilly, <b>200</b> BPH by Dhopeswar.</p>
76	<p><b>Century Farms</b>, Erampalli, P.O. Shivalli Udupi Taluka &amp; District- 576102 Karnataka. A <b>500</b> BPH plant built by Storm Engineering, in operation from 2015.</p>
77	<p><b>Chatha Foods</b>, 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 <a href="http://cfpl.net.in">http://cfpl.net.in</a></p>
78	<p><b>Coastal Hatcheries</b>, Mangalore, <b>500</b> BPH by RND. To be scrapped now that their Marel plant is commissioned.</p>





79	<b>College of Vet &amp; Animal Sciences, Kerala, 200 BPH</b> by RND in 2003.
80	<b>Contai Golden Hatcheries Pvt. Ltd, Contai, E. Midinapore, West Bengal, 300 BPH</b> by RND in 2003. It is owned by Shalimar Hatcheries and is available for sale.
81	<b>CP India, Chennai, 500 BPH</b> by RND in 2002. Scrapped soon after commissioning.
82	Computerized web based delivery platforms for order booking and order tracking using purpose-designed apps. These include <b>Amazon, Food Panda, Fresh to Home, Licious, Ola, Road Runners, Swiggy, Zapp Fresh, Zomato</b> and others
83	<b>Darshan Foods or Meatzza.</b> Established in 1969 as a buffalo meat exporter. Started an RTE division in 1996 with facilities for delicatessens, Indian products like <i>seekh kabab, shami kabab, samosa, tikka</i> etc. and breaded products for retail & institutional customers. Now operate through their own plant at Lawrence Road Delhi, several leased premises at Udyog Vihar, Gurgaon and a purpose-built plant at Behror, in Rajasthan. It has a combined capacity of 750 tonnes per month from chicken, pork & mutton/lamb. It sources whole dressed birds from many plants listed in Section A of this table as well as from Ghazipur Mandi. Possesses a Meyn cone de-boner line for portioning and deboning chicken carcasses. The company is run by Narinder and Rajiv Jaisinghani. <a href="http://www.meatzza.com">http://www.meatzza.com</a> .
84	<b>Doon Valley Poultry's 500 BPH</b> plant supplied by Storm Engg. Commissioning expected in first quarter of 2024.
85	<b>Dr Srinivasa,</b> promoter of the decommissioned and eventually trashed 500 BPH Bayle plant called <b>Pragathi Broilers</b> at Doddaballapur in a disused feed mill shed. He is planning another facility in Karnataka, this time with an ambitious capacity of 1000 BPH but there is no news of any progress.
86	<b>Empire Foods, Taloja, Maharashtra. 1000 BPH</b> plant purchased from RND some 12 years ago, not yet installed. It has probably been resold to and installed by another company, or listed here under a different name.
87	<b>Farm Suzanne, 64, Montieath Road, Egmore, Chennai 600008, Tamil Nadu.</b> Established in 1984 by Eric and Mary Rodriguez at Siruseri, near Chennai with a capacity of 1.5 tonnes per day, as a branch of a larger sea-foods company. They sell to institutions and through retail chains and also perform as ship chandlers. Procure chicken meat from several processors listed above in section A. They partnered with Pizza Hut to make pepperoni for the first time when the Indian Government banned its import in 2006. In 2015 they were planning a new plant. <a href="http://www.farmsuzanne.com">http://www.farmsuzanne.com</a>
88	<b>Farm Value Foods Private Limited</b> owned by Anshu Sibbal Chatli runs an RND plant of <b>350 BPH</b> capacity at Barnala. It was commissioned in 2014.
89	<b>Five Star Chicken,</b> a unit of CP, acquired in 2005 and 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. They 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. Later, commencing 2016, from their 2000 BPH Meyn processing plant at Chittoor where they also have an RTE plant. In 2016 they shut 133 non-performing outlet, because of sluggish market growth, bringing their total down to around 270. They also terminated lease of Penn Foods in Maharashtra and ProTAC contract-processing. They are now learnt to be reviving and revamping their presence in India. <a href="https://www.fivestarchicken.com">https://www.fivestarchicken.com</a>
90	<b>Food and Flavours, Bangalore.</b> 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.
91	<b>Gitwako Farms,</b> headquartered at Jangpura Extension, New Delhi, is owned by Ajay Beri at Ferozepur Jirka. They operate an RND plant of <b>unknown</b> capacity and also process goat meat. Mainly produce RTE products for which they possess a retort.
92	<b>Godrej Tyson, Hoskote, Karnataka, 1000 BPH</b> plant from RND in 1999, which was scrapped in 2007 and replaced by a Marell 2000 BPH plant, which was later expanded to 3000 BPH. They have a 400 Kg/hour formed products line and a sausage, salami and cold cuts lines – part of which was reconditioned and procured from The Waterbase Nellore facility of the Ballarpur group – a fish further processing facility that failed.
93	<b>Golden Hatcheries Bangalore,</b> operate a manual dressing facility of <b>500 BPH</b> within municipal limits. Under orders to relocate. Have set up a 3000 BPH Meyn plant at Davangere.
94	<b>Hayagreeva Poultry Solution</b> has a <b>500 BPH</b> RND plant located at Doddaballapur near Bangalore which was commissioned in 2020. The plant was earlier owned by Chicken Stop, sold to another owner, then shifted to its present location.
95	<b>Hitech Hatch Fresh, Kolkata.</b> Already have a manual dressing plant of <b>unknown</b> capacity and plan to set up a modern processing unit soon.
96	<b>Higrow Chicken,</b> owner Deepak Raj Garg, runs an RND plant of <b>500 BPH</b> at Ludhiana, which was commissioned in 2017.
97	<b>Hygienic Chickens, 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, 300 BPH</b> by RND.
98	<b>Ideal Chicken (Anupama Feeds and Farms), Kulshekar, Mangalore,</b> run by Vincent Cutinha. Commenced processing around 2017 with a locally sourced plant of <b>unknown</b> capacity which runs its own home delivery and also process for Fresh-To-Home and Licious <a href="http://www.idealchicken.in">http://www.idealchicken.in</a>
99	<b>Indian Broilers (IB Group, Rajnandgaon)</b> located at Nagpur, Madhya Pradesh. It is a <b>500 BPH</b> plant by RND, started in 2016. They are planning a major foray into poultry processing, with several 6000 BPH plants at several locations.
100	<b>Indian Hospitality Company Group</b> was registered in Caymen Islands in 2006 to make investments in hospitality and QSR sectors. To help them do so, they recruited the founder of Barista and CEO of Yum and acquired Adelie Foods of UK, who are contract caterers and suppliers to airlines, in 2012. Subsequently they acquired Skygourmet, Mars Restaurant chain, Birdy's, Dosa Diner, Roti, Pizzeria & Pasta Bar, and Tendulkar's. Owing to these, IHC is now fully into QSR and RTE foods businesses, and given the market potential, may make an entry into the chicken RTE sector.
101	<b>International Food Products, Chandigarh.</b> Small RTE producer in chicken and other meats.

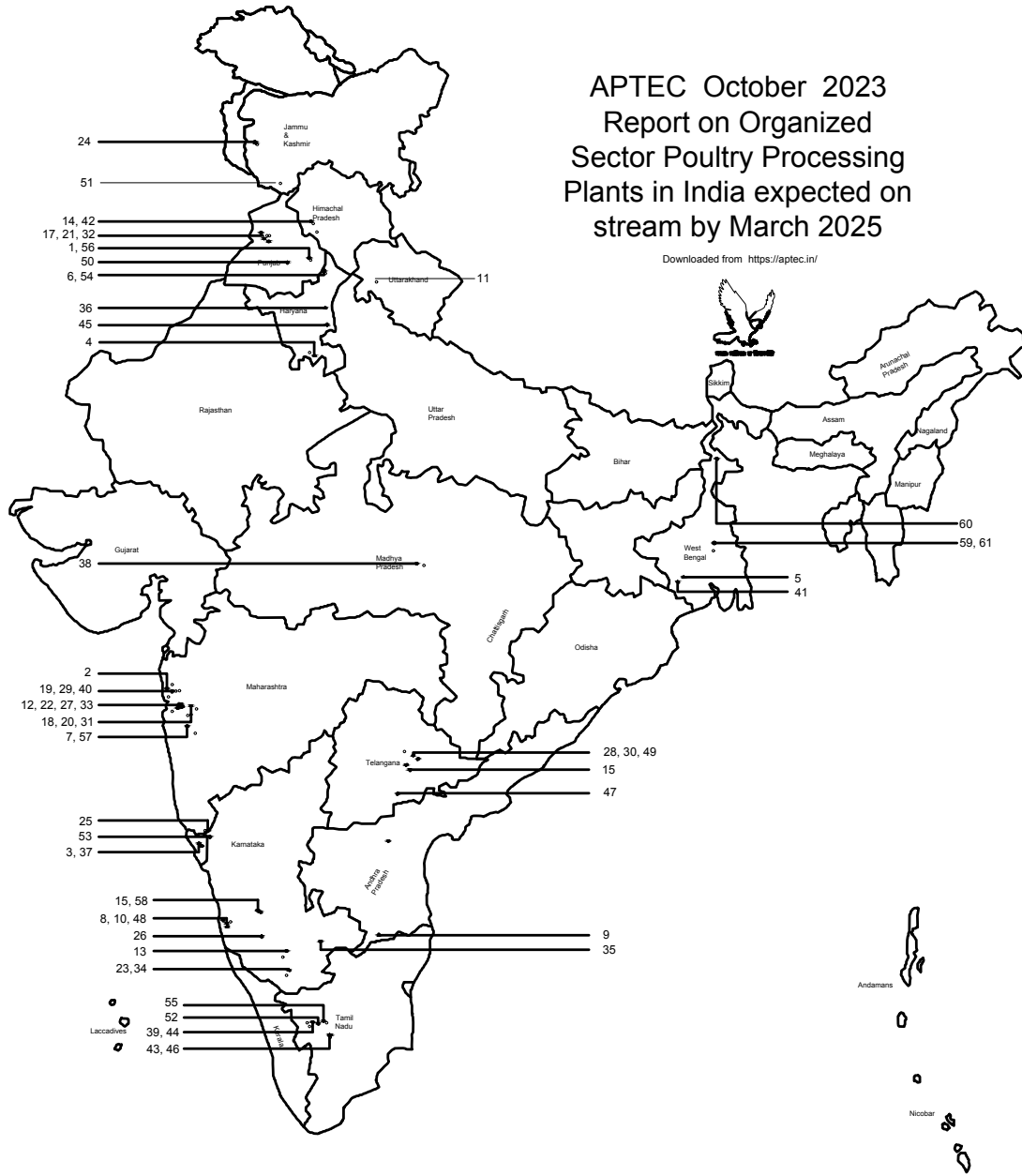


102	<b>Irani Chicken Products LLB</b> , Daman, Gujarat, <b>500 BPH</b> plant by Bayle, commissioned Dec, 2013.
103	<b>ITC Welcomegroup</b> made its entry into the branded & packaged foods business in August 2001 with inspiration from its successful restaurants Bukhara and Dum Pukht. In June 2003 they 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.
104	<b>Khushbaksh Poultry</b> , Near Kashmir Glass House, Phase 3RD, Industrial Estate, Srinagar- 190001, Jammu & Kashmir. A 500 BPH plant under order from one Mr Bashir under fabrication by Storm Engg and slated for commissioning by mid 2023
105	<b>Knowledge Foods</b> , Neral. Manual-dressing <b>300 BPH</b> . Also making RTE products.
106	<b>KSIDC</b> , Kerala, <b>300 BPH</b> by RND in 2005.
107	<b>McDonalds India</b> , 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. <a href="https://vistafood.com">https://vistafood.com</a>
108	<b>MTR</b> . Started in 1924 as a restaurant called Brahmanara Coffee Club and later in 1951, changed to Mavalli Tiffin Room in Bangalore. During the Emergency, unable to conform to the prescribed pricing orders of Indira Gandhi, they diversified into packaged convenience foods. Around 2008 they were acquired by Norway's Orkla Foods. They produce seasonings, RTE foods, curries and RTE meals. In 2012 the original owner P.S. Maiya, no longer encumbered by the agreement with Orkla, re-entered the RTE foods segment with a new company. Given the dynamism of Maiya and Orkla, they are both quite likely to enter the RTE chicken sector, given its growth potential.
109	<b>Meat Masters</b> . Incorporated in 2000, a producer & supplier of frozen vegetarian & non-vegetarian (fish, mutton and chicken) and RTE products in retort pouches and filled products like sausages. They have set up a new processing facility for further processed meat products at Ladhawal Food Park near Ludhiana in Punjab. Meat Masters sells through own stores BigNMeat, other retailers, and directly to hotels and restaurants in that region <a href="http://www.meatmasters.co.in">http://www.meatmasters.co.in</a> .
110	<b>Meat Products of India</b> , a Kerala government company established in 1973, operating in Chalakudy and Edayar, with bought-out chicken meat and pork from own farms. Produce feed and RTE products. Accumulated losses exceed 3 years' turnover. In mid May 2003 they were planning a captive 1000 BPH primary processing facility.
111	<b>MP Pashudhan Nigam</b> , Bhopal, <b>500 BPH</b> by RND 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.
112	<b>Monrovia Agro Foods</b> , Bhandgaon, Pune, Maharashtra, <b>500 BPH</b> by Storm Engg in Jan 2014.
113	<b>Nagpal Frozen Foods</b> , 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.
114	<b>Navi Nutrix</b> , <b>750 BPH</b> by RND at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Sriya Foods
115	<b>Nandus Foods Pvt Ltd</b> . 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 Nandakumar's two sons Naveen & Narendra Pasuparthi.
116	<b>Nensey's Poultry</b> , Valsad, Gujarat, <b>300 BPH</b> by RND around 2002. It is learnt to have been sold to an unknown party.
117	<b>Peninsula Foods Pvt Ltd</b> , a division of DeeJay Group, Bangalore, owned by David Lobo, set up a 1000 BPH Meyn plant in the late 1990's. For tax benefits it was run by a complex arrangement of four DeeJay companies. Closed around 1998 following labour unrest which coincided with Lobo's unsuccessful foray into broiler pure-lines with Ross – in direct competition with his one-time partner Dr B. V. Rao of VH. The plant was scrapped.
118	<b>Perfect Poultry Pvt Ltd</b> . 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 <b>2000 BPH</b> is probably available for sale.
119	<b>Pioneer</b> , Hyderabad, Andhra Pradesh, 500 BPH by Dhopeswar. It has been scrapped.
120	<b>PL-480 plants</b> . Even before VH set up their first poultry processing plant in India in 1986, several carousel track type prototypes from Diamond of USA arrived as grant to the Indian Government under the PL-480 scheme. As far as we are able to ascertain, they were installed in Chandigarh, Mumbai, Aligarh, Orissa, Kerala and Andhra Pradesh. We have seen the one at Chandigarh (CPDO) and the one of <b>Mafco</b> , 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.
121	<b>Prabhat Foods.</b> 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. <a href="https://www.prabhatpoultry.com">https://www.prabhatpoultry.com</a>
122	<b>Ratnagiri Cooperative,</b> Chiplun, Maharashtra, <b>300 BPH</b> by RND in 2003. Now closed and possibly scrapped.
123	<b>Riverdale Foods,</b> Somatne, Maharashtra, 1000 BPH by Meyn around 1995 installed for Harianawala brothers, ex-employees of VH. It closed around 2003 when its arrangement with McDonalds became unprofitable. Was bought by ANC Holdings, Dubai for its prime location near the Mumbai-Pune expressway. The plant has been scrapped.
124	<b>Ruchi Agro Industries Ltd,</b> Chikmagalur. It is an RND manual plant of <b>unknown</b> capacity.
125	<b>Royal Foods Pvt Ltd/Shakir Shaikh,</b> Lohegaon, Pune, Maharashtra, <b>500 BPH</b> by Storm in Nov 2013.
126	<b>Saaras Breeding Farms,</b> Odisha, a 500 BPH plant, currently under fabrication by Storm
127	<b>Sai Agri,</b> Kakinada, Andhra Pradesh, 500 BPH used Lincop plant imported and installed around 2001 to cater to nearby oil platform workers. Closed shortly thereafter. Bought and mothballed by Srinivasa Hatcheries Ltd, Vizag.
128	<b>Sandip Mukherjee,</b> One time plant manager of <b>Arambagh Hatcheries,</b> is operating a 500 BPH manual processing plant at Gariahat, near Kolkata in West Bengal.
129	<b>Shiva Chicken,</b> Coimbatore. Manual dressing of <b>unknown</b> capacity <a href="http://www.shivaachicken.com">http://www.shivaachicken.com</a>
130	<b>Shiva Farms,</b> Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery
131	<b>Shiva Poultry Equipment,</b> Barnala city, is operating a <b>500 BPH</b> processing plant supplied by RND at GADVASU University in Ludhiana. Their brand name as “ <i>Hygrom Chicken</i> ”
132	<b>Sirsa Foods,</b> at 2, Lavkush Dharamshala, Balmiki Chowk, Opp. Khunger Sweets, Sirsa, Haryana. A <b>500 BPH</b> plant supplied by Storm. Expected to be commissioned by first quarter of 2024.
133	<b>S.M. Feeds &amp; Farms Pvt. Ltd,</b> No. 294, Thiruvallur High Road, Alamathy Village, CCBF Post, Redhills Chennai – 600052. A 500 BPH plant commissioned by Storm in 2017
134	<b>Sood Poultry</b> at Jullunder, Punjab. A <b>500 BPH</b> plant commissioned by Storm in 2020.
135	<b>Srinivasa Farms Private Limited.</b> Plant at Mega Food Park, Kurichedu, Prakasam, AP. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. <a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a> . Order for the 2000 BPH plant was placed on Marel in late 2017. The plant is delivered but six years on we still have no information on its commissioning schedule.
136	<b>S.S.S Hatcheries,</b> 258/1-1, N.S.R.Road, Venkitapuram, Coimbatore-641025, Tamil Nadu. A 500 BPH plant set up by Storm in 2023
137	<b>Sujay Feeds,</b> SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, <b>200 BPH</b> manual slaughter.
138	<b>Swift Foods,</b> Dadri, Uttar Pradesh. An automatic Stork 4000 BPH processing plant commissioned in the early 1990's by Jagdish Prasad, in competition with VH's Kamshet plant of 1000 BPH. It had an RTE section. Closed around 1995, then scrapped.
139	<b>Taurus Foods</b> 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 <a href="https://www.taurusfoods.in">https://www.taurusfoods.in</a>
140	<b>Unitas Foods Pvt. Ltd</b> 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. <a href="http://www.unitasfoods.com">http://www.unitasfoods.com</a>
141	<b>Unnat Feeds,</b> Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana. An order was placed on Lark Engineering. Learnt to be under fabrication from early 2021, but lack important approvals from the government, therefore commissioning date is unknown. The project may have been scrapped.
142	<b>Violet Industries/Souza Hatcheries,</b> Mangalore, <b>500 BPH</b> by RND. Not yet commissioned.
143	<b>Vista Agriculture &amp; Food Products,</b> Khurdah Road, Bhubaneswar, Odisha, <b>750 BPH</b> by Storm Engg in 2013. Plant is closed
144	<b>Walvekar Hatcheries Ltd,</b> Pune. 1000 BPH plant was confiscated by the Mumbai Customs due to some irregularities. When auctioned several years later, the lot was picked up by Dr C. R. Behl of VH with a view to install it near Bangalore. Later, most of the machines were used by VH to replace run-down Marel machines at their Kamshet facility.
145	<b>WBFCSL/R. K. Doloi,</b> MLA, Midinapore, West Bengal, <b>300 BPH</b> by RND in 1998, ostensibly for the economic up-lift-ment of local tribals. It was never commissioned. Meanwhile the owner tried selling the equipment or the company, first to Amrit Feeds and then on 15 Jan 2020 to VH but failed each time.
146	<b>Zorabian,</b> Khopoli, Maharashtra, Originally a drum plucker manual dressing facility, upgraded to <b>500 BPH</b> by RND in 2007. Following the death of Khorram Zorabian, the plant is now run by his daughter.
<p>Note: This list is as exhaustive as we could make it and covers slaughter operations in the un-organized sector. Counting from within this list, we arrive at a total active or potentially re-deployable capacity of 38,350 BPH (34,450 in 44 plants + 5 of unknown cap) for primary slaughter. Where capacity is not known – we have assumed it to equal the average capacity of the remaining plants within this category. The total capacity includes Srinivasa Hatcheries and RFK Green because their equipment is physically at site, whether installed or not.</p>	





1	Alchemis	11	Doon Valley D'door	21	Rai Poultry	31	Penn Foods	41	Shalimar Gals	51	Star Poultry Jammu	61	WBLDC, Harin II
2	Al Halal Foods	12	Godrej Tyson Talaja	22	KGn Poultry	32	Perfect Poultry	42	Shalimar Una	52	Suguna, Vayalur		
3	Ambica Chicken	13	Godrej Tyson Hosk	23	Kavi Proteins	33	Premium Chick	43	Shanthi Feeds	53	Suguna, Belgaum		
4	AOV Agri	14	Goel Foodworld	24	Khazir Poultry	34	Pragati Broilers	44	Sivasakthi Agri	54	Suguna, Lulu		
5	Arambagh	15	Goldchick	25	Kwality Animal Feed	35	ProTAC Foods	45	Skylark Foods	55	Swami Feeds		
6	AV Ventures	16	Golden Hatcheries	26	Lifeline Feeds	36	RM Delicious	46	SKM Feeds	56	Syra Foods		
7	Baramati Agri	17	Healthy Choice	27	Maval Agri	37	Royal Foods	47	Sneha Farms	57	VH, Kamshet		
8	Bharat Agrovet	18	Huda Foods	28	Mayuri Broiler	38	Sabir Qureshi	48	Souza Hatcheries	58	VH, Davangere		
9	CP India	19	Hybro Foods	29	Miki Exports	39	Saffa Foods	49	Srinivasa, Taniki	59	WBLDC, Harin		
10	Coastal Farms	20	Japfa Comfeed	30	Nafees Poultry	40	Sethwala Foods	50	Star Foods	60	WBLDC, Siliguri		



**Disclaimer:** The author, Alok Raj, is Director APTEC, an independent technical consultancy company for the poultry and meat processing industries with nearly a quarter century of practical experience. He may be reached at +91 98110 49914 or rajalok@gmail.com and alok@aptec.in. The views expressed here are the author's own and have been so expressed in the interest of the processed broiler industry and meat industry in India. They do not necessarily reflect ideas or interpretations attributable to any other person or organization. In so much as readers seek to excerpt sections of this article for discussion or dissemination, provided always that they acknowledge the original source(s), they are free to do so even as much as the Author does himself quote, with acknowledgement and thanks, data, views and ideas from within the public domain.

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### Endnotes:

<sup>i</sup> Caris Pure assumed that shipments of unpacked carcasses to hotels and restaurants merely replaced wet market supplies and was therefore not subject to GST under the TNVAT Act 2006 Entry 54 of Part B of Schedule IV Section 15. Just as, according to his claim, other processors were exempt. But was compelled to comply with the tax assessment orders passed in respect of the assessment years 2014-15 and 2015-16. Source: *Indian Kanoon* <http://indiankanoon.org/doc/121070941/>

