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



1 Schedule

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

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 ten years. If you want an older copy, e-mail us.

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 End 2026 In India. (This list includes existing units and those based on orders released and/or work already initiated at site and/or manifest news or information about an individual company's plans).				
A	The Organized Sector - Comprising Plants Of 1000 BPH 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 Q2, 2026.
2	Abis Proteins P Ltd , Chittoor, Andhra Pradesh. https://www.ibgroup.co.in/	Meyn	12000	Part of the IB Group of Rajnandgaon. Contract signed in 2024, plant may be ready by Q2, 2026.
3	Al Arif Foods , Vakwady Road, Kumbashi Post, Kundapur Taluka, 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 2TPD RTE plant.
4	Alchemist Foods & Hospitality Ltd , Kurali, Punjab (leased to Star Foods) http://www.alchemist.co.in/ (This link is no longer functional).	Meyn	<u>2000</u>	Commissioned in 2004. Between 2017 & mid 2025 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. Following The Star Foods plant was commissioned in mid 2025 and is now processing its own brand.
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 Q1, 2026.
6	Al Halal Foods , 1098, Dohole Village, Kalamboli, Padgha, Taluka Bhiwandi, Dist. Thane, Maharashtra. https://www.exportersindia.com/al-halal-foods-company3354292/	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	Annai Poultry , No. 5-B, ASRN Complex, Palayamkottai Market, MKP Hospital Road-Tirunalavelli, Tamil Nadu 627001.	Local	1000	The plant may be in operation by end 2025.
8	AOV Agro Foods Pvt Ltd , Khasra Nos. 20-22, Village Tapkan, Tehsil Nuh, Haryana 122107. HQ at C-22/25 Sector 57 Noida 201301	Meyn	4000	Promoted by O. P. Arora of AOV Group (mainly in red meat), who acquired the Nuh facilities from Moin Akhtar Qureshi , one time biggest buffalo meat exporter in India. Originally 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.
9	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.
10	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> .
11	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.
12	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 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.
13	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.
14	Bharat Agrovet , Plant at Ganjimutt, Mangalore, Karnataka. HQ behind Annapoorneshwari 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 .
15	Cedar Integrated Food Tech Pvt Ltd. , 7/732/9-11 Green Tower, Mannuthy-Nadathara Road, Pattalakunnu, Thrissur, Kerala 680651.	-	3000	Earlier known as ESAF Retail , it was established in 2008 to bypass middlemen in FMCG retail, electronics and fibre trade. Now operating in poultry and cattle feeds. The company proposes a poultry slaughterhouse at a project cost of Rs 66.6 crores for which a govt capital subsidy of Rs 10 crores has been sanctioned.
16	Charoen Pokphand India Pvt Ltd (CP) . Plant at Chittoor, Andhra Pradesh. HQ at CPF Tower, 1, 100-Foot Road, Stage 2, Hoysala Nagar, Indiranagar, Bengaluru, Karnataka https://cpbrandindia.com	Meyn	<u>2000</u>	Commissioned in January 2016. It is the only air-chilling plant in India. Planned expansion went into abeyance for lack of space. Their RTE brand sold as <i>Five Star Chicken</i> (ref part B of this table). It was learnt that they faced short supply of breeding stock in early 2023. Are now in the process of revamping their operations & plant.
17	Coastal Farms , Plant at Kannur, Mangalore, Karnataka. HQ near Navdurga Bus Garage, Mangalore, Karnataka.	Marel	2000	Partnership started in 1996 by P. S. Prakash Shetty and his wife. Initially had a local drum plucking plant. The existing plant, started in 2021, was operating intermittently, but lately they have revamped their facility for more regular operation.
18	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 .
19	Food Lovers (Hitech Hatch) , Metropolitan Co-Op. Housing Society Ltd., Sector B, Plot	Meyn	1500	A major integrator in West Bengal, owned by Radheyshyam Roy. This company entered the



	28, Canal South Road, Kolkata, West Bengal. 700 105. https://hitechhatchfresh.com/			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.
20	Fowl Fusion Kerala Pvt Ltd , 13/634, Rayonpuram Post, Perumbavoor, Ernakulam, Kerala 683543.	Marel	2000	Incorporated in Oct 2023. Plan a 2000 BPH plant at a capital cost of Rs 29.1 crores, for which they have been awarded govt subsidy of Rs 9.3 crores. Expect to be on stream by end 2025.
21	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.
22	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.
23	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.
24	Godrej Foods , Plant at Hoskote, Karnataka https://www.godrejagrovet.com/businesses/godrej-tyson-foods	Marel	<u>3000</u>	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.
25	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.
26	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.
27	Golden Fresh , HQ at Golden Hatcheries Building #3, Queen's Road Cross near Congress Committee office, Bangalore, Plant at Sy No 37/7, Hanumanahalli Village, Kuppelur Hubli, Haveri, Karnataka 581119. http://goldengrp.co.in/ .	Meyn	3000	Part of the Golden Group companies started in 1985 and incorporated in 1988. Placed order on Meyn in 2021 for setting up a green field plant. Their manual slaughterhouse within Bangalore city may have been closed following commissioning of this plant in August 2023.
28	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.
29	Healthy Choice Poultry , village and post Wadala, Tehsil Majitha, Dist Amritsar, Punjab.	Meyn	1300	Plant owned by Gurpuran Singh Randhawa. Commissioned in end 2023.
30	H M A Agro , HQ at 18A/5/3, Tajview Crossing, Fatehabad Road, Agra, Uttar	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



	Pradesh 282001. Plant is at Jabalpur, Madhya Pradesh.			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.
31	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.
32	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.
33	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.
34	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.
35	Indian Poultry Alliance , Kishanganj, Bihar.	Linco	3000	Three integration projects of 25000 BPD each at these locations has been announced by IPA. They expect to make these projects operational by end 2026.
36	Indian Poultry Alliance , Punjab.	-	3000	
37	Indian Poultry Alliance , Zaheerabad, Telangana.	-	3000	
38	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/	Linco	6000	Partnership established in 1998. Operates a broiler breeder operation with a hatch size of 7.5 lakh eggs/week serving 2000 contract farmers. Entering processing with a 6000/9000 BPH plant at a capital cost of Rs 77.8 crores for which a govt capital subsidy of Rs 9.7 crores has been awarded. The plant is to be built and commissioned by Linco by Q2, 2026 on a plot of land adjacent to Suguna Vyalur in Coimbatore District. Kasturi has pulled out of the Indian Poultry Alliance.
39	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.
40	Khazir Agro , Plant I.G.C. Lassipora, Srinagar, Srinagar U.T. HQ 4 th Floor, Opp New Era School, Rai Bagh, Srinagar, Srinagar U.T.	Local	1000	Production commenced in January 2021. Production is irregular and output is at minimal capacity, mainly owing to problems of live bird procurement logistics.
41	KM Feeds & Chicken Agencies , 7/916, Koomanchira, Mannarkkad, Ariyakundu Road, Alanallur, Kerala.	Local	1500	A proprietorship firm registered in 2021, it operates poultry hatcheries. This plant was commissioned in Q4, 2024.
42	KPF Chicken , Kavumkandam Junction, Kadanad P.O Kavumkandam, Pala, Kadanad Meenachil, Kottayam, 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.
43	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 <u>300</u> 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.



44	Kupanna Poultry Farm. No 18/1, Kalapatti to Kurumbapalayam road, Near Kadarkarai Restaurant. Plant at No 18/1, Kalapatti, near Kadarkarai Restaurant, Kurumbapalayam SSKulam, Tamil Nadu 641017	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 on stream by Q2, 2026.
45	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.
46	Lifeline Feeds (India) Pvt Ltd, HQ at Shri Manjunatha Chambers, Ratnagiri Road, Chikmagalur, Karnataka. Plant at nearby industrial estate in 8 acres occupying four adjacent industrial plots separated by 3 roads. https://www.lifelinefeeds.com	Meyn	3500	Owned by K. Kishore Kumar Hegde. Initially a 300 BPH local plant commissioned in 2002 and 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. Lifeline is now expanding its integration so as to facilitate its plant expansion to 7000 BPH, the maximum that the location can hold. Their processed poultry is sold through over 40 company-owned retail outlets in Karnataka.
47	Maval Agro, Talegaon, Maharashtra	Local	1000	Expanded from the original to 1000 BPH in 2023.
48	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.
49	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 loss during the Covid lockdown but now appears to have stabilised.
50	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.
51	Nafees Poultry, Plot No 129, East Marredpally, Hyderabad, Telangana, 500026	Local	<u>1000</u>	Operated by Sarabjiyot Singh, son-in-law of Harbans Singh, one time owner of Starchick (see Sethwala). This plant started around 2013.
52	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.
53	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> .
54	Perfect Poultry Pvt Ltd, Plant and HQ at Khasra No 29/13 and 29/18, village Vichhoa, Tehsil Ajnala, Amritsar, Punjab	Meyn	4000	Commissioned at 1000 BPH in July 2015 by 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.
55	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.
56	Pragati Broilers, HQ no 32, MMDA Colony, Ashoka Nagar, Arumbakkam,	Meyn	2500	This plant, for a 2500/4500 BPH capacity has been commissioned in Q1 2025.



	Chennai, Tamil Nadu and plant at Krishnagiri, Karnataka.			
57	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.
58	ProTAC Foods International Pvt Ltd , Plant and HQ at 115 Allasandra, behind RTO Check Post, NH4, Mulbagal Taluk, Karnataka.	Meyn	4500	Commissioned in June 2016 at 2000 BPH. Planned as a merchant processor with <i>mandi</i> sourced live birds. Operating now on contract at 24,000 BPD for Tri Star (Kerala), Nandus , Licious , Shanti (Fortune) and Fresh-to-Home . Commissioning to 4500 BPH done in mid 2023. Next expansion will be to 7000 BPH.
59	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.
60		Marel	3000	
61	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.
62	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.
63	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 by Q1, 2026. The project involves an investment of Rs 36.3 crores, with a govt capital subsidy of Rs 5.5 crores.
64	Safa Foods , 535 Fathima Manzil 1st Floor, Near Old Kavitha Theatre, Dr Nanjappa Road, Gandhipuram-Coimbatore 641012	Local	1000	Commissioned mid 2024.
65	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.
66	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> .
67	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.
68	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> .
69		Meyn	2500	This new plant of initial capacity of 2500 BPH was to come up at Una in Himachal Pradesh. Commissioning was expected by mid 2024, but was delayed for want of approvals and 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.



70	Shanthi Feeds , Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore http://shanthifeeds.com	Meyn	<u>12000</u>	Originally a 1000 BPH Meyn plant commissioned in 2009. Expanded in 2 stages to 3000 BPH till 2014. Then expanded and re-commissioned at 6000 BPH in February 2016. Expanded to 12000 BPH in first quarter of 2021.
71	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> .
72	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.
73	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.
74	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.
75	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.
76	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 3rd quarter, 2025.
77	Star Poultry , Johrawar Singh, Jammu	Local	1000	Fabrication in progress. Was expected to come into operation in Q3 of 2025.
78	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.
79	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 land is for sale. See Suguna entry in part B of this table.
80	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.
81	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 Mr Surjit Kohli. Relocated, expanded, re-commissioned in February 2014. Sold in 2018 to Suguna and refurbished.



82	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.
83	Swami Chickens Pvt Ltd , (Swami Group) Plant ar 261,272 - Kottathurai Village, Perichipalayam (Post), Thappampatti Union, Palani Taluk, Dindigul District, Tamil Nadu 624617	Marel	3000	During construction parts of the structure were gutted in a fire in mid-2020. Came on stream in mid 2021. They are now planning expansion with more automation in the cut-up portioning department and RTE.
84	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.
85	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.
86	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.
87	Vimla Feeds Plant at Tuniki Village, Kowdipally Mandal, Medak District, Telangana. HQ at Chalimeda Vimala Devi Building, Sy. 93/B, NH 7, Kompally, Petbasheerabad, Quthbullapur, Medchal-Malkajgiri Distt, Telangana	Bayle/Local	4000	Bought original 1000 BPH Bayle plant of Srinivasa Farms which was operating at 1500 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.
88	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.
89	West Bengal Livestock Dev Corp , Siliguri, West Bengal.	Linco	1000	Combined poultry, goat, beef and pork slaughterhouse commissioned in 2022.
90	West Bengal Livestock Dev Corp , Haringhata, West Bengal.	Meyn	4000	Construction is on for a 4000/8000 BPH plant at their Haringhata location. Commissioning expected by early 2026.
91	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 Menon, an ex-bank employee, later a processed poultry merchant purchased the old Bayle plant of Pragathi Broilers and relocated it to Jategaon Khurd. Now planning to scrap the Bayle equipment and replace it with a 3000 BPH plant at the same location.

Integrated processing capacity expected by mid 2026 based on current orders, on-stream and under-construction projects.	2,52,300	Average plant capacity is 2770 BPH.
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Capacities are mentioned in birds per hour (BPH). For calculating market shares, of the total capacity of 2,37,300 (2,52,300-15,000 of Cedar Integrated, Indian Poultry Alliance - two plants, Strategic Hitech and Z&M Foods= 2,37,300 BPH) expected on stream by end 2026, Meyn's market share is 112,100 (47.2%); Locals' is 65,200 (27.5%); Marel's is 38,500 (16.2%); Baader-Linco's is 18,500 (7.8%); and Bayle's is 3,000 (1.3%); [Total 2,24,800 (100%)]

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, selfish misreporting by local fabricators cynically took it as a vehicle for free publicity. Therefore with this issue we give collective credit to the local fabrication industry instead of assigning credit to individuals.

B 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 *cloud kitchens* 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.
92	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.
93	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.
94	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
95	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/
96	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 'Buffet' 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
97	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.
98	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.
99	Amrit Feeds , Beldanga Mouza, Raghunathpur, PO Bonkati KankasI, Panagarh, West Bengal. A Linco plant of 4000 BPH, commissioned in first quarter 2014 and promptly closed a year later on June 1, 2015. This facility has recently been purchased by Mr Amit Saraogi of Anmol Feeds , Jalan Industrial Complex, Gate #1, Bombay Road, Howrah 711411. Amit Saraogi hopes to re-commission it.
100	Anmol Feeds . See Amrit Feeds
101	Arambagh 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.
102	AOV old plant with 2000 BPH local machinery. May be on sale.
103	Arthur's Food Company , Bangalore. This RTE plant retails through Bigbasket, Food Basket, Foodhall, Foodworld, Metro Cash & Carry, Nature's Basket, Scootsy, Spar, Spencer's and Star Bazar. http://www.arthursfood.com
104	Assam Livestock & Poultry Corporation , Panjabari Road, Khanapara, Guwahati 781022. A local 500 BPH plant. Was installed and commissioned in 2023.
105	A-One Agro , Pune, unknown capacity, reportedly commissioned in 2024 by a local fabricator.
106	Barafwala Co , 11 High Street, Camp, Belgaum, Karnataka. Had so far been confined to the red meat industry. Recently they have set up a pilot plant for processing poultry using some fabricators' machines and some made by themselves and are slaughtering 2000-3000 birds daily.
107	Big Bird , Bangalore, unknown capacity, reportedly commissioned in 2020 by a local company.
108	Brahmagiri Dev Society , Wynad, Kerala, 500 BPH plant by a local company in 2010.
109	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.
110	Caris Pure , Processing Company Pvt Ltd. Plant at Paramankeni Village, Kancheepuram, Tamil Nadu. HQ at 23 C, Kohinoor Complex, East Coast Road, Village Vettuvankeni, Injambakkam, Chennai, Tamil Nadu. Tae-Jin supplied the 3000 BPH plant which is now closed and available for sale. Promoted by one Prince Jacob, an NRI from Korea and Madavan Nair in May 2013. Operated for some time by a hotel chain. Purchase bid by Suguna, Shanthi and others failed to get transfer of local PCB approval to any new owner. In Nov 2019 the banker issued an auction notice. The promoters were charged with non-payment of GST, which is mandatory for organized sector processors but not levied on the wet market.
111	Central Avian Research Institute , (IVRI) Bareilly, 200 BPH plant by a local fabricator.
112	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.
113	Chatha Foods , launched by P.S. Chatha in 1998 at village Chaundheri, Dapper, on the Chandigarh - Ambala highway in the Mohali district of Punjab, market their RTE products under the brand names <i>Gustto</i> and <i>Swiss Naturen</i> . With their retort packaged



	products being shelf-stable at ambient temperature, they beat the hurdle of the inadequate cold chain. They source chicken meat from SHL Agro (now Suguna) and Shanthi. Their institutional customers include about 80 five star hotels besides Taj Air Caterers, Sugar and Spice and ITC Welcomegroup. They also retail through some 1100 outlets. Following on the heels of having joined the Indian Poultry Alliance, Chatha are learnt to be negotiating for takeover of a recently established poultry processing plant in their neighbourhood to ensure steady supply of raw poultry meat for their operations. http://cfpl.net.in .
114	Chicago Foods , Coimbatore. Unknown capacity poultry slaughterhouse, reportedly commissioned in mid 2024 by a local fabricator.
115	Chicken Factory , Anjananagar, Bangalore 560091. Has a semi manual locally built operation doing 1000 BPD.
116	Coastal Farms , Mangalore, Old 500 BPH local plant. Scrapped and probably available for sale.
117	College of Vet & Animal Sciences , Kerala, 200 BPH plant by a local fabricator in 2003.
118	College of Vet & Animal Sciences , Parbhani, 300 BPH plant by a local fabricator. Commissioned in 2020.
119	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.
120	CP India , Chennai, 500 BPH plant by a local fabricator in 2002. Scrapped and probably available for sale.
121	Darshan Foods (Meatzza) , Established in 1969 as a buffalo meat exporter. Started an RTE division in 1996 with facilities for delicatessens, Indian products like <i>seekh kabab</i> , <i>shami kabab</i> , <i>samosa</i> , <i>tikka</i> etc. and breaded products for retail & institutional customers. Now operate through their own plant at Lawrence Road, Delhi; several leased premises at Udyog Vihar, Gurgaon and a purpose-built plant at Behror, in Rajasthan. It has a combined capacity of 750 tonnes RTE/ month from chicken, pork & mutton/lamb. It sources whole dressed birds from many plants listed in Section A of this table as well as from Ghazipur <i>Mandi</i> . Possesses a Meyn cone de-boner line for portioning and deboning chicken carcasses. http://www.meatzza.com .
122	Deepan Foods LLP , Pune, 2024. A 500 BPH locally fabricated plant, commissioned at Taloja in 2022-23.
123	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.
124	Dr Meat . See Lotus Farms
125	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.
126	Farmer Choice , Pune A 500 BPH plant supplied a local fabricator who commissioned it during 2023-24
127	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
128	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.
129	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
130	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.
131	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.
132	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.
133	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.
134	Henny Fresh , Odisha, 500 BPH plant by a local fabricator, expected commissioning in Q2, 2025.
135	Hilary Fluff Pvt Ltd , Lucknow, 500 BPH plant by a local fabricator, expected to be ready for shipment in Q1, 2025.
136	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.
137	Higrow Chicken , owner Deepak Raj Garg, runs a local plant of 500 BPH at Ludhiana, which was commissioned in 2017.
138	Hygienic Chickens , 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, 300 BPH by a local fabricator.



139	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
140	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.
141	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.
142	International Food Products , Chandigarh. Small RTE producer in chicken and other meats.
143	Irani Chicken Products LLB , Daman, Gujarat, 500 BPH plant by Bayle, commissioned Dec, 2013.
144	ITC Welcomegroup made its entry into the branded & packaged foods business in August 2001 with inspiration from its successful restaurants Bukhara and Dum Pukht. In June 2003 they launched their <i>Kitchens of India</i> brand comprising a range of heat-and-eat Aashirvaad brand RTE meals. This range was available in heat-resistant packaging form, produced using a retort process at Chatha Foods. Their Indian meal packs are sold in Australia, Canada, Germany, Japan, New Zealand, South Korea and USA. Although this range contributed only 1% of group sales, it sold 6 times as much in USA than in India in 2012 and was the second most sold Indian meal in USA after <i>Tasty Bites</i> . It set up a new plant for these product lines at Bangalore.
145	Karma Protein P. Ltd , Haryana. A 500 BPH local plant being built by a local company, slated for commissioning in Q2 2025.
146	Kenchick Foods , Erode, Tamil Nadu, A locally supplied 700 BPH plant commissioned in Q4, 2024.
147	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.
148	Kudumbashree Broiler Farmers Producer Company Ltd , at Trivandrum, Kerala. Is a 500 BPH plant supplied by a local company. Commissioning expected Q2 2025.
149	Knowledge Foods , Neral. Manual-dressing 300 BPH. Also making RTE products.
150	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.
151	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.
152	KSIDC , Kerala, 300 BPH local plant in 2005.
153	Limra Chicken , Coimbatore. A 500 BPH local plant.
154	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.
155	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.
156	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
157	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.
158	MTR . Started in 1924 as a restaurant called Brahmanara Coffee Club and later in 1951, changed to Mavalli Tiffin Room in Bangalore. During the Emergency, unable to conform to the prescribed pricing orders of Indira Gandhi, they diversified into packaged convenience foods. Around 2008 they were acquired by Norway's Orkla Foods. MTR produces seasonings, RTE foods, curries and RTE meals. In 2012 the original owner, P.S. Maiya, no longer encumbered by the agreement with Orkla, re-entered the RTE foods segment with a new company. Given the dynamism of Maiya and Orkla, they are both quite likely to enter the RTE chicken sector, given its growth potential.
159	Meat Masters . Incorporated in 2000, a producer & supplier of frozen vegetarian & non-vegetarian (fish, mutton and chicken) and RTE formed and filled products like sausages in retort pouches. They have set up a new processing facility for further processed meat products at Ladhawal Food Park near Ludhiana in Punjab. Meat Masters sells through own stores, <i>BigNMeat</i> , other retailers, and directly to hotels and restaurants in that region. http://www.meatmasters.co.in .
160	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.
161	Meatyns Farmer Producer Co Ltd , incorporated in December 2021 and located at 1156 E, Unit No.10 Manik Chamber, Karvir Kolhapur (M Corp.) Maharashtra 416001 Operates a 300 BPH plant supplied by a local fabricator.



162	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.
163	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
164	Monrovia Agro Foods , Bhandgaon, Pune, Maharashtra, 500 BPH local plant in Jan 2014.
165	Mulpuri Foods & Feeds Pvt Ltd , Ramannagudem, Vattigudipadu, Nuzvid, Andhra Pradesh. In fish, animal feeds & poultry.
166	Nagpal Frozen Foods , Barwala, Haryana, 1000 BPH local plant commissioned 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.
167	Navi Nutrix , 750 BPH local plant at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Sriya Foods .
168	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. Run by Naveen & Narendra Pasuparthi.
169	Nensey's Poultry , Valsad, Gujarat, 300 BPH local plant around 2002. It is learnt to have been sold to an unknown party.
170	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.
171	Nutrivit Innovation , Hyderabad, local plant of unknown capacity, reportedly commissioned in 2023.
172	Ovo Farms , Odisha has been awarded government capital subsidy for setting up an egg powder plant in Odisha.
173	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.
174	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.
175	Perfect Poultry Pvt Ltd , Plant and HQ at 27 Ft Road, Chowk Green Field, Majitha Road, Amritsar, Punjab. Earlier 1000 BPH local 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, The plant is suitable, after balancing, for 1000 BPH or more, and is probably available for sale.
176	Pioneer , Hyderabad, Andhra Pradesh, 500 BPH local plant. It has been scrapped.
177	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 Kamsheet. The Mafco plant is probably scrapped by now, but the remaining machines may yet be put to use if auctioned by the government.
178	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
179	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.
180	Ratnagiri Cooperative , Chiplun, Maharashtra, 300 BPH local plant in 2003. Now closed and possibly scrapped.
181	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.
182	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.
183	Ruchi Agro Industries Ltd , Chikmagalur. It is a manual plant of unknown capacity.
184	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.
185	Royal Foods Pvt Ltd/Shakir Shaikh , Lohegaon, Pune, Maharashtra. 500 BPH local plant set up in Nov 2013.
186	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.
187	Sandip Mukherjee , One time plant manager of Arambagh Hatcheries , is operating a 500 BPH manual processing plant at Gariahat, near Kolkata in West Bengal.

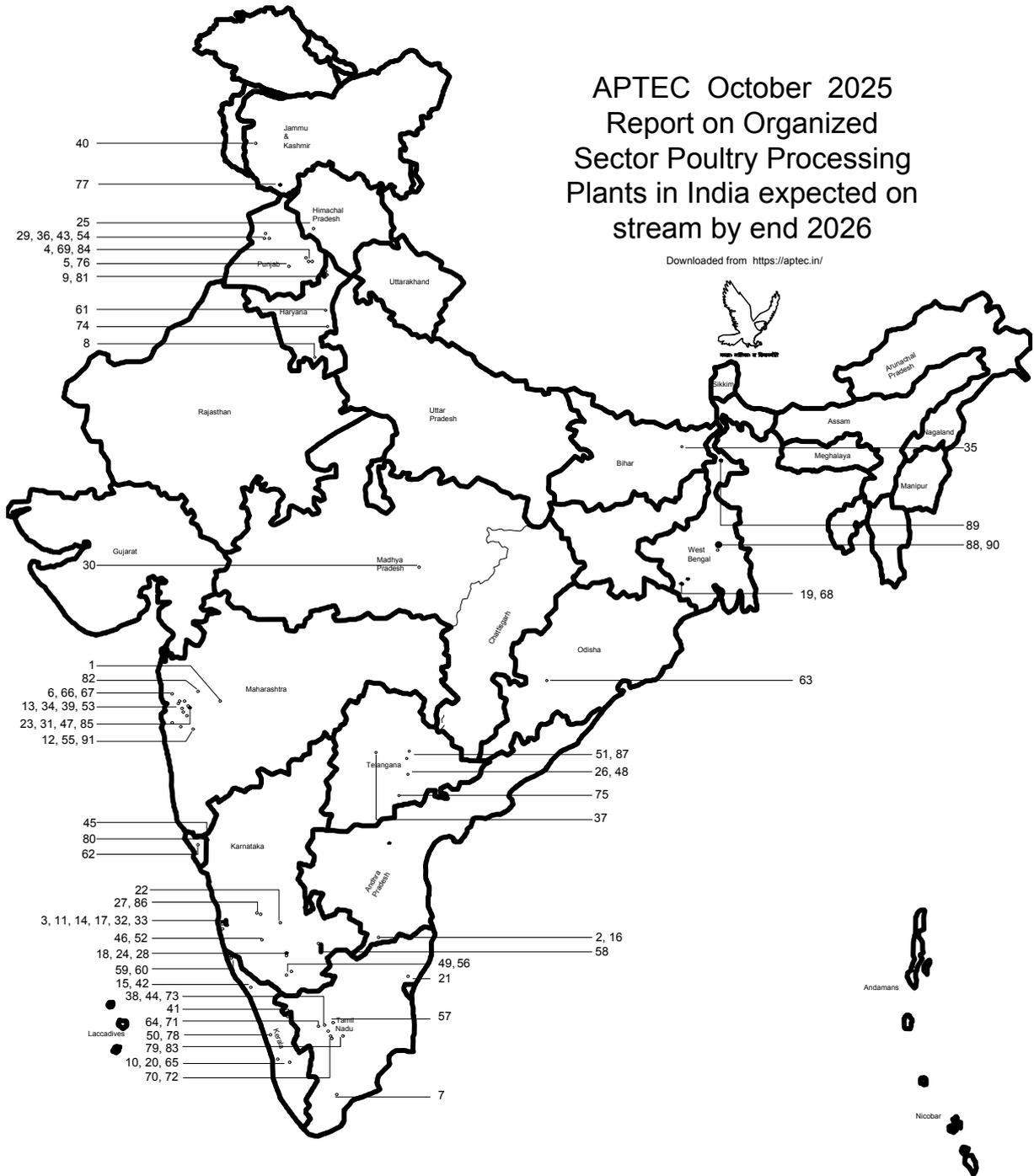


188	Sethwala Foods Pvt Ltd , Stork imported and installed a refurbished, used 500 BPH plant in the 1990s for Shiraz Hotels, Agra. Shiraz sold it to Harbans Singh of Starchick, Hyderabad, who operated it and later sold it to Hanif Shahran of Sharon Broilers, who in turn sold it to Sethwala in 2012. Installed and expanded by local fabricators to 3000 BPH in stages.
189	Shivaa Chicken , 2/418, Palladam Main Road, Opp. Microwave Station, Puliampatty, Pollachi, Coimbatore, TN. Manual dressing of unknown capacity. http://www.shivaachicken.com .
190	Shiva Farms , Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery.
191	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> ”.
192	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.
193	Sirsa Foods , at 2, Lavkush Dharamshala, Balmiki Chowk, Opp. Khunger Sweets, Sirsa, Haryana. A 500 BPH local plant commissioned in Q1 2024.
194	S. K. Chicken , Coimbatore, unknown capacity local plant, reportedly commissioned in 2023.
195	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.
196	Sood Poultry at Jullunder, Punjab. A 500 BPH local plant commissioned in 2020.
197	Souza Hatcheries , Mangalore, Karnataka. HQ at Souza Commercial Complex, Highlands, Falnir Road, Mangalore http://www.souzahatch.com . 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.
198	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 .
199	Sriya Farms and Feeds Pvt Ltd. , 208 B, 3rd Floor, 80 Feet Road, IndusInd Bank buildings, 2nd Block, HBR Layout, Bangalore 560043.
200	S.S.S Hatcheries , 258/1-1, N.S.R.Road, Venkitapuram, Coimbatore, Tamil Nadu 641025. 500 BPH local plant set up in 2023.
201	Star Agrovet Marketing , Manjri, Pune, 700 BPH local plant set up in 2022. They process chicken under contract with Shalimar Corporation.
202	Subsara Poultry , Coimbatore, Tamil Nadu. A 700 BPH local plant commissioned during 2021-22
203	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.
204	Sujay Feeds , SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, 200 BPH manual slaughter.
205	Sukos Foods Private Limited . See Lotus Farms.
206	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.
207	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
208	Thai Thirunaal Agro Foods Pvt Ltd . A 500 BPH local plant commissioned at Coimbatore in 2022.
209	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
210	Unnat Feeds , Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana. Learnt to be fabricating the plant themselves from early 2021.
211	Villa Sita Farm , Hyderabad, local plant of unknown capacity, reportedly commissioned mid 2024.
212	Violet Industries/Souza Hatcheries , Mangalore, 500 BPH local plant. Not yet commissioned.
213	Vista Agriculture & Food Products , Khurdah Road, Bhubaneshwar, Odisha, 750 BPH local plant supplied in 2013. Plant is closed.
214	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.
215	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.
216	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
217	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 October 2025 Report on Organized Sector Poultry Processing Plants in India expected on stream by end 2026

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



3 Leveraging Disturbed Global Trends For Our Poultry Industry

Readers are aware of an unprecedented churn in the international order. Its direction will depend on the political destinies of three important personalities, (a) our own PM Modi and the continuing rule of the BJP in India, (b) President Donald Trump with his mercurial policies, and (c) President Xi Jinping and CPC's fate in China.

In India we are forming new trade partnerships with the Global South. A revised and enlarged New Farm Policy may be introduced as part of Gen-2 reforms and hopefully this time its introduction will remain free from interference. Our growing proximity with China will bring only limited trade changes. But meanwhile the future of trade with USA remains uncertain. An agreement with USA depends on Trump mollifying his MAGA vote bank, much of which comes from mid-western growers of GM maize and GM soybean. Besides urgently attracting FDI for manufacturing in USA, Trump needs to find new markets for his GM soy and maize crops and has repeatedly tried to force them upon us because the traditional buyer China chose other sources this year.

Two outcomes are likely for the poultry industry. These are (a) expansion of global trade between India and new trading and investments partners and (b) India's clear and abiding polarization against GMO in soybean and maize, although import of maize for production of alcohol for blending with petrol may be eased. Do better opportunities for this industry exist? Yes. For alert poultry feed millers a third scenario exists. It has been proposed by Aptec in Section 3.2

3.1 GMO & The Precautionary Approach

Genetic modification of crops needs better understanding than our policymakers appear to possess. At present only GM BT cotton is officially allowed into this Country. The argument being that after all, cotton does not enter our food chain. But our policymakers are mistaken: it does enter our food chain - both directly and indirectly. Cotton seed is the source of cotton-seed oil which is refined and blended with other cooking oils to enter our food stream. And de-oiled cotton-seed cake is used in India for making poultry and cattle feed. So our stand against GMO may be cautious to the extent it prevents US corporate control of our agriculture, but not entirely principled. Possibly not even scientific.

Exchange of genetic material between species does happen in nature without the intervention of humans. Evolution of modern bread wheat *Triticum aestivum* involved two major inter-species hybridization events, combining three different genomes from three distinct species. The first event occurred around 0.8 million years ago when two diploid wild grasses crossed, for unknown reasons, to form a new tetraploid species. The second was the addition of the D genome from *Aegilps tauschii* which gave bread wheat its unique properties, including presence of gluten proteins that allows leavening and an increased range of adaptability.

Long-term effects of GMOs directly entering our food chain is difficult to predict. Would GMO food crops necessarily entail irreversible risks for humans? We do not know: but if the US citizens have already volunteered to be guinea pigs for humankind by adopting widespread cropping of all sorts of GM food crops, why not wait and watch?

Now let us step away for the topic and ask ourselves a general question – how do humans respond to risks? We balance risks by adopting the **precautionary principle** - take out an insurance policy, provided the cost of insurance is a small fraction of the cost of risk!

One contemporary example where the cost of insurance appears to be unacceptably large, even possibly as large as the cost of risk itself, is climate change action - a crusade being fought under the **UN Climate Change Conference (COP)** agenda. This popular agenda is based solely on the speculated role of carbon dioxide in global climate. But carbon dioxide is only a minor greenhouse gas: water vapour has an order of magnitude larger greenhouse effect. Other natural phenomena such as the Milankovitch Cycles, dimethyl sulphide from planktons, low and high altitude clouds, oceanic oscillations, sunspot cycles and the solar system's orbit through the milky way affect global climate in ways which we are only now beginning to understand. Most of these cyclical phenomena have different periodicities: ranging from 11 years to 150 million years, with the result that at times when cycle-peaks overlap, their effects get amplified and when cycle-troughs overlap, the effects moderate.

Therefore some people feel that precipitate action based on just one proxy, that of anthropogenic carbon dioxide emission, may amount to over-insurance against climate change. By following this insurance policy,



Western Europe, particularly Germany, dismantled its existing fossil fuel (and nuclear!) infrastructure and is now facing de-industrialization. Furthermore, relentless pursuit of this agenda keeps the Global South poor, underdeveloped and under-nourished from lack of energy. By contrast, after suffering two decades of delay in the Narmada dam project, we Indians have developed a low tolerance for sponsored environmental activism. So we chose a balanced mix in these and similar controversial contexts. We continue to use coal and oil AND pursue solar energy, green hydrogen and methane from bio-waste. Can we not follow a similar balanced approach towards GMO?

3.2 Action Plan

Our agricultural sector is inefficient. Between 46 and 55% of our population is engaged in the agricultural and allied sectors, which contributed a mere 16% to India's GDP for financial year 2024. So if we propose to double our agricultural output, we need to repeal outdated laws and handle built-in structural time-lags in the sector. For broilers, the in-built time lags have been calculated in table 2. The government did bring in three new laws in 2016 but had to withdraw them in November 2021 in the face of sponsored resistance from the grain merchants' lobby. We believe that when these laws will be re-introduced soon, we now possess the resources to defeat external interference.

So what is Aptec's proposition for leveraging the present global turmoil to our benefit - pandering to Trump's demands at the same time that we expand and benefit our poultry and vegetable oil sectors by the initiative?

Half a dozen Indian poultry feed makers should immediately invest in USA to produce poultry feed there, using GM maize and de-oiled GM soybean cake, for export of pelleted poultry feed and edible oils to India.

This will take Indian FDI into USA, make poultry cheaper in India, accelerate sectoral growth and make us a major poultry meat exporter. Additionally it will produce cooking oil for which we remain deficient. Given vast unused stocks of soybean and maize in US godowns and President Trump's helplessness to come to the aid of his Maga constituency, we are in an excellent position to negotiate hard.

Average maize productivity in India is 3.7 to 5 t/Ha while in USA it is 10.8 t/Haⁱ. For direct human consumption only a tiny part of present maize acreage can continue as such in India, while the remaining maize acreage serving animal feed production can be diverted to more remunerative crops like vegetables and fruits. This will dramatically raise farm income.

We could export pelleted poultry feed to Europe (which has a ban on US GM crops similar to ours and for similar reasons). And in the pelleted feed form, the GM material cannot directly enter our own food chain, so by taking these steps we will also fully conform with our own lobby which objects to direct introduction of GM crops. In short, a win-win for everybody!

4 Estimating Broiler Production & Consumption In India

For long we have sought reliable macrodata (or any proxy for it) on India's broiler output for estimating the wet market size and consequently quantifying growth opportunities for poultry processing. The most reliable proxy would be broiler breeder placement data from the Broiler Breeder Associationsⁱⁱ. In the April 2019 issue we had written that Cobb and Aviagen, (the only breed houses in India – then, as now), had together placed approximately 30 million broiler breeders in 2018. This would have generated approximately 4400 million broilers in 2019-20. At the end of that financial year Covid-19 struck India and destroyed much of the broiler industry. After the return to normalcy, the broiler industry limped back. We were keen to record the pace of recovery during that period.

We have recently learnt that the broiler DOC placement over 2024-25 was as high as 5520 million and is expected to be 6360 million in 2025-26. This would place the availability of broilers for slaughter at around 6040 million in 2025-26. As against this, the forecast processing capacity has also exhibited a very good growth trend. So we can expect a period of rapid growth of broiler availability and processing capacity, running in harmony over the foreseeable period, as table 3 shows.

Activity	Duration (weeks)	
	Week	Lag
Announcement of placement data	0	0
Commencement of Laying	27	27
Hatching of breeder (parent) eggs	3	30
Broiler grow-out	5	35
Harvesting, transport, processing, distribution, placement in shops etc	1	36

Table 2 Phase-lag between release of breeder placement data and eventual broiler meat availability to the consumer.



For readers who are interested in our calculations, we will be happy to e-mail a copy of the spreadsheet. However, for making accurate projections, it may be necessary to incorporate the time lag thumb rules which we have shown in table 2. For the present calculations we have ignored these refinements because we have very limited macrodata at hand and using more refined projection techniques may imply a higher and misleading level of reliability than the meagre data points merit.

Figures relating to placement of breeders and broiler DOC were shared with us by a reliable source who wishes to remain anonymous.

In 2018 we had carried out a study on the role of per capita disposable income on purchase and consumption of poultry meat in India^{iv}. It involved selection of several countries that had disposable per capita income similar to ours and comparison of their propensity to consume meat with ours. The assumption being that given a disposable income higher than subsistence level, spending on meat could be limited only by its availability. The study showed that given equal propensity towards consumption of meat across other populations and Indian non-vegetarian population, lack of ease in purchase of poultry meat was limiting consumption to around 40% of the potential in India. These findings are available from the 'News' page of the Aptec website.

No doubt institutions and professionals who are skilled and equipped to bring greater scientific rigour to this topic may feel keen to re-do the study for the benefit of this industry. We will be happy to publish the findings in these pages in order to increase their reach.

Finally, as the more perceptive among you may have noticed from table 3, now that the broiler breed houses have ramped up their growth rates to match that of the processing industry, we may soon expect a serious shortage of manpower trained in poultry processing. Is the industry prepared for this?

Table 3 Broiler Availability & Processing In India – Covid-19 Years & Beyond
(Source: www.aptec.in)

Particulars	2018-19 ⁱ	Apr 2020 to Mar 2024	24-25	25-26
Broiler breeder placement (millions)*	30 (2018)			
Broiler DOC placement (millions)*			5520	6360
Broiler availability (millions)*	4085		5244	6042
Growth rate broiler availability (CAGR)		4.8%	15.2%	
Processing capacity (millions)#	229.4		393.4	605.5
Growth rate processing capacity (CAGR)		9.3%	15.75 ⁱⁱⁱ %	
Share of wet market in India (%)	5.6%		7.5%	10%
Poultry meat availability (million t)	5.89		7.59	8.77
Per capita annum poultry meat availability (grams)	4332		5190	6000

*For breeders we have assumed 5% mortality at pullet stage, 8% mortality among hens in lay, 4 eggs per hen-week during a 45 week laying career and 80% hatchability. For commercial broiler flocks we have assumed 5% mortality before harvest. Because we are making only ball-park estimates given the rather sketchy data we have access to, we have not used other, more refined time series projection techniques.

#Projected processing capacity figures taken from Aptec's Feb 2018, March 23 and current Industry Report totals. Processing plants projected to work 8 hours, 300 days per year. We have ignored country chicken and layer culls in our estimate of poultry production in India. To estimate million tonnes of poultry meat availability, we have used the figure of 2200 grams liveweight on harvest, 65% dressing yield in the wet market (You lose skin while defeathering) and 75% in factory processing. Because published human population estimates over 2024-2026 vary widely, we have used one figure: 1460 million for both years. Because there is negligible foreign trade in broiler meat, we have assumed production equals consumption.

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Endnotes:

- ⁱ This large difference in productivity is mainly because we do not grow GM maize in India, whereas US maize is GM. But in the form of pelleted poultry feed, the GM objection gets taken care of because it can no longer enter human food chain directly.
- ⁱⁱ Actually not a single organization but a combination of at least two constituents - All India Poultry Breeders Association (AIPBA) and Poultry Farmers (Broilers) Welfare Federation.
- ⁱⁱⁱ Refer Chapter 2 of the Aptec Handbook for derivation of this growth rate.
- ^{iv} Refer the article "What Ails Poultry..." in the 'News' page of the Aptec Website www.aptec.in.

