

Keywords: AptecApp, brand, breed, broiler slaughterhouse, chicken, civil construction, consultancy, domain expertise, FMCG, handbook, hub and spoke model, local fabricator, meat, parent stock, prefab building, project finance, project management, poultry processing, process plant design, processing, pureline, turnkey engineering,

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://aptecc.in> rajalok@gmail.com, alok@aptecc.in

Document dated April 14, 2023. Rev 1 dated May 3, 2023



[This revision carries some spelling and grammatical corrections, change in narration about Srinivasa Hatcheries and updating of prospective plants]

1 Delay

This issue of the Industry Report has been delayed by a month. We are sorry about that. However, we have been busy in the meantime. This is what we did

- APTECAPP
The spreadsheet **App** which was uploaded last October needed a text companion. Originally we had placed a document called **Step-By-Step** which needed serious updating as it was created in August 2005. We have revised and uploaded the new version.
- CLIENT BASE
In the past Aptec would not offer consultancy services to projects that proposed to source equipment entirely from local vendors. Such promoters invariably got stuck when they sought to expand beyond 3000 BPH, which was the limit of local suppliers' support. The client had to sell his plant and begin afresh with a standard overseas supplier who could support his growth fully. Backing such projects with no clear growth path held no professional satisfaction for a consultant, we felt.

Aptec will now work on projects supported by RND and Storm Engineering either with the vendor or the promoter, depending on what the latter wants. **RND** has tied up with **Baader-Linco** and **Storm** has likewise the help of **Dutch Poultry** and so both are able to offer full hand-holding for growth to their clients. Aptec will, however, not involve itself in project sale for any vendor.
- HANDBOOK
We have now added a new feature to our webpage. A project design **Handbook Project**. We will progressively upload chapters of this handbook. The proposed chapters have been listed and we have two uploads – on **chilling poultry** and on designing **rendering plants**. We expect to complete this project before 2023 end. You may download the handbook free of cost.
- INDUSTRY REPORT
We are discontinuing the technical reviews and database in the Industry Report. Some of the past technical articles will now be updated and included in the Handbook chapters.
- TURNKEY SERVICES
Aptec is now part of a consortium offering turnkey project engineering services as part of a team headed by **Le Bat** of Kuala Lumpur, Malaysia. **Le Bat** will undertake projects, provide design and project management, using **Aptec** as domain expert and project consultant; **Orkay Constech** will construct conventional brick and mortar building components using local materials and **NeuWave Capital** will help arrange capital when specifically asked for by the client to do so.
- VENDOR DATABASE
The **Vendor Database** used to be appended to Industry Reports in the past. Now it is a part of the Step-By-Step document. Occasionally, as we edit and expand the database, we will attempt to update the entire document and upload a revised version.



□ WEBSITE

The **Aptec website** has been updated. Visitors can now register to receive intimation of new uploads automatically. There is also a provision to leave your comments to get our prompt attention.

2 Schedule

When this Industry Report was uploaded, the earlier Report dated March 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. Barring this issue being delayed, we aim to upload the next in mid-October, as always.

3 Developments In The Industry

Two plants have shut down for the time being because of pressure from their banks. Indian banks have of late tightened their collections and recovery drive against loans following conscious policy measures taken by the government to reduce non performing assets (NPA). These are Arambagh Hatcheries and Hybro. We understand efforts are on to restore them to health.

CP is learnt to have exited several regional markets and to have stopped getting birds processed by Penn Foods and ProTAC. We understand that their commercial broiler production has also been curtailed and production at their Chittoor plant has been reduced to just cover captive needs to keep their retail RTE operation Five Star Chicken running.

3.1 Breeds

In recent years some changes have happened in the broiler breeds space. Suguna, who had worked with Cobb from VH, then Ross with Aviagen, then Hubbard, finally ran out of options when Hubbard was acquired by Aviagen. Of late Suguna has developed its own breed carrying the name of **Sunbro**. At present this breed is learnt to have reached a DOC placement of around 500 million a year. Sunbro is said to be a red, heat-tolerant bird and in this regard said to closely resemble the dominant breed from VH. Heat-tolerance suits the essentially open commercial shed farming makeup of the industry in India. One of Sunbro's GP lines comes from a breeding company in Hyderabad.

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*.

3.2 Corporates Specializing in Building Processed Broiler Brands?

Hiding behind dry and uninteresting statistics that Aptec's Industry Report publishes twice every year, are trends that may be very valuable for existing players and future investors – both Indian and overseas. In this Report we bring two such trends to your notice. The first is the sharpening focus of broiler corporate houses towards establishing their brands.

After over a decade of experimentation, (ignoring for the moment those multi-location ventures that have not pursued their intentions boldly), some broiler industry players have arrived at the inevitable conclusion that multi-location processing operation and promoting a national brand of processed broilers is the only way to go. Which players are we talking about? Table 1 lists them.

What are the requirements for establishing a national brand? You must have farming operations in various zones. Then you should set up processing in each such zone. Promote your brand and connect directly with the consumer. In this way broiler epidemics do not seriously damage your brand because you have created for



yourself brand-friendly disease-proof-zoning (as against farm-zoning which got lost in endless parleys). It also indicates your awareness that to the consumer you sell FMCG, not livestock.

The pity is that none of these ventures have examined the *Hub & Spoke Model* seriously. Setting up 3000 BPH plants in several locations is not the way to go. You get no benefit of scale economies at such low capacities.

Table 1 shows our analysis.

Group	Remark
Godrej Tyson	Two locations – Hoskote in Karnataka and Taloja in Maharashtra. No new location after 2008 when Tyson & Godrej Agrovvet formed JV. First expanded both plants; then steadily lost market share over a decade. There are no known plans for a return to market dominance.
Huda Foods	Pune plant in 2020. Planning new unit at Satara, both in Maharashtra
Indian Broilers	Existing small plant at Nagpur, Maharashtra. Planning several new 6000/12000 BPH plants on the back of growth of their breed and farms.
Last Mile Delivery Companies	Marketing companies who created their own space in the delivery business. Many of them expanded supply-lines by buying, leasing, refurbishing, expanding local process houses. Now plan entering backward integration
Perfect Poultry	Started with plant at Amritsar, in Punjab. Took up Nuh plant in Haryana. Both plants have been upgraded, expanded. May be planning a third unit.
Shalimar	Processing at Panagarh in West Bengal, now setting up new unit at Una in Himachal Pradesh in line with planned nationwide expansion of farms.
Suguna	Started first operation at Udumalpet in 2002. Acquired Sagri at Ambala and Alpha Agro in Belgaum. Now planning a new unit near Mysore in Karnataka
VH	Started in 1986 at Kamshet, Maharashtra, then at Davangere in Karnataka in 2013. No further action. Appear to have shifted corporate focus to RTE, breeding stock and non-core activities

3.3 What is the Future of Foreign Interest in India's Broiler Industry?

A likely question to be asked these days is the prospect of overseas interest in the broiler business in India. Particularly so, against the backdrop of wholesale exit of businesses from China. Does India have a convincing story to tell? We have been watching this for nearly a quarter century and have much to tell. At least, we do feel it our duty to record past attempts in this general direction and let you form your own opinion. Unlike other industry sectors such as automobiles, electronics, energy, engineering, infrastructure, IT and pharmaceuticals, the livestock industry poses many more challenges.

The first among these is the absence of statistics, records and reporting – many of livestock industry's sub-sectors still reel from the ill-effects of agriculture being non-taxable and therefore a magnet for the informal economy. There remains a confusion about definitions – at what stage does farming transform into industry, a fact which needs clarity if we are to follow the government's directive to process more and more of our farm produce. And finally how, in the absence of public domain reporting of outputs strictly enforced by the government, can India's monopolies and restrictive trade laws be implemented? And that, by a judicial system distracted from its true role, to justify dynastic continuity for past and present judges in Indian high courts!

Finally, livestock industry is not uniform all over the world. There are local climatic, behavioral and consumer factors to look into. Indians do not farm and process just like Americans do! We do not farm and process even like south east Asians do! Our way is different, and has had success - we have not done badly for ourselves!

Here is our analysis



JV/Venture	Fate of Venture/JV
Supreme-Suguna	Formed circa 2000-2001. Built and operated a 2000 BPH processing plant for two years. Then parted ways.
Godrej-Tyson	Formed July 2008. Expanded capacities at 2 existing Godrej Agrovet plants. Progressively lost market share thereafter. No growth. No plans.
2SFG - Reliance	JV formed between 2 Sisters (UK) Group and Reliance Retail circa 2012. Project planning for next two years. JV broke down because 2SFG locked all corporate funds in overnight Vion buyout and RR shareholders insisted on retaining their group's vegetarian ethos.
CP of Thailand	Set up processing unit at Chittoor, insisting on corporate domain knowledge at the cost of local trends. Pioneering air chilled poultry was the initial hiccup. Now for unknown reasons exiting several zonal markets instead of expanding

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

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	<u>2000</u>	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, Margao, Goa	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, Nuh, Haryana. HQ at C-22/25 Sector 57 Noida 201301	Meyn	4000	Promoted by O. P. Arora of AOV Group involved in red meat, who acquired the Nuh facilities from Moin Akhtar Qureshi, one time biggest buffalo meat exporter in India as an RND line, which was commissioned in 2016, then modified in 2017 to 2000 BPH. Replaced with a 4000 BPH line from Meyn in 2 nd quarter, 2022
5	Arambagh Hatcheries. Plant at Birbhum, West Bengal. HQ at 59 B Chowringhee Road, Kolkata https://arambagh.com	Meyn	<u>4000</u>	Commissioned as 1000 BPH in Sept 1999, expanded to 2000 BPH in 2002 and 4000 in 2004. The plant has been shut down 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 operated Nagpal Frozen Foods, Barwala, Haryana, a 1000 BPH plant, set up by RND in 2007. After its closure on failure to comply with local zoning laws, AV Ventures set up a new 1200 BPH poultry & 100 goats per day plant on their own land in Panchkula Industrial



				area. Poultry processing has started, goat commissioning held up
7	Baramati Agro, Baramati, Maharashtra Baramati Agro Ltd. 4th Floor, Farena Corporate Park , Kharadi Bypass Rd., Hadapsar, Pune- 411028, India https://www.baramatiagro.com/	RND/Storm	<u>2000</u>	Baramati is owned by the family of local politician Sharad Pawar. Their first 300 BPH plant was commissioned around 2002, rebuilt to 750 BPH in 2009, doubled to 1500 BPH in 2020 by RND. It was finally expanded to 2000 BPH in end 2022 by Storm. They also operate a CFS facility for RTE products, producing around 80 t/month.
8	Bharat Agrovvet, Plant at Ganjimutt, Mangaluru, Karnataka. HQ behind Annapoorneshwari Building, Mahaveer Circle, Pumpwell, Mangaluru, Karnataka.	RND/Storm	1500	Old plant of Lifeline Feeds built by RND was reconditioned and reinstalled by Storm Eng in Nov 2015.
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 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. ProTAC. RTE sold as <i>Five Star Chicken</i> (ref part B of this table). CP are learnt to face short supply of breeding stock and are now down to approximately 35,000 broilers per day in their captive verticals and send only 16000 processed birds/day to feed their Five Star Line
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, serving six retail outlets in Mangalore. Construction started in 2017 and was finally Commissioned four years later, in 2021.
11	Godrej Tyson Foods. Plant at Taloja, Maharashtra https://www.godrejagrovvet.com/godrej-tyson-foods	Marel	3000	Expanded from original 2000 BPH of 2001 to 3000 BPH. It is located in an industrial estate that lies between two nearby village whose inhabitants regularly protest against the smell nuisance
12	Godrej Tyson Foods. Plant at Hoskote, Karnataka https://www.godrejagrovvet.com/godrej-tyson-foods	Marel	<u>3000</u>	Set up in 1999 as a 1000 BPH RND plant which was scrapped in 2007. The 2000 BPH Marel plant was set up in an adjacent plot of land in 2007. 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. Now falling within a smart city zone, it is under pressure to relocate.
13	Goel Foodworld, Plot no 23A, Industrial Area, Shogi, Shimla, Himachal Pradesh	Storm	3000	This is a replacement of the existing 500 BPH plant by Dhopeswar commissioned over a decade ago. First expansion executed by Storm. Under pressure to relocate out of city limits according to zoning laws, this modified plant consists of refurbished Meyn equipment imported by Storm from Europe, to be installed by early 2024.
14	Goldchick Hatcheries and Foods Ltd. Plant at Sadashivpet near Hyderabad, Telangana. HQ at Plot No.151, Kavuri Hills, Madhapur, Hyderabad, Telangana http://goldchick.in	Marel	2000	Commissioned in Sept 1998, and in intermittent operation since then. First to export Indian processed chicken and also the first in the world to install an automatic re-hanging machine and continuous rendering plant at this low capacity.
15	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 Feb 21 for setting up a green field unit close to VH in Davangere. Installation is under progress now and commissioning expected by mid 2023.
16	Healthy Choice Poultry, village and post Wadala, Tehsil Majitha, Distt Amritsar	Meyn	1300	Plant owned by Gurrpuran Singh Randhawa. To be commissioned by mid 2023
17	Huda Foods Pvt Ltd. Plant at Kondhwa. HQ at FL-I-403 Unity Park, SN-43	Deccan	1500	Incorporated in 2020 by Sarfraz Momin. The plant processes around 10,000 BPD, with live



	Kondhwa Kd, behind Sheetal Petrol Pump, Pune			birds procured from Japfa Farms. The company proposes a second slaughterhouse of 3000 BPH at Sukhed near Satara in Maharashtra.
18	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 their banks.
19	Japfa Comfeeds Pvt Ltd, 91 Sakore Nagar Vimannagar, Pune 411014, India https://japfaindia.com/	Marel	3000	Work has commenced constructing a 3000/6000 BPH plant at Village Pedgaon, Tal Daund, Distt Pune in Maharashtra. The plant is expected to be commissioned by 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.
20	Kuljas Rai Poultry, Amritsar	Storm	3000	Kuljas Rai Poultry set up a 300 BPH Dhopeswar plant at Chamrang Road, Amritsar, Punjab. Under orders to exit municipal limits, they closed down this plant and put it up for sale. Rai's new Storm plant near Amritsar, is in operation from first quarter 2020. Also make RTE poultry products to cater to local markets.
21	KGN Poultry, Pimpri, Maharashtra	Storm	1500	Started as a manual plant of 300 BPH. Storm plant was commissioned in 2018.
22	Kavi Proteins, Krishnagiri, Karnataka HQ 26, 1 st Cross, Sindhi Colony, behind VISL House, JC Road, Bengaluru	Storm	1000	Operating at 700 BPH. Suffered closure with the onset of the lock-down. Sriya Farms is operating it now.
23	Khazir Agro. Plant I.G.C. Lassipora, Srinagar, Srinagar U.T. HQ 4 th Floor, Opp New Era School, Rai Bagh, Srinagar, Srinagar U.T.	RND	1000	Production commenced in January 2021. Production is irregular and output is at minimal capacity, mainly owing to logistics of live bird supply.
24	Kwality Animal Feeds Pvt Ltd. Plant 763/19, A/P-Rajgoli, Chandgad, District Kolhapur, Maharashtra. HQ 12, Kwality House Machhe, Industrial Area, Belgaum, Karnataka http://kwalityhouse.in/	Meyn	<u>3000</u>	Ordered as a 2000 BPH plant in Dec 2014. Commissioned in June 2016. Expanded to 3000 end 2018. Sell under the brand name <i>Belchick</i> .
25	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	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.
26	Maval Agro, Talegaon	Deccan/ Storm	1000	Leased from their owners (Premium Chick Feeds) by Japfa. Expanded from the original to 1000 BPH by Storm under orders from Japfa.
27	Mayuri Broiler Breeding Farms Pvt Ltd at Sy 537/A, 537/E, Village Yellikal, Kalwakurthy, Nagarkurnool District, near Hyderabad	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 third quarter of 2023.
28	Miki Exports International, Taloja, Maharashtra Domain name http://mikichicken.com 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.
29	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.
30	Penn Foods Pvt Ltd. Plant at Karjat, Maharashtra. HQ at Clucky's Products	Bayle	1500	Commissioned in 2016. Is functioning as a merchant processor, slaughtering for Licious



	LLP, 294, S. Bhagat Singh Road, Fort, Mumbai http://cluckys.co/the-processing-plant/			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> .
31	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.
32	Premium Chick Feeds Pvt. Ltd 401-404, C Wing, Nyati Millenium, Datta Mandir Chowk, Pune 411014, https://www.premiumchickfeeds.in/ 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. Expect commissioning by mid 2023
33	Pragati Broilers, Krishnagiri, Karnataka	Meyn	2500	Expect commissioning by 2024 end
34	ProTAC Foods International Pvt Ltd, Plant and HQ at 115 Allalasaandra, 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. Equipment for expansion to 4400 BPH arrived mid March. Commissioning expected by mid 2023
35	RFK Greens Pvt Ltd. Plant at Lassipora, Pulwama, J&K. HQ at C-37, First Floor NSM, Azadpur New Delhi	Meyn	2500	Plant was ordered end July, 2017. Expect to commission the plant by mid 2023. Delays have been because of local disturbed conditions.
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 mid 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	Sethwala Foods Pvt Ltd, plant at Talasari, Palghar, Maharashtra.	Marel/RND/Storm	<u>2000</u>	Installed a refurbished <u>500</u> BPH used Stork plant originally sold to Shiraz Hotels, Agra, then to Harbans Singh of Starchick, Hyderabad, who in turn sold it to Hanifbhai of Sharon Broilers, who in turn sold it to Sethwala in 2012. Installed by Dhopeswar shortly thereafter; expanded and re-commissioned with inputs from RND and Storm. The brand name is <i>Seth's</i>
40	Shalimar Corporation, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata http://shalimarcorp.in	Meyn	6000	Commissioned in Sept 2014 at 2000 BPH. Expanded to 2600 in 2018. Equipment for expansion to 6000 BPH has arrived and commissioning may be done by mid 2023. They sell under the brand name <i>Total Chicken</i> .
41	Shalimar Corporation, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata http://shalimarcorp.in	Meyn	2500	This new plant of initial capacity of 2500 BPH is coming up at Una in Himachal Pradesh. Commissioning is expected by end 2023
42	Shanthi Feeds. Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore http://shanthifeeds.com	Meyn	<u>12000</u>	Originally a 1000 BPH Meyn plant commissioned in 2009. Expanded in 2 stages to 3000 BPH till 2014. Then expanded and re-commissioned at 6000 BPH in Feb 2016. Expanded to 12000 BPH in first quarter of 2021.
43	Sivasakthi Agro Foods, plant at Udumalpet, Tamil Nadu. HQ 793/18, Kumaralingam West Village, Rudrapalayam Post,	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



	Madathukalam Taluk, Tirupur Dist. Tamil Nadu http://www.sivasakthifoods.com			they had expanded to the present capacity. Brand name is <i>Supriya</i>
44	Skylark Foods, plant at Rai Food Park, Sonapat, Haryana. HQ at Dharamgarh Road, Safidon, Distt. Jind, Haryana http://skylarkfoods.com	Meyn	<u>1000</u>	Commissioned March 2006 on an 1800 SqM piece of food park land with no room for expansion or growth. They have added an RTE plant in a nearby plot of land. Sell through Walmart and to many premium hotels and their franchisee outlets. Brand is <i>Nutrich</i> .
45	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.
46	Souza Hatcheries, Mangalore, Karnataka. HQ at Souza Commercial Complex, Highlands, Falnir Road, Mangalore http://www.souzahatch.com	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.
47	Srinivasa Farms Private Limited, plant at Taniki Village, Kowdipally Mandal, Medak District, Andhra Pradesh. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. https://www.srinivasafarms.com	Bayle	1000	Ordered May 2015. Commissioned in Sept 2017. Operating at 1500 BPH.
48	Srinivasa Farms Private Limited. Plant at Mega Food Park, Kurichedu, Prakasam, AP. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. https://www.srinivasafarms.com	Marel	2000	Order for the 2000 BPH plant was placed in late 2017. The plant was installed several years back but commissioning keeps on getting delayed. Six years on we still have no information on its commissioning schedule. **
49	Star Foods Pvt Ltd, proposed plant at Ladhawal Food Park, Ludhiana. HQ at Sampoorana Feeds, Phagwara, Punjab http://sampoornafeeds.com	-	3000	Land procured. Construction has started. Planned capacity reduced from 4000/8000 to 3000/6000. None of the plant and equipment supplier have been chosen yet
50	Suguna Foods Pvt Ltd, Vyalur, Tamil Nadu HQ at Unitea Building, No 3, Savithri Shanmugam Road, Race Course, Coimbatore. https://www.sugunafoods.co.in	Meyn	3000	Commissioned 2000 BPH in Aug 2002. Grew in 2009. To 3000 BPH. This plant has been reconfigured for increased value added products
51	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.
52	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.
53	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. Came on stream in mid 2021.
54	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 settled for a site near Mohali in Punjab. Equipment arrived at site in March 2023 end. Commissioning by mid year.
55	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>	Commissioned in 1986 as 1000 BPH Meyn plant – the first processing plant in the private sector. Expanded to 3000 BPH by Marel during the early 1990's. Old Marel equipment progressively replaced by Meyn's Walvekar consignment.
56	Venkateshwara. 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.



57	SKM Feeds (earlier known as VKS Farms). Plant at Dindigul, Tamil Nadu. HQ Nanjai Uthukuli, Modakurichi Tamil Nadu https://www.skmpornafoods.com	Meyn	8000	Original capacity of 2000 BPH commissioned in Sept 2009 by VKS. Company changed hands in Jan 2015 and became SKM. Expansion to 4000 BPH done by mid 2019. Further expansion to 8000 BPH was commissioned in 3 rd quarter 2022.
58	West Bengal Livestock Dev Corp, Haringhata.	RND/Storm	1000	Commissioned in 2015.
59	West Bengal Livestock Dev Corp, Siliguri	Linco	1000	Combined poultry, goat, beef and pork slaughterhouse commissioned in 2022
60	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
Integrated processing capacity expected by early 2024 based on current orders, on-stream and under-construction projects			1,63,900	Average plant capacity is 2730 BPH.
Capacities are mentioned in birds per hour. For calculating market shares, of the total capacity of 1,60,900 (1,63,900-3000 of Star) BPH expected on stream by end 2023, Meyn's market share is 84,500 (52.5%), Marel's is 31,000 (19.3%), Storm Engineering's is 16,400 (10.2%); RND's is 14,000 (8.7%), Baader-Linco's is 9,500 (5.9%), Bayle's is 3,500 (2.2%); Deccan's is 2,000 (1.2%). [Total 1,60,900 (100%)] [Sethwala's capacity divided >> 500 to Marel, balance 750 each to RND and Storm]				
Proposed 2500 BPH project of Anjaneya has been dropped for the time being from the table because of ongoing uncertainties. ** A formal complaint was lodged by Mr Sridhar Adabala, AVP – Operations, Srinivasa Farms Pvt. Ltd, on 25/4/23 about the veracity of information earlier published by Aptec to the effect that some items of equipment delivered at their Prakasam project site were missing. Aptec checks up each piece of information from alternative sources within the industry as a matter of policy before publishing it. However, in view of Mr Adabala's indignation, we apologize to him and have removed this statement from the Report.				
B	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) 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 are acquiring idle facilities and reviving them or setting up <i>cloud kitchens</i> for captive use. Also, while compiling this list I 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.			
61	Agritech Hatcheries Ltd promoted by Damania brothers, started with a 1000 BPH Meyn plant in early 1990's at Ahmadnagar, Maharashtra. It then expanded in 1995 to 4500 BPH and at that time was the most advanced facility in India. It then closed when the group became insolvent around 1997. Leased for a year from the State Bank of India by C&M with a view to re-commission it, they failed and surrendered it in 1999. Later the plant was scrapped.			
62	Al Arif Poultry , Vakwady Road , Udupi District, Karnataka. Operate a 700 BPH manual dressing plant.			
63	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			
64	Amalgam Group , Cochin, Kerala (Innovative Foods – Sumeru brand) was started in 1977 as a family owned seafood and spice exporting company. Later in 1989 they diversified into processed foods – partnering with Nissin Foods of Japan for freeze drying and with Mitsubishi and Unilever to develop cold chains, besides Ristic GmbH, Saudi Fisheries and others, consolidating their business around Innovative Foods, a clearing and forwarding agency for Hindustan Lever ice cream. Headquartered at Bangalore. Their first attention was to frozen vegetables, followed by <i>parathas</i> and finally to RTE chicken based products under the 'Buffet' range, offering sausages, nuggets and popcorns, <i>samosas</i> , spring rolls and burger patties in chicken and pork. Production is distributed between two plants – at Cochin and Chittoor where they have breeding, battering, frying, IQF and soup making machinery. Lacking a primary processing plant, they source chicken and pork from nearby processors, which amounted, last year, to INR 60 million. Recently they launched innovative recipes curated by Michelin Star Chef Alfred Prasad and now propose to venture into vegetarian and meat based momos. http://www.sumeru.net			
65	Amrit Feeds , Jangalpur, Howrah, West Bengal, bought original RND plants from Lifeline Feeds and Ave Mariam and installed the combination as a 300 BPH unit at Jangalpur. Later expanded to 700 BPH in 2009. Along with this primary processing facility they also set up a sausage and ham plant in 2010 with an investment of around INR 30 million for sale under the brand name <i>Fresco Pollo</i> . Now closed. Planned relocation of this plant to Assam in 2016 was dropped. http://www.amritgroup.net .			
66	Amrit Feeds , Beldanga Mouza, Raghunathpur, PO Bonkati Kanksal Panagarh, West Bengal. A Linco plant of 4000 BPH plant commissioned in first quarter 2014 and promptly closed on June 1, 2015. Available for sale but unlikely to find buyers because the asking price is too high. http://www.amritgroup.net .			
67	Arthur's Food Company , Bangalore. This RTE plant retails through Big Basket, Food Basket, Foodhall, Foodworld, Metro Cash & Carry, Nature's Basket, Scootsy, Spar, Spencer's and Star Bazar. http://www.arthursfood.com			
68	AOV old plant with 2000 BPH machinery from both RND and Storm may be on sale after commissioning of the Meyn plant			



69	Barafwala Co , 11 High Street, Camp, Belgaum, Karnataka. Had so far been confined to the red meat industry. Recently they have set up a pilot plant for processing poultry using some Deccan Automation Technology machines and some made by themselves and are slaughtering 2000-3000 birds daily.
70	Brahmagiri Dev Society , Wynad, Kerala, 500 BPH by RND in 2010.
71	Broiler Master , Punjab, 200 BPH by RND in 2011. This is a “dry processing” plant, having neither scalding nor plucking and does wet market style evisceration.
72	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 ¹
73	Central Avian Research Institute , (IVRI) Bareilly, 200 BPH by Dhopeswar.
74	Century Farms , Manipal, 500 BPH plant built by Storm Engineering, in operation from 2015
75	Chatha Foods , launched by P.S. Chatha in 1998 at village Chaundheri, Dapper, on the Chandigarh - Ambala highway in the Mohali district of Punjab, market their RTE products under the brand names <i>Gusto</i> and <i>Swiss Naturen</i> . With their retort packaged products being shelf-stable at ambient temperature, they beat the hurdle of the inadequate cold chain. They source chicken meat from SHL Agro 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 http://cfpl.net.in
76	Coastal Hatcheries , Mangalore, 500 BPH by RND. To be scrapped now that their Marel plant is commissioned.
77	College of Vet & Animal Sciences , Kerala, 200 BPH by RND in 2003.
78	Contai Golden Hatcheries Pvt. Ltd, Contai, E. Midinapore, West Bengal, 300 BPH by RND in 2003. It is owned by Shalimar Hatcheries and is available for sale.
79	CP India , Chennai, 500 BPH by RND in 2002. Scrapped soon after commissioning.
80	Computerized web based delivery platforms for order booking and order tracking using purpose-designed apps. These include Amazon, Food Panda, Fresh to Home, Licious, Ola, Road Runners, Swiggy, Zapp Fresh, Zomato and others
81	Darshan Foods or Meatzza . Established in 1969 as a buffalo meat exporter. Started an RTE division in 1996 with facilities for delicatessens, Indian products like <i>seekh kabab, 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 <i>Mandi</i> . Possesses a Meyn cone de-boner line for portioning and deboning chicken carcasses. The company is run by Narinder and Rajiv Jaisinghani. http://www.meatzza.com .
82	Doon Valley Poultry's 500 BPH plant supplied by Storm Engg. Commissioning expected in first quarter of 2022.
83	Dr Srinivasa , promoter of the decommissioned and eventually trashed 500 BPH Bayle plant called Pragathi Broilers at Doddaballapur in a disused feed mill shed. He is planning another facility in Karnataka, this time with an ambitious capacity of 1000 BPH.
84	Empire Foods , Talaja, Maharashtra. 1000 BPH plant purchased from RND some 8 years ago, not yet installed. It has probably been resold to and installed by another company, or listed here under a different name.
85	Farm Suzanne , 64, Montieith Road, Egmore, Chennai 600008, Tamil Nadu. Established in 1984 by Eric and Mary Rodriguez at Siruseri, near Chennai with a capacity of 1.5 tonnes per day, as a branch of a larger sea-foods company. They sell to institutions and retail chains and also performs as ship chandlers. Procure chicken meat from several processors listed in Table 6A. 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. http://www.farmsuzanne.com
86	Farm Value Foods Private Limited owned by Anshu Sibbal Chatli runs an RND plant of 350 BPH capacity at Barnala, which was commissioned in 2014.
87	Five Star Chicken , 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 today. However CP's lease of Penn Foods in Maharashtra and use of ProTAC contract-processing indicates their continued drive in this market. https://www.fivestarchicken.com
88	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.
89	Gitwako Farms , headquartered at Jangpura Extension, New Delhi, is owned by Ajay Beri at Ferozepur Jirka. They operate an RND plant of unknown capacity and also process goat meat. Mainly produce RTE products for which they possess a retort.
90	Godrej Tyson , Hoskote, Karnataka, 1000 BPH by RND in 1999, (scrapped in 2007, replaced by a Marel 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

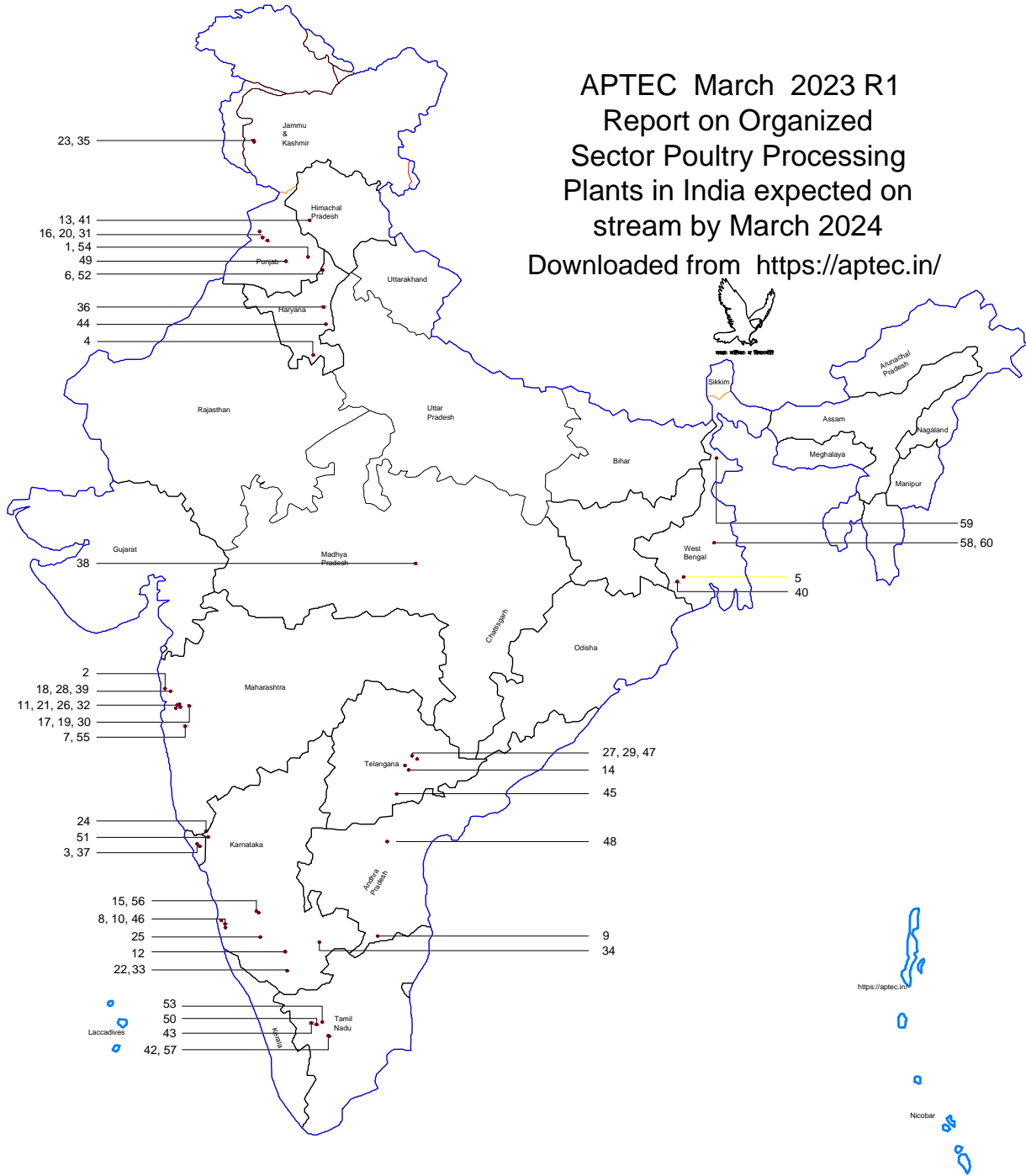


	line – part of which was reconditioned and procured from The Waterbase Nellore facility of the Ballarpur group – a fish further processing facility that failed.
91	Golden Hatcheries Bangalore, operate a manual dressing facility of 500 BPH within municipal limits. Under orders to relocate. Setting up a 3000 BPH Meyn plant at Davangere.
91	Hayagreeva Poultry Solution has a 500 BPH RND plant located at Doddaballapur near Bangalore which was commissioned in 2020. The plant was earlier owned by Chicken Stop, sold to another owner, then shifted to its present location.
93	Hitech Hatch Fresh, Kolkata. Already have a manual dressing plant of unknown capacity and plan to set up a modern processing unit soon.
94	Higrow Chicken , owner Deepak Raj Garg, runs an RND plant of 500 BPH at Ludhiana, which was commissioned in 2017.
95	Hygienic Chickens , 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, 300 BPH by RND.
96	Ideal Chicken (Anupama Feeds and Farms), Kulshekar, Mangalore, run by Vincent Cutinha. 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
97	Indian Broilers (IB Group, Rajnandgaon) located at Nagpur, Madhya Pradesh. It is a 500 BPH plant by RND, started in 2016.
98	Indian Hospitality Company Group was registered in Caymen Islands in 2006 to make investments in hospitality and QSR sectors. To help them do so, they recruited the founder of Barista and CEO of Yum and acquired Adelle 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.
99	International Food Products , Chandigarh. Small RTE producer in chicken and other meats.
100	Irani Chicken Products LLB, Daman, Gujarat, 500 BPH plant by Bayle, commissioned Dec, 2013.
101	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.
102	Khushbaksh Poultry , Srinagar. 500 BPH plant being set up by Storm Engg and slated for commissioning by end 2023
103	Knowledge Foods , Neral. Manual-dressing 300 BPH. Also making RTE products.
104	KSIDC , Kerala, 300 BPH by RND in 2005.
105	McDonalds India , now owned by OSI, set up their first plants at Taloja in the 1995 as Vista Foods and Kitran Foods to cater separately to vegetarian and non-vegetarian products. 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 source approximately 95% of their supplies from 38 local sources – raw chicken coming from the Godrej Taloja plant. Are now installing a cone de-boner sourced from Meyn. https://vistafood.com
106	MTR . Started in 1924 as a restaurant called Brahmanara Coffee Club and later in 1951, changed to Mavalli Tiffin Room in Bangalore. During the Emergency, unable to conform to the prescribed pricing orders of Indira Gandhi, they diversified into packaged convenience foods. Around 2008 they were acquired by Norway's Orkla Foods. They produce seasonings, RTE foods, curries and RTE meals. In 2012 the original owner P.S. Maiya, no longer encumbered by the agreement with Orkla, re-entered the RTE foods segment with a new company. Given the dynamism of Maiya and Orkla, they are both quite likely to enter the RTE chicken sector, given its growth potential.
107	Maval Agro , Chakan Road, Talegaon, Maharashtra. A 700 BPH merchant processing plant built by an ex-employee of Deccan Automation (who later set up his own brand of poultry processing machinery under the name of Deccan Automation). Was in use by Premium Chicken of Raigarh since 2015. It shut during the lock-down. Now after being revamped, it is run by Japfa India for continued trial marketing pending completion of their own plant.
108	Meat Masters . Incorporated in 2000, a producer & supplier of frozen vegetarian & non-vegetarian (fish, mutton and chicken) and RTE products in retort pouches and filled products like sausages. They have set up a new processing facility for further processed meat products at Ladhawal Food Park near Ludhiana in Punjab. Meat Masters sells through own stores BigNMeat, other retailers, and directly to hotels and restaurants in that region http://www.meatmasters.co.in .
109	Meat Products of India , a Kerala government company established in 1973, operating in Chalakudy and Edayar, with bought-out chicken meat and pork from own farms. Produce feed and RTE products. Accumulated losses exceed 3 years' turnover.
110	MP Pashudhan Nigam , Bhopal, 500 BPH 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.
111	Monrovia Foods , Bhandgaon, Pune, Maharashtra, 500 BPH by Storm Engg in Jan 2014.
112	Nagpal Frozen Foods , Barwala, Haryana, 1000 BPH plant commissioned by RND in 2007 and operated by Nagpal's relative Mulk Raj and his sons under the name of Chandigarh Poultry, suppliers to the armed forces. Chandigarh Poultry was later renamed AV Ventures. Nagpal Frozen was closed in 2017 for non-compliance with pollution control laws and has probably been scrapped. Following this, AV Ventures decided to set up their own plant in Panchkula. It is listed in table 1, part A.
113	Navi Nutrix , 750 BPH by RND at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Shreya Foods
114	Nandus Foods Pvt Ltd. Headquartered at Bangalore, the Nanda Group, comprises 11 small companies promoted by P. S. Nandakumar, an old business associate of Rao of VH. As integrators, Nandus skipped the processing stage, venturing directly into RTE in 1989 with a 400mm Koppens forming-frying line and a 32 tonne frozen store. They initially ran it themselves, and at one stage even fought and lost a legal battle in 2007 with the international restaurant chain Nandos Indage Restaurants P. Ltd over brand ownership. The RTE line was leased to Suguna in 2007 for a five year period. At the turn of the century they



	acquired a small Linco slaughterhouse, which had been closed down and mothballed for sometime by its previous owners in UAE, in collaboration with Godrej Agrovet and Sheikh Hamed bin Butti under the name of Al Rahba. Around 2015 they turned their attention to processing with a used RND line in Karnataka. Now closed. Planned a 2000 BPH processing plant, placing an order with Marel. Finally 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.
115	Nensey's Poultry , Valsad, Gujarat, 300 BPH by RND around 2002. It is learnt to have been sold to an unknown party.
116	Peninsula Foods Pvt Ltd, a div 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 VH. The plant was scrapped.
117	Perfect Poultry Pvt Ltd. Plant and HQ at 27 Ft Road, Chowk Green Field, Majitha Road, Amritsar, Punjab. Earlier 1000 BPH Storm plant being replaced by Meyn 4000 BPH plant. They are retaining only one plucker, screw chillers and some secondary processing items. Storm equipment, suitable after balancing, for 2000 BPH is probably available for sale.
118	Pioneer , Hyderabad, Andhra Pradesh, 500 BPH by Dhopeswar. It has been scrapped.
119	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 on grant to the Indian Government under the PL-480 scheme. As far as I am able to ascertain, they were installed in Chandigarh, Mumbai, Aligarh, Orissa, Kerala and Andhra Pradesh. I have seen the one at Chandigarh (CPDO) and the one of Mafoo , Mumbai, the latter being bought in an auction by VH and mothballed at Kamshet. The Mafoo plant is probably scrapped, but the remaining machines may yet be put to use if auctioned by the government
120	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
121	Ratnagiri Cooperative , Chiplun, Maharashtra, 300 BPH by RND in 2003 (closed).
122	Riverdale Foods , Somatne, Maharashtra, 1000 BPH by Meyn around 1995 installed for Harianawala brothers, ex-employees of VH. It closed around 2003 when its arrangement with McDonalds became unprofitable. Was bought by ANC Holdings, Dubai. The plant equipment has suffered pilferage and is now scrapped.
123	Ruchi Agro Industries Ltd, Chikmagalur. It is an RND manual plant of unknown capacity.
124	Royal Foods Pvt Ltd/Shakir Shaikh, Lohegaon, Pune, Maharashtra, 500 BPH by Storm Engg in Nov 2013 .
125	Sai Agri , Kakinada, Andhra Pradesh, 500 BPH used Linco plant imported and installed around 2001 to cater to nearby oil platform workers. Closed shortly thereafter. Bought and mothballed by Srinivasa Hatcheries Ltd, Vizag.
126	Sandip Mukherjee , One time plant manager of Arambagh Hatcheries , is operating a 500 BPH manual processing plant at gariahat, near Kolkata in West Bengal.
127	Shiva Chicken , Coimbatore. Manual dressing of unknown capacity http://www.shivaachicken.com
128	Shiva Farms , Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery
129	Shiva Poultry Equipment , Barnala city is operating a 500 BPH processing plant supplied by RND at GADVASU university in Ludhiana. Their brand name as “ <i>Hygrow Chicken</i> “
130	Sirsa Foods , at Sirsa, Haryana. A 500 BPH plant supplied by Storm. Expected to be commissioned by third quarter of 2023.
131	Sood Poultry at Jullunder, Punjab. A 500 BPH plant commissioned by Storm in 2020.
132	Sujay Feeds , SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, 200 BPH manual slaughter.
133	Swift Foods , Dadri, Uttar Pradesh. Automatic 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.
134	Taurus Foods was set up in the mid 1990's. It produces marinated, smoked and cooked chicken RTE products at its plant at EPIP, Kasna Site 5 Greater Noida, for which it sources raw chicken meat from SHL Agro and others. It has a capacity of 25 tonnes of RTE products per month https://www.taurusfoods.in
135	Unitas Foods Pvt. Ltd M. G. Road, Ghitorni, Delhi. Was incorporated in 2004 and operates QSR and food kiosks business as well as serving bulk buyers. It offers chicken meat, vegetable frozen <i>dimsums</i> or <i>momos</i> , rolls and <i>samosas</i> and claims to be the largest producer of <i>dimsums</i> in India. http://www.unitasfoods.com
136	Unnat Feeds , Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana. An order was placed on Lark Engineering. Under installation from early 2021, but lack important approvals from the government, therefore commissioning date is unknown. The project appears to have been scrapped
137	Violet Industries/Souza Hatcheries , Mangalore, 500 BPH by RND. Not yet commissioned.
138	Vista Agriculture & Food Products , Khurdah Road, Bhubaneswar, Orissa, 500 BPH by Storm Engg in 2013. Now closed;
139	Walvekar Hatcheries Ltd, Pune. 1000 BPH plant was confiscated by the Mumbai Customs due to some irregularities. When auctioned several years later, the lot was picked up by Dr C. R. Behl of VH with a view to install it near Bangalore. Later, most of the machines were used by VH to replace run-down Marel machines at their Kamshet facility
140	WBFCSL/R. K. Doloi , MLA, Midnapore, West Bengal, 300 BPH by RND in 1998, ostensibly for the economic up-lift-ment of local tribals. It was never commissioned. Meanwhile the owner tried selling the equipment or the company, first to Amrit Feeds and then on 15 Jan 2020 to VH but failed each time.
141	Zorabian , Khopoli, Maharashtra, Originally a drum plucker manual dressing facility, upgraded to 500 BPH by RND in 2007. Following the death of Khorram Zorabian, the plant is now run by his daughter.
<p>Note: This list is as exhaustive as I could make it and covers slaughter operations in the un-organized sector. Counting from within this list, I arrive at a total active or potentially re-deployable capacity of 26,700 BPH (23,600 in 38 plants + 5 of unknown capacity = 26,700 BPH) for primary slaughter. Where capacity is not known – I have assumed it to equal the average capacity of the remaining plants within this category.</p>	





APTEC March 2023 R1
 Report on Organized
 Sector Poultry Processing
 Plants in India expected on
 stream by March 2024
 Downloaded from <https://aptec.in/>

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



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.

Readers are welcome to send their comments, critiques, observations and suggestions to the author at rajalok@gmail.com. The author gratefully acknowledges valuable information inputs from various industry professionals.

Fair Use Notice: This document may contain copyrighted material, duly accredited here, but whose use has not been specifically authorized by the copyright owners. I believe that this not-for-profit, educational use on the Web constitutes a fair use of the copyrighted material as provided for in section 107 of the US Copyright Law. If you wish to use such material, possibly copyrighted, for purposes of your own that go beyond fair use, you must obtain permission from its copyright owner. Leads to referenced materials are given below

Endnotes:

ⁱ 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/>

