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# **Annotated APTEC Poultry Industry Reports - From Their Beginning In 2011, Till Their End In October 2026**

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## Preface

Following the publication of the May 10, 2026 issue of the Industry Report, APTEC received requests for a re-publication of past Reports from inception for their role in historicity. To fulfil this need, we at APTEC decided to annotate and upload some of them in this document, adding commentaries as needed, to make them relevant to the present. After 2011, when the first issue of the Industry Report was published, we did not publish on two occasions – the first relating to October 2018, immediately after APTEC parted with Meyn, having served them and establishing their market firmly in India and adjacent countries and in October 2024 when I was beset with several family and health issues.

Over this period as I covered many topics concerning the industry, in some of the issues of the Report I also touched upon machine and layout design and plant operation. As I am an engineering consultant, I was able to discover problems associated with the current approach to plant design and create solutions. In the end I decided to write a Design and Operation Handbook for the Poultry Processing Industry and make it available free-of-cost. At this moment half of the Chapters are already uploaded on webpage “Handbook” on [www.aptec.in](http://www.aptec.in). By the third quarter of next year all chapters will have been uploaded and at the end of that year the website [www.aptec.in](http://www.aptec.in) will have been closed down.

Readers who have routinely downloaded and retain copies of APTEC Industry Reports may note on comparing them with tabulations reproduced here that against some projects there may be small variations in the narrative. This is to be expected – people volunteer information and are not obliged to do so. And they are not always right. Also since these Reports did manage to set up a competition amongst vendors, sometimes the vendors themselves supply misleading information. This last one is the cause why I stopped referring to local vendors by name and started calling them collectively “Local Fabricators”. At other times conflicting claims are made about contributions to plant sales by competing interests. Next, plant owners routinely volunteer optimistic commissioning dates and finally some also exaggerate installed capacity figures. We try to correct these errors in subsequent issues.

In general, our civilization has been criticized for turning the Nelson’s eye to history. This is probably a myth, and poor historicity in India is owing only partly to the weather which rapidly destroys books and parchments, but mainly to the barbaric and uncouth Muslim invaders whose *Jahiliat*<sup>1</sup>, first helped them destroy their neighbours’ cultures and is now assisting them to destroy their own. Mercifully, the sub-continent’s next tranche of invaders, the British, while equally rapacious, were vastly more educated and cultured.

In each walk of life, we owe it to ourselves to record the history of our doings. Because, paraphrasing Mark Twain, *History may not repeat itself, but it sure rhymes* and often **unpleasantly**. So, to those sensitive to the history of this business, APTEC restores herein some glimpses of what we have been privileged to record for posterity.

Which brings me to the question why although statistics on this industry are easily available, they conflict widely with each other and are consequently unreliable<sup>2</sup>. Shouldn’t the industry associations themselves compile statistics? Some associations do. For instance, The Compound Livestock Feed Millers’ Association

Between 1977-84 when I worked as a consultant with an engineering company in bulk and fine chemicals, minerals, petrochemicals and commodities, I did several projects in the chlor-alkali industry in which salt is separated into its elemental constituents – chlorine and metallic sodium and these were then converted into the gas and caustic soda for sale. In under-developed economies such as India of those days, chlorine had little use, and consultants like me had to find novel uses for it else the gas would cause severe pollution. But caustic soda was much in demand and there was a severe shortage. Those were the days of the Licence Raj.

Every entrepreneur wishing to set up an industry sought a government **Letter Of Intent** and on having submitted a valid Input-Output Product Utilization Report to the government and successfully received an **Industrial Licence**, he could then build his plant. The economy was deliberately and perpetually kept in a state of shortages so that the privileged few could laugh all the way to the bank.

On the chlor-alkali industry subject I had acquired a sort of celebrity status, having successfully obtained a number of Industrial Licences for my clientele. So when I approached the MRTPC (Monopolies & Restrictive Trade Practices Commission) or the equivalent of The US Sherman Anti-trust Act, against their newspaper advertisement seeking an expert on the subject, I was instantly selected. All I had to do was *leave my consulting job* and join the gravy train.

I declined the offer – telling them that they were perpetuating the story of **Eklavya** of the Mahabharat and I was sorry, but I did not belong to their tribe.

**Inset 1**      **Why Eklavya would not fall again for the monopoly mindset**



(CLFMA) does. They compile good quality statistics, but in the end are unable to estimate the output of their un-organized sector. Other associations, closer to the broiler industry, do not make any attempt at generating statistics although the recent efforts of Ricky Thapar<sup>3</sup> are commendable.

When we started our Website at APTEC around 2010, we felt that the biggest challenge this industry faced was secrecy. Deliberate, conspiratorial secrecy – the kind that gives power to control. And I have fought it assiduously all my working life. One of the most important lessons I learnt during my working career dates back to around 1982 or 83 and has been narrated in inset 1. It gave me the energy to always keep the windows in my professional life open – no matter what the financial downsides. Well-meaning friends often cautioned me to be more accommodative, but I did manage to stubbornly stand my ground.

So it is, that with the publication of this Commemorative Fifteen Year Report, I state the problems facing this industry as they have been – in order that corrective action may be taken and allow our industry eventually to reach the heights it ought to.

### 1.1 Convention Of Narrative In This Document

In a narrative such as this, in which one must frequently switch from the historic to the present and back, all the time, I felt I needed to use the following text styles to better connect with the reader:

| <b>Table 2 Text Styles Used In This Document</b> |                                                                                         |                                                                                                                                               |
|--------------------------------------------------|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Number</b>                                    | <b>Characters</b>                                                                       | <b>Example</b>                                                                                                                                |
| 1                                                | Times Roman, 11 point Bold, black characters.                                           | Section heading.                                                                                                                              |
| 2                                                | Times Roman, 10 point, plain or italic, black characters.                               | when I am reflecting the historic – narrating, with some editing as required for the sake of brevity, but essentially retaining the original. |
| 3                                                | Times New Roman, 10 points, bold, blue characters, always enclosed within box brackets. | <b>[In this later upload, we draw the attention of the industry to the present situation concerning this very matter by bringing up...].</b>  |

### 1.2 The Beginnings Of Poultry Processing In India

Through the 1990's, (actually beginning a bit earlier, with VH in 1986 and quickly followed by Swift Foods), several plants were set up, only to close down soon thereafter. The aggregate size of processing capacity that downed shutters was 11,500 BPH during the late 1990s and early 2000s included Damania's Agritech (Ahmadnagar), DeeJay's Peninsula Foods (Bangalore), Godrej Agrovet (Bangalore –RND), Gold Chick (Hyderabad), Riverdale (Pune), Sai Agri (Kakinada), Shiraz Foods (Agra), Starchick (Hyderabad) and Walvekar (Pune). Actually Walvekar's imported plant and equipment arrived at Mumbai but the entire consignment was confiscated by the port authorities. More alarmingly for the industry in general, the aggregate capacity that had shut down over the end-1990's and early-2000 period, had risen to equal the aggregate operating capacity!

Because I was asked by my retiring predecessor at Meyn, Woodley Jackman, to offer to take over his responsibilities as Meyn's sales in-charge (if given the responsibility, I would be functioning as sales-agent instead of an employee sales-engineer, which he was), I decided to investigate. I discovered that something was seriously wrong with either the industry, the technology, or the planning of these ventures. Plants built overseas had been sold, but the industry was not in good health. When engineering sales ride on the back of spreadsheets scrutinized by senior managers, this is often the way. Eventually with these findings, I convinced Meyn that in new technologies such as this, new ventures foreclosed rather than opened future avenues for growth unless projects were planned properly.

In my analysis, in two instances, two plants had adopted inferior technology, one plant had opted for inappropriate technology, two had settled for uneconomic capacities, another entrepreneur had an unreasonable obsession with "technological self-sufficiency (Licence Raj style - through import substitution)", yet another entrepreneur was obsessed with financial devices to circumvent the then prevailing punitive local taxation regime, another made a bad choice of site in terms of water security, two ventures failed because of bad management, another targeted the wrong market segment, one venture suffered owing to the foreign consultant's ignorance of local grid power conditions, one was beset with labour trouble and the last became the victim of intense trade rivalry with an erstwhile colleague.



How did I identify twelve reasons for seven failures? Because some failures merited more than one cause! What the industry clearly needed was a lot more hand-holding by the overseas machinery suppliers. Concluding machinery sales by offering cash discounts and parroting the usual spiel of superior technology and automation can conclude sales but cannot guarantee a reputation for reliability. I advised Meyn to offer good, reliable and long term hand-holding as initial investment towards market development.

Fortunately, on hearing my analysis, in contrast to their competitors, Meyn was willing to foot the bill for hand-holding. And Meyn reaped the benefits of its decision by emerging as the most reliable vendors, controlling by far the most dominant position in this market in India. I bring this short term approach to concluding sales of capital goods up again in section xxx because one vendor in particular is repeating this spiel.

Meyn agreed to pay me a small retainer till the time I managed to establish a brisk sale and earn a satisfactory rate of commission. So I took up their assignment – initially for a three year period of 100 man-days per year, till they could identify a permanent employee for the job. In the end they became complacent and did not bother to find my replacement. After helping build their presence in India I decided to leave them on my own on the completion of exactly 20 years since having agreed to work for them.

Fortunately, the period starting from the late 1990s benefited from critical analyses similar to mine, by others, and ushered in the growth phase of this industry. Except for Arambagh, all organized sector plants set up after 1998 by me are still in operation. Indeed, several small locally assembled plants (of <500 BPH capacity) did close shutters, but thanks to constant coverage of their status in APTEC's Industry Reports, many of them were later revived to form the base of the **D2C** internet order suppliers.

**[Part B of the tables listing operating plants and those under construction throughout this document show the status of plants that did down their shutters or were sold and I have endeavoured to give the reasons why this happened. You can read these tables and identify the failures and in effect pursue the investigation that I undertook before offering my services to Meyn]**

### 1.3 Role For The Federation

Finding suitable land for poultry slaughterhouses is a serious challenge. Instead of doing it one by one as I did for my clients, the industry associations and indeed the Federation should take this task up seriously for all future ventures. The best way to start is to take a good look at four maps – (a) the population density map of India, (b) the map of India drawn by quality of agricultural land, (c) the proposed map of India drawn with the rivers linked and reservoirs drawn and (d) the map of India showing freight corridors and ocean and river ports as expected a decade into the future. Of these, the population density map is already reproduced here.

From these four basic resources, employing a team of professionals, the organization should be able to identify suitable stretches or enclaves of land that ought to be set aside as slaughter zones for the establishment of poultry slaughterhouses and slaughter places for other animals that the prevailing government may agree to include.

The population density map shows where slaughterhouses ought not to be built in future. It is no wonder then that there are no slaughterhouses in U.P and Bihar, except, in the case of the latter, one being built in Kishanganj. High population density areas raise the investment cost and locals complain of the smell nuisance.

A map showing poorer grade land suggests land more suited for animal farming and slaughter houses. Linked rivers and reservoir locations show areas where ground water levels may rise and slaughterhouses located there may not encounter stress on this account. Finally access to freight corridors and river or ocean ports can help lower the transport cost of processed products. If you take a look at the map in

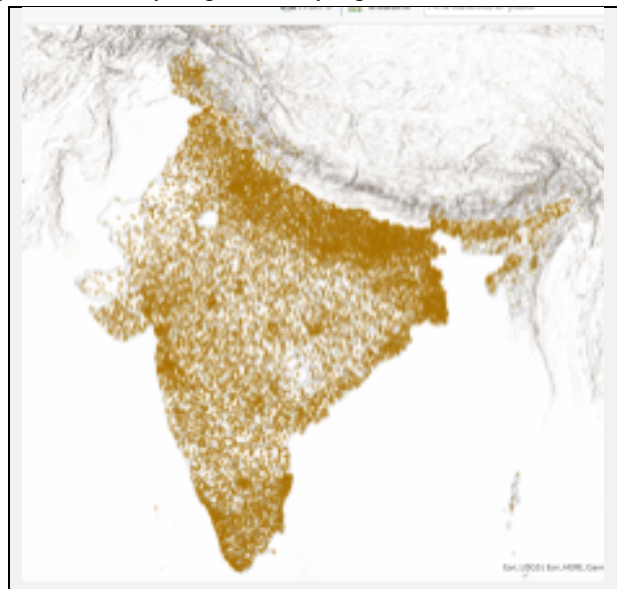


**Figure 3 Population Density Map Of India**



Figure 35 at this point you will note that there is a serious mismatch between distribution of consumers and producers. This has happened because no one has bothered to guide the industry.

At present the regulation on this subject is extremely arbitrary, unsatisfactory and even incompetent. It is almost single handedly controlled by the Pollution Control authorities. A complete analysis of the shortcomings of their red zone classification, their zero discharge policy and their absurd eucalyptus plantation “Karnal Technology” is covered in Chapter 2 of the Handbook which may be downloaded free-of-cost from the APTEC website.

#### 1.4 Need For Social Engineering

A perusal of Chapter 13 of the APTEC Handbook, which discusses some social issues relating to the establishment and development of Delhi’s Jama Masjid slaughter area will show that while historically, vegetarianism was the preference among Hindus, goat meat was commonly consumed by some. Poultry, on the other hand was almost exclusively associated with Muslims and its slaughter was therefore also their exclusive domain. This has changed over the years and poultry slaughter and trade, reserved by tradition for unlettered and poor Muslim lads, is inadvertently slipping out of their hands.

We believe that as organised poultry slaughter with its increased social standing emerges as the new norm, fair social engineering by those in power to implement it, ought to attempt restoring an equitable part of this trade to Muslim lads instead of permitting it to be diverted entirely away from them. Halal certification, does mandate that a Muslim lad (or failing this, one of “the book”) should perform the act. But the fate of that certificate is itself uncertain and it may be banned because of its exploitation by an avaricious *Ulema*. This is not idle speculation. Halal has already been outlawed in several countries – Sri Lanka being a close example and there already exists a strong, well-organised and well-funded public movement against it in India.

Fair social engineering may not naturally follow, because as Chapter 13 will also show, the Muslim community has made no attempt at regaining the initiative in favour of their own youth. This is illustrated by their lack of unity over consolidation of the Ghazipur Mandi abattoir project under their own purpose-formed cooperative. I personally tried to facilitate them to do this, but they remain a divided lot, untrusting of each other.

Who other than the Poultry Federation should take on this responsibility? To do this they will have to seek legal teeth from the Ministry of Home. Why not also build a tribunal with a couple of retired judges on the panel? And how does one go about imparting some education on hygiene to working lads at our municipal slaughter yards to make them acceptable to the expected availability of slaughter job-slots? The Federation should insist that the existing slaughterhouse owners send out talent scouts to the municipal slaughter areas from time to time to pick a couple of eligible lads. These should be adopted, two at a time by the talent scouts and oriented for a month or so on the shop floor and then offered as candidates to new slaughter plants as employees.

For several years, when I was interacting closely with CII on these subjects, I raised these concerns and indeed suggested that this kind of skill development drive simply had to be initiated by them. But the “Chief” was mainly preoccupied with “name dropping” or listing the number of important people he had met last month. Frustrated, I left attending their meetings several years ago.

#### 1.5 APTEC Takes A Curtain Call

Because of my advanced age I have decided to make the next year-end Industry Report Aptec’s last. There will be no more issues thereafter. By mid 2027 my free-to-download Handbook project will also be completed and by December that year, APTEC will also shut down its website. Thereafter I will continue to take up consulting assignments and execute them as long as I am physically able to.

#### 1.6 Prospects For The Industry

As we pass through the third decade of this millennium, we see a world which has built excess manufacturing capacity in everything. We transited through a time when products were built to last and there was enough repair and maintenance capability available in towns, cities, service centres and factories to put things back in use instead of throwing them into urban waste-heaps. Instead of learning skills to perform such tasks, our youth evolved to find fault with manufacturing and instead built a religion out of environmental concern.



Close around the rise of this new religion, manufacturing activities started moving to China – first from USA and then from Western Europe. The CCP perfected the method of holding the entire world hostage by subsidizing manufacture by keeping Chinese workers poor. Then, with the arrival of Biden and Trump, a face-off started between China and USA. Later Western Europe made this face-off a threesome. At present neither Western Europe nor USA possess manufacturing skills, nor the attitude to re-acquire them, nor indeed do emerging workers from their schools and colleges relish the incomes that manufacturing jobs could fetch them if they did indeed agree to enter that sector.

So what did we get? An era when Chinese manufactured goods – consumer goods, even armament and machinery, go a-begging for markets and are offered at cut-throat discounts worldwide. They are of abysmal quality, with built-in obsolescence, and are vastly inferior in quality to those still made in Europe. We have seen how during Operation Sindoor Chinese armament proved to be no match for those produced even in India.

Partly for having moved their own manufacturing facilities and skills to China and so having lost the skills and partly for having lost interest in re-learning those skills or being interested in returning to that old lifestyle, the glory of Western achievements seen during and shortly after the 2<sup>nd</sup> World War is now a thing of the past. Meanwhile, consider that while much of the world has been exhibiting poor economic growth, India has shown stellar performance in spite of Trump's tariff shenanigans. And try as hard as he can, he is unable to bring about a regime change here. Clearly a shift of global power is in progress.

While these major changes are taking place worldwide, let us return to our own industry and note the changes that have taken place in the recent past – some in response to global trends and others in anticipation of them. The poultry processing machinery manufacturers, worldwide, consists of three majors – Meyn, Marel and Baader-Linco. All were born in Europe. Warren Buffett's subsidiary CTB Inc. acquired Meyn Holding in 2012 from the private equity firm Altor and the company's manufacturing facilities are in The Netherlands, Poland, USA and two corporate support presences are in the Iberian Peninsula. JBT bought Iceland's Marel and started a Global Production Centre (GPC) last September, near Pune in India. Bader manufactures in Germany, The Netherlands, Denmark, Iceland and Malaysia while all its design functions remain at Linco's original centre in Denmark.

It should not surprise anyone that Europe's manufacturing costs have risen high and made it uncompetitive. This would explain JBT-Marel's move to Pune, Baader-Linco's move to Malaysia and Buffet's choice of Poland and the Iberian peninsula: clearly both being lower cost economies.

Towards the end of this document I have shown that both DOC availability and construction of new processing capacity are now in excess of 15% CAGR. If the single constraint of suitable land with adequate water can be identified by the federation, there is no reason why India should not emerge like Brazil as an important source for poultry meat and table eggs worldwide. This, together with serious long term uncertainties about the Chinese economy should also make India a suitable destination for more investment by the three poultry processing machinery majors.

Eventually as neither Western European nor American economies manage to compete with Indian labour costs, and the world refuses to trust China, India's importance is a given – both for manufacture of machinery and OCM and for supply of processed chicken and table eggs. India's stellar economic performance and its *Mother Of All Trade Deals* with Europe are sure signs of this.

In the past Meyn and Marel have held big chunks of the Indian market, but Baader-Linco has had a poor presence. In this context, read their boast in the Linked-In post (Inset 39) that because they possess "superior technology", they can fit much larger facilities in the existing plant premises than has been dared in the past by Meyn and Marel. They are also giving unprecedented discounts on machinery in a bid to increase their market share in India.

But both Marel and Meyn have expanded plant capacities in India in the past by proper hand-holding – not just their own versions of "superior technologies". All expansions are performed as "open heart surgeries" in which production is never stopped for more than one day so as to cause no interruption in shipments of fresh chilled produce. Technology plays no part in the effort. Rather meticulous planning and careful maintenance of schedules plays the key role. As far as Baader-Linco are concerned, future scrutiny of their "technology and



discount” based performance will be interpreted in the same manner as I had adjudged the fate of overseas processing machinery vendors in India in 1998.

It would be wrong to suggest that price discounts play no role in making a plant sale in India, but if price was the only incentive for an Indian plant buyer, India would already have plenty of Chinese plants, and yet you find none, while both neighbouring Bangladesh and Pakistan abound in them.

On our part, we need, with the efforts of the federation, to keep up the flow of skilled workers, reduce the hurdles placed in the path of growth by ill thought out environmental and zoning laws, rapidly identify growth zones for this industry and ensure that plants are designed not in ape-like imitation of the west, but in a manner suited to our own conditions and skills. For the last mentioned task, free-to-download Handbook of APTEC ought to help.



## 2 My Earliest List

The earliest list available on my back-up disks, reproduced here as Table 5, relates only to conveyor based units. I prepared this list in 2006, shortly after I was requested by Mr Balram Yadav, retired MD of Godrej Agrovet to audit their Hoskote plant designed and set up by the then outgoing MD Dr Anaokar and recommend action. I advised Godrej Agrovet to shut down the unit, buy some additional land adjacent to it so that it could become wider than the mere 34m it then was, dispose of the locally built apology of a plant it ran, and invest in a modern plant from a reputable company that could live up to the name and reputation of Godrej. They did as I advised.

At that time total capacity set up by Meyn was 11000 BPH and my own contribution was 7000. Also in 2006, under pressure from the Supreme Court and environmental activists, the Delhi Agro Marketing Board (DAMB) was planning to set up a 5000 BPH processing facility, expandable to 10000 BPH at Ghazipur Mandi near Delhi. The Feasibility report was being prepared by Blue Cross Poultry Consultants whose presentation was soundly rejected by the body of commission agents employed at the *mandi*. Later when the commission agents sought help from APTEC, we worked for several years trying to get them to form a cooperative and then set up the processing plant themselves. But there is an enormous degree of mistrust among the commission agents and they would not gather together even when the head of the *Qureshi Samaj* (Quresh are caste Muslim butchers who were associated with the Jama Masjid abattoir right from the Mughal times) offered to become their voluntary titular leader.

| <b>Table 4 2006 Status of Processing Industry in India. This list was compiled but never published by APTEC</b> |                                                                                                                                         |            |              |               |                    |
|-----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|------------|--------------|---------------|--------------------|
|                                                                                                                 | Company                                                                                                                                 | Make       | Capacity     | Prodn / week  | Status             |
| 1                                                                                                               | AgriTech Hatcheries Ltd, Ahmednagar, Maharashtra<br>Stage 1 was 1000 BPH, then 4000 BPH                                                 | Meyn       | 4000         | -             | Closed             |
| 2                                                                                                               | Arambagh Hatcheries Ltd, Kolkata. Stage 1 was 1000 BPH then 2000 BPH in 2002 and 4000 BPH in 2005                                       | Meyn       | 4000         | 150000        | Running            |
| 3                                                                                                               | Baramati Agro, near Pune, Maharashtra                                                                                                   | RND        | 250          | 10000         | Running            |
| 4                                                                                                               | CP Chennai                                                                                                                              | RND        | 250          | -             | Junked             |
| 5                                                                                                               | DEEJAY Group, Bangalore                                                                                                                 | Meyn       | 1000         | -             | Junked             |
| 6                                                                                                               | Godrej Agrovet, Bangalore                                                                                                               | RND        | 500          | 35000         | To be Junked       |
| 7                                                                                                               | Godrej Agrovet Bangalore RND replacement by Stork 2KBP                                                                                  | Stork      | 2000         |               | Under Installation |
| 8                                                                                                               | Godrej Agrovet, Taloja, near Mumbai                                                                                                     | Stork      | 2000         | 80000         | Running            |
| 9                                                                                                               | Gold Chick Hatcheries & Foods Ltd, Hyderabad                                                                                            | Stork      | 2000         | -             | Closed             |
| 10                                                                                                              | Hybro Foods Ltd, Mumbai                                                                                                                 | RND        | 1300         | 35000         | Running            |
| 11                                                                                                              | Life Line Feeds (India) P. Ltd, Chikmagalur                                                                                             | RND        | 650          | 3000          | Running            |
| 12                                                                                                              | Pioneer, Hyderabad                                                                                                                      | Dhopeshwar | 500          | -             | Junked             |
| 13                                                                                                              | Nensey's Poultry, Gujarat                                                                                                               | RND        | 250          | 6000          | Running            |
| 14                                                                                                              | Riverdale Foods Ltd, Talegaon, Pune                                                                                                     | Meyn       | 1000         | -             | Closed             |
| 15                                                                                                              | Royal Foods (Ave Maria) Goa                                                                                                             | RND        | 350          | 15000         | Running            |
| 16                                                                                                              | Sai Agri International Ltd, Kakinada                                                                                                    | Linco      | 500          | 10000         | ??                 |
| 17                                                                                                              | Shiraz Hotels, Agra / Starchik Specialities Ltd, Hyderabad                                                                              | Stork      | 500          | -             | Junked             |
| 18                                                                                                              | Venky's, Kamshet Maharashtra. Stage 1 was 1000 BPH Meyn then 4000 BPH Stork                                                             | Stork      | 4000         | 80000         | Running            |
| 19                                                                                                              | Supreme Suguna Foods Company Limited Coimbatore                                                                                         | Meyn       | 2000         | 100000        | Running            |
| 20                                                                                                              | Swift Foods, Dadri, Uttar Pradesh                                                                                                       | Stork      | 2000         | -             | Closed             |
| 21                                                                                                              | Toubro Industries Ltd, Kurali, near Chandigarh in Punjab                                                                                | Meyn       | 2000         | 30000         | Running            |
| 22                                                                                                              | Walvekar Hatcheries Ltd, Pune. 1000 BPH plant confiscated by Mumbai Port Authorities, auctioned and now owned now by Venky's, Bangalore | Meyn       | -            | -             | To be installed    |
| 23                                                                                                              | Skylark Foods, Sonapat, Haryana. 1000 BPH                                                                                               | Meyn       | 1000         | 5000          | Just installed     |
|                                                                                                                 | <b>Total Operational capacity</b>                                                                                                       |            | <b>32050</b> | <b>559000</b> |                    |



### 3 Excerpts From A Decade & A Half Of APTEC's Industry Reports

The first industry Report compilation was made by APTEC on July 4, 2011 and its fourth revision dated September 6, was uploaded in 2011. We have excerpted in this document several of the tables we uploaded over the years. It has been our convention to list the organised sector (plants of 1000 BPH capacity or higher), in the list. The table includes existing plants, ordered and under construction plants as part A. At the end of this section we list the contribution of each principal vendor. After that, in part B, we list those poultry processing plants which closed down, were scrapped or were on offer for re-sale, as well as entities that were already operating in the processed foods sector and held a likelihood of diversifying into poultry processing.

#### 3.1 APTEC Industry Report Upload Of 2011

Broiler processing began in the bad old days of the PL-480 programme of the US Government<sup>4</sup>, with subsequent arrival of peace corps volunteers, who sought, from the late 1960s through to the 1970s, to assist the Indian economy through a slew of measures aimed at improving agriculture, which was in a total disarray. Beside laying the foundation of the first green revolution, PL-480 aid programme also kick-started soybean cultivation and broiler and layer farming using improved breeds and techniques. A living (and now antiquated) example of their innovations is the simple electro-mechanical incubator-hatcher design introduced in that period. It has been copied ad-infinitum and is still churned out in large numbers by local fabricators.

As part of the drive, a number of broiler slaughter lines were also imported – probably gifted. I know of installations in Maharashtra (Markfed), Chandigarh (CPDO), Kerala and Andhra Pradesh, but there probably were others as well. These slaughter machines consisted of carousel type lines, typically from or similar to those made by Diamond or Johnson of USA. One such 5000 BPD Johnson line<sup>5</sup> is still installed at CPDO, Chandigarh. Most of the rest were scrapped or auctioned by the disinterested public sector entities to commercial broiler processors during the 1990s. Though these slaughter lines whetted the curiosity of entrepreneurs in the industry, they fell far short of kick-starting a revolution in broiler processing.

The credit for this goes to the Late Dr B. V. Rao. The first commercially successful processing plant was set up by Dr Rao, founder of the Venkateshwara Group (VH), at Kamshet near Pune in 1986. It was a 1000 birds per hour (BPH) plant, sourced from Meyn Maschnefabriek of Holland, and the project was based on the business model of a merchant processor. Under this model the broiler farmers (who bought commercial day-old chicks from VH) were to bring their mature flocks back to this plant for slaughter. From this stage VH would take over – slaughtering, packing, promoting and marketing – all scale-sensitive activities at which the processor, not the farmer, was more competent.

But the model failed because the processor had no control on input prices, and yet, as he was expected to market a packaged product, he had to maintain the selling price within a very narrow band. At that time VH was a seller of commercial day-old broiler (and layer) chicks – vertical integration was not their business model. Nor has it been for most of their existence. VH promptly solved this business model problem by acquiring several commercial broiler farms in the vicinity. This constituted a changeover by the first merchant processor in India to the integrator processor model and has remained virtually un-changed till today. See figure 19)

The second processing venture was likewise based on the merchant-processor model. This was the rather more ambitious 2000 birds per hour “fully automatic” Stork plant of Swift Foods at Dadri, east of Delhi. Like VH, Swift (promoted by the Late Jagdish Prasad) were also broiler breeders, preferring to sell commercial day-olds to farmers from their breeding operation at Dehradun and expecting the commercial farmers to eventually bring their birds to Dadri for processing. Predictably this venture faced the same problems that VH did, but it could not be saved in the same way that VH was, because this plant was located East of Delhi while all commercial farms existed west of Delhi, in Haryana. Truckloads of live birds needed to cross the town to reach the plant, but there was a truck traffic ban in Delhi for most of the day!

| <b>Table 5 List uploaded in 2011 of organized sector poultry processing plants (existing, ordered and under construction, comprising Grosscap 28,000 of 16 units)</b>                                                                            |                 |     |                       |                                                                                                                                                                                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-----|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| (All statements and figures in this table remain unchanged from the time they were uploaded in 2011. In hindsight we may have better figures, but altering them may introduce bias. We would rather be inaccurate but authentic and consistent.) |                 |     |                       |                                                                                                                                                                                  |
|                                                                                                                                                                                                                                                  | Plants/Sector   | Nos | Capacity <sup>1</sup> | Remarks                                                                                                                                                                          |
| 1                                                                                                                                                                                                                                                | Imported plants | 12  | 28000                 | Alchemist, Arambagh, Godrej Tyson Taloja & Bangalore, Gold Chick, Sagri, Shanthi, Skylark, Suguna, VH (Venky's India Ltd or VII), Pune and Davangere, VKS (later bought by SKM). |



|   |                                                                                                       |                     |              |                                                                                                                                                                                          |
|---|-------------------------------------------------------------------------------------------------------|---------------------|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2 | Imported plants not in operation <sup>2</sup>                                                         | 4                   | -            | Gold Chick and Starchick (Stork), Sai Agri (Linco), Riverdale (Meyn)                                                                                                                     |
| 3 | Indigenous chain type plants of RND and Dhopeswar.                                                    | 15 <sup>6</sup> (?) | 8000         | Amrit (Jangalpur, Howrah), Ave Mariam (Goa), Sharad Pawar's Baramati Agro, Goel Foods, Shimla, United Poultry (Hybro), Indian Broilers, Kuljas Rai, Lifeline, Nagpal, Shalimar, Zorabian |
| 4 | Indigenous chain type plants in intermittent production and drum plucker type facilities <sup>4</sup> |                     | 20000        | This is a guesstimate.                                                                                                                                                                   |
|   | <b>TOTAL</b>                                                                                          |                     | <b>56000</b> |                                                                                                                                                                                          |

**NOTES:**

Only known facilities and capacities in operation as in June end 2011 are listed here.

<sup>1</sup> Capacity figures are in birds per hour (BPH).

- 1.5 Of these plants Gold Chick is learnt to have been restored subsequently. Riverdale was under the Government's Bureau of Industrial Finance and Restructuring (BIFR) as a financially sick unit and has recently been restored to the owner. It may be revived. **[It could not be revived and was later scrapped and the land was sold]**. Star Chick, installed originally at Agra, was sold and reinstalled at Hyderabad, sold again to Sharon Broilers (Mumbai), sold once again to Sethwala Foods (Mumbai), who are yet to take a decision where/when to install it.. **[They did manage to set it up, as future uploads in this document will reveal]**.
- 1.6 Making use of GP Breeders' Association data to further fine-tune the broiler statistics under directions of an appropriate body such as the Poultry Federation of India (PFI) and officially adopt it makes good sense. This will reduce unfettered use of bogus and misleading data found regularly in industry publications and press briefings.
- <sup>4</sup>It is impossible to enumerate or classify these facilities. When asked, the owner of any plant using "equipment" more sophisticated than a broken hacksaw blade honed on a curb-stone claims to have a "fully automatic processing plant". Processing in the drum plucker plants differs from the wet market only in one particular – the method of removing feathers in the former does not involve de-skinning, therefore the carcass externals do not contact faeces directly, but the process of table-top evisceration ensures that it does eventually spread well throughout the body cavity.

**Cross-checking Our Macro-data**

One way to cross-check this figure is to take the per capita consumption of just over 2 Kg/year-as widely quoted and accepted by most authorities. Given a population of 1210 million, at 2 Kg/capita, India consumes 2420 million kg.

At an average 1.4 Kg dressed weight per bird, 1.8 billion birds amount to 2520 million Kg annual consumption, which is quite close to the above figure.

At 6%, this equals 150 million Kg or 107 million birds processed in all kinds of plants, or amounting to 44,600 BPH gross processing capacity. Since the capacity installed as shown above, is 12pprox. 56,000 BPH, one may conclude that the figure 56000 is either an overestimate or that such a capacity does indeed exist, but probably operates at just 80% utilisation factor. You may choose either view, but I would prefer to back the "56,000 BPH @ 80%" hypothesis.

Of course, these statistics make many assumptions, i.e. average live-weight (which I take at 1850 grams), the generally accepted per capita annum consumption figure (2 Kg), average process stream days (300), shift length (8 hrs) in processing plants and dressing yield (75% by weight) of the average live bird. We have no means to cross check or verify these assumptions. However, if we do accept them, the salient statistics derived from this admittedly circular, iterative, and market survey cum market intelligence basis – the only means we have at our service.

So, we could assume the following:

Capacity/hr = 56,000 birds

Capacity/year (nos and Kg resp) = 56,000x300x8 and 56,000x300x8x1.4 (134.4 million and 188.2 million resp)

Capacity @ 80% utilisation factor = 150,500 tonnes of chicken meat processed. The balance in the wet market.

Capacity addition till end 2012 = 27,000 BPH, or 223,000 tonnes of chicken meat processed.

I welcome inputs from readers which can help fine-tune these figures.

**What do responsible industry experts say?**

- 1.7 RNCOS Industry Research Solutions – "Vision For Indian Poultry Industry: Current Scenario And Future Prospects" states that the processed poultry meat market in 2004 was 600 million Kg.
- 1.8 HindPoultry<sup>7</sup> In its lead article titled "Venky's Intends to Lead India as Number 1 Global Poultry Map" informs its readers that the broiler industry is growing at 18-20%, and broiler consumption level is 3.5Kg/capita annum. In its publication dated July 2010 it states that broiler meat production in India is 3.7 million tonnes at present, which places the consumption at 3 Kg/capita annum.
- 1.9 Confederation of Indian Industries<sup>8</sup> places the 2004 poultry production at 450 million nos –at par with RNCOS.
- 1.10 Website of VH<sup>9</sup> claims Cobb 400 enjoys 75% market share of the 2.5 billion broiler (DOC) industry in India. As regards market size, 2.5 billion at 15% mortality and 1.4 Kg dressed weight accounts for 2.45 Kg/capita annum consumption. So VH figure is only a bit higher than my estimate.
- 5 Meanwhile, at the lower end is MOFPI<sup>10</sup>, which places the current poultry meat consumption at 1.6 Kg/capita annum!



### 3.1.1 Size Of The Broiler Processing Industry In India

The best data on the size of this industry is obtained from grandparent farmers' statistics, by inference. At a meeting of the Broiler Grandparent Farmers' Association, it was estimated that the commercial broiler chick placement in 2011, based on hen-housed population of breeders, taken together with breeder pullet and commercial farm mortality rates of 15% (the estimated national average in the near-absence of controlled environment farm sheds), and hatchability rates would translate into 1.8 billion broilers projected for 2011 and just above 1.7 billion in 2010. Taken together with layer and breeder culls and backyard poultry, this placed the total 2010 availability of poultry meat birds at approximately 1.8 billion numbers and at an estimated 10% growth, this would be 2 billion for 2011.

### 3.1.2 Who's Who in the Broiler Processing Industry in India

| <b>Table 6 Who's Who in the Broiler Processing Industry</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Supplier</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Plant, location and capacity in birds per hour (BPH)</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Meyn                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Arambagh Hatcheries Ltd, Ilambazar, West Bengal, 4000 BPH<br>Alchemist Ltd, Ban Majra, Kurali, near Chandigarh, 2000 BPH<br>Darshan Foods Pvt Ltd, New Delhi (at present only a portioning/deboning facility)<br>Sagri Foods Pvt Ltd, Chanalon, Kurali, near Chandigarh, 1000 BPH<br>Skylark Foods Pvt Ltd, Rai Industrial Estate, Sonapat, 1000 BPH<br>Suguna Poultry Farm Ltd, Vayalur, Coimbatore District, Tamil Nadu, 3000 BPH<br>Shanthi Poultry Farms Pvt Ltd, Dindigal District, Tamil Nadu, 2000 BPH<br>VKS Farms Pvt Ltd, Dindigal District, Tamil Nadu, 2000 BPH |
| Stork                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Godrej Tyson Ltd, Taloja and Hoskote (Mumbai and Bangalore). 2000 BPH each<br>Gold Chick Hatcheries & Foods Ltd, near Hyderabad. 2000 BPH                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Linco                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | The first Linco plant in India (500 BPH, Kakinada, circa 2000 AD, D.C.K. Reddy of Sai Agri P. Ltd).<br>Closed soon after installation by Srinivasa Hatcheries and promptly mothballed.<br>Venky's India Ltd (Davangere), Linco 6000 BPH plant. On stream mid-March, 2011, 75% utilisation till mid July 2011 <sup>11</sup>                                                                                                                                                                                                                                                  |
| Local plants of reasonable size*                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Amrit Feeds, Jangalpur, Howrah, 700 BPH (after recent expansion)<br>Baramati Agro, Baramati, Maharashtra, 1000 BPH<br>Lifeline Feeds, Chickmagalur, Karnataka, 12,000 BPD<br>United Poultry (Hybro), Thane, 12,000 BPD                                                                                                                                                                                                                                                                                                                                                      |
| Mixed (Meyn + Stork)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Venky's India Ltd, Kamshet, near Pune, 3000 BPH                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Plants closed at the moment, but capable of restoration                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Riverdale Foods & Feeds Ltd, (Meyn) Talegaon, near Pune, 1000 BPH<br>Sethwala Foods Ltd (old 500 BPH Stork plant of Starchick who bought it from Shiraz Foods of Agra, not yet re-installed)                                                                                                                                                                                                                                                                                                                                                                                |
| <p>* There are 15 or more local plant. However, the majority of them are very small and most of them operate only intermittently. I have listed only the significant players here.</p> <p>* VH Pune has a claimed installed capacity of 4000 BPH. However, having worked for several years to solve their operational problems I have found that their cramped layout restricts output. Hence I state here a de-rated and more realistic figure of 3000 BPH. This is consistent also with my treatment of plants which routinely exceed installed capacities – I have ignored the excess output when considering total installed industry capacity.</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

### 3.1.3 Some Legal, Social, Market & Processing Features Of Interest

#### 3.1.3.1 Defeathering

Processing begins early in the morning and the first shift ends by 2 PM except when overtime is on offer owing typically to a glut in live broiler prices. Owners of process plants are then at an advantage because they can freeze carcasses which the wet market cannot. Live birds arrive in top-opening coops and Halal is almost universal.

**[In Sri Lanka stunning was generally not allowed by the ulema who insisted that stunning conflicts with the religious definition of Halal. This used to result in downgrading of 20-25% of the carcasses. Sri Lanka overcame this problem by banning Halal in process plants].**

#### 3.1.3.2 Evisceration

In a processing plant in South Asia, a total of 7 automatic machines deployed in the evisceration department makes it "fully automatic". These machines are (1) vent cutting machine, (2) opening machine, (3) eviscerating machine, (4) giblet harvesting machine(s), (5) cropping machine, (6) final inspection machine and (7) inside-outside bird washing machine. Neck breaking and neck skin trimming are not relevant to processing for the Indian market. Here is the tally in India:



| <b>Table 7 Automation in Broiler Evisceration</b>                                                                                                                                                                                                                                                                                                 |                                                                                                                                                    |                                                                                                         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
|                                                                                                                                                                                                                                                                                                                                                   | <b>Level of “Automation”</b>                                                                                                                       | <b>Operating plants in India which qualify</b>                                                          |
| 1                                                                                                                                                                                                                                                                                                                                                 | Plants with 5 or more machines installed, including plants with “multipurpose <sup>1</sup> ” machines which perform all or many of these 7 actions | NIL <sup>2</sup>                                                                                        |
| 2                                                                                                                                                                                                                                                                                                                                                 | Plants with 4 automatic machines                                                                                                                   | Shanthi Poultry Farms                                                                                   |
| 3                                                                                                                                                                                                                                                                                                                                                 | Plants with 3 automatic machines                                                                                                                   | Suguna, VKS                                                                                             |
| 4                                                                                                                                                                                                                                                                                                                                                 | Plants with 2 automatic machines                                                                                                                   | Arambagh, Alchemist, GoldChick, VIL Pune                                                                |
| 5                                                                                                                                                                                                                                                                                                                                                 | Plants with 1 automatic machine                                                                                                                    | Skylark                                                                                                 |
| 6                                                                                                                                                                                                                                                                                                                                                 | Plants with no automatic machine at all                                                                                                            | Godrej at Taloja and Bangalore, and of course all indigenously fabricated plants of RND, Dhopeswar etc. |
| <sup>1</sup> Stork used to claim to have combined vent-cutting and opening operations in one machine and evisceration and cropping operation in another. During subsequent evolution of machine design they dropped these claims by separating these functions to improve performance levels. Two Stork plants have these multi-purpose machines. |                                                                                                                                                    |                                                                                                         |
| <sup>2</sup> The VH Davangere plant has been excluded from this analysis as I am not aware of its configuration, although I expect that it should have a fairly high automation index in keeping with its claimed capacity                                                                                                                        |                                                                                                                                                    |                                                                                                         |

The phrase “touched by hand” in itself can scarcely be treated as a pejorative. Worldwide, even in those plants that have automated with a vengeance, human contact occurs – if not just in the dirty and unpleasant departments that perform scalding, defeathering and evisceration, then most definitely in the post-processing stages such as portioning and de-boning, packing, inspection etc. These are the very stages after which the product cannot be washed or disinfected anymore!

Objectively speaking, the purpose of automation is manifold – to increase speed, reduce cost, perform tasks in unpleasant environments, eliminate error and, finally, to increase hygiene. Any attempt to project the single agenda of hygiene at the cost of other factors is misleading. Full automation of evisceration becomes a necessity beyond the line speed of 4000 BPH. Below it, and at it, full automation may be gainfully avoided without any ill effect, provided skilled labour is available and labour productivity permits it. However, paradoxically, there is now a well perceived creeping shortage of labour in India, just as it had started in China, a few years ago.

In making comparisons, it is useful to remember that the daily wage of a process plant worker in Holland in 2002-03 was 127 Euros<sup>12</sup> as against just under 2 Euros in India. This is a sound reason why the bulk of the poultry processing done in the developed West needs to migrate to the third world.

**[In recent years most of the new plants even when they are in the range of 3000 BPH prefer to go in for a fair level of automation in evisceration. From around the year 2003 in most plants we would insist on the customer buying at least 3 of the automation machines, namely giblet handling, inside outside bird washer and cropping. At present because of labour shortage most plant owners are forced into a high level of automation]**

### 3.1.3.3 Chilling

As far as I know, air-chilling of broiler carcasses is absent in India. The standard chilling process uses chilled water with flake ice or ice slush. All plants listed above use spin (screw) chillers. Some smaller plants use static tanks holding ice slush. Almost all smaller plants source block ice from outside, crush and add it to their chillers. It should be noted that commercial block ice makers are not particular about hygiene and water quality.

**[Air chilling which was insisted upon by the engineers from Thailand in the case of the CP Plant, was a total failure and the plant started using their air-chill sprinkler system as a sort of compromise water chilling. This resulted in refrigeration overload, retained water in the body cavity and consequently incorrect weight grading. Unfortunately the engineers were so sure of the superiority of their decision that they had left no space in the building for retrofitting of a screw chiller. Indian customers refused to buy air chilled carcasses because dryness implied old material]**

### 3.1.3.4 Freezing

An estimated 50% of the production from the processing industry uses inadequately powered blast freezers (which are actually souped-up frozen stores) for freezing the product. Consequently freezing of a batch is completed in as many as 8-12 hours. I have found it practically impossible to educate the industry about the



damage slow freezing causes to product quality – the capital cost difference between a well-designed blast freezer and a souped-up frozen store is so large that short-term commercial prudence always overrides reasonable discourse. An MS Excel tool on my website may be downloaded by those who want to use technically sound guidelines for planning their blast freezers.

**[A more recent MS Excel tool called AptecAPP may be downloaded from the APTEC website and used to note the impact on processing cost by changing the ratio of frozen versus fresh chilled carcasses. So a well-designed blast freezer impacts both the capital and operating cost].**

### 3.1.3.5 Frozen Versus Fresh Chilled

Fresh chilled as a brand USP was first promoted in India with a large advertising budget by Godrej Agrovet Ltd (later called Godrej Tyson Foods Ltd). As it was central to their marketing concept, the Company made no provision for freezing at their first major facility in Taloja, Mumbai. In their other facility at Bangalore they did install freezing capacity, but they only use freezing for up-country dispatches<sup>13</sup>. Fresh product is on display at all their retail points. Shelf life is typically 3 days. According to the Company, at the end of the three day period unsold product is collected from retail points and destroyed.

All other processors generally concentrate on frozen broiler as their primary offering. **[Except when they are sure that the quantity they offer will get sold at the retail outlet]**. This enables them to distribute their brands further up-country. Transport of frozen broilers from the Coimbatore area to Delhi by road adds approximately INR 12 (USD per Kg to its cost, yet products routinely travel this distance. Transport from Coimbatore to Assam, almost twice this distance, is also quite common.

**[At present such long distance transport is not very common owing to increased transport cost and the establishment of nearly 100 plants of approximately 2900 BPH average capacity]**

Processors who mainly produce frozen products do acknowledge the customer preference for fresh chilled product. Some, like Suguna, are slowly promoting “Suguna Daily Fresh” through their 70 odd company retail outlets located in Tamil Nadu, Bangalore and Kerala – places that they can conveniently service with daily supplies from their plant. In Suguna’s case the fresh chilled product is 20% of their total production, whereas in the case of Godrej Tyson frozen is only 5% of their production<sup>14</sup>.

In a country where the infrastructure for transport and power for refrigeration are poor and unreliable, marketing of fresh chilled broiler is rather more difficult than marketing of frozen broiler. This may sound contradictory, but it is not.

Chilled poultry is defined as “slaughtered poultry stored and sold at temperatures not below -1°C”. The scalding temperature during slaughtering is generally below + 55°C<sup>15</sup> (“soft scald” as against 57.5-58.5°C of “hard scald” for frozen poultry). With this lower temperature the epidermis of the carcasses remains unimpaired after the plucking process and protects the carcasses against untimely spoilage and drying-out.

Therefore, to qualify for this category, the scalding must be sufficiently large, (typically 1.5 times the scald dwell-time that frozen poultry requires for a given throughput), and, as stated above, the scald temperature has also to be lower. Then, since the epidermis emerges intact after scalding, more force needs to be applied in the plucker to get a satisfactory result equivalent to hard scald. So you also have to de-rate your plucker to process for the fresh chilled market. To sum up, you cannot simply start producing fresh chilled product in a plant designed for frozen product without sacrificing throughput capacity significantly. If such a sacrifice is not possible, fresh chilled product of very short shelf life results.

Further processing (portioning, packing, storage and handling) conditions for fresh chilled product are also more stringent as regards pick-up of pseudomonas - the principal microorganisms responsible for reducing shelf life. On reaching the supply chain, chilled product must remain within a band of -1°C and +4°C, or within just 5 Celsius degrees of freedom, with disastrous consequences beyond both temperature limits. If the temperature falls below -1°C, the product starts freezing – slowly<sup>16</sup>. If subjected to slow freezing, meat proteins get denatured<sup>17</sup> and the product spoils. On the other hand, allow it to go above +4°C and its shelf-life falls rapidly.



In contrast, frozen product has a wider degree of freedom. It must remain below approximately  $-15^{\circ}\text{C}$ <sup>18</sup> – no matter even if the temperature is allowed to go 10 or 15 Celsius degrees below this level. It spoils only at one end of the temperature band, not at both ends.

Given the fact that distances between major consumption centres are large, and the power situation is poor, it makes good sense to have distributed, small processing, at many centres rather than having very large capacities at a few centres. This strategy suits both product types – fresh chilled and frozen.

**[Later within this document as also in Chapter 2 of APTEC's Handbook, I recommended popularizing the Hub & Spoke Concept of distributed processing when I realized that finding suitable land for setting up poultry slaughterhouses was rapidly becoming a constraint in India].**

In my view the Indian processing industry will have to resurrect the old American concept of freshly thawed poultry as soon as a substantial infrastructure of retail supermarkets is in place. Under this plan, frozen product is received at walk-in frozen stores located at each large outlet. Every evening, as the store closes, the sales staff places a certain quantity of frozen poultry on the display shelves which are at  $+4^{\circ}\text{C}$  – the ideal temperature for overnight thawing of frozen poultry. By morning, the product is available as good as fresh chilled, to be sold within the day and to be consumed (not re-frozen) within the next two days.

**[The other concept is for each processing plant to produce, under prior agreement, fresh chilled products in different brand-packs. A reciprocal arrangement involving this concept among processors located all over the Country will result in rapid growth of processed poultry without the attendant cost of transport over large distances. These I call Spoke centres (see Hub & Spoke Model, where at the Spoke establishments there are walk-in frozen stores similar to those that existed in American supermarkets and the Spoke establishments use overnight thawed frozen carcasses before despatching chilled portions to customer)].**

### 3.1.3.6 Packing

Wicket bag packing of whole broilers, polybag bulk packing of portions and de-boned meat for institutional market (2 kg to 5 Kg), tray packs in blow-moulded thermos-polymer and styropor trays with cling-film cover are the common packs used in India. Master packing is in 10 broiler corrugated cardboard cartons for the export market and first-use lined HDPE woven bags for the local institutional markets.

Most institutional buyers now have preference for plant processed broilers. These include large restaurants, large hotels, fast-food chains like McDonalds, KFC, Pizza Hut, Subway, the armed forces, airline caterers and hospital kitchens. The requirement is for both fresh and frozen products and portions and boneless meat are the preferred types. Retail packs are required to display “use-before date”, “weight when packed” and price per weight unit or weight and price per pack.

Modified atmosphere packs and vacuum packs are non-existent in India. Also I am not aware of any automation in packaging yet.

### 3.1.3.7 Branding & Taxation

Branding requires tamper-proof packaging. By law packaging attracts VAT, and if the product is marinated or further processed in any manner, excise duty as well. So as long as the wet market coexists with organised processing, the former will effectively receive a subsidy at the cost of the latter. This is in effect an example of ambiguous legislation (see section 2.1.4.12)

**[In general, from the early 2000s the Indian government has been pussyfooting the taxation issue in so far as it concerns processed poultry. The wet market does not pay taxes, but the processing industry does. The wet market must render and treat its wastewater but the wet market does. So the government is obliged to subsidize the build-up of processing capacity. But for nearly 3 years now there has been no fresh grant of subsidy because they are still tinkering with the policy].**

### 3.1.3.8 Foreign Trade

Export of processed broiler from India is rare. The first time export of processed broilers was taken up on a sustained and regular basis was after the commissioning of the Supreme-Suguna plant in August 2002. Following approximately 5 years of regular export from this plant, some export consignments were shipped by VKS (commissioned Sept 2009). VH has exported from time to time from their Pune facility. Gold Chick,



originally set up amidst much fanfare as India's first export-oriented poultry processing plant<sup>19</sup> has exported only intermittently for a couple of years commencing its commissioning in September 1998

While sustained and regular export is a distinct possibility over the next couple of years, I do not think it wise to plan totally export-oriented units, nor to depend too much on export until one has a large footprint in the domestic market. For the industry as a whole, export market may become significant when domestic processing reaches, say, something like 30% of the total market as against 6% of the total, which it now is.

### 3.1.3.9 Collaborations & JVs

First, my general perception about JV's – in poultry or other sectors. Beside deputing senior expatriates experienced in technology, finance and marketing, an overseas collaborator urgently needs to look into organisational resistance to change, particularly when its Indian partner is an old or large company – entrenched in local traditions. Indian society does not accept change gracefully, holding tenaciously to the mistaken belief that our ways are unquestionably the best.

The first collaboration in poultry processing was between Suguna Poultry Farm and Supreme (Saudi Arabia). The JV, consisting of a 2000 birds per hour processing plant, was commissioned in Coimbatore District in August 2002. For nearly 5 years thereafter, it exported a 40 ft container (holding some 27 tonnes of whole broilers) to 4 destinations in the Middle East, 350 days a year. The product, labelled "Tanmiah", was very successful and helped expand Supreme's own market in the Middle East.

However, towards the end of this period, the JV ended in a divorce, owing to inadequate safeguards in the collaboration agreement to ensure fair and equitable profit-sharing and to ensure that each partner, instead of pussyfooting evident growth and expansion options in his own area of responsibility, acted in a positive manner for growth and expansion of the JV.

After the exit of Supreme, Suguna expanded the plant. It now processes just over 40,000 birds per day. At present the Company does not have any plans to expand its processing business. Instead it chooses to concentrate on expanding the market share of commercial broiler chick placements and purchase of additional processing capacity at other locations.

**[Suguna went on to purchase the plant of SHL Agro near Chandigarh and Alpha Agro, nominally doubling their capacity of the original Vayalur location and although we were hopeful that their new facility under construction near Mysore would come to fruition, that facility is now on sale and it appears they have made an about-turn in their policy for processing. This decision may be tied to the impasse they face at the breeder level].**

The second major investment in processing by an overseas entity was that of Tyson during the third quarter of 2008 when they formed a JV with Godrej Agrovet. When this collaboration was signed, Godrej Agrovet already operated a gross processing capacity of 4000 birds per hour divided equally between two locations. At present they process 5000 birds per hour and by 2012 end they aim to reach 10,000 across these locations. Thereafter they plan "a very large capacity at Nasik", from where they propose to deliver fresh chilled poultry all over India.

Tyson is the owner of Cobb, one of the leading broiler breeds. Cobb has a decades-old collaboration with VH. So Tyson was expected to have partnered with VH in India, but in the end, they did not. When they commenced operations in India with Godrej, they were the principal importers of Hubbard day old chicks, Cobb's competing breed. Recently Godrej Tyson switched over to VennCobb-400Y. Yet the Godrej Group continues its close associations with Hubbard.

I see a possible clash of interest among VH-Godrej-Tyson over the breed issue when breed availability, rather than retail business growth becomes the key limiting variable in the processed poultry industry. **[This anticipated clash of interested roped in CP later on. CP is yet another independent collaborator of Tyson at the breed level and operating in India with their Thai-source of breeding stock may have contravened Cobb-VH agreement terms].**

Tyson has plans to leverage two important geographical areas within the global poultry market – India and China, to maintain its dominance of the processed poultry industry worldwide. It already has two plants in each country.



[Subsequent events tell a different tale. Frustrated with the inept handling of their JVs, for a brief period Tyson brought in processing experts from their overseas operations, (whom I had the fortune to work with, on invitation of the company's top brass). But by then Tyson had already shot the bolt in India. Eventually, they exited the JV and left. And the fate of the existing plants remains uncertain. The Hosur plant falls within a smart city area and may soon receive marching orders and at the Taloja plant there is a lot of resistance from adjoining villages over the smell nuisance from their rendering facility. At one time the Taloja plant was transporting processing waste in tankers to Hosur (a distance of just over 1000 kilometres) for treatment and disposal! This arrangement was kept a secret for a long time and hit the newspapers only when a tanker overturned on the highway, spilling its cargo all over. Our inept pollution control law prohibits transport of poultry processing waste on public roads and processing poultry in the absence of a functioning rendering facility].

[A third JV was planned between 2 Sisters Group of UK and Reliance Supermarket Operations. But it was dismantled when the original “staunchly vegetarian” founding shareholders of the Ambani group got wind of it. The fourth overseas investment into India was by CP. It was not a JV but a direct investment. It does not appear to be performing well. See 2.1.4].

[Finally the last JV agreement was announced just over a year ago. It was between Mitsui and Sneha of Hyderabad. In a later upload the Industry Report mentioned this JV and speculated on the future possibilities of increase of trade in processed poultry. Read about it in section 3.8.1]

### 3.1.3.10 Availability of Broiler Breeding Stock

Historically availability of breeds has been the principal force shaping the fortunes of the Indian broiler industry and there are indications that it will remain so in the foreseeable future. Here we look at the four main existing suppliers of broiler breeding stock and their linkages to broiler integrators.

Through its own vertical integration VH has a placement of approximately 100 million commercial chicks per year. For the volume of commercial chicks it produces (8% of the DOCs) for performing as an integrator, it is technically in competition with its customers. Although at this volume the competition is trivial, as VH increases its own integration, and its customers also integrate and build their own processing facilities, they would come in direct and effective competition with their breeding stock supplier, and this could have important implications for the industry. This point was highlighted in a published interview of Bahadur Ali, the owner of Indian Broilers, a major group in this business. You can see the complication for yourself in graphic form in figure 19).

At present VH supplies two broiler breeds. These are VennCobb-100 and VennCobb-400Y. VennCobb-100 has a limited market – mainly in North India where open sheds abound, and this situation is likely to continue till all the old breeding stock with VH is exhausted and this breed is completely phased out.

Meanwhile in recent years VH has confused industry watchers regarding its long-term leadership of the poultry industry, given its investments in the real estate business (Lavassa resort township, a significant 12.8% of total equity<sup>20</sup>) and more surprisingly, its purchase of controlling shares in the English football club Blackburn Rovers<sup>21</sup> and its recent disclosure of plans to start a training centre near Pune. Barely a year after their football club investment, Venky's London's acquisition of Akon Hitlab<sup>22</sup>, a Canadian internet music download company in April 2011 left the industry more confused about whether these actions described any planned shift from the widely and long understood definition of the Group's business.

VH's one time ace breed VennCobb-100 lacked many of the qualities one would like to see in a good broiler, but it is a very hardy bird and performs better than all other breeds in the north Indian summers in open sheds. This means that it does not need expensive sheds (see the price differential in table 27) and needs no electricity to power an evaporative cooling system. It was this feature that probably convinced our bureaucrats that India's search for a suitable broiler breed had finally hit pay dirt. So much so that in their enthusiasm they announced a ban on further import of broiler breeding stock. We have speculated on possible reasons for this bureaucratic fiat and its aftermath in inset 20 and the endnote associated with it.

But in the initial years of the broiler industry in India, this was all right because the industry consisted of almost no integration and the merchant breeder preferred having lots of hatching eggs and viable chicks. And the role of VH, which, with this breed, made it the definite leader in this industry.



Many years later, when import was resumed in the mid 1990's, following litigation against the Government (which the government lost) forcing it to lift the ban, some broiler farmers took to vertical integration with more efficient breeds newly imported for this purpose. But instead of recommending that the DOC from such flocks be reared in EC sheds where they would perform better, these new entrants in the business went about reverse-breeding their flocks to produce new heat tolerant offspring to compete with VennCobb-100. Dependence on open sheds had already been cast in stone. Read section 3.5.3 and inset 24 to understand the rail gauge conversion analogy I present in support of this reasoning.

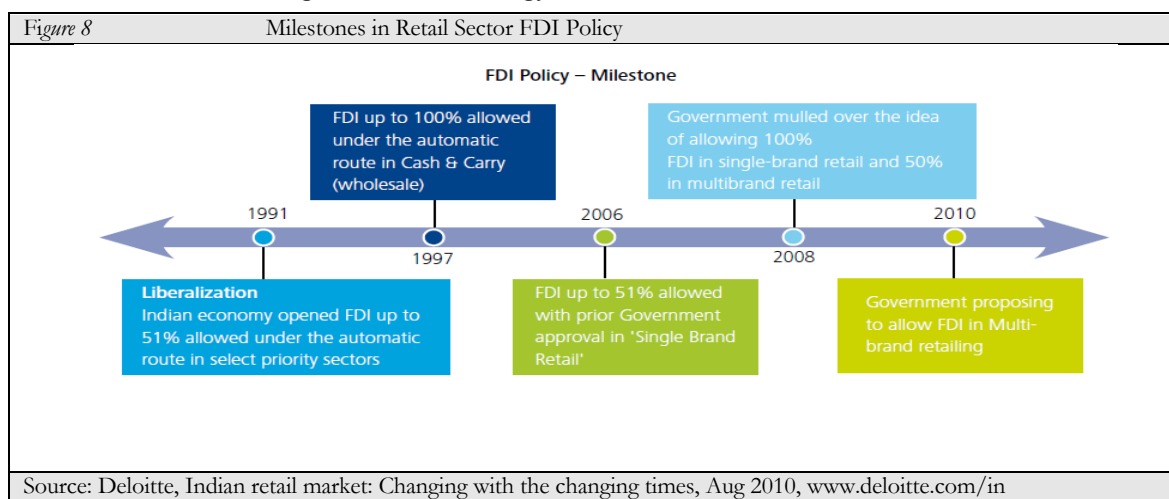
**{That the nature of existing infrastructure influences future growth cannot be denied. In 2014 Aviagen<sup>23</sup> entered India with a GGP farm at Udumalpet and offered several breeds of their own. Although Aviagen had no breed that could take on the specially acclimatized heat-tolerant offering from VH, they did dent the market somewhat. When Aviagen bought Hubbard, the competition only stiffened as there were now only two breed houses in the field}.**

With this new challenge, VennCobb-100 came under pressure and this made VH introduce several versions of the integrator's bird VennCobb-400 – from the breeding stock obtained under licence from Tyson. After some field tests, the best version was adjudged to be the VennCobb-400Y. We understand this version was obtained by crossing Cobb-400 with Cobb-500. It is a good breed, performing reasonably well under predominantly open shed conditions in India. Venn-Cobb-100 and VennCobb-400Y together account for approximately 68% of placements in India. In addition to their predominant position as breeders for the broiler industry, VH also control approximately 80% of the layer industry with their Babcock-300 breed.

**[VennCobb-100 was chosen by Indian bureaucracy as the solution to the broiler breed problem and a ban on further importation was placed. Later, when the government was challenged through the court and the ban order had to be rescinded, it became clear why this bureaucratic over-reach was wrong and had hurt the prospects of the broiler industry severely. The case has been thoroughly discussed under section 3.5.2 onwards].**

### 3.1.3.11 Retail Outlets

The Indian retail sector is highly fragmented with 95 per cent of its business in the hands of unorganized retailers who constitute the largest source of employment after agriculture. Retail by mom-and-pop stores has deep linkages with rural India and indeed Indian culture and contributes over 10% of GDP. Almost the entire retail sector pays no direct income tax. In its handling of perishable agricultural produce such as fruits, vegetables, milk and meat, it is also extremely inefficient and nearly half of all vegetables and fruits is wasted for want of efficient management and technology.



For several decades efforts have been made to open up the retail sector to modern management, but progress has been very slow. In this sector non-payment of taxes is the norm, and absence of record-keeping for fresh produce is a tool to this end. However, perishables like poultry require stringent record keeping at all stages in the distribution chain, particularly if we are to implement traceability.

For the processed broiler industry growth of modern format retail chain is essential, because fragmented mom-and-pop stores and their distribution chain are simply not geared for handling perishable products. In the



absence of an efficient retail sector, some individual broiler processors have made valiant and expensive attempts to create their own chains, together, in some instances, with imaginative branding and promotion strategies. Examples are Arambagh (150 stores at its peak in 2004/5), Suguna (70 *Daily Fresh* stores), StarChick (18 stores), VKS (40 stores) and the brand *Republic of Chicken*, owned by Alchemist (40 stores) in Delhi, Chandigarh and parts of Punjab – with a new store opening every week.

**[Lack of retail space with sufficient parking space eventually killed all efforts at building a decent supermarket culture in India. In recent years B2C delivery of packaged poultry direct to homes against orders received over the internet have eased the struggle faced by the inadequacy of the retail sector. There are many home delivery ventures: for instance Amazon Fresh, BBnow, Blinkit, Dunzo, Flipkart Minutes, JioMart, Swiggy Instamart, Zepto. Some of these are running concurrently with their normal supermarket format stores and bear their names. Arrival of these home delivery outfits is the reason why establishments like Seven-Eleven recently downed shutters. In fact these are welcome developments as they create more jobs].**

According to Reuters June 10, 2011<sup>24</sup>, the Government is now planning to allow foreign direct investment (FDI) in as much as 51% of equity of multi-brand retail chains. This is good news for the industry. But the industry also needs to ask – what caused the policy decisions to stretch over a time horizon of 20 years, and has the legislative machinery done its homework during that period?

**[I have come to the conclusion that at this moment, for all its past planning and announcements on the subject, making waves in the retail sector would be electorally unwise for the government and they know it].**

### 3.1.3.12 Ambiguous Legislations

A recent consolidated FDI Policy draft issued in October 2010 by the department of industrial policy and promotion (DIPP) provides sector-specific guidelines. Although prior to Jan 24, 2006, FDI was not authorised in retailing, according to an article in Legal India<sup>25</sup>, most general players were already operating in India through loopholes in the legislation, such as franchise agreements, strategic licensing agreements and single brand retail arrangements.

According to this source loopholes exist because the notifications fail to define terms such as “brand”, “single brand” and “multiple brand”. Unless these loopholes are plugged promptly, the immediate aftermath of legislation will not be growth of this sector, but a torrent of acrimonious litigations.

**[A classic example of investment that went wrong is that of Caris Pure. The investors were Indian nationals living in South Korea and they set up a plant near Chennai without consulting local people on the ambiguous tax laws. Read about it in table 11 (entry 10) & table 17 (entry 65) and follow the legal explanation down in the endnote].**

### 3.1.3.13 Urban Real Estate And Antiquated Rent Laws

For want of adequate reliable investment options, Indians tend to park much of their savings in urban land and real estate. This pushes up prices so that our urban real estate is generally priced totally out of proportion to the rest of the economy's goods and services, even given the natural pressure one would expect on it with our large and growing population. High cost of urban real estate is another major deterrent to the growth of modern format retail chains, which, unlike the mom-and-pop stores, require parking space and generally larger premises.

Laws relating to rental of premises are antiquated. They lean heavily in favour of the tenant, with the result that prime urban properties, which would otherwise be suitable for retail trade, remain in the possession of tenants who pay a pittance and effectively use the legal mechanism to resist eviction.

Therefore, supermarkets face some major investment obstacles. You need a significantly higher footfall rate for a given supermarket area with a higher than usual investment, to break-even. Given these high investment requirements, some local supermarket ventures (Subhiksha and Vishal Retail) recently went bankrupt and many overseas investors in this sector pulled out of it.



### 3.1.3.14 Land For Processing Plants, Process Water & Treated Water For Irrigation

Having been associated with the search and approval of processing plant sites in India for nearly three decades, I am convinced that very soon one of the major deterrents to growth of processing will be the paucity of suitable land with adequate water supply and means to dispose of the treated effluent. Poultry processing requires large amounts of water – typically 25 litres per bird for small plants, going down to 12-13 litres in large plants. Water is not “used up” in poultry processing. It merely gets downgraded after use and treatment, into a form suitable for other uses, such as irrigation of crops. Laws need to be framed to facilitate such a cascading hierarchy of water usage.

A new integration venture needs some 12-15 plots of land (farms, hatchery, feed mill, processing etc) within an area circumscribed by a radius of some 30-50 Km. Location of suitable land, moving the local authorities to allow changed usage status for the selected plots and obtaining legal possession, utility connection and clearance from other local authorities is perhaps the most daunting task.

Industrial estate land offered in “food-parks” for poultry processing, is woefully unsuited for the purpose because (1) the plots are too expensive, (2) too small, (3) have no provision for common wastewater treatment, (4) nor reasonable access to agricultural land on which to dispose of the treated wastewater. In fact, in developing industrial estates, local and central government alike are behaving more like real estate developers rather than industry facilitators. In a study available in Chapter 2 of the APTEC Handbook only 6 plants were set up on industrial estate land. Of these 6, four have serious complaints relating to their sites and its administration by the estate authorities. This includes two who have decided to relocate because of these difficulties.

Pollution control laws mandate that the entrepreneur aiming to set up a processing facility must not only ensure an adequate supply of raw water (which is a reasonable prerequisite), but that he cannot discharge his wastewater, duly treated to suit irrigation in conformity with local standards, into a natural waterway, nor discharge it upon land, whether for irrigation or otherwise, except if it is his own land, or land owned by others who have given him a written and court approved affidavit for such disposal.

Obtaining such approvals from nearby farmers is an insurmountable problem. In the end process plants are being set up on plots of 40-50 hectares, self-sufficient with irrigable land, although the process requirement for the largest facility, complete with all construction, internal roads etc, seldom exceeds 5-10 hectares or so.

This trend is unhealthy. Here the very law that sets out to protect the farmer’s land ends up depriving him of it. It also burdens the processing industry with unwanted and unproductive capital expenditure, and makes the process needlessly expensive and internationally uncompetitive.

I believe the best solution lies in (a) the pollution control board permitting discharge of treated wastewater into irrigation canals subject to automatic continuous monitoring and logging devices being attached to the discharge points at processing plants, or (b) legislating a form of **ownership of irrigation rights**. Under the latter scheme, the integrator may buy **irrigation rights** for a certain agricultural acreage near his plant on payment of, say, 10% of the sale price of that land. Once the processor has secured such a right, the law would prohibit the farmers owning that land to draw ground-water or canal water for irrigating their land with, as long as the processor is ready to supply them treated wastewater conforming to the discharge standards laid down for such irrigation. This would protect the farmer, groundwater resources and ease the uncompetitive cost burden on processors.

### 3.1.3.15 Truck Movement in Urban Areas

Blanket ban on movement of trucks in urban areas during rush hours is a negative development. Local authorities ought to develop a system of permits for medium tonnage vehicles such as refrigerated trucks carrying perishable produce to retail points within cities on a priority basis. The major reason for the failure of Swift Foods can be attributed to this.

### 3.1.3.16 The GM Controversy

Maize is less of a food crop and more of an industrial feedstock, finding diverse uses for making industrial starch, animal feed, cooking oil and high fructose corn syrup. As the yield of maize in India is almost the same as that of wheat, and the Government maintains a support price for wheat, there is not much incentive for farmers to plant maize. This situation cannot be altered unless sowing of GM maize is allowed or the elegant solution of leveraging US GM maize, described in section 3.9.1.2 is followed. Average maize productivity in



India is 3.7 to 5 t/Ha while in USA it is 10.8 t/Ha. How can the broiler industry, to which maize contributes as much as 40-50% of input cost, compete internationally until serious, impartial and dispassionate thought is given to this problem and a credible solution arrived at?

[In response to his tariff shenanigans, there was some movement in the international press about India's firm position against GM crops like soybean, maize and cotton. Last year I suggested a formula which could benefit both countries. It is available in this document in section 3.9.1].

### 3.1.3.17 Government Support & Subsidies

A number of government departments and agencies are involved in promoting growth and betterment of this industry. Among the tasks they plan to address are establishment of rural abattoirs, promotion of abattoirs held jointly by public and local authorities in municipalities, setting up slaughterhouse machinery manufacture, quality benchmarking, training, media campaign to promote processed meat, setting up regional quality laboratories and cold chains, and others.

Recent efforts by APEDA<sup>26</sup> and MOFPI<sup>27</sup> at subsidizing and promoting this industry include capital subsidy for poultry slaughterhouses, assistance for purchase of reefers, financial assistance for setting up or upgrading laboratories and transport subsidy for export of poultry meat.

[But as observed elsewhere in this document, the policy on subsidies for slaughterhouses is under scrutiny and no long term policy may be expected soon].

## 3.2 APTEC Industry Report Upload of February 21, 2018 (Grosscap 95,600)

| <b>Table 9 List uploaded on February 21, 2018 (of existing organized sector poultry processing plants existing, ordered and under construction, with a Grosscap of 95,600 BPH in 43 units).</b> |                                                           |                      |                      |                                                                                                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|----------------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>A</b>                                                                                                                                                                                        | <b>Plant, location</b>                                    | <b>Make</b>          | <b>Cap<br/>acity</b> | <b>Remarks</b>                                                                                                                                    |
| 1                                                                                                                                                                                               | Alchemist Foods & Hospitality Ltd, Kurali, Punjab         | Meyn                 | 2000                 | Commissioned in 2004. Change of owner in 2017, now operated under lease by Sampoorna Feeds under the brand name Star Foods                        |
| 2                                                                                                                                                                                               | Al Halal Foods, Thane Maharashtra                         | RND                  | 1000                 | Commissioned in 2016                                                                                                                              |
| 3                                                                                                                                                                                               | Alpha Agro & Cold Storage Pvt Ltd, Belgaum, Karnaaka      | Meyn                 | 1000                 | Commissioned in April, 2014                                                                                                                       |
| 4                                                                                                                                                                                               | Ambica Chicken, Margao Goa                                | Storm                | 1200                 | Commissioned in 2016                                                                                                                              |
| 5                                                                                                                                                                                               | AOV Agro Foods Pvt Ltd, Nuh, Haryana                      | RND                  | 2000                 | Commissioned in 2016                                                                                                                              |
| 6                                                                                                                                                                                               | Arambagh Hatcheries, Birbhum, West Bengal                 | Meyn                 | 4000                 | Commissioned as 1000 BPH in Sept 1999, expanded twice to reach present capacity                                                                   |
| 7                                                                                                                                                                                               | Bharat Agrovet, Mangalore Karnataka                       | RND<br>Storm<br>Engg | 1500                 | Old plant of Lifeline Feeds built by RND has been reconditioned and reinstalled by Storm Engineering in Nov 2025                                  |
| 8                                                                                                                                                                                               | Caris Pure, Paramankeni Village, Kancheepuram, Tamil Nadu | Tae-Jin              | 3000                 | Set up in 2013. In operation.                                                                                                                     |
| 9                                                                                                                                                                                               | Charoen Pokphand India Pvt Ltd, Chittoor, Andhra Pradesh  | Meyn                 | 2000                 | Commissioned in January 2016. Planning expansion to 3000 BPH                                                                                      |
| 10                                                                                                                                                                                              | Coastal Farms, Mangalore, Karnataka                       | Marel<br>Stork       | 2000                 | Construction on. Expect to be commissioned by end 2018                                                                                            |
| 11                                                                                                                                                                                              | Godrej Tyson, Taloja, Maharashtra                         | Marel<br>Stork       | 3000                 | Expanded in 2012 from original 2000 BPH set up in 2001                                                                                            |
| 12                                                                                                                                                                                              | Godrej Tyson, Hoskote, Karnataka**                        | Marel<br>Stork       | <u>3000</u>          | Expanded in 2012 from original 2000 BPH set up in 2007                                                                                            |
| 13                                                                                                                                                                                              | Goel Foods, Simla, Himachal Pradesh                       | Dhopeshw<br>ar       | 2000                 | This is a replacement of the existing 500 BPH plant by same supplier commissioned a decade ago. The plant has been shipped but not yet installed. |
| 14                                                                                                                                                                                              | Goldchick, Telangana                                      | Marel<br>Stork       | 2000                 | Commissioned Sept 1998, in intermittent operation since the beginning.                                                                            |
| 15                                                                                                                                                                                              | Hybro Foods, Thane, Maharashtra                           | RND                  | 1800                 | Installed in 2004, attempted, then aborted expansion in 2007                                                                                      |



|    |                                                                                               |             |             |                                                                                                                                                                                                                                                               |
|----|-----------------------------------------------------------------------------------------------|-------------|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 16 | Kavi Proteins, Krishnagiri, Karnataka                                                         | Storm Engg  | 1000        | Operating at 700 BPH, expect to reach full capacity by mid 2018                                                                                                                                                                                               |
| 17 | Kwality Animal Feed, Rajgoli Taluka Maharashtra                                               | Meyn        | 3000        | Order signed in Dec 2014. Commissioned in June 2016. Plan expansion to 3000 by end 2018                                                                                                                                                                       |
| 18 | Lifeline Feeds, Chikmagalur, Karnataka                                                        | Meyn        | 3000        | 300 BPH RND plant commissioned in 2002; sold to Amrit Feeds and replaced by 1900 BPH RND plant shortly after 2005. In turn, replaced by Meyn 2000 BPH plant in June 2015, expanded to 3000 in mid 2016. BPH plant in June 2015, expanded to 3000 in mid 2016. |
| 19 | Miki Exports, Taloja, Maharashtra                                                             | RND         | 2000        | Commissioned 2015                                                                                                                                                                                                                                             |
| 20 | Nafees Poultry, Hyderabad                                                                     | RND         | <u>1000</u> | Operated by Harbans Singh, one time owner of Starchick, started around 2013                                                                                                                                                                                   |
| 21 | Nanda Group (Nandus), Karnataka                                                               | Stork Marel | <u>2000</u> | Order signed for 2000 BPH plant in late 2017 but financial closure learnt to be pending as of date. Construction schedule unknown.                                                                                                                            |
| 22 | Penn Foods Pvt Ltd, Karjat, Maharashtra                                                       | Bayle       | <u>1500</u> | Commissioning and trial runs completed in 2016                                                                                                                                                                                                                |
| 23 | Perfect Livestock Pvt Ltd, Amritsar, Punjab                                                   | Storm Engg  | <u>1000</u> | Commissioned July 2015.                                                                                                                                                                                                                                       |
| 24 | ProTAC Foods International Pvt Ltd, Mulbagal, Karnataka                                       | Meyn        | <u>2000</u> | Commissioning in June 2016                                                                                                                                                                                                                                    |
| 25 | RFK Greens, Lassipora, Pulwama, J&K                                                           | Meyn        | <u>2500</u> | Order received end July, Expected commissioning 3 <sup>rd</sup> Quarter 2018                                                                                                                                                                                  |
| 26 | Royal Foods/Ave Miriam, Salsette, Goa                                                         | RND         | <u>1000</u> | Originally 500 BPH, expanded in 2009                                                                                                                                                                                                                          |
| 27 | Ruchi Agro Industries Ltd, Chikmagalur                                                        | RND         | 1000        | Set up in 2009                                                                                                                                                                                                                                                |
| 28 | SHL Foods Private Ltd/Sagri, Lalru, Punjab                                                    | Meyn        | 2500        | Originally a 1000 BPH plant set up in 2008 at Chalon Ind Park, Chandigarh-Ropar highway. Relocated, expanded, re-commissioned Feb 2014                                                                                                                        |
| 29 | Shalimar Hatcheries, Galsi, Panagarh, West Bengal                                             | Meyn        | 2600        | Commissioned in Sept 2014. To expand to 2600 by end 2017                                                                                                                                                                                                      |
| 30 | Shanthi Feeds, Dindigul, Tamil Nadu                                                           | Meyn        | 6000        | Originally a 1000 BPH plant, Expanded in several stages                                                                                                                                                                                                       |
| 31 | Sivasakthi Farms (Supriya), Udumalpet, Tamil Nadu                                             | Marel Stork | 2000 *      | Originally planned as a 1000 BPH facility in mid 2012. Changed plans to 2000 BPH in 2013. Trial runs done in Nov 2015. In production since early 2016. May be expanded by early 2019 to 4000 BPH                                                              |
| 32 | Skylark Foods, Rai Food Park, Sonapat, Haryana                                                | Meyn        | 1000        | Commissioned March 2006.                                                                                                                                                                                                                                      |
| 33 | Sneha Farms, Hyderabad, Telangana                                                             | RND         | 1000        | Commissioned around 2011                                                                                                                                                                                                                                      |
| 34 | Sneha Farms, Addakul, Hyderabad-Bangalore Highway, Telangana                                  | Marel Stork | 6000        | Ordered in March 2014. Commissioned in April 2016. Recently reached full operating capacity.                                                                                                                                                                  |
| 35 | Souza Hatcheries, Mangalore, Karnataka                                                        | Bayle       | 1000        | Commissioned 2013.                                                                                                                                                                                                                                            |
| 36 | Srinivasa Hatcheries, Narsapur, Andhra Pradesh                                                | Bayle       | 1000        | Ordered May 2015. Equipment arrived Sept 2015. Expect commissioning second quarter 2017                                                                                                                                                                       |
| 37 | SH (Srinivasa Hatcheries) Mega Food Park, Mustla Gangavaram, Kurichedu, Prakasam District, AP | Marel Stork | 2000        | Order signed for 2000 BPH plant in late 2017 but financial closure learnt to be pending as of date. Construction schedule unknown.                                                                                                                            |
| 38 | Suguna Farms, Vyalur, Tamil Nadu                                                              | Meyn        | 3000        | Commissioned as 2000 BPH in August 2002. Expanded in 2009                                                                                                                                                                                                     |
| 39 | Venkateshwara, Kamshet, Maharashtra                                                           | Meyn/Stork  | <u>3000</u> | Commissioned in 1986 as 1000 BPH. Expanded to 3000 BPH during the early 1990's.                                                                                                                                                                               |
| 40 | Venkateshwara, Davangere, Karnataka                                                           | Linco       | <u>6000</u> | Commissioned in March 2012                                                                                                                                                                                                                                    |
| 41 | VKS Farms (now SKM Feeds), Dindigul, Tamil Nadu                                               | Meyn        | 4000        | Original capacity of 2000 BPH commissioned in 2010. Expansion to 4000 BPH to be reached by end 2018 with final expansion to 6000 BPH expected in 2020.                                                                                                        |



|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                              |        |      |                                                                                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|--------|------|-------------------------------------------------------------------------------------|
| 42                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | West Bengal Livestock Dev Corpn.,<br>Haringhata, West Bengal | RND    | 1000 | Commissioned in 2015.                                                               |
| 43                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | West Bengal Livestock Dev Corpn., Siliguri, West Bengal      | Linco  | 1000 | Combined poultry, goat, beef and pork slaughterhouse expected to commission in 2019 |
| Capacity expected by end 2018 based on current orders, on stream and in construction projects                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                              | 95,600 |      | Average plant capacity is 2200 BPH                                                  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                              |        |      |                                                                                     |
| Capacities are mentioned in birds per hour. Of the total capacity of 95,600 BPH expected on stream by end 2018, Meyn’s market share is 40,100 (42%), Stork’s is 23,500 (25%), RND’s is 12,550 (13%), Linco’s is 7,000 (7%), Storm Engineering’s is 3,950 (4%) Bayle’s is 3,500 (4%), Taejin’s is 3000 (3%) and Dhopeswar’s is 2000 (2%).                                                                                                                                                                                                                                  |                                                              |        |      |                                                                                     |
| *During a visit in October 2017 to Sivasakthi’s plant, I discovered that it is still at 2000 BPH capacity and that the purported expansion to 4000 BPH has not actually taken place so far. The capacity figure has accordingly been corrected. An entry had existed for some time in the name of Empire Foods, Taloja, Maharashtra, poised to commission a 1000 BPH facility by RND in my earlier reports. However, since there is no indication when and if this facility will become a reality, it has been has been listed as “not yet installed” for the time being. |                                                              |        |      |                                                                                     |
| Small conveyORIZED capacities include                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                              |        |      |                                                                                     |
| Amrit Feeds, Jangalpur, Howrah, West Bengal, original Lifeline Feeds plant of 300 BPH rebuilt to 700 BPH by RND in 2009. Planned relocation of this plant to Assam was postponed; It is now closed;                                                                                                                                                                                                                                                                                                                                                                       |                                                              |        |      |                                                                                     |
| Amrit Feeds Panagarh, West Bengal. A Linco plant of 4000 BPH commissioned in first quarter 2014 . Operations were closed on June 1, 2015 and the plant premises were closed by end 2015. Available for sale                                                                                                                                                                                                                                                                                                                                                               |                                                              |        |      |                                                                                     |
| Baramati Agro, Baramati, Maharashtra, 300 BPH plant commissioned around 2002, rebuilt to 750 BPH in 2008;                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                              |        |      |                                                                                     |
| Brahma Giri Dev Society, Wynad, Kerala, 500 BPH by RND in 2010;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                              |        |      |                                                                                     |
| Broiler Master, Punjab, 200 BPH by RND in 2011 (this plant has neither scalding nor plucking);                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                              |        |      |                                                                                     |
| Central Avian Research Institute, (IVRI) Bareilly, 200 BPH by Dhopeswar;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                              |        |      |                                                                                     |
| Century Farms, Manipal, 500 BPH plant built by Storm Engineering, expect commissioning soon;                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                              |        |      |                                                                                     |
| Coastal Hatcheries, Mangalore, 500 BPH by RND. To be scrapped soon;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                              |        |      |                                                                                     |
| College of Vet & Animal Sciences, Kerala, 200 BPH by RND in 2003;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                              |        |      |                                                                                     |
| Contai Golden Hatcheries Pvt. Ltd, Contai, E. Midinapore, West Bengal, 300 BPH by RND in 2003 (available for sale);                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                              |        |      |                                                                                     |
| CP India, Chennai, 500 BPH by RND in 2002, (scrapped);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                              |        |      |                                                                                     |
| Empire Foods, Taloja, Maharashtra. Purchased from RND some 5 years ago, not yet installed;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                              |        |      |                                                                                     |
| **Godrej Tyson, Hoskote, Karnataka, 1000 BPH by RND in 1999, (scrapped in 2007, replaced by Stork 2000 BPH plant;                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                              |        |      |                                                                                     |
| Goel’s Foodworld, Shimla, Uttarakhand, 500 BPH by Dhopeswar. To be replaced by a 2000 BPH plant in 2018;                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                              |        |      |                                                                                     |
| Hygienic Chickens, Ludhiana, Punjab, 300 BPH by RND;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                              |        |      |                                                                                     |
| Irani Chicken Products LLB, Daman, Gujarat, 500 BPH by Bayle, commissioned Dec, 2013;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                              |        |      |                                                                                     |
| Indian Broilers, Nagpur, Madhya Pradesh, 500 BPH by RND, commissioned 2016;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                              |        |      |                                                                                     |
| KSIDC, Kerala, 300 BPH by RND in 2005;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                              |        |      |                                                                                     |
| Kuljas Rai Poultry, Chamrang Road, Amritsar, Punjab, 300 BPH by Dhopeswar; under orders to relocate outside municipal limits;                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                              |        |      |                                                                                     |
| Maval Agro, Chakan Road, Talegaon, Maharashtra, dry processing 500 BPH plant by Iqbal Engineers to be commissioned in April 2018 (this plant has neither scalding nor plucking);                                                                                                                                                                                                                                                                                                                                                                                          |                                                              |        |      |                                                                                     |
| MP Pashudhan Nigam, Bhopal, 500 BPH by RND in 1997, (scrapped);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                              |        |      |                                                                                     |
| Nagpal Frozen Foods, Barwala, Haryana, 1000 BPH plant commissioned RND in 2007. Closed in 2017;                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                              |        |      |                                                                                     |
| Navi Nutrix, 500 BPH by RND at Kaveripatnam, Krishnagiri in Karnataka, commissioned end 2017;                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                              |        |      |                                                                                     |
| Nensey’s Poultry, Valsad, Gujarat, 300 BPH by RND, (closed);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                              |        |      |                                                                                     |
| Pioneer, Hyderabad, Andhra Pradesh, 500 BPH by Dhopeswar, (scrapped);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                              |        |      |                                                                                     |
| Pragathi Broilers Pvt Ltd, Doddballapur, Karnataka, 500 BPH by Bayle in 2013.(closed). Available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                              |        |      |                                                                                     |
| Ratnagiri Cooperative, Chiplun, Maharashtra, 300 BPH by RND in 2003 (closed);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                              |        |      |                                                                                     |
| Riverdale Foods, Somatne, Maharashtra, 1000 BPH by Meyn around 1995, (closed); Bought by ANC Holdings, Dubai;                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                              |        |      |                                                                                     |
| Royal Foods Pvt Ltd/Shakir Shaikh, Lohegaon, Pune, Maharashtra, 500 BPH by Storm Engg in Nov 2013;                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                              |        |      |                                                                                     |
| Sai Agri, Kakinada, Andhra Pradesh, 500 BPH by Linco around 2001, Closed shortly thereafter. Bought and mothballed by Srinivasa Hatcheries Ltd, Vizag;                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                              |        |      |                                                                                     |
| Sethwala Foods, Talasari, Maharashtra, refurbished 500 BPH Stork plant originally sold to Shiraz Hotels, Agra, then to Starchick, Hyderabad, who sold it to Hanifbhai of Sharon Broilers, who in turn sold it to Sethwala in 2012. It was subsequently installed by Dhopeswar;                                                                                                                                                                                                                                                                                            |                                                              |        |      |                                                                                     |
| SM Feeds & Farms (India) Pvt Ltd, 300 BPH plant by Storm Engineering, Chennai, came on stream in 2016;                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                              |        |      |                                                                                     |
| Sujay Feeds, Ganganagar, Bengaluru, Karnataka, 200 BPH;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |        |      |                                                                                     |
| Vista Agriculture & Food Products Pvt Ltd, Khurdah Road, Bhubaneshwar, Orissa, 750 BPH by Storm Engg, Oct 2013. Now closed by owner;                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                              |        |      |                                                                                     |
| Violet Industries/Souza Hatcheries, Mangalore, 500 BPH by RND (not yet commissioned);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                              |        |      |                                                                                     |
| WBFCSL/R. K. Doloi, MLA, Midinapore, West Bengal, 300 BPH by RND in 1998 (not yet commissioned);                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                              |        |      |                                                                                     |
| Zorabian, Khopoli, Maharashtra, 500 BPH by RND in 2007.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |        |      |                                                                                     |
| Total listed capacity of 21,950 BPH is distributed among 38 plants. Of this, total capacity on stream is 8,750 BPH (40%), spread over 21 plants at an average capacity of 420 BPH. Total closed/scrapped/not commissioned capacity is 13,200 BPH (17 plants).                                                                                                                                                                                                                                                                                                             |                                                              |        |      |                                                                                     |



Total estimated capacity likely available for sale/to be refurbished/ not yet installed/not yet commissioned, is 8,900 BPH. This figure excludes scrapped plants.

Where a plant's capacity figure is underlined, that plant has a captive further processing divisions designed for manufacture of ready-to-eat packaged foods based on chicken meat<sup>1</sup>. All these further processing facilities are on the common premises with primary processing. Suguna has exited the further processing market, having returned the leased facility to its owner Nandus who have revived their further processing business with raw chicken sourced from ProTAC.

Write to [query@aptec.in](mailto:query@aptec.in) for addresses of these companies. Those with used equipment to sell are urged to make use of the Equipment Exchange feature on the APTEC website. To some readers, this classification might appear confusing, but it was essential to arrive at a reasonable assessment and enumeration of the industry.

### 3.2.1 Structure Of The Industry

Yet another type of “dry dressing” that was being done by some unscrupulous persons, has come to light and based on this discovery I now define the processing industry as comprising four sectors. These are (1) the organized sector being composed of processing plants of 1000 BPH and higher, (2) the unorganized sector consisting of overhead conveyor based plants of less than 1000 BPH capacity each, (3) the “dry processing” sector comprising overhead conveyor based killing with table top deskinning to remove feathers, followed by table-top evisceration and tray-packaging as national brands - in defiance of several existing laws, and finally (4) the genuine text book type wet market sector, including some drum plucker plants. At this point I calculated the tentative size of the wet market and uploaded them and was obliged to revise them later in the March 2021 upload. You can find the revised March 2021 calculations in this document in table 12.

**[Much later, in the November 10, 2025 upload, I was able to recalculate details for the industry and found that the figures had changed again. The November 10, 2025 figures are available in this document in section 3.9].**

### 3.2.2 Water Scarcity Resolved (For The Time Being)

A group of around 50 companies with interests in textile, paper, poultry breeding and poultry processing operations have come together with a corpus of Rs 3 crores to lay a new raw water pipeline extension from Tirupur to Palani, to cater to their water requirements in these arid areas. This project may be ready to sell metered water to buyers in the target area by 3rd quarter, 2019. Buyers would include 5-6 new poultry processing projects which have hitherto been seeking assured supply of process water, to come up in a few years.

Earlier L&T had created a reservoir near Tirupur, linking it to the Bhavanisagar Dam which stores surplus water from the Bhawani River in Erode District. Bhavanisagar Dam, said to be one of the largest earthen dams in the world, was opened for use in 1956, and was expanded and upgraded over the years. It feeds water into two canals, the [Lower Bhavani Project Canal](#) and the [Kalingarayan Canal](#).

### 3.2.3 Wet Markets At Mandis Are Targeted

A case filed by an animal rights NGO against slaughter of poultry in Ghazipur Mandi by wet market process, is under hearing in the Delhi High Court. Charges include violation of mandatory health checks and veterinary screening, “gruesome and sadistic” slaughter of poultry, violation of the Prevention of Cruelty to Animals Rules, 2017, illegal slaughter without any licence or compliance with FSSAI regulations and improper disposal of processing waste which is flushed into municipal drains.

Disposal of solid waste in landfills, the plea further charges, could potentially lead to spread of contagious diseases such as bird flu. Solid waste landfills in the metropolis are already under criticism as one of them recently collapsed onto a road and caused a traffic accident.

### 3.2.4 Open Sheds Versus EC Sheds

Local climate and lack of financial resources to invest in closed houses have long been held as the reasons for dominance of the hardy broiler commercial *VennCobb-100* in India.

But Pakistan has the same agro-climatic conditions and similar, if not worse, resource limitations among its farmers, yet open houses are rare in that country. So, to claim that agro-climatic conditions, which favour the hardy *VennCobb-100* and helped establish India's lead in broiler farming is false, because in Pakistan leadership belonged to Hubbard and most of the commercial sheds are EC there. To claim this would be to confuse cause with effect. In fact limited availability of alternative breeds (even to the exclusion of



alternatives by legislation, for some time, as stated above) that could compete with this hardy and low performance bird has historically been the cause rather than the effect for preference of open houses in India.

[At an industry seminar around 2012 at Ghaziabad, when a self-styled champion of VennCobb-100 and open sheds was lecturing on the disease preventing qualities of open sheds (he conjectured that as against EC sheds in which pathogens remained confined and therefore caused cross-infection, open sheds allowed such pathogens to be wafted away by natural air currents and so reduce chances of cross-infection), I asked why it was that all over the world EC sheds routinely produce superior results. He then countered that this effect is more pronounced in the hot climate of India. When I again countered with the observation that the same hot climate exists in Pakistan which has produced excellent results with EC sheds housing Hubbard strains, he could not respond meaningfully].

Industry experts predict that when closed broiler commercial houses become commonplace, breed hardiness will cease to be a winning factor. While this transition has just commenced, the pace is very slow.

As stated above, to cater to the transition period, VH had introduced Cobb 400-Y, which is an intermediate breed combining hardiness with high FCR, high dressing yield and rapid maturation. This smart combination of qualities allowed it to dominate the market at between 65 and 75% share for several years. Logically, 400-Y was expected to dominate throughout the transition to EC sheds and perform even better when EC sheds became predominant. At this moment only an estimated 5% of commercial broiler houses have EC. It may take several years for the percentage of such houses to attain a critical mass.

The fact that VennCobb-400-Y heat tolerance has been matched by the almost simultaneous introduction of a new hardy and high performance Ross strain from Brazil by Aviagen signals the start of a retrograde progression with a **battle for dominance through heat tolerance** with its attendant reduced FCR.

[Experts tell me that the percentage of EC sheds in 2025 is around 15-20%. This and Aviagen's move suggests that my inference, arrived at during the second decade, was spot on. While this competition continues and the percentage of EC sheds rises, reducing the handicap enjoyed by heat tolerance, the government could subsidize construction of EC sheds so that a level playing field could be created. Instead, because heat tolerance was the ticket to dominance, the also-ran competitor pursued the goal of perfecting its own heat-tolerant offering. At this point the government ought to have carried out a correction to its own earlier mistake. See section 3.5.5].

### 3.3 APTEC Industry Report Upload Of April 30, 2019 (Grosscap 97,600)

**Table 10** List uploaded on April 30, 2019 of organized sector poultry processing plants (existing, ordered and under construction with a Grosscap of 97,600 BPH in 43 units).

|    | Plant, location                                                | Make                    | Capacity | Remarks                                                                                                                        |
|----|----------------------------------------------------------------|-------------------------|----------|--------------------------------------------------------------------------------------------------------------------------------|
| 1  | Alchemist Foods & Hospitality Ltd, Kurali, Punjab (Star Foods) | Meyn                    | 2000     | Commissioned in 2004. Change of owner in 2017, now operated under lease by Sampoorana Feeds under the brand name of Star Foods |
| 2  | Al Halal Foods, Thane Maharashtra                              | RND                     | 1000     | Commissioned in 2016                                                                                                           |
| 3  | Alpha Agro & Cold Storage Pvt Ltd, Belgaum, Karnataka          | Meyn                    | 1000     | Commissioned in April, 2014                                                                                                    |
| 4  | Ambica Chicken, Margao Goa                                     | Storm Engineering       | 1200     | Commissioned in 2016                                                                                                           |
| 5  | AOV Agro Foods Pvt Ltd, Nuh, Haryana                           | RND                     | 2000     | Commissioned in 2016                                                                                                           |
| 6  | Arambagh Hatcheries, Birbhum, West Bengal                      | Meyn                    | 4000     | Commissioned as 1000 BPH in Sept 1999, expanded twice to reach present capacity                                                |
| 7  | Bharat Agrovet, Mangalore Karnataka                            | RND – Storm Engineering | 1500     | Old plant of Lifeline Feeds built by RND has been reconditioned and reinstalled by Storm Engg in Nov 2015.                     |
| 8  | Caris Pure, Paramankeni Village, Kancheepuram, Tamil Nadu      | Tae-Jin                 | 3000     | Set up in 2013. In operation.                                                                                                  |
| 9  | Charoen Pokphand India Pvt Ltd, Chittoor, Andhra Pradesh       | Meyn                    | 2000     | Commissioned in January 2016. Planning expansion to 3000 BPH.                                                                  |
| 10 | Coastal Farms, Mangalore, Karnataka                            | Marel                   | 2000     | Construction on. Expect to be commissioned by end 2019                                                                         |



|    |                                                                                               |            |             |                                                                                                                                                                                                               |
|----|-----------------------------------------------------------------------------------------------|------------|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 11 | Godrej Tyson, Taloja, Maharashtra                                                             | Marel      | 3000        | Expanded in 2012 from original 2000 BPH set up in 2001                                                                                                                                                        |
| 12 | Godrej Tyson, Hoskote, Karnataka                                                              | Marel      | <u>3000</u> | Expanded in 2012 from original 2000 BPH set up in 2007                                                                                                                                                        |
| 13 | Goel Foods, Simla, Himachal Pradesh                                                           | Dhopeshwar | 2000        | This is a replacement of the existing 500 BPH plant by same supplier commissioned a decade ago. The plant has been since been installed.                                                                      |
| 14 | Goldchick, Telangana                                                                          | Marel      | 2000        | Commissioned Sept 1998, in intermittent operation since the beginning.                                                                                                                                        |
| 15 | Hybro Foods, Thane, Maharashtra                                                               | RND        | 1800        | Installed in 2004, attempted, then aborted expansion in 2007.                                                                                                                                                 |
| 16 | Kavi Proteins, Krishnagiri, Karnataka                                                         | Storm Engg | 1000        | Operating at 700 BPH, expect to reach full capacity by mid 2019.                                                                                                                                              |
| 17 | Kwality Animal Feed, Rajgoli Taluka Maharashtra                                               | Meyn       | 3000        | 2000 BPH order signed in Dec 2014. Commissioned in June 2016. Expanded to 3000 end 2018                                                                                                                       |
| 18 | Lifeline Feeds, Chikmagalur, Karnataka                                                        | Meyn       | 3000        | 300 BPH RND plant commissioned in 2002; sold to Amrit Feeds and replaced by 1900 BPH RND plant shortly after 2005. In turn, replaced by Meyn 2000 BPH plant in June 2015, expanded to 3000 in mid 2016.       |
| 19 | Miki Exports, Taloja, Maharashtra                                                             | RND        | 2000        | Commissioned 2015                                                                                                                                                                                             |
| 20 | Nafees Poultry, Hyderabad                                                                     | RND        | <u>1000</u> | Operated by Harbans Singh, one time owner of Starchick, started around 2013                                                                                                                                   |
| 21 | Nanda Group (Nandus), Karnataka                                                               | Marel      | <u>2000</u> | Order signed for 2000 BPH plant in late 2017 but financial closure learnt to be pending as of date. Construction schedule unknown.                                                                            |
| 22 | Penn Foods Pvt Ltd, Karjat, Maharashtra                                                       | Bayle      | 1500        | Commissioning and trial runs completed in 2016                                                                                                                                                                |
| 23 | Perfect Livestock Pvt Ltd, Amritsar, Punjab                                                   | Storm Engg | 1000        | Commissioned July 2015.                                                                                                                                                                                       |
| 24 | ProTAC Foods International Pvt Ltd, Mulbagal, Karnataka                                       | Meyn       | 2000        | Commissioning in June 2016.                                                                                                                                                                                   |
| 25 | RFK Greens, Lassipora, Pulwama, J&K                                                           | Meyn       | 2500        | Order received end July, 2017. Expected commissioning end 2019.                                                                                                                                               |
| 26 | Royal Foods/Ave Miriam, Salsette, Goa                                                         | RND        | 1000        | Originally 500 BPH, expanded in 2009.                                                                                                                                                                         |
| 27 | Ruchi Agro Industries Ltd, Chikmagalur                                                        | RND        | 1000        | Set up in 2009.                                                                                                                                                                                               |
| 28 | SHL Foods Private Ltd/Sagri, Lalru, Punjab (Suguna Foods)                                     | Meyn       | 2500        | Originally a 1000 BPH plant set up in 2008 at Chalon Ind Park, Chandigarh-Ropar highway. Relocated, expanded, re-commissioned Feb2014. Sold in 2018 to Suguna, slated for expansion to 5000 BPH by early 2020 |
| 29 | Shalimar Hatcheries, Galsi, Panagarh, West Bengal                                             | Meyn       | 2600        | Commissioned in Sept 2014. Expanded to 2600 in 2018                                                                                                                                                           |
| 30 | Shanthi Feeds, Dindigul, Tamil Nadu                                                           | Meyn       | 6000        | Originally a 1000 BPH plant commissioned in 2009. Expanded in 2 stages to 3000 BPH till 2014. Then expanded and re-commissioned at 6000 BPH in Feb 2016.                                                      |
| 31 | Sivasakthi Farms (Supriya), Udumalpet, Tamil Nadu                                             | Marel      | 4000        | Originally planned as a 1000 BPH facility in mid 2012. Changed plans to 2000 BPH in 2013. Trial runs done in Nov 2015. In production since early 2016. Expansion to 4000 BPH to commence in May 2019.         |
| 32 | Skylark Foods, Rai Food Park, Sonapat, Haryana                                                | Meyn       | 1000        | Commissioned March 2006.                                                                                                                                                                                      |
| 33 | Sneha Farms, Hyderabad, Telangana                                                             | RND        | 1000        | Commissioned around 2011.                                                                                                                                                                                     |
| 34 | Sneha Farms, Addakul, Hyderabad-Bangalore Highway, Telangana                                  | Marel      | 6000        | Ordered in March 2014. Commissioned in April 2016.                                                                                                                                                            |
| 35 | Souza Hatcheries, Mangalore, Karnataka                                                        | Bayle      | 1000        | Commissioned 2013.                                                                                                                                                                                            |
| 36 | Srinivasa Hatcheries, Narsapur, Andhra Pradesh                                                | Bayle      | 1000        | Ordered May 2015. Equipment arrived Sept 2015. Commissioning in 2018.                                                                                                                                         |
| 37 | SH (Srinivasa Hatcheries) Mega Food Park, Mustla Gangavaram, Kurichedu, Prakasam District, AP | Marel      | 2000        | Order signed for 2000 BPH plant in late 2017 but financial closure learnt to be pending as of date. Construction schedule unknown.                                                                            |



|          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                |               |                                                                                                                                                                  |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 38       | Suguna Foods Pvt Ltd, Vyalur, Tamil Nadu                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Meyn           | 3000          | Commissioned as 2000 BPH in August 2002. Expanded in 2009.                                                                                                       |
| 39       | Venkateshwara, Kamshet, Maharashtra                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Meyn/<br>Marel | 3000          | Commissioned in 1986 as 1000 BPH Meyn plant. Expanded to 3000 BPH by Marel during the early 1990's.                                                              |
| 40       | Venkateshwara, Davangere, Karnataka                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Linco          | 6000          | Commissioned in March 2012.                                                                                                                                      |
| 41       | VKS Farms (now SKM Feeds), Dindigul, Tamil Nadu                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Meyn           | 4000          | Original capacity of 2000 BPH commissioned in 2010. Expansion to 4000 BPH to be reached by third quarter 2019 with final expansion to 6000 BPH expected in 2020. |
| 42       | West Bengal Livestock Dev Corpn., Haringhata, West Bengal                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | RND            | 1000          | Commissioned in 2015.                                                                                                                                            |
| 43       | West Bengal Livestock Dev Corpn., Siliguri, West Bengal                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Linco          | 1000          | Combined poultry, goat, beef and pork slaughterhouse expected to commission in 2019.                                                                             |
| <b>A</b> | <b>Capacity expected by end 2019 based on current orders, on stream and in construction projects</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                | <b>97,600</b> | <b>Average plant capacity is 2270 BPH</b>                                                                                                                        |
|          | <p>Capacities are mentioned in birds per hour. Of the total capacity of 98,600 BPH expected on stream by end 2019, Meyn's market share is 40,100 (41%), Stork's is 25,500 (26%), RND's is 12,550 (13%), Linco's is 7,000 (7%), Storm Engineering's is 3,950 (4%) Bayle's is 3,500 (4%), Tacjin's is 3000 (3%) and Dhopeswar's is 2000 (2%).</p> <p>An entry had existed for some time in the name of Empire Foods, Taloja, Maharashtra, poised to commission a 1000 BPH facility by RND in my earlier reports. However, since there is no indication when and if this facility will become a reality, it has been has been listed as "not yet installed" for the time being.</p> |                |               |                                                                                                                                                                  |
| <b>B</b> | Small conveyorized capacities include                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                |               |                                                                                                                                                                  |
| 44       | Amrit Feeds, Jangalpur, Howrah, West Bengal, original Lifeline Feeds plant of 300 BPH rebuilt to 700 BPH by RND in 2009. Planned relocation of this plant to Assam was postponed; It is now closed;                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                |               |                                                                                                                                                                  |
| 45       | Amrit Feeds, Panagarh, West Bengal. A Linco plant of 4000 BPH plant commissioned in first quarter 2014. Operations were closed on June 1, 2015 and plant premises closed by end 2015. Available for sale;                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                |               |                                                                                                                                                                  |
| 46       | Baramati Agro, Baramati, Maharashtra, 300 BPH plant commissioned around 2002, rebuilt to 750 BPH in 2008;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                |               |                                                                                                                                                                  |
| 47       | Brahmagiri Dev Society, WYNAD, Kerala, 500 BPH by RND in 2010;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                |               |                                                                                                                                                                  |
| 48       | Broiler Master, Punjab, 200 BPH by RND in 2011 (this plant has neither scalding nor plucking);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                |               |                                                                                                                                                                  |
| 49       | Central Avian Research Institute, (IVRI) Bareilly, 200 BPH by Dhopeswar;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                |               |                                                                                                                                                                  |
| 50       | Century Farms, Manipal, 500 BPH plant built by Storm Engineering, expect commissioning soon;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                |               |                                                                                                                                                                  |
| 51       | Coastal Hatcheries, Mangalore, 500 BPH by RND. To be scrapped soon;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                |               |                                                                                                                                                                  |
| 52       | College of Vet & Animal Sciences, Kerala, 200 BPH by RND in 2003;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                |               |                                                                                                                                                                  |
| 53       | Contai Golden Hatcheries Pvt. Ltd, Contai, E. Midnapore, West Bengal, 300 BPH by RND in 2003 (available for sale)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                |               |                                                                                                                                                                  |
| 54       | CP India, Chennai, 500 BPH by RND in 2002, (scrapped);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |               |                                                                                                                                                                  |
| 55       | Empire Foods, Taloja, Maharashtra. Purchased from RND some 5 years ago, not yet installed;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                |               |                                                                                                                                                                  |
| 56       | **Godrej Tyson, Hoskote, Karnataka, 1000 BPH by RND in 1999, (scrapped in 2007, replaced by Stork 2000 BPH plant);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                |               |                                                                                                                                                                  |
| 57       | Goel's Foodworld, Shimla, Uttarakhand, 500 BPH by Dhopeswar. Replaced by a 2000 BPH plant in 2018;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                |               |                                                                                                                                                                  |
| 58       | Hygienic Chickens, Ludhiana, Punjab, 300 BPH by RND;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                |               |                                                                                                                                                                  |
| 59       | Irani Chicken Products LLB, Daman, Gujarat, 500 BPH by Bayle, commissioned Dec, 2013;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                |               |                                                                                                                                                                  |
| 60       | Indian Broilers, Nagpur, Madhya Pradesh, 500 BPH by RND, commissioned 2016;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                |               |                                                                                                                                                                  |
| 61       | KSIDC, Kerala, 300 BPH by RND in 2005;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |               |                                                                                                                                                                  |
| 62       | Kuljas Rai Poultry, Chamrang Road, Amritsar, Punjab, 300 BPH by Dhopeswar; under orders to relocate outside municipal limits. Construction of new 1000 BPH RND building started;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                |               |                                                                                                                                                                  |
| 63       | Maval Agro, Chakan Road, Talegaon, Maharashtra, dry processing 500 BPH plant by Iqbal Engineers to be commissioned in April 2018 (this plant has neither scalding nor plucking);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                |               |                                                                                                                                                                  |
| 64       | MP Pashudhan Nigam, Bhopal, 500 BPH by RND in 1997, (scrapped);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                |               |                                                                                                                                                                  |
| 65       | Monrovia Foods, Bhandgaon, Pune, Maharashtra, 500 BPH by Storm Engg in Jan 2014;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                |               |                                                                                                                                                                  |
| 66       | Nagpal Frozen Foods, Barwala, Haryana, 1000 BPH plant commissioned RND in 2007. Closed in 2017;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                |               |                                                                                                                                                                  |
| 67       | Navi Nutrix, 500 BPH by RND at Kaveripatnam, Krishnagiri in Karnataka, commissioned end 2017;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |               |                                                                                                                                                                  |
| 68       | Nensey's Poultry, Valsad, Gujarat, 300 BPH by RND, (closed);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                |               |                                                                                                                                                                  |
| 69       | Pioneer, Hyderabad, Andhra Pradesh, 500 BPH by Dhopeswar, (scrapped);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                |               |                                                                                                                                                                  |
| 70       | Pragathi Broilers Pvt Ltd, Doddballapur, Karnataka, 500 BPH by Bayle in 2013.(closed). Available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                |               |                                                                                                                                                                  |
| 71       | Ratnagiri Cooperative, Chiplun, Maharashtra, 300 BPH by RND in 2003 (closed);                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |               |                                                                                                                                                                  |
| 72       | Riverdale Foods, Somatne, Maharashtra, 1000 BPH by Meyn around 1995, (closed); Bought by ANC Holdings, Dubai;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                |               |                                                                                                                                                                  |
| 73       | Royal Foods Pvt Ltd/Shakir Shaikh, Lohegaon, Pune, Maharashtra, 500 BPH by Storm Engg in Nov 2013;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                |               |                                                                                                                                                                  |
| 74       | Sai Agri, Kakinada, Andhra Pradesh, 500 BPH by Linco around 2001, Closed shortly thereafter. Bought and mothballed by Srinivasa Hatcheries Ltd, Vizag;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |               |                                                                                                                                                                  |
| 75       | Sethwala Foods, Talasari, Maharashtra, refurbished 500 BPH Stork plant originally sold to Shiraz Hotels, Agra, then to Starchick, Hyderabad, who sold it to Hanifbhai of Sharon Broilers, who in turn sold it to Sethwala in 2012. It wa subsequently installed by Dhopeswar;                                                                                                                                                                                                                                                                                                                                                                                                    |                |               |                                                                                                                                                                  |
| 76       | SM Feeds & Farms (India) Pvt Ltd, 300 BPH plant by Storm Engineering, Chennai, came on stream in 2016;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                |               |                                                                                                                                                                  |



|                                                                                                                                                                             |                                                                                                                                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| 77                                                                                                                                                                          | Sujay Feeds, Ganganagar, Bengaluru, Karnataka, 200 BPH;                                                                            |
| 78                                                                                                                                                                          | Vista Agriculture & Food Products Pvt Ltd, Khurda Road, Bhubaneswar, Orissa, 750 BPH by Storm Engg, Oct 2013. Now closed by owner; |
| 79                                                                                                                                                                          | Violet Industries/Souza Hatcheries, Mangalore, 500 BPH by RND (not yet commissioned);                                              |
| 80                                                                                                                                                                          | WBFCSL/R. K. Doloi, MLA, Midinapore, West Bengal, 300 BPH by RND in 1998 (not yet commissioned);                                   |
| 81                                                                                                                                                                          | Zorabian, Khopoli, Maharashtra, 500 BPH by RND in 2007                                                                             |
| Write to rajalok@gmail.com for addresses of these companies. Those with used equipment to sell are urged to make use of the Equipment Exchange feature on the APTEC website |                                                                                                                                    |

### 3.3.1 Optimum Start-up Capacity and Operating Model

For the benefit of new ventures, two caveats are relevant. First is the optimum size of organized sector processing plant. The average size in my list – 2270 BPH ought to be the default minimum. When you plan a new processing facility it is useful to adopt the collective wisdom of the market and start at this capacity. You may certainly start at a lower capacity, say 1300 or 1500 BPH, provided that you plan to quickly expand to the industry average level and beyond.

Looking at the second half of my table, where the sub-1000 BPH plants are listed, you will find that only around a third of them have survived over the entire period that I have been compiling my reports (from 2013). What are the reasons for such a high failure rate?

I believe that these small capacities are unviable. Moreover, they are set up under guidance by local plant fabricators, who routinely downsize all utilities and services so as to conclude a sale. Local plants adopt faulty machine design, because they copy unintelligently. Read section 3.5.1 for an example. Also, they offer inefficient layouts, mostly through ignorance, and above all, even fail to educate the buyer on proper alignment and adjustment of operating parameters of their own machines. Over the years I have had the opportunity of visiting several such plants on invitation and significantly improve performance and throughput by simple adjustment of existing machines.

**[According to the 6<sup>th</sup> of October 2021 news release by Meyn Holland, marking the agreement between AOV Agro & Perfect Poultry with Meyn, Mr. Ramanjit Singh Madaan, Managing Director, Perfect Poultry Products Pvt Ltd said, “Perfect Poultry [had]... to renovate ... existing facility fast to meet the rapidly developing global standards.... [We] were using a local Indian plant but we realized that all the international buyers or brands who buy from India have stringent quality norms [which are]...extremely difficult to achieve from the existing line.”]**

**So while local plants do serve an important role – to reduce the capital barrier to entry in this field, eventually serious parties have to move up the value chain and reach out to standard manufacturers.**

The second caveat relates to operating model. Almost without exception, a merchant processor has no prospects – nor does complete dependence on contract farming guarantee commercial success. You cannot base your plant on supply of live birds from the open market or *mandi*. You must have an integration, at least to the tune of 50% of your live bird requirements.

**[Over the years I have had cause to revise this viewpoint, noting the success of ProTAC, Penn Foods and Alpha-Agro (under its original owner). Each has made a success of merchant processing and I believe there is need for a few such processors in the industry].**

### 3.3.2 Prospects

According to their manifesto<sup>28</sup>, BJP plans to invest INR 25 lakh crores (INR 25,000 billion or \$358 billion) over the next five years towards rural development. In many of their speeches, BJP leaders have promised to double farmers’ income (see section 3.5.3), partly by investing heavily in agro-processing. Achieving their objectives without bringing in GM and closely linking agriculture to industry - i.e. processing houses, boosting animal husbandry including poultry and opening up of the poultry sector to international markets, resorting to market driven choice of crops and letting in foreign investment and trade may be difficult. And these are precisely the steps that the farmers’ agitation had targeted. It should be evident that the agenda had been written by learned men, aiming to bring about a regime change in India. But this regime has stayed the course and soundly routed the regime change initiative.

**[Section 3.5.3 will show how the BJP manifesto intentions were scuttled, first by bureaucrats who saw a goal dissonance between the political intentions and the breeders lobby and acted in keeping with the**



sentiments expressed in inset 22) and later the anti DFI move was extended, first by an agitation at Jamia Milia Islamia and later by the farmers lobby on Delhi's borders].

Of the companies involved in poultry processing, there are three having multi-location processing facilities. These are big corporate entities and I had hoped that they would see the signal and gear up for growth. To my knowledge, of these, Suguna alone appears to be headed in that direction, having recently acquired the plant of SHL in Ambala and set up contract processing at two other plants. It is headed towards achieving a gross capacity of 12,000 BPH or more by 2020 end.

Two other companies aim at achieving 12000 BPH capacity in around the same time frame, but will do so from their present locations. To grab a portion of the growth, quantity is not enough, one has to be able to deliver from several plant locations, reaching several markets at once.

### 3.4 APTEC Industry Report Upload Of March 15, 2021 (Grosscap 1,33,300)

| <b>Table 11 List uploaded on March 15, 2021, of organized sector poultry processing plants (existing, ordered and under construction with a Grosscap of &amp; 1,33,300 in 52 units).</b> |                                                                                                                                                  |             |                 |                                                                                                                                                                                                                                                                                                                                  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>A</b>                                                                                                                                                                                 | <b>The Organized Sector Comprising Plants of 1000 BPH or Higher Capacities</b>                                                                   |             |                 |                                                                                                                                                                                                                                                                                                                                  |
|                                                                                                                                                                                          | <b>Plant, location</b>                                                                                                                           | <b>Make</b> | <b>Capacity</b> | <b>Remarks</b>                                                                                                                                                                                                                                                                                                                   |
| 1                                                                                                                                                                                        | Alchemist Foods & Hospitality Ltd, Kurali, Punjab (Star Foods)                                                                                   | Meyn        | 2000            | Commissioned in 2004. Since 2017 it is operated by Star Foods under a lease which is to end shortly, with the brand name Star. Also leased is the 135 t per month RTE capacity of Alchemist. Within the premises Alchemist operates a hand dressing unit to service web orders for Republic of Chicken brand.                    |
| 2                                                                                                                                                                                        | Al Halal Foods, Thane Maharashtra                                                                                                                | RND         | 1000            | Commissioned in 2016                                                                                                                                                                                                                                                                                                             |
| 3                                                                                                                                                                                        | Alpha Agro & Cold Storage Pvt Ltd, Belgaum, Karnataka (Suguna)                                                                                   | Meyn        | 1000            | Commissioned in April, 2014. To function as a merchant processor, producing mainly for the armed forces and the Goa and local markets. The company was purchased by Suguna in 2019.                                                                                                                                              |
| 4                                                                                                                                                                                        | Ambica Chicken, Margao, Goa                                                                                                                      | Storm       | 1200            | Commissioned in 2016. Suffered financially during the lockdown particularly as most of their business was with hotels.                                                                                                                                                                                                           |
| 5                                                                                                                                                                                        | Anjaneya Breeding and Agriventures Pvt Ltd, 915D, Raibag Sainagar Jalapur Road, Raibag Belgaum (Belgavi), Karnataka                              | Meyn        | 2500            | Incorporated in February 2011. Land procured at Girinayakanwadi, 90 Km north east of Belgavi. Plant ordered in 2017. Plans ready. Applied for MOFPI subsidy in February 2021.                                                                                                                                                    |
| 6                                                                                                                                                                                        | AOV Agro Foods Pvt Ltd, Nuh, Haryana. HQ at C-22/25 Sector 57 Noida 201301                                                                       | RND/Storm   | 2000            | 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. Commissioned in 2016, modified in 2017                                                                                                                     |
| 7                                                                                                                                                                                        | Arambagh Hatcheries. Plant at Birbhum, West Bengal. HQ at 59 B Chowringhee Road, Kolkata <a href="https://arambagh.com">https://arambagh.com</a> | Meyn        | 4000            | Commissioned as 1000 BPH in Sept 1999, expanded to 2000 BPH in 2002 and 4000 in 2004. It also produces boneless Kakugiri and Yakitori for the Japanese market and RTE roasted and fried products, sold through its own retail outlets called Arambagh Foodmarts                                                                  |
| 8                                                                                                                                                                                        | AV Ventures, Plot Number-72 A, Panchkula Industrial Area Phase 1, Panchkula, Haryana                                                             | Storm       | 1500            | Initially operated Nagpal Frozen Foods, Barwala, Haryana, a 1000 BPH plant commissioned by RND in 2007. After its closure on failure to comply with pollution control laws, setting up a new 1500 BPH poultry & 100 goats per day plant on their land in Panchkula Industrial area. Work in progress, but commissioning delayed. |
| 9                                                                                                                                                                                        | Bharat Agrovets, 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 Engg in Nov 2015.                                                                                                                                                                                                                            |



|    |                                                                                                                                                                                                                                      |                   |      |                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 10 | 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           | 3000 | Promoted by one Prince Jacob, an NRI from Korea and Madavan Nair in May 2013. Operated for some time by a hotel chain. Purchase bid by Suguna, Shanthi and others failed to get transfer of local PCB approval to any new owner. In Nov 2019 the banker issued an auction notice. The promoters were charged with non-payment of GST, which is mandatory for organized sector processors but not levied on the wet market <sup>29</sup> |
| 11 | Charoen Pokphand India Pvt Ltd (CP). Plant at Chittoor, Andhra Pradesh. HQ at CPF Tower, 1, 100-Foot Road, Stage 2, Hoysala Nagar, Indiranagar, Bengaluru, Karnataka <a href="https://cpbrandindia.com">https://cpbrandindia.com</a> | Meyn              | 2000 | Commissioned in January 2016. It is the only plant in India with air-chilling equipment. Planned expansion went into abeyance for lack of space. Also get contract processing done by Penn, ProTAC. RTE sold as Five Star Chicken                                                                                                                                                                                                       |
| 12 | 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. Commissioning already delayed for 3 years.                                                                                                                                                                                                       |
| 13 | Godrej Tyson Foods. Plant at Taloja, Maharashtra <a href="https://www.godrejagrovet.com/godrej-tyson-foods">https://www.godrejagrovet.com/godrej-tyson-foods</a>                                                                     | Marel             | 3000 | Expanded in 2012 from original 2000 BPH set up in 2001 on an industrial estate plot of land.                                                                                                                                                                                                                                                                                                                                            |
| 14 | Godrej Tyson Foods. Plant at Hoskote, Karnataka <a href="https://www.godrejagrovet.com/godrej-tyson-foods">https://www.godrejagrovet.com/godrej-tyson-foods</a>                                                                      | Marel             | 3000 | Set up in 1999 as 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 Real Good and they also produce RTE products on 400Kg/hr used lines sourced from The Waterbase, Ananthapuram, Nellore, a failed fish RTE unit                                                                             |
| 15 | Goel Foodworld, Plot no 23A, Industrial Area, Shogi, Shimla, Himachal Pradesh                                                                                                                                                        | Dhopeswar / Storm | 2000 | This is a replacement of the existing 500 BPH plant by Dhopeswar commissioned a decade ago. The modified plant has been installed in 2020 by Storm Engg.                                                                                                                                                                                                                                                                                |
| 16 | Goldchick Hatcheries and Foods Ltd. Plant at Sadashivpet near Hyderabad, Telangana. HQ at Plot No.151, Kavuri Hills, Madhapur, Hyderabad, Telangana <a href="http://goldchick.in">http://goldchick.in</a>                            | Marel             | 2000 | Commissioned Sept 1998, and in intermittent operation. First to export Indian processed chicken and also the first in the world to install an automatic re-hanging machine at this capacity.                                                                                                                                                                                                                                            |
| 17 | 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 three years later. Placed order on Meyn in Feb 21. Expect commissioning by first quarter 2022                                                                                                                                                                                                                                                                       |
| 18 | Huda Foods Pvt Ltd. Plant at Kondhwa. HQ at FL-I-403 Unity Park, SN-43 Kondhwa Kd, behind Sheetal Petrol Pump, Pune                                                                                                                  | Deccan            | 1500 | Incorporated in 2020 by Sarfraz Momin. The plant processes birds procured from the Japfa farms.                                                                                                                                                                                                                                                                                                                                         |
| 19 | Hybro Foods Pvt Ltd. Plant at Lahe, Taluka Shahpur, District Thane, Maharashtra. HQ at 8, Shah Industrial Estate, Opp Veera Desai Road, Andheri West, Mumbai                                                                         | RND               | 3000 | Installed in 2004 as a 1800 BPH plant, then expanded to 3000 BPH.                                                                                                                                                                                                                                                                                                                                                                       |
| 20 | KGN Poultry, Pimpri, Maharashtra                                                                                                                                                                                                     | Storm             | 1500 | Started as a manual plant of 300 BPH. Storm plant was commissioned in 2018.                                                                                                                                                                                                                                                                                                                                                             |
| 21 | Kavi Proteins, Krishnagiri, Karnataka HQ 26, 1st Cross, Sindhi Colony, behind VISL House, JC Road, Bengaluru                                                                                                                         | Storm             | 1000 | Operating at 700 BPH. Suffered closure with the onset of the lock-down. Shreya Farms is operating it now.                                                                                                                                                                                                                                                                                                                               |
| 22 | Khazir Agro. Plant I.G.C Lassipora, Srinagar, Srinagar UT. HQ 4th Floor, Opp New Era School, Raj Bag, Srinagar, Srinagar UT                                                                                                          | RND               | 1000 | Production commenced in January 2021                                                                                                                                                                                                                                                                                                                                                                                                    |
| 23 | Kwality Animal Feeds Pvt Ltd. Plant 763/19, A/P-Rajgoli, Chandgad, Dist Kolhapur, Maharashtra. HQ 12, Kwality House Machhe, Industrial Area, Belgaum, Karnataka                                                                      | Meyn              | 3000 | Ordered as a 2000 BPH in Dec 2014. Commissioned in June 2016. Expanded to 3000 end 2018. Sell under the brand name Belchick                                                                                                                                                                                                                                                                                                             |



|    |                                                                                                                                                                                                                                                                    |                 |             |                                                                                                                                                                                                                                                                                                                                                                             |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | <a href="http://kqualityhouse.in/">http://kqualityhouse.in/</a>                                                                                                                                                                                                    |                 |             |                                                                                                                                                                                                                                                                                                                                                                             |
| 24 | Kuljas Rai Poultry HQ 112, City Centre, Shastri Market, Amritsar, Punjab                                                                                                                                                                                           | Storm           | 2000        | They have a 300 BPH plant supplied by Dhopeswar, at Chamrang Road, Amritsar which they were forced to close because of zoning laws. The new plant, sourced from Storm was set up under technical expertise of Dr Behl, recently retired from Indian Broilers, Rajnandgaon. In operation from 2021. Operations run by Kuljas Rai Arora and his two sons Gaurav and Varun.    |
| 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 industrial plots.<br><a href="https://www.lifelinefeeds.com">https://www.lifelinefeeds.com</a> | Meyn            | 3000        | 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. Owned by K. Kishore Kumar Hegde.                                                                                                               |
| 26 | Miki Exports International, Taloja, Maharashtra<br>Domain name <a href="http://mikichicken.com">http://mikichicken.com</a> has expired.                                                                                                                            | RND             | 2000        | Established in 1950 as Miki Food Stuffs, for export of frozen buffalo meat from a plant at Muzaffarnagar, U.P. In 2015 they commissioned this plant supplied by RND. It was shut down during the lock-down. Now the facility processes for Fresh To Home and Licious. It is not clear whether this facility has been sold or leased.                                        |
| 27 | 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                                                                                                                                                                                                                                        |
| 28 | Penn Foods Pvt Ltd. Plant at Karjat, Maharashtra. HQ at Clucky's Products LLP, 294, Shahid Bhagat Singh Road, Fort, Mumbai<br><a href="http://cluckys.co/the-processing-plant/">http://cluckys.co/the-processing-plant/</a>                                        | Bayle           | 1500        | Commissioned in 2016. Contract processing for CP, MacDonald and Licious. Also selling through Metro Cash and Carry, Amazon, Walmart and others. Brand name is Clucky's                                                                                                                                                                                                      |
| 29 | 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 Engg. Being replaced by Meyn to 4000 BPH. Work in progress.                                                                                                                                                                                                                                                                  |
| 30 | ProTAC Foods International Pvt Ltd, Plant and HQ at 115 Allalasandra, behind RTO Check Post, NH4, Mulbagal Taluk, Karnataka                                                                                                                                        | Meyn            | 2000        | Commissioned in June 2016. Planned as a merchant processor with <i>mandi</i> sourced live birds. Operating on contract at 25,000 BPD for Tri Star (Kerala), Nandus, Licious, Shanti (Fortune), Fresh to Home and CP. Plan expansion to meet growing merchant processing demand. Brand name is Barnfree.                                                                     |
| 31 | RFK Greens Pvt Ltd. Plant at Lassipora, Pulwama, J&K. HQ at C-37, First Floor NSM, Azadpur New Delhi                                                                                                                                                               | Meyn            | 2500        | Ordered end July, 2017. Installation completed. Expected commissioning by mid 2021.                                                                                                                                                                                                                                                                                         |
| 32 | 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 lock-down. Now re-commenced operations in a limited way.                                                                                                                                                                                                              |
| 33 | Sethwala Foods Pvt Ltd, plant at Talasari, Palghar, Maharashtra.                                                                                                                                                                                                   | Marel/RND/Storm | <u>2000</u> | Installed a refurbished 500 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 Engg. The brand name is Seth's |
| 34 | SHL Foods Private Ltd (Sagri) Plant at Lalru, Punjab. HQ at Suguna Foods, Unitea Building, No: 3, Savithri Shanmugam Road, Race Course, Coimbatore.<br><a href="https://www.sugunafoods.co.in">https://www.sugunafoods.co.in</a>                                   | Meyn            | 2500        | Originally a 1000 BPH plant set up in 2009 at Chalanon 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.                                                                                                                                                                       |
| 35 | Shalimar Corpn, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata                                                                                                                                                        | Meyn            | 2600        | Commissioned in Sept 2014. Expanded to 2600 in 2018. They sell under the brand name Total.                                                                                                                                                                                                                                                                                  |



|    |                                                                                                                                                                                                                                        |             |              |                                                                                                                                                                                                                                                                        |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | <a href="http://shalimarcorp.in">http://shalimarcorp.in</a>                                                                                                                                                                            |             |              |                                                                                                                                                                                                                                                                        |
| 36 | Shanthi Feeds. Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore <a href="http://shanthifeeds.com">http://shanthifeeds.com</a>                                                                                         | Meyn        | <u>12000</u> | Originally a 1000 BPH 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                                                                |
| 37 | Sivasakthi Agro Foods, plant at Udumalpet, Tamil Nadu. HQ 793/18, Kumaralingam West Vill, Rudrapalayam Post, Madathukalam Taluk, Tirupur Dist. Tamil Nadu <a href="http://www.sivasakthifoods.com">http://www.sivasakthifoods.com</a>  | Marel       | 3000         | 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. Brand name is Supriya                                                                          |
| 38 | Skylark Foods, plant at Rai Food Park, Sonapat, Haryana. HQ at Dharamgarh Road, Safidon, Distt. Jind, Haryana <a href="http://skylarkfoods.com">http://skylarkfoods.com</a>                                                            | Meyn        | <u>1000</u>  | Commissioned March 2006 on an 1800 SqM piece of food park land with no room for expansion or growth. They have added an RTE plant in a nearby plot of land. Sell through Walmart, Nirula's, and tp many premium hotels and their franchisee outlets. Brand is Nutrich. |
| 39 | Sneha Farms (Sabir Qureshi)                                                                                                                                                                                                            | 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.                                                                                                              |
| 40 | Sneha Farms Pvt Ltd, plant at Addakul, Hyderabad-Bangalore Highway, Telangana. HQ at Plot No 30, Survey No. 22, 17AA, Kondapur, Hyderabad <a href="http://snehagroup.co">http://snehagroup.co</a>                                      | Marel/Meyn  | <u>12000</u> | Ordered initial 6000 BPH plant from Marel in March 2014. Commissioned in April 2016. Procured equipment from Meyn for doubling their capacity in 2020. Installation in progress                                                                                        |
| 41 | Souza Hatcheries, Mangalore, Karnataka. HQ at Souza Commercial Complex, Highlands, Falnir Road, Mangalore <a href="http://www.souzahatch.com">http://www.souzahatch.com</a>                                                            | Bayle       | 1000         | Commissioned 2013 for Lester DSouza. Fate of RND plant of 500 BPH bought earlier by them is yet not known.                                                                                                                                                             |
| 42 | Srinivasa Farms Private Limited, plant at Taniki Village, Kowdipally Mandal, Medak District Andhra Pradesh. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. <a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a> | Bayle       | 1000         | Ordered May 2015. Commissioned in Sept 2017. Operating at 1200 BPH. In a plant audit done by me last year, I recommended operation as a Spoke facility, sourcing additional whole carcasses from their Prakasam plant.                                                 |
| 43 | Srinivasa Farms Private Limited. Plant at Mega Food Park, Kurichedu, Prakasam, AP. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. <a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a>                          | Marel       | 2000         | Order for the 2000 BPH plant was placed in late 2017. The plant is installed but commissioning is delayed - expected by mid 2021                                                                                                                                       |
| 44 | Star Foods Pvt Ltd, proposed plant at Ladhawal Food Park, Ludhiana. HQ at Sampoorana Feeds, Phagwara, Punjab <a href="http://sampoornafeeds.com">http://sampoornafeeds.com</a>                                                         | -           | 4000         | Land procured. Plans ready. Applied for subsidy from MOFPI in Feb 2021.                                                                                                                                                                                                |
| 45 | Suguna Foods Pvt Ltd, Vyalur, Tamil Nadu HQ at Unitea Building, No 3, Savithri Shanmugam Road, Race Course, Coimbatore. <a href="https://www.sugunafoods.co.in">https://www.sugunafoods.co.in</a>                                      | Meyn        | 3000         | Commissioned 2000 BPH in Aug 2002. Grew in 2009. Due for revamping. Suguna acquired processing plants in other zones - Alpha Agro and SHL Foods.                                                                                                                       |
| 46 | Swami Feeds. Plant at Dharapuram. HQ SF 324/2C Nathapalayam, Mulanur, Dharmapuri, Tamil Nadu                                                                                                                                           | Marel       | 3000         | Trial runs completed. Expected to come on stream in April 2021                                                                                                                                                                                                         |
| 47 | Unnat Feeds, Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana                                                                                                                                                                   | Lark Engg   | 1000         | Under installation.                                                                                                                                                                                                                                                    |
| 48 | Venkateshwara (VH) Plant at Kamshet near Pune. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. <a href="http://venkys.com">http://venkys.com</a>                                                               | Meyn/ Marel | <u>3000</u>  | 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.                                                                                                                  |
| 49 | Venkateshwara. Plant at Davangere, Karnataka. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. <a href="http://venkys.com">http://venkys.com</a>                                                                | Linco       | <u>6000</u>  | Commissioned in March 2012. VH has, since the commissioning of this unit preferred to focus on RTE instead of primary processing. It has large RTE facilities at both locations.                                                                                       |
| 50 | VKS Farms (now SKM Feeds). Plant at Dindigul, Tamil Nadu. HQ Nanjai Uthukuli, Modakurichi Tamil Nadu <a href="https://www.skmpornafoods.com">https://www.skmpornafoods.com</a>                                                         | Meyn        | 4000         | Original capacity of 2000 BPH commissioned in Sept 2009. Expansion to 4000 BPH done by mid 2019. Company changed hands in Jan 2015 and became SKM. Further expansion likely.                                                                                           |



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|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-----------------|-----------------------------------------------------------------------------------|
| 51                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | West Bengal Livestock Dev Corp, Haringhata.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | RND/Storm | 1000            | Commissioned in 2015.                                                             |
| 52                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | West Bengal Livestock Dev Corp, Siliguri                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Linco     | 1000            | Combined poultry, goat, beef and pork slaughterhouse expected to commission soon. |
| <b>Integrated processing capacity expected by mid 2022 based on current orders, on-stream and under-construction projects</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |           | <b>1,33,300</b> | <b>Average plant capacity is 2563 BPH. Round off to 2560.</b>                     |
| Capacities are mentioned in birds per hour. For calculating market shares, of the total capacity of 1,29,300 (1,33,300-4000 of Star) BPH expected on stream by mid 2022, Meyn's market share is 61,600 (47.6%), Marel's is 26,000 (20.1%), RND's is 13,500 (10.4%), Storm Engineering's is 11,200 (8.7%); Linco's is 7,000 (5.4%), Bayle's is 3,500 (2.7%); Taejin's is 3000 (2.3%); Deccan's is 1,500 (1.2%); Dhopeswar's is 1000 (0.8%); and Lark's is 1000 (0.8%). [Total 1,29,300 (100%)]<br>[Sethwala's capacity divided >> 500 to Marel, balance 750 each to RND and Storm Engg] |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |           |                 |                                                                                   |
| <b>B</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 or have grown to become organized sector processing houses (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 important 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 cloud kitchens for captive use. Also, while compiling this list I have dwelled on historical past of potential big players in the belief that history is a great teacher. Plants possessing RTE capacities are indicated with <u>underlined</u> capacity figures.                                                                                                                                                                                                                                              |           |                 |                                                                                   |
| 53                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |           |                 |                                                                                   |
| 54                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Al Arif Poultry, Vakwady Road , Udupi Dist, Karnataka. Operate a <b>700</b> BPH hand dressing plant.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |           |                 |                                                                                   |
| 55                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 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. <a href="http://www.al-kabeer.in">http://www.al-kabeer.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |           |                 |                                                                                   |
| 56                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 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, samosas, 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. <a href="http://www.sumeru.net">http://www.sumeru.net</a> |           |                 |                                                                                   |
| 57                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 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 <b>700</b> BPH in 2009. Along with this primary processing facility they also set up a sausage and ham plant in 2010 with an investment of around INR 30 million for sale under the brand name Fresco Pollo. Now closed. Planned relocation of this plant to Assam in 2016 was dropped. <a href="http://www.amritgroup.net">http://www.amritgroup.net</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |           |                 |                                                                                   |
| 58                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Amrit Feeds, Beldanga Mouza, Raghunathpur, PO Bonkati KanksaI 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. <a href="http://www.amritgroup.net">http://www.amritgroup.net</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |           |                 |                                                                                   |
| 59                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 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. <a href="http://www.arthursfood.com">http://www.arthursfood.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |           |                 |                                                                                   |
| 60                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | AOV old plant with <b>2000</b> BPH machinery from both RND and Storm may be on sale after commissioning of the Meyn plant                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |           |                 |                                                                                   |
| 61                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Baramati Agro, Baramati, Maharashtra, 300 BPH RND plant commissioned around 2002, rebuilt to <b>750</b> BPH in 2009. Also operate a CFS facility for RTE products. Primary poultry processing plant set up around 2000. Around 2013 they installed a 600 Kg/hr forming and frying line from CFS for INR 140 million. They are estimated to produce 80 tonnes of RTE products per month. Baramati is owned by the family of the Maharashtra politician Sharad Pawar. <a href="http://www.baramatiagro.com">http://www.baramatiagro.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |           |                 |                                                                                   |
| 62                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Brahmagiri Dev Society, Wynad, Kerala, <b>500</b> BPH by RND in 2010.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |           |                 |                                                                                   |
| 63                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Broiler Master, Punjab, <b>200</b> BPH by RND in 2011. This is a “dry processing” plant, having neither scalding nor plucking and does wet market style evisceration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |           |                 |                                                                                   |
| 64                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Central Avian Research Institute, (IVRI) Bareilly, <b>200</b> BPH by Dhopeswar.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |           |                 |                                                                                   |
| 65                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Century Farms, Manipal, <b>500</b> BPH plant built by Storm Engineering, in operation from 2015                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |           |                 |                                                                                   |
| 66                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 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 Gustto and Swiss Naturen. 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 Shanthy. Their institutional customers include about 80 five star hotels besides Taj Air Caterers, Sugar and Spice and ITC Welcomegroup. They also retail through some 1100 outlets <a href="http://cfpl.net.in">http://cfpl.net.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |           |                 |                                                                                   |
| 67                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Coastal Hatcheries, Mangalore, <b>500</b> BPH by RND. To be scrapped soon after their Marel plant gets commissioned.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |           |                 |                                                                                   |
| 68                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | College of Vet & Animal Sciences, Kerala, <b>200</b> BPH by RND in 2003.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |           |                 |                                                                                   |
| 69                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Contai Golden Hatcheries Pvt. Ltd, Contai, E. Midnapore, West Bengal, <b>300</b> BPH by RND in 2003. It is owned by Shalimar Hatcheries and is available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |           |                 |                                                                                   |
| 70                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | CP India, Chennai, 500 BPH by RND in 2002. Scrapped soon after commissioning                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |           |                 |                                                                                   |



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|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 71 | 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 72 | 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 seekh kabab, shami kabab, samosa, tikka etc. and breaded products for retail & institutional customers. Now operates 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 Ghazipur Mandi. Possesses a Meyn cone de-boner line for portioning and deboning chicken carcasses. The company is run by Narinder and Rajiv Jaisinghani. <a href="http://www.meatzza.com">http://www.meatzza.com</a> .                                                                                                                                                                                                                                                           |
| 73 | Empire Foods, Taloja, Maharashtra. <b>1000</b> BPH plant purchased from RND some 7 years ago, not yet installed. It has probably been resold to and installed by another company.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 74 | 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 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. <a href="http://www.farmsuzanne.com">http://www.farmsuzanne.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 75 | Farm Value Foods Private Limited owned by Anshu Sibbal Chatli runs an RND plant of <b>350</b> BPH capacity at Barnala, which was commissioned in 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 76 | 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. <a href="https://www.fivestarchicken.com">https://www.fivestarchicken.com</a> |
| 77 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 78 | Gitwako Farms, headquartered at Jangpura Extension, New Delhi, is owned by Ajay Beri at Ferozepur Jirka. They operate an RND plant of <b>unknown</b> capacity and also process goat meat. Mainly produce RTE products for which they possess a retort.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 79 | 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/hr 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 80 | Golden Hatcheries Bangalore, operate a manual dressing facility of <b>500</b> BPH within municipal limits. Under orders to relocate. Setting up a 3000 BPH Meyn plant at Davangere.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 81 | Harsha Poultry. A manual dressing plant of <b>400</b> BPH in Telangana, Now planning a 1300 BPH plant. Land already bought.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 82 | Hayagreeva Poultry Solution has a <b>500</b> 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 83 | Hitech Hatch Fresh, Kolkata. Already have a manual dressing plant of <b>unknown</b> capacity and plan to set up a modern processing unit soon.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 84 | Higrow Chicken, owned by Deepak Raj Garg, runs an RND plant of <b>500</b> BPH at Ludhiana, which was commissioned in 2017.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 85 | Hygienic Chickens, 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, <b>300</b> BPH by RND                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 86 | Ideal Chicken (Anupama Feeds and Farms), Kulshekar, Mangalore, run by Vincent Cutinha. Commenced processing around 2017 with a locally sourced plant which runs its own home delivery and also process for Fresh-To-Home and Licious <a href="http://www.idealchicken.in">http://www.idealchicken.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 87 | Indian Broilers (IB Group, Rajnandgaon) located at Nagpur, Madhya Pradesh. It is a <b>500</b> BPH plant by RND, started in 2016.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 88 | 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 Adelie Foods of UK, who are contract caterers and suppliers to airlines, in 2012. Subsequently they acquired Skygourmet, Mars Restaurant chain, Birdy's, Dosa Diner, Roti, Pizzeria & Pasta Bar, and Tendulkar's. Owing to these, IHC is now fully into QSR and RTE foods businesses, and given the market potential, may make an entry into the chicken RTE sector.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 89 | International Food Products, Chandigarh. Small RTE producer in chicken and other meats.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 90 | Irani Chicken Products LLB, Daman, Gujarat, <b>500</b> BPH plant by Bayle, commissioned Dec, 2013.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 91 | 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 Kitchens of India 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 Tasty Bites. It set up a new plant for these product lines at Bangalore.                                                                                                                                                                                                                                                                                                                                                   |
| 92 | Knowledge Foods, Neral. Hand-dressing <b>300</b> BPH. Also making RTE products.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 93 | KSIDC, Kerala, <b>300</b> BPH by RND in 2005                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |



|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 94  | Kuljas Rai Poultry, Chamrang Road, Amritsar, Punjab, <b>300</b> BPH by Dhopeswar; under orders to relocate out of municipal limits. Now closed and on sale. Rai's new Storm Engg plant, also near Amritsar is already in operation. Also make RTE poultry products to cater to local markets. It is not known whether the RTE facility will be shifted to the new plant site.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 95  | 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. <a href="https://vistafood.com">https://vistafood.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 96  | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 97  | Maval Agro, Chakan Road, Talegaon, Maharashtra. A <b>700</b> BPH merchant processing plant built by an ex-employee of Deccan Automation. Was in use by Premium Chicken of Raigarh since 2015. It shut during the lock-down. Now being revamped and leased by Japfa India for continued trial marketing pending completion of their own plant.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 98  | 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 at Ladhawal Food Park near Ludhiana in Punjab. Meat Masters sells through own stores BigNMeat, other retailers, and directly to hotels and restaurants in that region <a href="http://www.meatmasters.co.in">http://www.meatmasters.co.in</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 99  | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 100 | MP Pashudhan Nigam, Bhopal, <b>500</b> BPH by RND in 1997. Scrapped. When newly commissioned, this plant inspired Dr Anaokar, then MD of Godrej Agrovat, to model his Hoskote unit on it.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 101 | Monrovia Foods, Bhandgaon, Pune, Maharashtra, <b>500</b> BPH by Storm Engg in Jan 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 102 | 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. Chanadigarh 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. The construction was already half complete in early 2020, but the project is now delayed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 103 | Navi Nutrix, <b>750</b> BPH by RND at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Shreya Foods                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 104 | Nandus. 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 Agrovat 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 and Narendra Pasuparthi. |
| 105 | Nensey's Poultry, Valsad, Gujarat, <b>300</b> BPH by RND around 2002. It is learnt to have been sold to an unknown party.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 106 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 107 | Pioneer, Hyderabad, Andhra Pradesh, 500 BPH by Dhopeswar. It has been scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 108 | 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 Mafco, Mumbai, the latter being bought in an auction by VH and mothballed at Kamshet. The Mafco plant is probably scrapped, but the remaining machines may yet be put to use if auctioned by the government                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 109 | 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 <a href="https://www.prabhatpoultry.com">https://www.prabhatpoultry.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 110 | Pragathi Broilers Pvt Ltd, Doddballapur, Karnataka, <b>500</b> BPH by Bayle in 2013. Closed or probably sold.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 111 | Ratnagiri Cooperative, Chiplun, Maharashtra, <b>300</b> BPH by RND in 2003 (closed).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 112 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 113 | Ruchi Agro Industries Ltd, Chikmagalur. It is an RND manual plant of <b>unknown</b> capacity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 114 | Royal Foods Pvt Ltd/Shakir Shaikh, Lohegaon, Pune, Maharashtra, <b>500</b> BPH by Storm Engg in Nov 2013 .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 115 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 116 | Shiva Chicken, Coimbatore. Hand dressing of <b>unknown</b> capacity <a href="http://www.shivaachicken.com">http://www.shivaachicken.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |



|                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 117                                                                                                                                                                                                                                                                                                                                                                                                                                              | Sujay Feeds, SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, <b>200 BPH</b> manual slaughter.                                                                                                                                                                                                                                                     |
| 118                                                                                                                                                                                                                                                                                                                                                                                                                                              | Shiva Farms, Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery                                                                                                                                                                                                                                                       |
| 119                                                                                                                                                                                                                                                                                                                                                                                                                                              | 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.                                                                                                                          |
| 120                                                                                                                                                                                                                                                                                                                                                                                                                                              | Taurus Foods was set up in the mid 1990s. 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 <a href="https://www.taurusfoods.in">https://www.taurusfoods.in</a>            |
| 121                                                                                                                                                                                                                                                                                                                                                                                                                                              | 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 dimsums or momos, rolls and samosas and claims to be the largest producer of dimsums in India. <a href="http://www.unitasfoods.com">http://www.unitasfoods.com</a> |
| 122                                                                                                                                                                                                                                                                                                                                                                                                                                              | Violet Industries/Souza Hatcheries, Mangalore, <b>500 BPH</b> by RND. Not yet commissioned.                                                                                                                                                                                                                                                                       |
| 123                                                                                                                                                                                                                                                                                                                                                                                                                                              | Vista Agriculture & Food Products, Khurda Road, Bhubaneswar, Orissa, <b>500 BPH</b> by Storm Engg in 2013. Now closed;                                                                                                                                                                                                                                            |
| 124                                                                                                                                                                                                                                                                                                                                                                                                                                              | Walvekar Hatcheries Ltd, Pune. 1000 BPH plant was retained by the Mumbai Customs due to some irregularities. When auctioned several years later, the lot was picked up by VH with a view to install it near Bangalore. Later, most of the machines were used to replace run-down Marel machines at their Kamshet facility                                         |
| 125                                                                                                                                                                                                                                                                                                                                                                                                                                              | WBFCSL/R. K. Doloi, MLA, Midinapore, West Bengal, <b>300 BPH</b> by RND in 1998, ostensibly for the economic up-liftment of local tribals. It was never commissioned. Meanwhile the owner tried selling the equipment or the company, first to Amrit Feeds and then recently (15 Jan 2020) to VH but failed each time.                                            |
| 126                                                                                                                                                                                                                                                                                                                                                                                                                                              | Zorabian, Khopoli, Maharashtra, Originally a drum plucker hand dressing facility, upgraded to <b>500 BPH</b> by RND in 2007.                                                                                                                                                                                                                                      |
| <b>Note:</b> This is as exhaustive a list of slaughter operations in the un-organized sector as I could make it. Counting from within this list, I arrive at a total active or potentially re-deployable capacity of 20100 BPH (18050 in 35 plants + 4 of unknown capacity = 20114 BPH, say 20100 BPH) for primary slaughter. Where capacity is not known – I have assumed it to equal the average of the remaining plants within this category. |                                                                                                                                                                                                                                                                                                                                                                   |

### 3.4.1 Structure of the Industry & Size Of The Wet Market

At the beginning of this Report I used some figures relating to the size of the wet market. How did I arrive at them? Processing of poultry occurs in India in one of two easy-to-differentiate segments: **the wet market and processing plants** such as those listed in Table 11. The latter may further be broken down into the **organized sector** and the **un-organized sector**.

The un-organized sector uses one of these four methods (a) hand-dressing, (b) drum plucker assisted hand-dressing, (c) dry-dressing (see section 3.2.1) and (d) processing by small, (generally locally built) conveyORIZED plants. Dry-dressing is done by those plants which employ a conveyORIZED system for stunning, killing and bleeding after which the carcasses are de-skinned to remove feathers and are eviscerated on table-tops; with both defeathering and evisceration done in typical wet market style. They invented this hybrid technique to lull their buyers into believing that they possess modern conveyORIZED processing facilities and therefore their products must be up to the mark.

For want of a better source of data on total availability of birds in India I use data from broiler breeders. Their data on production of broiler DOC (day old commercial chicks) that I have access to, is not very recent, but my figure of 3640 million mature birds available for consumption per year is close to the guesstimate of 4 billion birds in contemporary publications in the public domain.

**[After I published the analysis based on the broiler Breeders Association data that led to the 3640 million figure, my sources dried up. I obtained some data much later, in 2025, but by then, as this document will show, the Association had probably already ramped up the breeding stock following the Covid-19 shut-down and decided to remove the rationing of breeding stock which had been the principal mechanism for regulating selling prices].**

Three breeds are available in India at present. These are from the house of Cobb, operated in India by VH; the house of Aviagen, operated by Aviagen India Poultry Breeding Company and Indian Broilers; and Hubbard which was recently acquired by Aviagen. Together they place approximately 30 million broiler breeders a year. Around 21 millions of these are Cobb, and the remaining 9 million are Aviagen, including Hubbard, which is a subsidiary.

Almost all of Cobb breeding stock is sold to integrators, while approximately 50% of non-Cobb stock is sold to integrators – the remainder goes to the respective GP (Grand Parent) farmers' own integration.

Going further, each breeder placement accounts for approximately 120 commercial DOCs per year and this in turn, at 8% growing mortality, gives a harvest of 3310 million broilers for consumption each year. The overall contribution of local backyard poultry sector and layer culls in the poultry meat sector is probably an



insignificant amount, taken as not exceeding 10% of this figure<sup>30</sup>. **In sum, I take 3640 million as the total number of birds consumed in India in a year.** And since there is negligible foreign trade yet, production equals consumption.

It is difficult to convert this into weight of poultry meat consumed. There is no authentic data on size of bird at the time of slaughter. It varies considerably, depending on the state of the market. When live bird prices are low, bird size is large and when they are high, the reverse is true. Let us avoid the temptation to calculate tonnage of consumption and instead remain content with number of birds. So, we may summarize the present market size as:

| <b>Table 12 Total Poultry Market in India Expressed as Projected/Potential Processing Capacity per Hour</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                |                 |       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------|
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Sector performing slaughter                                                                                                                                                                                                    | Capacity in BPH | %     |
| 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Processing potential in the entire broiler industry projected to mid 2022: *                                                                                                                                                   | 15,20,000       | 100.0 |
| 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Projected organized sector processing (Table 11A)                                                                                                                                                                              | 1,33,300        | 8.8   |
| 3                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Estimated un-organized sector processing (Table 11B) **                                                                                                                                                                        | 20,100          | 5.4   |
| 4                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Estimated <i>mandi</i> based “dry processing” ***                                                                                                                                                                              | 62,000          |       |
| 5                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Estimated “processing” capacity deployed by 96 (52 organized sector + 39 un-organized sector + 5 <i>mandi</i> ) facilities, expressed as active capacity in BPH, at an average capacity per facility of 2244 BPH (2,15,400/96) | 2,15,400        | 14.2  |
| 6                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Genuine text book type wet market expressed as potential processing capacity                                                                                                                                                   | 13,04,600       | 85.8  |
| *1.5 Million birds per hour processing. (Taking 3640 million birds as total consumption, on 300 days, 8 hours bases, it amounts to 1.52 million birds per hour of processing potential).                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                |                 |       |
| ** In an earlier Report I had derived and added the size of the cantonment slaughterhouses (which have now largely closed down following action taken by Manohar Parrikar, our late Defence Minister) to determine the un-organized sector’s size. Here I use only the figure from Table 11B (last row).                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                |                 |       |
| ***This is a guesstimate. Together with several municipal <i>mandis</i> and at least half a dozen commercial enterprises doing dry processing. Ghazipur <i>Mandi</i> in Delhi used to dry process about half a million birds per week (before the Delhi High Court Order of 2018), and I assume that only 5 metropolises have rid their streets of roadside slaughter by creating their own Ghazipur style <i>mandis</i> (which have not come under the Delhi High Court Order yet). Then, assuming 40 operating hours per week, we arrive at a capacity figure of 62,500 BPH for this segment. |                                                                                                                                                                                                                                |                 |       |

### 3.4.2 Plant Location– The Magnitude Of This Challenge

In the 3rd quarter of 2002 the gross poultry processing capacity in the organized sector was 13,000 BPH. By mid 2022 it is slated to touch 133,300 BPH, comprising 52 plants with an average capacity of 2560 BPH (See Table 11A), growing at 12.3% CAGR over the twenty year period. And we are now on the cusp of an even more rapid and steady growth phase, thanks to the general realization that the wet market may be the cause of many zoonotic diseases, Xi Jinping’s Kungflu being no exception.

What is our target? Look at Table 13. It shows that a mere 14.2% of all the poultry consumed in India comes from *some kind of processing plant*. If the pandemic encourages us to remedy this situation and target, say, up to 50% of consumption to be processed in, say, 5 years, we have to cover the remaining gap of 35.8% of total consumption in that period with proper processing. To cover this gap, using the overall average capacity of all 96 existing facilities, would require 242 new facilities.

$$35.8/14.2 \gg 2.52 \times 2,15,400 = 5,42,808 \text{ BPH additional capacity or } 5,42,808/2244 = 242$$

For nearly all the twenty odd poultry processing plants that I have designed and helped build in India, the factors that I have found to be the most difficult to overcome are:

- a severe paucity of good locations for these ventures - there being limited availability of water in sufficient quantities;
- limited availability of red zones (designated as suitable for slaughter of animals). Red zones are the areas the pollution control. Authorities have designated in their wisdom to be suitable for locating slaughter plants on;
- a shortage of locations that are sufficiently distant from populated areas and suffer no local resistance on account of the smell nuisance and our impractical rule about zero discharge of treated wastewater from poultry processing, which forces investors to purchase large tracts of land and become unwilling horticulturists.

To sum up, given the average plant capacity, the number of plants needed to reduce or eliminate wet- markets far exceeds potential good plant sites in India.



[This matter about paucity of suitable land for setting up poultry processing facilities, especially when they tend to be of small sizes, has been taken up in many past Industry Reports. They have been touched upon in this Document in the context of responsibility of the Poultry Federation spelt out under section 1.3. A fuller coverage may be found in Chapter 2 of the APTEC Handbook, together with coverage of the Hub & Spoke model which is one of the measures to overcome this structural difficulty. The latter occurs here in section 2.4.2].

In predicting the urgent need to eliminate the wet market over the next five years, I take into account recent events. News reports highlight the fact that the poultry sector has suffered a near-complete loss of investment during the pandemic and bird flu lockdown that followed hard on its heels. Re-investment to the tune of INR 250,000 million is called for. To elaborate on these difficulties, I excerpt the excellent note contributed by Dr Sujit Menon of Petersime (sujanvi@gmail.com), who has a wide knowledge of both layer and broiler segments of the industry.

### 3.4.3 Covid-19 Kung Flu Causes Turmoil In The Poultry Industry

Over the last 13 months, the poultry industry has been moving in fits and starts, owing to continued increase in feed prices arising from lower acreage in maize and soybean and the COVID-19 lockdown.

During the early weeks of 2020, uncorroborated and fictitious communiqués in the social media maimed the entire poultry industry, with the false premise that chicken meat could be a potential transmitter of severe acute respiratory syndrome corona virus 2. This led to plummeting consumption of chicken meat and eggs.

Imposed in the country from March 25, the world's most extensive nationwide lockdown disrupted the logistic chain of feed, vaccines, medicines, live birds, and DOCs. This further accentuated the existing decline.

Chicken meat consumption in India is intrinsically volatile. It is conflated with religious proscription, festive occasions, purchasing power, availability, and similar factors. As such the industry already suffers from severe volatilities. In the past prices rose across the board and given that consumer prices are critical to demand, sales took the punishment. [Restrictions](#) on travel & tourism added yet another constraint on demand, as did cuts in salaries and loss of employment.

But the Covid lock-down made the citizenry alert to the need for better sanitation and hygiene, which, coupled with growing awareness for protein in the diet, has accentuated the demand for processed, hygienically packed chicken. [Covid-19](#) may therefore be seen as the watershed moment for the nation's acceptance of processed chicken and a burgeoning of processing units.

About the origins of Covid-19 Xi Jinping will continue to pick quarrels with the whole world, meanwhile the rest of us must benefit from the renewed growth potential that his virus has gifted us with. Now that we must re-invest, let us do it right.

### 3.4.4 The Hub & Spoke Model

Poultry processing is both capital intensive and highly scale sensitive. Machinery manufacturers now offer line speeds of 15000 BPH. And here we are, struggling at 2244 BPH. Imagine the scale economies we are losing! What is the solution? To answer this question, we must think out of the box. Let us split the processing configuration into two steps, viz slaughter, evisceration, chilling and weighing/grading as Step1 or the Hub section and post-grading activities such as maturation, portioning, deboning and packing as Step2 or the Spoke section.

**Table 13 Capital Cost Comparison of Hub and Spoke Components of Some Large Processing Capacities**

| Description of Plant                                           | Investment % in Machinery in |             |
|----------------------------------------------------------------|------------------------------|-------------|
|                                                                | Spoke Section                | Hub Section |
| 4000 BPH with moderate portioning and packing                  | 3.7                          | 96.3        |
| 6000 BPH with high level of automation in portioning & packing | 10.9                         | 89.1        |
| 8000 BPH with KFC 9pc cuts & automatic portioning, packing     | 24.7                         | 75.3        |
| 9000 BPH with moderate level of automation                     | 10.8                         | 89.2        |
| Weighted avg % investment                                      | 14                           | 86          |

Also, note that besides being capital intensive and scale sensitive, Hub requires most of the water and power, generates all the pollution and employs a small number of workers (about 60 as against 200 or more in Spoke). So by splitting the process into two steps, we contain the pollution, water and power requirements at fewer locations, where we can solve these issues more efficiently because the solutions also exhibit scale economies. Besides, by restricting pollution generation and abatement to fewer locations, better control and compliance becomes feasible. And to monitor wastewater quality the pollution control authorities will require fewer honest officials – a resource for which there is a severe shortage in that institution.



As a complement to Hub plants, the industry must also set up a large number of Spoke facilities, located close to cities and towns in standard industrial sheds (many of which exist around almost all our cities and largely remain unoccupied). These facilities will hire from an abundance of urban unemployed youth (who need no purpose-built housing) to staff establishments capable of making quick-response house deliveries of packaged poultry against orders placed over telephones.

Hub plants would ship fresh-chilled carcasses in reefers to Spoke facilities, gainfully using the transportation time for maturation of carcasses. This maturation time of about 4 hours represents an inventory-carrying cost to the industry. When maturation occurs during transportation, you make use of that time and so effectively eliminate inventory-carrying cost and also extend the useful shelf life of fresh poultry.

Initially large integrators could serve one or more Spoke facilities, understand the business over a year or two and develop benchmarks for properly managing them. Later they could hand out this operation as franchises. Spoke facilities being close to consumers, would have a quick response – so critical to inventory control and consumer satisfaction. It is my belief that there would be a groundswell of urban youth to take up franchises.

I developed this Hub and Spoke model during September last and initially distributed the paper I wrote on this subject privately within the industry. Later I discussed this concept with the Asian Poultry Journal who published it in their January 2021 issue, following an interview they held in October last.

For the processing industry to adopt this idea, large integrators should convert their existing plants into Hubs, preferably operating 2 shifts to improve the utilization of their machinery and so further cut down operating cost. Within their Hub units, they may also continue to retain small Spoke functions to cater to local demand and direct bulk shipments to existing institutional customers. After this initial transformation the industry should rapidly set up new Hub plants and promote a large network of Spoke facilities in industrial sheds close to cities and towns all over India.

The Hub location may have large blast freezing capacities (preferably tunnel freezers) and frozen stores, thus not only qualifying for MOFPI's cold chain capital subsidy, but also benefiting from live bird price volatility and periodic gluts. With adequate freezing and storage capacity, gluts would be smoothened and poultry farming would become a low-risk activity and attract more rural youth into contract farming. It is true that at present many potential Hub plants are located outside industrial zones<sup>31</sup> and lack good and wide connecting roads. The Poultry Federation needs to take this issue up with legislators. Given the National mood about infrastructure, I am sure this would get top priority.

What is the scope for smaller investors in this scenario? Firstly, they could, together with un-organized sector plants that have failed or are likely to do so because of their sub-optimal capacities, (refer part B of Table 12), emerge as important Spoke operators.

| Table 14 Features and Functions for Hub and Spoke Facilities                                                                                                                                                                                    |          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| Functions/Sections/Facilities                                                                                                                                                                                                                   | Location |
| Arrival, killing, evisceration, chilling, grading, coop, truck washing, ETP, rendering, blast freezing, frozen store- Large electrical sub-station                                                                                              | Hub      |
| Housing for essential operating, security and maintenance staff                                                                                                                                                                                 |          |
| Portioning, de-boning, packing, bulk shipments in reefers                                                                                                                                                                                       |          |
| Reefers for fresh chilled skin-on carcasses packed in ice, once or twice a day to Spoke plants                                                                                                                                                  |          |
| Computerized web-based delivery platforms for order booking & tracking                                                                                                                                                                          | Spoke    |
| Refrigerated work-space at +12°C, with work tables, for portioning/deboning                                                                                                                                                                     |          |
| Plate freezers, small blast freezers, stores, for reception and dispatch and accompanying dedicated refrigeration units.                                                                                                                        |          |
| Fleet of 3 small reefers for outbound shipments. Add complementary products.                                                                                                                                                                    |          |
| Bones & trimming waste are shipped back to Hub for rendering. If large quantities of skin is taken off at Spokes by selling skin-off products, they are sent back to the hub for bulk sale to RTE plants where they form the base for sausages. |          |

| <b>Table 15 Ongoing Transitions in the Processing Industry</b>               |                                                                                                                                                                                                                                                                                                                                            |
|------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Trend</b>                                                                 | <b>Example</b>                                                                                                                                                                                                                                                                                                                             |
| Ongoing consolidation by brand leaders in both Hub and Spoke business models | <ul style="list-style-type: none"> <li>• Suguna purchases Alpha Agro, SHL Agro, evaluates Caris Pure.</li> <li>• Shanthi, Godrej and Suguna evaluated purchase of Amrit's defunct plant, then dropped it.</li> <li>• CP uses Penn Foods, ProTAC</li> <li>• Licious, Fresh to Home, Nandus, Zomato use ProTAC, Miki, Huda, Penn.</li> </ul> |
| Business model options for integrators                                       | <ul style="list-style-type: none"> <li>• Promote their own brand or</li> <li>• Become commodity suppliers to emerging breed of web-based food delivery platforms like Amazon, Fresh to Home, Licious, Swiggy, Zomato, etc.</li> </ul>                                                                                                      |



If they want to invest small in processing and yet retain the potential to join the big boys later, they could begin with LEAP concept plants in good sized plots of land. Under the LEAP concept, with an investment of around Rs 170 million (land cost excluded), they can start a 1300 BPH operation within a master plan for future expansion and grow progressively and seamlessly to 4000 or 6000 BPH and beyond, depending on the size and features of their plot of land. APTEC website contains information on the LEAP concept on webpage Tools > AptecAPP.

### 3.4.5 The Trend is Already Visible In Merchant and Contract Processing

For the past quarter century I cautioned against the merchant processing business model in India. Merchant processing may be defined as a processing plant owner competing in the marketplace without having any live birds of his own. He is thus forced to operate with live birds bought from brokers or independent farms. If pitches him squarely against the wet market which also sources live birds in the same manner, but the wet market always wins because it has zero capital investment in processing!

| Table 16 Emerging Segmentation in the Marketplace |                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Players                                           | Skills/Barriers                                                                                                                                                                                                                                                                                                                                                                                      |
| Integrators, Industrialists ("Hub")               | Can create barrier to competition by <ul style="list-style-type: none"> <li>• having captive live bird supply</li> <li>• having access to capital</li> <li>• employing engineers, veterinarians food technologists to run large, high technology, low processing cost plants</li> </ul>                                                                                                              |
| Merchandisers ("Spoke")                           | Can create barriers to competition by <ul style="list-style-type: none"> <li>• consumer marketing skills</li> <li>• proximity to consumer</li> <li>• knowledge of local culinary traditions</li> <li>• piggybacking complementary items (eggs, red meat, fish, pork, beef, quail, rabbit, RTE, RTC, spices, condiments, seasonings) in their product-mix and so spread the operating cost</li> </ul> |

While this caveat proved apt over the years, during the lock-down period, ProTAC proved me wrong. ProTAC was initially designed as an export-oriented merchant processor. It has now emerged as a successful contract processor, slaughtering as many as 6000 birds per day for two customers and the balance for another four customers per day, stretching its line speed from 2000 to 2500 BPH and operating for 10 hours to produce around 25,000 carcasses a day. It now plans to expand to meet growing demand. Along the way it has co-opted Licious, Fresh-To-Home and Nandus as Spoke operations. Of these, the first two owe their success to customer-oriented marketing – the very feature that distinguishes Spoke.

Examples of merchant processors who found the business too erratic, and exited while the going was good, are Alpha Agro and SHL Agro. I think, for merchant processors, other than exiting the business, a more robust response would be to follow the example of ProTAC and further consolidate their positions by establishing cross-holdings with web based food delivery companies - their present business partners.

### 3.4.6 The Trend is Also Already Visible in Wet Market's Behaviour

In recent years municipalities chased most of the wet market vends out of our cities and towns. Has this placed a curb on wet markets? Unfortunately not. The wet market has become computer-savvy and started using web-based delivery platforms to become invisible to its customers. Like the current phenomenon of *cloud-kitchens*, wet market butchers have become *cloud-slaughterers*. Now these butchers do not need to display the actual slaughter to customers to prove their product. They use the impersonal nature of web-ordering to escape censure and, and at the same time gain market share.

The wet market has not cleaned up its act – it is merely keeping the old-fashioned hand-dressing out of public sight. Just Google "chicken home delivery" and hundreds of outlet names pop up! Only a few of them mention recognized brands. Within the supply chain there are probably "meat laundries" who superficially clean up the product before delivering it in neat packs. Does this not further increase the difficulty of monitoring the supply chain to ensure food-security?

I tried tracking their sources down to the names in Table 12, but failed every time. Undeterred, I then tried to make a more thorough list of processors, seeking help from volunteers, but was still unable to track their sources of processed chicken. Clearly a new *avatar* of the wet market is amongst us.

Some of this laundered meat may actually be turning up on supermarket shelves as successful market brands. I hope that in their mad rush to grab market share, successful marketing companies may not succumb to this compromise.



### 3.4.7 Farming Issues

Before the lockdown, live bird prices ruled extremely high. At prevailing feed and chick prices, a commercial farmer can break-even at live bird price of between INR 68 and 75 per kilogram. But prices stayed above INR 100 for most of this period. The main reason for this was the high price of DOC, which generally hovers around or above INR 25 each and but had remained higher at this time. Because most of the processors are also integrators, [See structure of the industry in figure 19], they earn more by selling live birds in *mandi* instead of bringing them to their own slaughterhouses. Under such conditions the industry has hitherto seen not much incentive to invest in processing capacity. They even prefer to keep the capacity idle if needed. Therefore wet market processed poultry, which has a shelf life of just one day, has been a significant cause of limited growth.

Although soybean and maize prices are stable at present in India, last year's 30% fall in China's grain crop and consequent massive imports by that country is bound to take international prices higher over the next few years. In the medium term broiler farming viability may be established at around INR 80-90 per kilogram live weight with chick prices at INR 20.

### 3.4.8 Location

Of the 52 plants in Table 12A, only 9 are (or will eventually exist) in government food parks or government industrial estates. These are - AV Ventures at Panchkula, Godrej Tyson at Taloja, Goel's Foodworld at Shimla, Lifeline at Chikmagalur, Miki Export at Taloja, RFK Greens at Pulwama, Srinivasa at Prakasam, Skylark at Rai Food Park and Star Poultry at Ladhawal Food Park, together accounting for only 15.8% of the total capacity. Lifeline plant occupies 4 plots of adjacent land with overhead and underground pipelines connecting them. Star is planned on 8 adjacent plots of land. Godrej Taloja has serious problems with neighbours and for some time was transporting tanker loads of processing waste to Hoskote for treatment and Skylark can neither expand for lack of space, nor use its rendering plant because of neighbours' complaints. This clearly illustrates the unpopularity of government food parks for poultry processing plants.

It is unfortunate that the government plans and operates them like property developers – making tiny plots, over-pricing them, failing to address the issue of adequately sized common effluent treatment facilities and failing to provide common steam lines. As a result investors prefer green field sites, obtain CLUs (changed land usage under zoning laws) and set up all facilities including dormitories for essential staff, all by themselves. I strongly encourage my clientele to do so. The rule of **zero liquid effluent discharge** further mandates that wastewater treated to BIS discharge standards may still not be released. Poultry processing uses large amounts of water. But processors may only use it for irrigating their own lawns **on their tiny pieces of land!**<sup>32</sup>. Human beings and bureaucrats live in different worlds !

## 3.5 APTEC Industry Report Upload Of October 18, 2021 (Grosscap 1,43,000)

**Table 17** List Uploaded on October 18, 2022, of organised sector poultry processing plants (existing, ordered and under construction with a Grosscap of 1,43,000, in 54 units)

| A The Organized Sector Comprising Plants of 1000 BPH or Higher Capacities |                                                                |       |          |                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------------------------------------------|----------------------------------------------------------------|-------|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                           | Plant, location                                                | Make  | Capacity | Remarks                                                                                                                                                                                                                                                                                                                        |
| 1                                                                         | Alchemist Foods & Hospitality Ltd, Kurali, Punjab (Star Foods) | Meyn  | 2000     | Commissioned in 2004. Since 2017 it is operated by Star Foods under a lease which is to end shortly, with the brand name <i>Star</i> . Also leased is the 135 t per month RTE capacity of Alchemist. Within the premises Alchemist operates a manual dressing unit to service web orders for <i>Republic of Chicken</i> brand. |
| 2                                                                         | Al Halal Foods, Thane, Maharashtra                             | RND   | 1000     | Commissioned in 2016                                                                                                                                                                                                                                                                                                           |
| 3                                                                         | Alpha Agro & Cold Storage Pvt Ltd, Belgaum, Karnataka (Suguna) | Meyn  | 1000     | Commissioned in April, 2014, to function as a merchant processor mainly for the armed forces and the Goa and local markets. The company was purchased by Suguna in 2019.                                                                                                                                                       |
| 4                                                                         | Ambica Chicken, Margao, Goa                                    | Storm | 1200     | Commissioned in 2016. Suffered financially during the 2020 lockdown, particularly as most of their business was with hotels.                                                                                                                                                                                                   |
| 5                                                                         | Anjaneya Breeding and Agriventures Pvt Ltd,                    | Meyn  | 2500     | Incorporated in February 2011. Land procured at Girinayakanwadi, 90 Km north east of Belgavi.                                                                                                                                                                                                                                  |



|    |                                                                                                                                                                                                                                      |                   |             |                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | 915D, Raibag Sainagar Jalalpur Road, Raibag Belgaum (Belgavi), Karnataka                                                                                                                                                             |                   |             | Plant ordered in 2017. Plans ready. Project implementation is in abeyance.                                                                                                                                                                                                                                                                                                                                                              |
| 6  | AOV Agro Foods Pvt Ltd, Nuh, Haryana. HQ at C-22/25 Sector 57 Noida 201301                                                                                                                                                           | RND/Storm /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. Commissioned in 2016, modified in 2017 to 2000 BPH. Ordered a 4000 BPH line from Meyn in mid 2021 to replace the existing machines. This last modification to be commissioning by first quarter 2022.                                                             |
| 7  | Arambagh Hatcheries. Plant at Birbhum, West Bengal. HQ at 59 B Chowringhee Road, Kolkata <a href="https://arambagh.com">https://arambagh.com</a>                                                                                     | Meyn              | <u>4000</u> | Commissioned as 1000 BPH in Sept 1999, expanded to 2000 BPH in 2002 and 4000 in 2004. It also produces boneless Kakugiri and Yakitori for the Japanese market and RTE roasted and fried products, sold through its own retail outlets called Arambagh Foodmarts                                                                                                                                                                         |
| 8  | AV Ventures, Plot Number-72 A, Panchkula Industrial Area Phase 1, Panchkula, Haryana                                                                                                                                                 | Storm             | 1200        | Initially operated Nagpal Frozen Foods, Barwala, Haryana, a 1000 BPH plant commissioned by RND in 2007. After its closure on failure to comply with local zoning laws, AV Ventures are setting up a new 1500 BPH poultry & 100 goats per day plant on their own land in Panchkula Industrial area. Work in progress, this plant is to be commissioning by mid 2022.                                                                     |
| 9  | Baramati Agro, Baramati, Maharashtra                                                                                                                                                                                                 | RND               | 1500        | Baramati is owned by the family of local politician Sharad Pawar. Their first 300 BPH plant was commissioned around 2002, rebuilt to <b>750</b> BPH in 2009 and has now been doubled to 1500 BPH in 2020. They also operate a CFS facility for RTE products, producing around 80 tonnes a month.                                                                                                                                        |
| 10 | Bharat Agroviet, 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 Engg in Nov 2015.                                                                                                                                                                                                                                                                                                                                   |
| 11 | Charoen Pokphand India Pvt Ltd (CP). Plant at Chittoor, Andhra Pradesh. HQ at CPF Tower, 1, 100-Feet Road, Stage 2, Hoysala Nagar, Indiranagar, Bengaluru, Karnataka <a href="https://cpbrandindia.com">https://cpbrandindia.com</a> | Meyn              | <u>2000</u> | Commissioned in January 2016. It is the only plant in India with air-chilling equipment. Planned expansion went into abeyance for lack of space. Also get contract processing done by Penn, ProTAC. RTE sold as <i>Five Star Chicken</i> – read about it in part B of this table                                                                                                                                                        |
| 12 | 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. Commissioned in early 2021                                                                                                                                                                                                                       |
| 13 | Godrej Tyson Foods. Plant at Taloja, Maharashtra <a href="https://www.godrejagroviet.com/godrej-tyson-foods">https://www.godrejagroviet.com/godrej-tyson-foods</a>                                                                   | Marel             | 3000        | Expanded in 2012 from original 2000 BPH set up in 2001 on an industrial estate plot of land. Expanded to 3000 BPH around 2017.                                                                                                                                                                                                                                                                                                          |
| 14 | Godrej Tyson Foods. Plant at Hoskote, Karnataka <a href="https://www.godrejagroviet.com/godrej-tyson-foods">https://www.godrejagroviet.com/godrej-tyson-foods</a>                                                                    | Marel             | <u>3000</u> | Set up in 1999 as 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> and they also produce RTE products on 400Kg/hr used lines sourced from The Waterbase of Nellore, a failed fish RTE unit. Since this plant is in a smart city zone, it is now under pressure to relocate. |
| 15 | Goel Foodworld, Plot no 23A, Industrial Area, Shogi, Shimla, Himachal Pradesh                                                                                                                                                        | Dhopeswar / Storm | 3000        | This is a replacement of the existing 500 BPH plant by Dhopeswar commissioned a decade ago. The modified plant has been installed in 2020 by Storm Engg. Expanded to 3000. They plan to relocate outside Simla to a piece of land already purchased by them.                                                                                                                                                                            |
| 16 | Goldchick Hatcheries and Foods Ltd. Plant at Sadashivpet near Hyderabad,                                                                                                                                                             | Marel             | 2000        | Commissioned Sept 1998, and in intermittent operation since then. First to export Indian                                                                                                                                                                                                                                                                                                                                                |



|    |                                                                                                                                                                                                                                                                                               |        |             |                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Telangana. HQ at Plot No.151, Kavuri Hills, Madhapur, Hyderabad, Telangana <a href="http://goldchick.in">http://goldchick.in</a>                                                                                                                                                              |        |             | processed chicken and also the first in the world to install an automatic re-hanging machine at this capacity.                                                                                                                                                                                                                                                                                                                     |
| 17 | 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 three years later. Placed order on Meyn in Feb 21 for setting up a green field unit close to Venkys in Davangere. Commissioning is expected to be delayed.                                                                                                                                                                                                     |
| 18 | Huda Foods Pvt Ltd. Plant at Kondhwa. HQ at FL-I-403 Unity Park, SN-43 Kondhwa Kd, behind Sheetal Petrol Pump, Pune                                                                                                                                                                           | Deccan | 1500        | Incorporated in 2020 by Sarfraz Momin. The plant processes birds procured from the Japfa farms.                                                                                                                                                                                                                                                                                                                                    |
| 19 | Hybro Foods Pvt Ltd. Plant at Lahe, Taluka Shahpur, District Thane, Maharashtra. HQ at 8, Shah Industrial Estate, Opp Veera Desai Road, Andheri West, Mumbai                                                                                                                                  | RND    | 3000        | Installed in 2004 as a 1800 BPH plant, then expanded to 3000 BPH.                                                                                                                                                                                                                                                                                                                                                                  |
| 20 | Kuljas Rai Poultry, Amritsar                                                                                                                                                                                                                                                                  | Storm  | 3000        | Kuljas Rai Poultry set up a <b>300</b> BPH Dhopeswar plant at Chamrang Road, Amritsar, Punjab. Under orders to relocate out of municipal limits, they closed down this plant and put it up for sale. Rai's new Storm plant, also near Amritsar, is in operation from first quarter 2020. Also make RTE poultry products to cater to local markets. It is not known whether the RTE facility will be shifted to the new plant site. |
| 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, 1st Cross, Sindhi Colony, behind VISL House, JC Road, Bengaluru                                                                                                                                                                                  | Storm  | 1000        | Operating at 700 BPH. Suffered closure with the onset of the lock-down. Shreya Farms is operating it now.                                                                                                                                                                                                                                                                                                                          |
| 23 | Khazir Agro. Plant I.G.C. Lassipora, Srinagar, Srinagar U.T. HQ 4 <sup>th</sup> Floor, Opp New Era School, Rai Bagh, Srinagar, Srinagar U.T.                                                                                                                                                  | RND    | 1000        | Production commenced in January 2021                                                                                                                                                                                                                                                                                                                                                                                               |
| 24 | Kwality Animal Feeds Pvt Ltd. Plant 763/19, A/P-Rajgoli, Chandgad, Dist Kolhapur, Maharashtra. HQ 12, Kwality House Machhe, Industrial Area, Belgaum, Karnataka <a href="http://kwalityhouse.in/">http://kwalityhouse.in/</a>                                                                 | Meyn   | <u>3000</u> | Ordered as a 2000 BPH plant in Dec 2014. Commissioned in June 2016. Expanded to 3000 end 2018. Sell under the brand name <i>Belchick</i>                                                                                                                                                                                                                                                                                           |
| 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. <a href="https://www.lifelinefeeds.com">https://www.lifelinefeeds.com</a> | Meyn   | 3000        | 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. Owned by K. Kishore Kumar Hegde.                                                                                                                                                                      |
| 26 | Mayuri Broiler Breeding Farms Pvt Ltd at Sy 537/A, 537/E, Village Yellikal, Kalwakurthy, Nagarkurnool Dist, near Hyderabad                                                                                                                                                                    | Storm  | 1000        | Mayuri Farms, owned by Harsha Poultry, operate a manual dressing plant of 400 BPH in Telangana, Now setting up a 1000 BPH plant which they expect to commission in 2021 end.                                                                                                                                                                                                                                                       |
| 27 | Miki Exports International, Taloja, Maharashtra Domain name <a href="http://mikichicken.com">http://mikichicken.com</a> has expired.                                                                                                                                                          | RND    | 2000        | Established in 1950 as Miki Food Stuffs, for export of frozen buffalo meat from a plant at Muzaffarnagar, U.P. In 2015 they commissioned this plant supplied by RND. It was shut down during the lock-down. Now the facility processes for Fresh To Home and Licious. It is not clear whether this facility has been sold or leased.                                                                                               |
| 28 | 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 Sarabjot Singh, son-in-law of Harbans Singh, one time owner of Starchick (see Sethwala). This plant started around 2013                                                                                                                                                                                                                                                                                                |
| 29 | Penn Foods Pvt Ltd. Plant at Karjat, Maharashtra. HQ at Clucky's Products LLP, 294, S. Bhagat Singh Road, Fort, Mumbai                                                                                                                                                                        | Bayle  | 1500        | Commissioned in 2016. Contract processing for CP, McDonald and Licious. Also selling through Amazon, Metro Cash and Carry, Walmart and others. Brand name is <i>Clucky's</i>                                                                                                                                                                                                                                                       |



|    |                                                                                                                                                                                                                                       |                 |              |                                                                                                                                                                                                                                                                                                                                                                                      |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | <a href="http://cluckys.co/the-processing-plant/">http://cluckys.co/the-processing-plant/</a>                                                                                                                                         |                 |              |                                                                                                                                                                                                                                                                                                                                                                                      |
| 30 | 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 Engg. Being replaced by Meyn to 4000 BPH. Work in progress, expected commissioning by end 2021.                                                                                                                                                                                                                                       |
| 31 | ProTAC Foods International Pvt Ltd, Plant and HQ at 115 Allal Sandra, behind RTO Check Post, NH4, Mulbagal Taluk, Karnataka                                                                                                           | Meyn            | 2000         | Commissioned in June 2016. Planned as a merchant processor with <i>mandi</i> sourced live birds. Operating on contract at 25,000 BPD for Tri Star (Kerala), Nandus, Licious, Shanti (Fortune), Fresh to Home and CP. Brand name is <i>Bamfree</i> . Plan expansion to meet growing merchant processing demand.                                                                       |
| 32 | RFK Greens Pvt Ltd. Plant at Lassipora, Pulwama, J&K. HQ at C-37, First Floor NSM, Azadpur New Delhi                                                                                                                                  | Meyn            | 2500         | Ordered end July, 2017. Installation completed. Expected commissioning by end 2021.                                                                                                                                                                                                                                                                                                  |
|    | RM Agro                                                                                                                                                                                                                               | Meyn            | 1300         | Owned by R Malik. Plant expected to be commissioned in 2 <sup>nd</sup> quarter 2022. RM Delicious is the brand name.                                                                                                                                                                                                                                                                 |
| 33 | 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 lock-down. Now re-commenced operations in a limited way.                                                                                                                                                                                                                       |
| 34 | 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> |
| 35 | SHL Foods Private Ltd (Sagri) Plant at Lalru, Punjab. HQ at Suguna Foods, Unitea Building, No: 3, Savithri Shanmugam Road, Race Course, Coimbatore. <a href="https://www.sugunafoods.co.in">https://www.sugunafoods.co.in</a>         | Meyn            | 2500         | Originally a 1000 BPH plant set up in 2009 at Chandalon Industrial Park, on a mere 1000 SqM plot of land owned by Surjit S. Kohli. Relocated, expanded, re-commissioned in Feb 2014. Sold in 2018 to Suguna.                                                                                                                                                                         |
| 36 | Shalimar Corpn, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata <a href="http://shalimarcorp.in">http://shalimarcorp.in</a>                                                               | Meyn            | 2600         | Commissioned in Sept 2014 at 2000 BPH. Expanded to 2600 in 2018. They sell under the brand name <i>Total Chicken</i> . They have plans to expand in other parts of the country- the first to be in the northern zone.                                                                                                                                                                |
| 37 | Shanthi Feeds. Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore <a href="http://shanthifeeds.com">http://shanthifeeds.com</a>                                                                                        | Meyn            | <u>12000</u> | Originally a 1000 BPH Meyn plant commissioned in 2009. Expanded in 2 stages to 3000 BPH till 2014. Then expanded and re-commissioned at 6000 BPH in Feb 2016. Expanded to 12000 BPH in first quarter of 2021.                                                                                                                                                                        |
| 38 | Sivasakthi Agro Foods, plant at Udumalpet, Tamil Nadu. HQ 793/18, Kumaralingam West Vill, Rudrapalayam Post, Madathukalam Taluk, Tirupur Dist. Tamil Nadu <a href="http://www.sivasakthifoods.com">http://www.sivasakthifoods.com</a> | Marel           | 3000         | 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. Brand name is <i>Supriya</i>                                                                                                                                                                                 |
| 39 | Skylark Foods, plant at Rai Food Park, Sonapat, Haryana. HQ at Dharamgarh Road, Safidon, Distt. Jind, Haryana <a href="http://skylarkfoods.com">http://skylarkfoods.com</a>                                                           | Meyn            | <u>1000</u>  | Commissioned March 2006 on an 1800 SqM piece of food park land with no room for expansion or growth. They have added an RTE plant in a nearby plot of land. Sell through Walmart, Nirula's, and to many premium hotels and their franchisee outlets. Brand is <i>Nutrich</i> .                                                                                                       |
| 40 | Sneha Farms (Sabir Qureshi)                                                                                                                                                                                                           | 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.                                                                                                                                                                                                                            |
| 41 | Sneha Farms Pvt Ltd, plant at Addakul, Hyderabad-Bangalore Highway, Telangana. HQ at Plot No 30, Survey No. 22, 17AA, Kondapur, Hyderabad <a href="http://snehagroup.co">http://snehagroup.co</a>                                     | Marel/Meyn      | <u>12000</u> | Ordered initial 6000 BPH plant from Marel in March 2014. Commissioned in April 2016. Procured equipment from Meyn for doubling their capacity in 2020. Commissioning expected end 2021.                                                                                                                                                                                              |



|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |             |                 |                                                                                                                                                                                                                                                                        |
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| 42                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Souza Hatcheries, Mangalore, Karnataka. HQ at Souza Commercial Complex, Highlands, Falnir Road, Mangalore<br><a href="http://www.souzahatch.com">http://www.souzahatch.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Bayle       | 1000            | Commissioned 2013 for Lester D'Souza. Fate of RND plant of 500 BPH bought earlier by them is yet not known. Ideal chicken operates this facility now.                                                                                                                  |
| 43                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Srinivasa Farms Private Limited, plant at Taniki Village, Kowdipally Mandal, Medak District, Andhra Pradesh. HQ at 169, Road 13A, Jubilee Hills, Hyderabad.<br><a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Bayle       | 1000            | Ordered May 2015. Commissioned in Sept 2017. Operating at 1500 BPH. In a plant audit done by me last year, I recommended operation as a Spoke facility, sourcing additional whole carcasses from their Prakasam plant when it gets commissioned.                       |
| 44                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Srinivasa Farms Private Limited. Plant at Mega Food Park, Kurichedu, Prakasam, AP. HQ at 169, Road 13A, Jubilee Hills, Hyderabad.<br><a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Marel       | 2000            | Order for the 2000 BPH plant was placed in late 2017. The plant is installed but commissioning is delayed.                                                                                                                                                             |
| 45                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Star Foods Pvt Ltd, proposed plant at Ladhawal Food Park, Ludhiana. HQ at Sampoorana Feeds, Phagwara, Punjab<br><a href="http://sampoornafeeds.com">http://sampoornafeeds.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | -           | 4000            | Land procured. Plans ready. Plant supplier not yet chosen. Implementation expected to be delayed due to the sudden death of the promoter Mr Ashish Gupta in August 2021.                                                                                               |
| 46                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Suguna Foods Pvt Ltd, Vyalur, Tamil Nadu HQ at Unitea Building, No 3, Savithri Shanmugam Road, Race Course, Coimbatore.<br><a href="https://www.sugunafoods.co.in">https://www.sugunafoods.co.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Meyn        | 3000            | Commissioned 2000 BPH in Aug 2002. Grew in 2009. Due for revamping. Suguna acquired processing plants in other zones - Alpha Agro and SHL Foods. Second expansion in progress, starting with increase in secondary processing. Target slaughtering capacity not known. |
| 47                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Swami Feeds. Plant at Dharapuram. HQ SF 324/2C Nathapalayam, Mulanur, Dharmapuri, Tamil Nadu                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Marel       | 3000            | Trial runs completed. Was expected to come on stream in April 2022, but delayed probably to end 2021.                                                                                                                                                                  |
| 48                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Syra Foods. (Redefining Taste) W-8/L, Industrial Area, Yamunanagar, 135001, Haryana, India.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Linco       | 2500            | Expect to be commissioned by July 2022                                                                                                                                                                                                                                 |
| 49                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Unnat Feeds, Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Lark Engg   | 1000            | Under installation from early 2021, but lack important approvals from the government, therefore commissioning date is unknown.                                                                                                                                         |
| 50                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Venkateshwara (VH) Plant at Kamshet near Pune. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune.<br><a href="http://venkys.com">http://venkys.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 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.                                      |
| 51                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Venkateshwara. Plant at Davangere, Karnataka. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. <a href="http://venkys.com">http://venkys.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Linco       | <u>6000</u>     | Commissioned in March 2012. VH has, since the commissioning of this unit preferred to focus on RTE instead of primary processing. It has large RTE facilities at both locations.                                                                                       |
| 52                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | VKS Farms (now SKM Feeds). Plant at Dindigul, Tamil Nadu. HQ Nanjai Uthukuli, Modakurichi Tamil Nadu<br><a href="https://www.skmpornafoods.com">https://www.skmpornafoods.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Meyn        | 8000            | Original capacity of 2000 BPH commissioned in Sept 2009. Expansion to 4000 BPH done by mid 2019. Company changed hands in Jan 2015 and became SKM. Further expansion to 8000 BPH likely to be commissioned by mid 2022.                                                |
| 53                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | West Bengal Livestock Dev Corp, Haringhata.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | RND/Storm   | 1000            | Commissioned in 2015.                                                                                                                                                                                                                                                  |
| 54                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | West Bengal Livestock Dev Corp, Siliguri                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Linco       | 1000            | Combined poultry, goat, beef and pork slaughterhouse expected to commission soon.                                                                                                                                                                                      |
| <b>Integrated processing capacity expected by mid 2022 based on current orders, on-stream and under-construction projects</b>                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |             | <b>1,43,000</b> | <b>Average plant capacity is 2648 BPH. Round off to 2650.</b>                                                                                                                                                                                                          |
| Capacities are mentioned in birds per hour. For calculating market shares, of the total capacity of 1,39,000 (1,43,000-4000 of Star) BPH expected on stream by mid 2022, Meyn's market share is 67,600 (48.6%), Marel's is 26,000 (18.7%), RND's is 15,000 (10.8%), Storm Engineering's is 13,900 (10%); Linco's is 9,500 (6.8%), Bayle's is 3,500 (2.5%); Deccan's is 1,500 (1.1%); Dhopeswar's is 1000 (0.75%); and Lark's is 1000 (0.75%). [Total 1,39,000 (100%)]<br>[Sethwala's capacity divided >> 500 to Marel, balance 750 each to RND and Storm Engg] |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |             |                 |                                                                                                                                                                                                                                                                        |
| <b>B</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. |             |                 |                                                                                                                                                                                                                                                                        |



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|    | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 55 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 56 | Al Arif Poultry, Vakwady Road, Udipi Dist, Karnataka. Operate a <b>700</b> BPH manual dressing plant.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 57 | 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 Sharzah and Falcon Foods in the U.K. In Hyderabad it produces, besides other products, RTE items with chicken sourced from nearby processors. <a href="http://www.al-kabeer.in">http://www.al-kabeer.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 58 | 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. <a href="http://www.sumeru.net">http://www.sumeru.net</a> |
| 59 | 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 <b>700</b> BPH in 2009. Along with this primary processing facility they also set up a sausage and ham plant in 2010 with an investment of around INR 30 million for sale under the brand name <i>Fresco Pollo</i> . Now closed. Planned relocation of this plant to Assam in 2016 was dropped. <a href="http://www.amritgroup.net">http://www.amritgroup.net</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 60 | 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. <a href="http://www.amritgroup.net">http://www.amritgroup.net</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 61 | 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. <a href="http://www.arthursfood.com">http://www.arthursfood.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 62 | AOV old plant with <b>2000</b> BPH machinery from both RND and Storm may be on sale after commissioning of the Meyn plant                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 63 | Brahmagiri Dev Society, Wynad, Kerala, <b>500</b> BPH by RND in 2010.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 64 | Broiler Master, Punjab, <b>200</b> BPH by RND in 2011. This is a "dry processing" plant, having neither scalding nor plucking and does wet market style evisceration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 65 | 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 <b>3000</b> BPH plant which is now closed and available for sale. Promoted by one Prince Jacob, an NRI from Korea and Madavan Nair in May 2013. Operated for some time by a hotel chain. Purchase bid by Suguna, Shanthi and others failed to get transfer of local PCB approval to any new owner. In Nov 2019 the banker issued an auction notice. The promoters were charged with non-payment of GST, which is mandatory for organized sector processors but not levied on the wet market <sup>[33]</sup>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 66 | Central Avian Research Institute, (IVRI) Bareilly, <b>200</b> BPH by Dhopeswar.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 67 | Century Farms, Manipal, <b>500</b> BPH plant built by Storm Engineering, in operation from 2015                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 68 | 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 <a href="http://cfpl.net.in">http://cfpl.net.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 69 | Coastal Hatcheries, Mangalore, <b>500</b> BPH by RND. To be scrapped now that their Marel plant is commissioned.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 70 | College of Vet & Animal Sciences, Kerala, <b>200</b> BPH by RND in 2003.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 71 | Contai Golden Hatcheries Pvt. Ltd, Contai, E. Midinapore, West Bengal, <b>300</b> BPH by RND in 2003. It is owned by Shalimar Hatcheries and is available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 72 | CP India, Chennai, 500 BPH by RND in 2002. Scrapped soon after commissioning.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 73 | 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 74 | Darshan Foods or <i>Meatzza</i> . 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 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 Jaishinghani. <a href="http://www.meatzza.com">http://www.meatzza.com</a> .                                                                                                                                                                                                                                                                                                                                                                                        |
| 75 | Doon Valley Poultry's <b>500</b> BPH plant supplied by Storm Engg. Commissioning expected in first quarter of 2022.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 76 | Empire Foods, Talaja, Maharashtra. <b>1000</b> BPH plant purchased from RND some 8 years ago, not yet installed. It has probably been resold to and installed by another company, listed here under a different name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |



|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 77 | 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 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. <a href="http://www.farmsuzanne.com">http://www.farmsuzanne.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 78 | Farm Value Foods Private Limited owned by Anshu Sibbal Chatli runs an RND plant of <b>350</b> BPH capacity at Barnala, which was commissioned in 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 79 | 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. <a href="https://www.fivestarchicken.com">https://www.fivestarchicken.com</a> |
| 80 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 81 | Gitwako Farms, headquartered at Jangpura Extension, New Delhi, is owned by Ajay Beri at Ferozepur Jirka. They operate an RND plant of <b>unknown</b> capacity and also process goat meat. Mainly produce RTE products for which they possess a retort.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 82 | 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/hr 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 83 | Golden Hatcheries Bangalore, operate a manual dressing facility of <b>500</b> BPH within municipal limits. Under orders to relocate. Setting up a 3000 BPH Meyn plant at Davangere.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 84 | Hayagreeva Poultry Solution has a <b>500</b> 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 85 | Hitech Hatch Fresh, Kolkata. Already have a manual dressing plant of <b>unknown</b> capacity and plan to set up a modern processing unit soon.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 86 | Higrow Chicken, owned by Deepak Raj Garg, runs an RND plant of <b>500</b> BPH at Ludhiana, which was commissioned in 2017.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 87 | Hygienic Chickens, 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, <b>300</b> BPH by RND.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 88 | Ideal Chicken (Anupama Feeds and Farms), Kulshekar, Mangalore, run by Vincent Cutinha. Commenced processing around 2017 with a locally sourced plant of <b>unknown</b> capacity which runs its own home delivery and also process for Fresh-To-Home and Licious <a href="http://www.idealchicken.in">http://www.idealchicken.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 89 | Indian Broilers (IB Group, Rajnandgaon) located at Nagpur, Madhya Pradesh. It is a <b>500</b> BPH plant by RND, started in 2016.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 90 | 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 Adelie Foods of UK, who are contract caterers and suppliers to airlines, in 2012. Subsequently they acquired Skygourmet, Mars Restaurant chain, Birdy's, Dosa Diner, Roti, Pizzeria & Pasta Bar, and Tendulkar's. Owing to these, IHC is now fully into QSR and RTE foods businesses, and given the market potential, may make an entry into the chicken RTE sector.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 91 | International Food Products, Chandigarh. Small RTE producer in chicken and other meats.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 92 | Irani Chicken Products LLB, Daman, Gujarat, <b>500</b> BPH plant by Bayle, commissioned Dec, 2013.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 93 | 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.                                                                                                                                                                                                                                                                                                                                    |
| 94 | Knowledge Foods, Neral. Manual-dressing <b>300</b> BPH. Also making RTE products.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 95 | KSIDC, Kerala, <b>300</b> BPH by RND in 2005.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 96 | McDonalds India, now owned by OSI, set up their first plants at Talaja 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 Talaja and 1750t/m at Madanapalle. They source approximately 95% of their supplies from 38 local sources – raw chicken coming from the Godrej Talaja plant. Are now installing a cone de-boner sourced from Meyn. <a href="https://vistafood.com">https://vistafood.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 97 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                              |



|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 98  | Maual Agro, Chakan Road, Talegaon, Maharashtra. A <b>700</b> BPH merchant processing plant built by an ex-employee 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 99  | 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 Ladhowal Food Park near Ludhiana in Punjab. Meat Masters sells through own stores BigNMeat, other retailers, and directly to hotels and restaurants in that region <a href="http://www.meatmasters.co.in">http://www.meatmasters.co.in</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 100 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 101 | MP Pashudhan Nigam, Bhopal, <b>500</b> 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 102 | Monrovia Foods, Bhandgaon, Pune, Maharashtra, <b>500</b> BPH by Storm Engg in Jan 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 103 | 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. Chanadigarh 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 104 | Navi Nutrix, <b>750</b> BPH by RND at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Shreya Foods                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 105 | 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 and Narendra Pasuparthi. |
| 106 | Nensey's Poultry, Valsad, Gujarat, <b>300</b> BPH by RND around 2002. It is learnt to have been sold to an unknown party.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 107 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 108 | 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 <b>2000</b> BPH will probably be available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 109 | Pioneer, Hyderabad, Andhra Pradesh, 500 BPH by Dhopeswar. It has been scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 110 | 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 Mafco, Mumbai, the latter being bought in an auction by VH and mothballed at Kamshet. The Mafco plant is probably scrapped, but the remaining machines may yet be put to use if auctioned by the government                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 111 | 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. <a href="https://www.prabhatpoultry.com">https://www.prabhatpoultry.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 112 | Pragathi Broilers Pvt Ltd, Doddballapur, Karnataka, <b>500</b> BPH by Bayle in 2013. Closed or probably sold.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 113 | Ratnagiri Cooperative, Chiplun, Maharashtra, <b>300</b> BPH by RND in 2003 (closed).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 114 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 115 | Ruchi Agro Industries Ltd, Chikmagalur. It is an RND manual plant of <b>unknown</b> capacity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 116 | Royal Foods Pvt Ltd/Shakir Shaikh, Lohegaon, Pune, Maharashtra, <b>500</b> BPH by Storm Engg in Nov 2013 .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 117 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 118 | Shiva Chicken, Coimbatore. Manual dressing of <b>unknown</b> capacity <a href="http://www.shivaachicken.com">http://www.shivaachicken.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 119 | Shiva Farms, Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 120 | Shiva Poultry Equipment, Barnala city is operating a <b>500</b> BPH processing plant supplied by RND at GADVASU university in Ludhiana. Their brand name as “ <i>Hygrom Chicken</i> ”                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 121 | Sirsa Foods, at Sirsa, Haryana. A <b>500</b> BPH plant supplied by Storm. Expected to be commissioned in first quarter of 2022.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 122 | Sood Poultry at Jullunder, Punjab. A <b>500</b> BPH plant commissioned by Storm in 2020.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 123 | Sujay Feeds, SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, <b>200</b> BPH manual slaughter.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 124 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |



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|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 125                                                                                                                                                                                                                                                                                                                                                                                                                                           | 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 <a href="https://www.taurusfoods.in">https://www.taurusfoods.in</a>                                        |
| 126                                                                                                                                                                                                                                                                                                                                                                                                                                           | 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. <a href="http://www.unitasfoods.com">http://www.unitasfoods.com</a> |
| 127                                                                                                                                                                                                                                                                                                                                                                                                                                           | Violet Industries/Souza Hatcheries, Mangalore, <b>500 BPH</b> by RND. Not yet commissioned.                                                                                                                                                                                                                                                                                                    |
| 128                                                                                                                                                                                                                                                                                                                                                                                                                                           | Vista Agriculture & Food Products, Khurdah Road, Bhubaneswar, Orissa, <b>500 BPH</b> by Storm Engg in 2013. Now closed;                                                                                                                                                                                                                                                                        |
| 129                                                                                                                                                                                                                                                                                                                                                                                                                                           | Walvekar Hatcheries Ltd, Pune. 1000 BPH plant was retained by the Mumbai Customs due to some irregularities. When auctioned several years later, the lot was picked up by Dr 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                                                     |
| 130                                                                                                                                                                                                                                                                                                                                                                                                                                           | WBFCSL/R. K. Doloi, MLA, Midinapore, West Bengal, <b>300 BPH</b> by RND in 1998, ostensibly for the economic up-lift-ment of local tribals. It was never commissioned. Meanwhile the owner tried selling the equipment or the company, first to Amrit Feeds and then recently (15 Jan 2020) to VH but failed each time.                                                                        |
| 131                                                                                                                                                                                                                                                                                                                                                                                                                                           | Zorabian, Khopoli, Maharashtra, Originally a drum plucker manual dressing facility, upgraded to <b>500 BPH</b> by RND in 2007.                                                                                                                                                                                                                                                                 |
| <b>Note:</b> This is as exhaustive a list of slaughter operations in the un-organized sector as I could make it. 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. |                                                                                                                                                                                                                                                                                                                                                                                                |

### 3.5.1 Machine Design Errors

Local fabricators, who tend to copy designs from each other, have created an amazingly inefficient design of screw chillers which is costing their owners enormous amounts of wasted energy. To determine why all the screw chillers fabricated locally are faulty and it is a waste of money to use them, try this thought experiment.

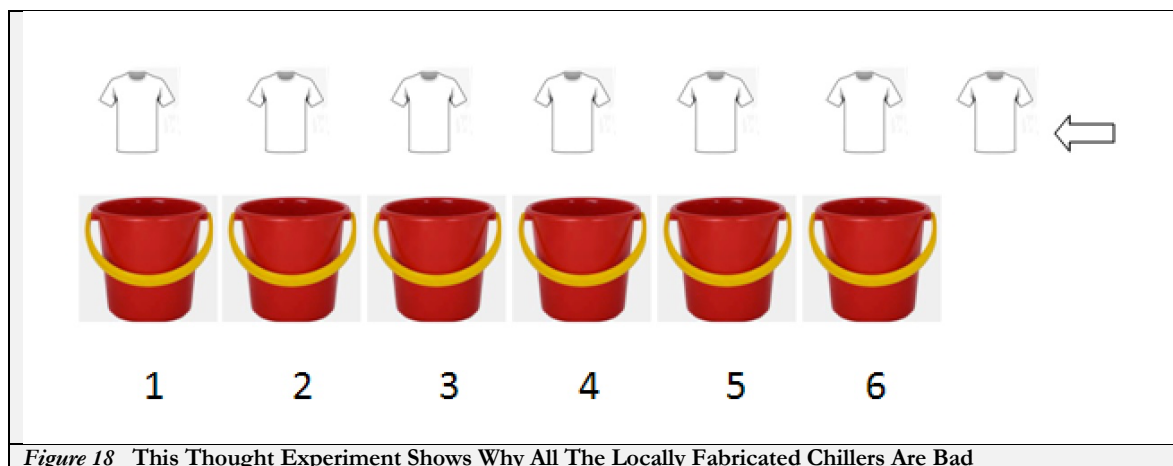


**Figure 18 This Thought Experiment Shows Why All The Locally Fabricated Chillers Are Bad**

Figure 18 shows a row of six buckets with wash water and you are dipping shirts which you have manually scrubbed with soap into the buckets to get the soap and dirt off. You begin at the arrow. Dip the first shirt into bucket 6, rinse it, wring it, then dip into bucket 5 and so on till bucket 1, rinse and wring it and then hang it up to dry.

As you progress with your wash, perhaps rinsing a dozen shirts in this manner, the water in your buckets will get dirty. Now your friend fetches a seventh bucket of fresh water. Which of the six buckets will this seventh bucket replace?

The answer should be obvious. If you replace bucket 6, the next shirt will emerge from its cleanest water in this bucket, which will then become bucket 1) and descend into the second dirtiest water (bucket 5)! And so on. In the end it will come out of bucket 1 which contains water dirtier than that in bucket 6!

Therefore the new fresh water bucket must not occupy position 6, rather it should occupy position 1 and each of the remaining buckets (2 to 5) should move up one position. Then you must remove bucket 6, dump its dirty water and hand it over to your friend to fetch more fresh water.

Now notice the arrangement. **Shirts move from right to left** to get cleaned and **water moves from left to right** to accomplish this cleaning. We conclude that shirt and water move in a **counter-current arrangement**.



Likewise in a properly designed screw chiller **chicken carcass and water must move in a counter-current arrangement** for the carcasses to get chilled.

Counter-current movement is a fundamental principle in engineering. Anyone who does not understand this principle has no business designing machines. Examine any international standard on poultry chilling – you will find that all of them mention counter-current chilling.

Furthermore the counter-current flow principle is used in any engineering step requiring ‘exchange’. What do I mean by that? In my example soap and dirt are being exchanged between shirt and wash-water. In a screw chiller heat is being exchanged between chicken and chilling water. In extraction of essential oils, flavour and aroma etc, a counter-current flow of solvent extracts these desirable components from a crushed mass of herbs moving in the opposite direction in the system. This principle is also used in the design of annealing tunnels where metal or glass objects are required to be cooled at **a steady and carefully calibrated rate**. In this latter

Yet each and every local screw chiller has been fabricated in ignorance of this fundamental principle. This results in poor chilling action and wastage of enormous amount of money by way of chilling water. If you were to total the amount of money wasted in the industry through this faulty design it would run into tens of crores of rupees.

A locally fabricated screw chiller at Lifeline plant in

Chikmagalur was modified on my insistence by its owner, Mr Hegde, sometime around 2012. Its performance improved so dramatically that Mr Hegde retained the machine when he switched over from RND to Meyn in 2013. It remains in operation to this day and is the only locally fabricated screw chiller in India which was corrected. All others were designed and built wrong and remain faulty, inefficient and wasteful.

Is it not time for local fabricators to make the correction not only on their new machines but also retrospectively in all their faulty machines operating at their customers’ premises?

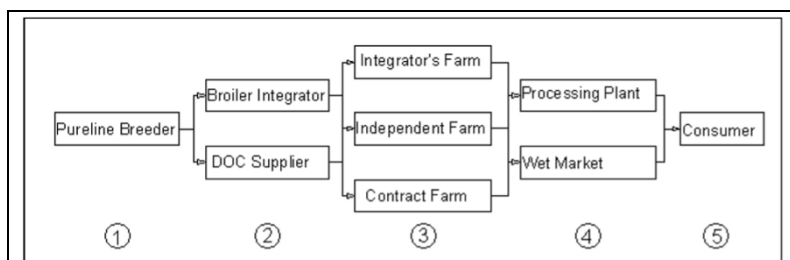


**Figure 19** There are five levels in this market. Pure line Breeder exercises quantitative control and together with Broiler Integrators, (operating down to level 4) by using their processing plants and frequent resort to the wet market, controls the broiler market, leaving contract farmers, independent DOC suppliers and independent farmers to bear the brunt of price swings that regularly occur 2-3 times every year. You cannot increase farm income till you tackle this control mechanism.

#### **Inset 20 Short Term Achievements Of Monopolies**

Remember the Ambassador car with a terrible fuel economy of under 8 km to the litre, lording it over the automobile industry in India under the plea “we are a poor country and cannot afford another car company”! Arguably, because of this, India lost many times more in foreign exchange on cumulative fuel cost than it saved by propping up the monopoly. Both HM and Toyota were established around 1947. India consciously permitted monopolies. Japan did not<sup>34</sup>. HM went to the trash heap of history while Toyota went on to lead the automobile industry worldwide.

As a lad I used to spend hours either under the chassis or bent into the bonnet, tinkering with a friend’s Standard -10 car. We could easily raise and maintain the fuel economy to a steady 15 Km to the litre. So if champions of monopoly claim that fuel efficient technology did not exist in those days, they clearly have not done their homework!

Similarly, in the above bucket analogy bureaucrats of the Licence Raj, who were in power permitted an incompetent designer to foist upon the public a design that cost the economy crores.

Later you can dismantle monopolies through competition, for better cars and screw chillers. But if the monopoly has persisted long enough to have skewed the infrastructure to favour it selectively, (like establishing open sheds for rearing a heat-tolerant breed), then you have in effect set up a narrow gauge track system which will not allow import of broad gauge rolling stock! Read inset 24 to follow my reasoning.

#### **Inset 20 Economic Damage From Monopolies Are Not Always Reversed By Bringing In Competition**

### **3.5.2 Industry Structure Itself Prevents Competition & Growth**

The structure of the broiler industry is shown in figure 20. The breeder segment usually sells GP stock derived from pure lines and sometimes also parent or breeder stock. These are converted to commercial day old chicks DOC, either by an integrator or an independent hatchery. The commercial farming sector, which produces meat birds, consists mainly on contract basis by poor farmers connected to the integrators.



The integrator produces commercial DOC often through a vertical consisting of GP farms and breeder (parent) farms. The integrator also owns and operates feed mills and hatcheries. When meat birds are grown under contract, the integrator buys back the harvested birds to process or sell in the wet market.

| Company in the industry                         | Functions  |
|-------------------------------------------------|------------|
| Suguna                                          | 2, 3, 4    |
| VH                                              | 1, 2, 4    |
| Sneha                                           | 2, 3, 4    |
| Godrej Tyson                                    | 1, 2, 3, 4 |
| CP                                              | 1, 2, 3, 4 |
| <b>Table 21 Functions combined by companies</b> |            |

When the contract farms lose broilers because of adverse weather or disease, broiler prices rise and in such conditions the integrator sells the broilers through the wet market and prefers to slow down his processing plant to compensate. On the other hand, when there is a glut, the integrator buys more live birds from the wet market, runs his processing plant extra shifts and freezes more processed carcasses. So the integrator is happy in each situation and is not keenly interested in growth of processing in competition with the wet market. He uses the wet market when he needs to. And if he also controls production of breeding stock he exercises control over the supply of breeding stock to the grandparent and parent levels. Because he sits in the Broiler Breeder Coordination Meetings, he takes care of his interests at the cost of commercial farmers. Read section 3.5.6 to appreciate the depth of control these meetings exercise on the industry.

Almost all processing plants are owned by integrators. In my more recent uploads I have taken to mentioning the company's operations as an integrator so that you can appreciate this fact directly. So we can see that the pure line and integrator levels control the market. In effect, the very businesses that operate processing plants also operate through the wet market at their convenience and they are themselves responsible for preventing free and unfettered growth of processing because they hold the safety valve of the wet market for use when needed.

In 2002 Yashwant Sinha presented his first union budget to parliament and it became an *instant disaster*. One by one, he had to sheepishly backtrack on all his proposals.

"Rollback Sinha", to use the sobriquet he immediately earned, was a bureaucrat before he retired and entered politics. A weak and obliging central government made him the finance minister and this sudden elevation went to his head. His bossy antics made his erstwhile bureaucrat brothers seek revenge. The team that compiled the budget for the ministry sought to bring him down a couple of notches and for this they prepared a document **engineered** to flop. Sinha did not himself understand economics so he did not understand the disaster he was walking into.

In 2018 the Department of Animal Husbandry, Dairying & Fisheries, Ministry of Agriculture & Farmers' Welfare (DAH) presented a plan at the behest of the government, to double farm income in the broiler sector. This was a disaster similar to Sinha's budget. The bureaucracy would blame both fiascos on "incompetence". This is their fallback excuse. We know the real cause in *Rollback Sinha's* case. Do we know the real cause in the other?

The Department of Animal Husbandry's "Doubling Farm Income Initiative" failed because the planners ignored both the built-in lag in the system and the vested commercial interests bent upon opposing expansion at the pure line level.

Circumstances have changed now. Firstly because our economy is performing very well, disposable incomes have increased, there is already a fair sized corpus of processing, blast freezing and cold storage capacities in India and I tend to believe that there is less room for goal dissonance between the government's intentions and commercial interests of the Pureline and breeder farmers.

**Inset 22 The Bureaucracy Runs The Government. Politicians Only Enjoy 'The Illusion'.**

### 3.5.3 Doubling Farmers' Income Scheme (DFI)

One of the items in the BJP manifesto was the DFI scheme which aimed at doubling farm incomes by 2022, starting around 2017-18. DFI was also applicable for broiler farmers, many of whom operated in the contract farming arrangement. Started in 2017, DFI failed to reach its goals. Instead it terminated in the hugely disruptive farmers' agitation, with Modi terminating it in 2022.

Clearly there was goal dissonance at the overall economic and agricultural level between what the government of India wanted and what other economies bent upon manipulating Indian policies to serve their needs wanted. There was also goal dissonance between bureaucrats and politicians. DFI also failed for the broiler industry in India. Here the Department of Animal Husbandry, Dairying & Fisheries, Ministry of Agriculture & Farmers' Welfare (DAH) was involved and the bureaucrat veterinarians in that ministry ought to have been well aware of the arithmetic presented by us in Table 23. It clearly states that it takes a minimum of 203 weeks to make any substantial increase in the production of broiler provided that at the pure line level there already exists sufficient number of hens for supporting your current agronomy without recurrent shortages. But if we look



objectively at the pure line operation level, we may find perhaps just a 10% surplus of hens in lay (to cater to contingencies and to help the company flex its marketing muscles). Before the DFI was announced, the pure line farms would have been in a state of complacency – fearing no sudden drop in demand, nor any competition from overseas (there was a ban on import of broilers or poultry meat), nor any unexpected event in the marketplace that could shake the prevailing situation.

Even if DFI had continued, it was bound to fail for broiler farmers. It could hardly have met the first objective – that of doubling at the pure line level by 2020, let alone managed to double broiler meat availability by 2022. In this respect the veterinarian bureaucrats in the ministry tacitly accepted that the government's goals under DFI were not their goals. And the government did repeat the actions of Rollback Sinha – not only with respect to the bureaucratic machinations but in acknowledgement of external powers using our internal differences as a tool to overturn our regime. If you recall, these were the days when powerful external forces operated within the country – first through the Shaheen Bagh sit-in, next through the farmers agitations inspired by Khalistanis. And their efforts continued through to Trump's tariff pressure to make India buy the agricultural surplus of his MAGA hinterland, namely GM maize and soybean. But the government held firm and denied outside forces any influence on Indian agriculture. At this point the DFI objectives were dropped. They may be taken up again after 2029.

**[Regarding Trump's tariff shenanigans insisting that India buy the surplus GM produce from his MAGA vote bank, I have a scheme which you may read in section 3.9.1].**

But with respect to DFI for broiler farming, India received a fresh opportunity from an unexpected source – Covid-19. We will discuss it, but before we do, we need to understand the historic basis for the mismatch in demand and supply of broilers in India.

| <b>Table 23 Timeline for Increasing Poultry Meat</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| To expand capacity by 25%, the breeding sector must increase pure line population by around 35-40%. Pure line stocks are always quite small, so to expand by 35-40% may take considerably longer than 27 weeks (the time it takes a pure line pullet to begin laying eggs). Each successive generation must come from hatched eggs. Hatching takes 3 weeks. Finally commercial broilers must grow for 5 weeks before harvest. So, as this table shows, it takes 2 years to achieve a quantum jump in DOC production capacity, <b>starting with increase in pure line stock.</b> |                  |
| Expanding pure line stock                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | 30 weeks         |
| Hatching eggs laid by them                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 3 weeks          |
| Expanded GP into breeders stock                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 30 weeks         |
| Hatching eggs laid by GP                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | 3 weeks          |
| Expanded breeders to produce commercial hatching eggs                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | 27 weeks         |
| Hatching of eggs into commercial DOC                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | 3 weeks          |
| Farming of DOC for broiler harvest                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 5 weeks          |
| <b>Total time – from plan to meat.</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>101 weeks</b> |

The automobile analogy fails in the case of heat tolerant broilers chosen by our past bureaucrats as the panacea for our poor country. And we need to move to the locomotive analogy.

Imagine again that the new government wants to demolish an existing locomotive monopoly. The easiest path for it is to subsidize gauge conversion. So in this broiler industry it should subsidize shed conversion into EC types and pay the difference as capital subsidy. To the exclusion of many other miscellaneous subsidies which it appears incapable of arriving at a consensus on.

**Inset 24 The Rail-gauge Analogy**

### 3.5.4 Demand & Supply Mismatch

Mismatch in agriculture is natural because agriculture depends on the weather and weather varies all the time. As we will see in a more thorough examination below, several factors are involved in creating mismatch and in setting magnitude or dimension of variations in broiler harvest from year to year. But in the process of itemizing the factors that cause a mismatch and in subsequent listing of corrective actions to be taken, we will miss out one important fact – the historical reasons that set our broiler farming on a perpetual path of mismatch. The reason derives from a decision taken by our bureaucrats sometime in the 1970s.

There is another factor impacting the growth of the processing industry. It is the absence of competition among broiler breeders. Economic theory teaches that competition is always healthy, but unfortunately continued competition also diminishes with successful business. It was to encourage competition that the Indian Parliament enacted the MRTP Law and other governments formulated similar laws. But it is unfortunate that in the livestock sector, thanks to past inaction by governments in North America, Western Europe, Australia and Israel that the world now essentially has only two major sources – Aviagen and Cobb and like every other country in the world, we are stuck with only these two suppliers.

In India we are also afflicted with adverse summer weather which accentuates gluts and surpluses of broilers. This is because our early planners in the bureaucracy chose the heat resistant VennCobb-100 as the standard.



Because it does not need EC sheds, it requires less investment and also much less electricity to rear. Perhaps our planners chose this breed to the exclusion of others because of this reason.

It is true there are Broiler Breeder Coordination Committees in India and they predict demand and try to maintain equitable distribution of parent stock from Aviagen and VH so that gluts and shortages at the commercial DOC level may be minimised. Yet one cannot deny the fact that there are constant shortages and gluts and that these have adversely affected the growth of this industry. Nor can one hold the Committees responsible for accurately predicting the summer two years into the future.

Further, as long as the processing industry remains short of reaching approximately 20% of all chicken consumed, there will not be enough blast freezing capacity in the country. Blast freezing works as a safety valve - to smoothen out the demand-and-supply mismatch. When there is a glut, processors see an opportunity to increase production of frozen chicken and thus benefit from low input costs. When the industry has a big processing capacity, not only do processors benefit from glut prices, but with plenty of processors bidding, the glut soon vanishes as prices climb. And the excess frozen chicken thus produced remains available to be released into the market in the event prices tend in a couple of months, to rise because of increase in demand.

This is how having a reasonably large processing industry tends to level prices. And I believe we have reached the stage when the entire industry is sanguine that we need to give the industry one last encouraging push and we will have exited the era of large price excursions. Meanwhile we must understand how to get out of this mismatch in the first place, we need to look at the timeline for breeding stock for poultry in table 23.

### 3.5.5 Historical Background Of This Mismatch

Thanks to the availability of heat-tolerant VennCobb-100, commercial broiler farming in India has taken place mostly in open sheds. When the heat tolerant VennCobb-100 was developed, it was hailed by the government as a miracle bird and a sign that we had reached self-sufficiency in the matter of broiler breed and the bureaucracy promptly banned any further import of broiler breeding stock.

But the bird had several notable downsides: low feed conversion index (FCI), poor dressing yield, an undersized breast were some of its undesirable features. But this breed faced no competition and all subsequent growth of the industry standardized on open houses.

Pakistan's broiler industry grew on the back of superior industry standard Hubbard breeds, which performed well in EC sheds. In comparison to Pakistan, how the decision Indian bureaucrats took in the past require reversal a la Rollback Sinha will become clear on reading section 3.2.4

Many years after VennCobb-100 was established as the only breed available in India, a legal battle was fought between the government and an irate poultry farmer who chafed at this restriction. The government lost the case as it was shown that the feat of the dominant pure line broiler breeder did not amount to self-sufficiency but instead to standardization of broiler farming in open houses and unpredictability of harvest due to weather conditions which could not be predicted two years in advance (see table 23). Having lost the case, the bureaucrats had to lift the ban on import of breeding stock.

Predominance of VennCobb-100 had forced the Indian broiler industry to a situation similar to a narrow rail gauge territory (see inset 24) Until this dependence on narrow gauge got dismantled you could not bring in broad gauge rolling stock. And until you had the freedom to choose, you would remain stuck with the past, whether or not you allowed import of other breeding stock.

To be fair, planners do make mistakes, often taking decisions that only hindsight can throw further light on. Bureaucrats should follow the example of Rollback Sinha. And for every mistake they make, they do come across opportunities when those mistakes can be set right. Such an opportunity for a *rollback* arose when the Court gave its verdict. Through their verdict the court had shown that in the past bureaucrats had taken a sub-optimal decision and by doing so, had placed the industry squarely on a "narrow gauge track conversion" nightmare.

At that moment either the plaintiffs, or the federation or the bureaucrats could have taken a cue and performed a rollback. In failing to seize this opportunity the federation failed in its duty because of the parties capable of redressing the situation, members of the federation ought to have understood the dilemma better than others. It should have instinctively known that unless processing grew to a sizable proportion, broiler farming would



continue to be a gamble for commercial farmers and millions would be deprived of a livelihood, and millions of others of a protein diet. The rollback could have been accomplished by granting capital subsidies to commercial farmers for building EC sheds and following lifting of the ban on import, the error would have been addressed in a couple of years.

### 3.5.6 Reasons for Mismatch

There are several reasons for large variations in live bird supply:

- 3.5.6.1 **Seasonal factors** In hot summers mortality rises and results in lower production. Since weather is an unknown, with some years having intense and prolonged hot spells, this gives rise to massive losses to farmers and unpredicted shortage of live bird supply.
- 3.5.6.2 **Unpredictability** To cater to increased requirement of DOC, breeder farms must be able to accurately predict both demand and weather conditions. They cannot. And since there is insufficient processing (and freezing) capacity in the industry, any miscalculation by breeders must result in gluts **two years later**. Why two years? Because table 23 shows that the impact occurs 101 weeks later!
- 3.5.6.3 **Goal Dissonance** between Pure line companies and the government. Pure line companies are, quite legitimately, less interested in a government-mandated program of 'disruptive expansion' and more with slowly expanding their market share while still maintaining their bottom lines, to do which they maintain a carefully calibrated effective short-supply of breeding stock at the GP level. From time to time the *Broiler Breeders' Association* holds meetings to discuss supply-demand mismatch and decides on measures to smoothen them out. In the past these measures have taken the form of :
  - a) Early culling of breeder hens. In this case each breeder hen thus culled lays fewer eggs and so a glut is avoided.
  - b) Reduced shipments of breeder chicks to breeder farms from pure line/GP operations.
  - c) Prescribing setting holidays. Hatcheries are ordered to skip some setting cycles so that a reduced number of commercial DOCs are available in the marketplace

However remember that members of the *Broiler Breeders' Association*, consisting of pure line operators, GP farmers and hatchery operators, are also in competition with each other. So many of them refuse to follow the guidelines determined by their *Associations*. It is impossible to present documentary proof of this, but being in this industry, I am privy to this information in the strictest confidence. So in effect, even given the best of intentions, these corrective proposals of the *Broiler Breeders' Association* are only partially effective. They only end up bullying the broiler farmers who are at the bottom of the pyramid and are made to foot the bill.

### 3.5.7 Jinping's Kungflu Comes To Our Aid

When demand for commercial DOC dropped rapidly with the lockdown, at the breeder level attention was turned to increase of pure line stock because on the one hand there was no demand for breeding stock down the line and on the other breeders realized that when the lockdown was lifted, the wet market would go out of demand because consumers were now sensitized to the need for hygiene. Also re-investment following the lockdown would bring about a rapid increase in processing capacity (which it did: see table 36). Industry leaders also felt that within a couple of years, processing, blast freezing and frozen storage capacities would reach that critical mass at which the industry would be able to hold buffer stock in the form of frozen poultry. This would have a stabilizing impact on prices, growth and demand. Also as much as 15 to 20% of the commercial sheds in India had already been upgraded to EC, the Country appeared to them well on its way to have set the stage for a sorely needed "*Rollback Sinha*" performance.

It appeared to me that in 2025 the Broiler Breeders Association felt that the processing industry had reached a critical size. The Covid lockdown had given the pure line farms time to jack up their breeding stock. Which is why the growth rate of both DOC availability and processing capacity are now forecast at above 15% CAGR. If this growth rate continues for just half a decade, India will have a large enough capacity of frozen stores to reduce wastage, stabilize prices, increase per capita consumption and allow large scale export of broiler meat. Doubling of broiler farmers income can then follow.

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## 3.6 APTEC Industry Report Upload Of October 2022 (Grosscap 154,000, 56 Units)

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**Table 25** List Uploaded on October 24, 2022 of organised sector poultry processing plants (existing, ordered and under construction with a Grosscap of 1,54,000, in 56 units)

| Nr | Plant                                                                                                                                                                                                                                   | Make        | Capacity | Remarks                                                                                                                                                                                                                                                                                                                                                               |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1  | Alchemist Foods & Hospitality Ltd, Kurali, Punjab (Leased to Star Foods)                                                                                                                                                                | Meyn        | 2000     | Commissioned in 2004. Since 2017 it is operated by Star Foods under a lease which is to end shortly, with the brand name <i>Star</i> . Also leased is the 135 t per month RTE capacity of Alchemist. Within the premises Alchemist operates a manual dressing unit to service web orders for <i>Republic of Chicken</i> brand.                                        |
| 2  | Al Halal Foods, Thane, Maharashtra                                                                                                                                                                                                      | RND         | 1000     | 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. Commissioned in 2016, modified in 2017 to 2000 BPH. Ordered a 4000 BPH line from Meyn in mid 2021 to replace the existing machines. This last modification was commissioned in 2nd quarter 2022 |
| 5  | Arambagh Hatcheries. Plant at Birbhum, West Bengal. HQ at 59 B Chowringhee Road, Kolkata<br><a href="https://arambagh.com">https://arambagh.com</a>                                                                                     | Meyn        | 4000     | Commissioned as 1000 BPH in Sept 1999, expanded to 2000 BPH in 2002 and 4000 in 2004. It also produces boneless Kakugiri and Yakitori for the Japanese market and RTE roasted and fried products, sold through its own retail outlets called Arambagh Foodmarts.                                                                                                      |
| 6  | AV Ventures, Plot Number-72 A, Panchkula Industrial Area Phase 1, Panchkula, Haryana                                                                                                                                                    | Storm       | 1200     | Initially operated Nagpal Frozen Foods, Barwala, Haryana, a 1000 BPH plant commissioned by RND in 2007. After its closure on failure to comply with local zoning laws, AV Ventures are setting up a new 1500 BPH poultry & 100 goats per day plant on their own land in Panchkula Industrial area. Work in progress, but there is no news on commissioning date       |
| 7  | Baramati Agro, Baramati, Maharashtra                                                                                                                                                                                                    | RND         | 1500     | 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 and was now doubled to 1500 BPH in 2020. They also operate a CFS facility for RTE products, producing around 80 t/month                                                                                          |
| 8  | Bharat Agrovet, Plant at Ganjimutt, Mangaluru, Karnataka. HQ behind Annapoorneshwari Building, Mahaveer Circle, Pumpwell, Mangaluru, Karnataka.                                                                                         | RND – Storm | 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<br><a href="https://cpbrandindia.com">https://cpbrandindia.com</a> | Meyn        | 2000     | Commissioned in January 2016. It is the only air-chilling plant in India. Planned expansion went into abeyance for lack of space. Also get contract processing done by Penn Foods, ProTAC. RTE sold as Five Star Chicken – read about it in part B of this table                                                                                                      |
| 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. Four years later, in 2021, it was finally Commissioned.                                                                                                                        |
| 11 | Godrej Tyson Foods. Plant at Taloja, Maharashtra<br><a href="https://www.godrejagrovet.com/godrej-tyson-foods">https://www.godrejagrovet.com/godrej-tyson-foods</a>                                                                     | Marel       | 3000     | Expanded from original 2000 BPH of 2001 to 3000 BPH from original set up in an industrial estate around 2017.                                                                                                                                                                                                                                                         |
| 12 | Godrej Tyson Foods. Plant at Hoskote, Karnataka                                                                                                                                                                                         | Marel       | 3000     | Set up in 1999 as 1000 BPH RND plant which was scrapped in 2007. The 2000 BPH Marel plant was                                                                                                                                                                                                                                                                         |



|    |                                                                                                                                                                                                                                   |        |      |                                                                                                                                                                                                                                                                                                                                   |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | <a href="https://www.godrejagrovet.com/godrej-tyson-foods">https://www.godrejagrovet.com/godrej-tyson-foods</a>                                                                                                                   |        |      | set up in an adjacent plot of land in 2007. Expanded in 2012. In 2008 Godrej tied up with Tyson. Their brand is Real Good . They also produce RTE products on 400Kg/hour used line sourced from The Waterbase of Nellore, a failed fish RTE unit. Since this plant is in a smart city zone, it is now 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. The modified plant has been installed in 2020 by Storm Engg. Expanded to 3000. Under pressure to relocate out of city limits according to zoning laws A piece of land has already been purchased by them.                        |
| 14 | Goldchick Hatcheries and Foods Ltd. Plant at Sadashivpet near Hyderabad, Telangana. HQ at Plot No.151, Kavuri Hills, Madhapur, Hyderabad, Telangana <a href="http://goldchick.in">http://goldchick.in</a>                         | Marel  | 2000 | Commissioned in Sept 1998, and in intermittent operation since then. First to export Indian processed chicken and also the first in the world to install an automatic re-hanging machine 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 three years later. Placed order on Meyn in Feb 21 for setting up a green field unit close to Venkys in Davangere. Installation is under progress now and commissioning may happen by first quarter 2023.                                                      |
| 16 | Healthy Choice Poultry, village and post Wadala, Tehsil Majitha, Distt Amritsar                                                                                                                                                   | Meyn   | 1300 | Plant owned by Gurpuran Singh Randhawa. To be commissioned in first quarter of 2023                                                                                                                                                                                                                                               |
| 17 | Huda Foods Pvt Ltd. Plant at Kondhwa. HQ at FL-I-403 Unity Park, SN-43 Kondhwa Kd, behind Sheetal Petrol Pump, Pune                                                                                                               | Deccan | 1500 | Incorporated in 2020 by Sarfraz Momin. The plant processes birds procured from the Japfa farms.                                                                                                                                                                                                                                   |
| 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.                                                                                                                                                                                                                                                                 |
| 19 | Japfa Comfeeds Pvt Ltd, 91 Sakore Nagar Vimannagar, Pune 411014, India <a href="https://japfaindia.com/">https://japfaindia.com/</a>                                                                                              | Marel  | 3000 | Work has commenced constructing a 3000/6000 BPH plant at Village Pedgaon, Tal Daund, Distt Pune in Maharashtra. The plant is expected to be commissioned by end 2023. Meanwhile the company continues to sell chicken processed at the leased plant of Maval Agro at Talegaon.                                                    |
| 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 | KG N 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, 1st Cross, Sindhi Colony, behind VISL House, JC Road, Bengaluru                                                                                                                      | Storm  | 1000 | Operating at 700 BPH. Suffered closure with the onset of the lock-down. Shreya Farms is operating it now.                                                                                                                                                                                                                         |
| 23 | Khazir Agro. Plant I.G.C. Lassipora, Srinagar, Srinagar U.T. HQ 4th Floor, Opp New Era School, Rai Bagh, Srinagar, Srinagar U.T.                                                                                                  | RND    | 1000 | Production commenced in January 2021. Production is irregular.                                                                                                                                                                                                                                                                    |
| 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 <a href="http://kwalityhouse.in/">http://kwalityhouse.in/</a> | Meyn   | 3000 | Ordered as a 2000 BPH plant in Dec 2014. Commissioned in June 2016. Expanded to 3000 end 2018. Sell under the brand name Belchick.                                                                                                                                                                                                |
| 25 | Lifeline Feeds (India) Pvt Ltd. HQ at Shri Manjunatha Chambers, Ratnagiri Road, Chikmagalur, Karnataka. Plant at nearby                                                                                                           | Meyn   | 3000 | 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                                                                                                                                                                                         |



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|    | industrial estate in 8 acres occupying four adjacent industrial plots separated by 3 roads. <a href="https://www.lifelinefeeds.com">https://www.lifelinefeeds.com</a>                                                   |                   |      | BPH plant in June 2015. Sell through 40 company owned retail outlets in Karnataka. Owned by K. Kishore Kumar Hegde.                                                                                                                                                                                                                                                    |
| 26 | 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, operate a manual dressing plant of 400 BPH in Telangana, Their 1000 BPH plant was commissioned earlier this year.                                                                                                                                                                                                               |
| 27 | Miki Exports International, Taloja, Maharashtra<br>Domain name <a href="http://mikichicken.com">http://mikichicken.com</a> has expired.                                                                                 | RND               | 2000 | Established in 1950 as Miki Food Stuffs, for export of frozen buffalo meat from a plant at Muzaffarnagar, U.P. In 2015 they commissioned this plant. It was shut down during the lock-down. The facility now processes for Fresh To Home and Licious. It is not clear whether this facility has been sold or leased.                                                   |
| 28 | Nafees Poultry Plot No 129, East Marredpally, Hyderabad 500026, Near Delhi Public School, Shanthi Niketan Society, Mahindra Hills, Hyderabad                                                                            | RND               | 1000 | Operated by Sarabjot Singh, son-in-law of Harbans Singh, one time owner of Starchick (see Sethwala). This plant started around 2013.                                                                                                                                                                                                                                   |
| 29 | Penn Foods Pvt Ltd. Plant at Karjat, Maharashtra. HQ at Clucky's Products LLP, 294, S. Bhagat Singh Road, Fort, Mumbai<br><a href="http://cluckys.co/the-processing-plant/">http://cluckys.co/the-processing-plant/</a> | Bayle             | 1500 | Commissioned in 2016. Contract processing for CP, McDonald and Licious. Also selling through Amazon, Metro Cash and Carry, Walmart and others. Brand name is Clucky's.                                                                                                                                                                                                 |
| 30 | 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                                                                                                                                                                                                                        |
| 31 | Premium Chick Feeds                                                                                                                                                                                                     | 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                                                                                                                                                                                                  |
| 32 | ProTAC Foods International Pvt Ltd, Plant and HQ at 115 Allalasandra, behind RTO Check Post, NH4, Mulbagal Taluk, Karnataka                                                                                             | Meyn              | 4000 | Commissioned in June 2016. Planned as a merchant processor with mandi sourced live birds. Operating on contract at 35,000 BPD for Tri Star (Kerala), Nandus, Licious, Shanti (Fortune), Fresh to Home and CP. Plan expansion to 4000 BPH to meet growing merchant processing demand. The expanded capacity will be in operation in first quarter of 2023               |
| 33 | RFK Greens Pvt Ltd. Plant at Lassipora, Pulwama, J&K. HQ at C-37, First Floor NSM, Azadpur New Delhi                                                                                                                    | Meyn              | 2500 | Ordered end July, 2017. All utilities and services commissioned. Expect to commission the plant in Dec 2022.                                                                                                                                                                                                                                                           |
| 34 | 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 Part of RM Agro Group of Companies. Plant expected to be commissioned in end 2022.                                                                                                                                                                                                                                                     |
| 35 | 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 lock-down. Now resumed operations in a limited way.                                                                                                                                                                                                              |
| 36 | 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                                                                                                                                                                                                               |
| 37 | Sethwala Foods Pvt Ltd, plant at Talasari, Palghar, Maharashtra                                                                                                                                                         | Marel/RN D/ Storm | 2000 | Installed a refurbished 500 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 Seth's |
| 38 | Shalimar Corporation, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata<br><a href="http://shalimarcorp.in">http://shalimarcorp.in</a>                                        | Meyn              | 6000 | Commissioned in Sept 2014 at 2000 BPH. Expanded to 2600 in 2018. They now plan to expand to 6000 BPH by first quarter of 2023. They sell under the brand name Total Chicken. They have plans to expand in other parts of the country- the first to be in the northern zone.                                                                                            |



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| 39 | Shanthi Feeds. Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore <a href="http://shanthifeeds.com">http://shanthifeeds.com</a>                                                                                           | Meyn       | 12000 | 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.                                                         |
| 40 | Sivasakthi Agro Foods, plant at Udumalpet, Tamil Nadu. HQ 793/18, Kumaralingam West Village, Rudrapalayam Post, Madathukalam Taluk, Tirupur Dist. Tamil Nadu <a href="http://www.sivasakthifoods.com">http://www.sivasakthifoods.com</a> | Marel      | 5000  | Originally planned as a 1000 BPH facility in mid 2012. Changed to 2000 BPH in 2013 and came into production in early 2016. Expansion to 3000 BPH commenced in May 2019. Last year they had expanded to the present capacity. Brand name is Supriya                    |
| 41 | Skylark Foods, plant at Rai Food Park, Sonapat, Haryana. HQ at Dharamgarh Road, Safidon, Distt. Jind, Haryana <a href="http://skylarkfoods.com">http://skylarkfoods.com</a>                                                              | Meyn       | 1000  | 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, Nirula's, and to many premium hotels and their franchisee outlets. Brand is Nutrich |
| 42 | Sneha Farms Pvt Ltd, plant at Addakul, Hyderabad-Bangalore Highway, Telangana. HQ at Plot No 30, Survey No. 22, 17AA, Kondapur, Hyderabad <a href="http://snehagroup.co">http://snehagroup.co</a>                                        | Marel/Meyn | 12000 | 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.                                                                                              |
| 43 | Souza Hatcheries, Mangalore, Karnataka. HQ at Souza Commercial Complex, Highlands, Falnir Road, Mangalore <a href="http://www.souzahatch.com">http://www.souzahatch.com</a>                                                              | Bayle      | 1000  | Commissioned 2013 for Lester D'Souza. Fate of RND plant of 500 BPH bought earlier by them is yet not known. Ideal chicken operates this facility now.                                                                                                                 |
| 44 | Srinivasa Farms Private Limited, plant at Taniki Village, Kowdipally Mandal, Medak District, Andhra Pradesh. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. <a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a>  | Bayle      | 1000  | Ordered May 2015. Commissioned in Sept 2017. Operating at 1500 BPH. In a plant audit done by me last year, I advised operation as a Spoke facility, with additional whole carcasses from their Prakasam plant awaiting commissioning.                                 |
| 45 | Srinivasa Farms Private Limited. Plant at Mega Food Park, Kurichedu, Prakasam, AP. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. <a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a>                            | Marel      | 2000  | Order for the 2000 BPH plant was placed in late 2017. The plant is installed but commissioning is delayed. Individual pieces of equipment are learnt to have been sold.                                                                                               |
| 46 | Star Foods Pvt Ltd, proposed plant at Ladhowal Food Park, Ludhiana. HQ at Sampoorana Feeds, Phagwara, Punjab <a href="http://sampoornafeeds.com">http://sampoornafeeds.com</a>                                                           | -          | 4000  | Land procured. Plans ready. Plant supplier not yet chosen. Implementation expected to be delayed due to the sudden death of the promoter Mr Ashish Gupta in August 2021. Work re-commenced in February 2022 but stopped again shortly thereafter                      |
| 47 | Suguna Foods Pvt Ltd, Vyalur, Tamil Nadu HQ at Unitea Building, No 3, Savithri Shanmugam Road, Race Course, Coimbatore. <a href="https://www.sugunafoods.co.in">https://www.sugunafoods.co.in</a>                                        | Meyn       | 3000  | Commissioned 2000 BPH in Aug 2002. Grew in 2009. Due for revamping. Suguna acquired processing plants in other zones – Alpha Agro (west) and SHL Foods (north).                                                                                                       |
| 48 | 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. The company was purchased by Suguna in 2019.                                                                            |
| 49 | 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.                                                                 |
| 50 | 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.                                                                                                                                                                         |
| 51 | 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. Are now looking for a third site. Equipment has been ordered and expected to arrive at site in the first quarter of 2023.                                                                         |
| 52 | Venkateshwara (VH) Plant at Kamshet near Pune. HQ Venkateshwara House, 114/A/2,                                                                                                                                                          | Meyn/Marel | 3000  | 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                                                                                                                        |



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|          | Pune-Sinhagad Road, Vitthalwadi, Pune.<br><a href="http://venkys.com">http://venkys.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |           |                 | 1990's. Old Marel equipment progressively replaced by Meyn's Walvekar consignment.                                                                                                                                                                                                                                  |
| 53       | Venkateshwara. Plant at Davangere, Karnataka. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. <a href="http://venkys.com">http://venkys.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Linco     | 6000            | 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.                                                                                                                                  |
| 54       | 54 SKM Feeds (earlier known as VKS Farms).<br><a href="https://www.skmpornafoods.com">https://www.skmpornafoods.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Meyn      | 8000            | Original capacity of 2000 BPH Plant at Dindigul, Tamil Nadu. HQ Nanjai Uthukuli, Modakurichi Tamil Nadu commissioned in Sept 2009 by VKS. Company changed hands in Jan 2015 and became SKM. Expansion to 4000 BPH done by mid 2019. Further expansion to 8000 BPH was commissioned in 3 <sup>rd</sup> quarter 2022. |
| 55       | West Bengal Livestock Dev Corp, Haringhata.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | RND/Storm | 1000            | Commissioned in 2015                                                                                                                                                                                                                                                                                                |
| 56       | West Bengal Livestock Dev Corp, Siliguri                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Linco     | 1000            | Combined poultry, goat, beef and pork slaughterhouse expected to commission soon.                                                                                                                                                                                                                                   |
|          | <b>Integrated processing capacity expected by mid 2022 based on current orders, on-stream and under-construction projects</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |           | <b>1,54,000</b> | <b>Average plant capacity is 2750 BPH.</b>                                                                                                                                                                                                                                                                          |
|          | Capacities are mentioned in birds per hour. For calculating market shares, of the total capacity of 1,50,000 (1,54,000-4000 of Star) BPH expected on stream by end 2023, Meyn's market share is 75,100 (50.1%), Marel's is 31,000 (20.7%), Storm Engineering's is 15,400 (10.3%); RND's is 14,000 (9.3%), Linco's is 9,500 (6.3%), Bayle's is 3,500 (2.3%); Deccan's is 1,500 (1.0%). [Total 1,50,000 (100%)]<br>[Sethwala's capacity divided >> 500 to Marel, balance 750 each to RND and Storm Engg]<br>Proposed project of Anjaneya has been dropped from the table because of ongoing uncertainties                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |           |                 |                                                                                                                                                                                                                                                                                                                     |
| <b>B</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 underlined capacity figures.                                                                                             |           |                 |                                                                                                                                                                                                                                                                                                                     |
| 57       | <b>AgriTech Hatcheries Ltd</b> promoted by Damania brothers, started with a 1000 BPH Meyn plant in early 1990's at Ahmadnagar, Maharashtra. It then expanded in 1995 to 4500 BPH and at that time was the most advanced 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |           |                 |                                                                                                                                                                                                                                                                                                                     |
| 58       | <b>Al Arif Poultry</b> , Vakwady Road , Udupi District, Karnataka. Operate a <b>700 BPH</b> manual dressing plant.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |           |                 |                                                                                                                                                                                                                                                                                                                     |
| 59       | <b>Al Kabeer</b> Group has been in processed foods in the Middle East since 1978, establishing a unit in India with a processing facility in Hyderabad, Cascade Marine Foods in Sharjah and Falcon Foods in the U.K. In Hyderabad it produces, besides other products, RTE items with chicken sourced from nearby processors. <a href="http://www.al-Kabeer.in">http://www.al-Kabeer.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |           |                 |                                                                                                                                                                                                                                                                                                                     |
| 60       | <b>Amalgam Group</b> , Cochin, Kerala (Innovative Foods – Sumeru brand) was started in 1977 as a family owned seafood and spice exporting company. Later in 1989 they diversified into processed foods – partnering with Nissin Foods of Japan for freeze drying and with Mitsubishi and Unilever to develop cold chains, besides Ristic GmbH, Saudi Fisheries and others, consolidating their business around Innovative Foods, a clearing and forwarding agency for Hindustan Lever ice cream. Headquartered at Bangalore. Their first attention was to frozen vegetables, followed by <i>parathas</i> and finally to RTE chicken based products under the 'Buffet' range, offering sausages, nuggets and popcorns, <i>samosas</i> , spring rolls and burger patties in chicken and pork. Production is distributed between two plants – at Cochin and Chittoor where they have 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. <a href="http://www.sumeru.net">http://www.sumeru.net</a> |           |                 |                                                                                                                                                                                                                                                                                                                     |
| 61       | <b>Amrit Feeds</b> , Jangalpur, Howrah, West Bengal, bought original RND plants from Lifeline Feeds and Ave Mariam and installed the combination as a 300 BPH unit at Jangalpur. Later expanded to <b>700 BPH</b> 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. <a href="http://www.amritgroup.net">http://www.amritgroup.net</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |           |                 |                                                                                                                                                                                                                                                                                                                     |
| 62       | <b>Amrit Feeds</b> , Beldanga Mouza, Raghunathpur, PO Bonkati KanksaI 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. <a href="http://www.amritgroup.net">http://www.amritgroup.net</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |           |                 |                                                                                                                                                                                                                                                                                                                     |
| 63       | <b>Arthur's Food Company</b> , 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. <a href="http://www.arthursfood.com">http://www.arthursfood.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |           |                 |                                                                                                                                                                                                                                                                                                                     |
| 64       | <b>AOV</b> old plant with <b>2000 BPH</b> machinery from both RND and Storm may be on sale after commissioning of the Meyn plant                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |           |                 |                                                                                                                                                                                                                                                                                                                     |



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| 65 | <b>Barafwala Co</b> , 11 High Street, Camp, Belgaum, Karnataka. Had so far been confined to the red meat industry. Recently they have set up a pilot plant for processing poultry using some Deccan Automation Technology machines and some made by themselves and are slaughtering 2000-3000 birds daily.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 66 | <b>Brahmagiri Dev Society</b> , Wynad, Kerala, <b>500 BPH</b> by RND in 2010.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 67 | <b>Broiler Master</b> , Punjab, <b>200 BPH</b> by RND in 2011. This is a “dry processing” plant, having neither scalding nor plucking and does wet market style evisceration                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 68 | <b>Caris Pure</b> Processing Company Pvt Ltd. Plant at Paramankeni Village, Kancheepuram, Tamil Nadu. HQ at 23 C, Kohinoor Complex, East Coast Road, Village Vettuvankeni, Injambakkam, Chennai, Tamil Nadu. Tae-Jin supplied the <b>3000 BPH</b> 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[.]                                                                                                                                                                                                                                                                                                                                                                                     |
| 69 | <b>Central Avian Research Institute</b> , (IVRI) Bareilly, <b>200 BPH</b> by Dhopeswar.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 70 | <b>Century Farms</b> , Manipal, <b>500 BPH</b> plant built by Storm Engineering, in operation from 2015                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 71 | <b>Chatha Foods</b> , launched by P.S. Chatha in 1998 at village Chaundheri, Dapper, on the Chandigarh - Ambala highway in the Mohali district of Punjab, market their RTE products under the brand names <i>Gusto</i> and <i>Swiss Naturen</i> . With their retort packaged products being shelf-stable at ambient temperature, they beat the hurdle of the inadequate cold chain. They source chicken meat from SHL Agro and Shanthi. Their institutional customers include about 80 five star hotels besides Taj Air Caterers, Sugar and Spice and ITC Welcomegroup. They also retail through some 1100 outlets <a href="http://cfpl.net.in">http://cfpl.net.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 72 | <b>Coastal Hatcheries</b> , Mangalore, <b>500 BPH</b> by RND. To be scrapped now that their Marel plant is commissioned                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 73 | <b>College of Vet &amp; Animal Sciences</b> , Kerala, <b>200 BPH</b> by RND in 2003.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 74 | <b>Contai Golden Hatcheries</b> Pvt. Ltd, Contai, E. Midnapore, West Bengal, <b>300 BPH</b> by RND in 2003. It is owned by Shalimar Hatcheries and is available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 75 | <b>CP India</b> , Chennai, <b>500 BPH</b> by RND in 2002. Scrapped soon after commissioning.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 76 | Computerized web based delivery platforms for order booking and order tracking using purpose-designed apps. These include <b>Amazon, Food Panda, Fresh to Home, Licious, Ola, Road Runners, Swiggy, Zapp Fresh, Zomato</b> and others                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 77 | <b>Darshan Foods or Meatzza</b> . Established in 1969 as a buffalo meat exporter. Started an RTE division in 1996 with facilities for delicatessens, Indian products like <i>seekh kabab, shami kabab, samosa, tikka</i> etc. and breaded products for retail & institutional customers. Now operate through their own plant at Lawrence Road Delhi, several leased premises at Udyog Vihar, Gurgaon and a purpose-built plant at Behror, in Rajasthan. It has a combined capacity of 750 tonnes per month from Chicken, Pork & Mutton/Lamb. It sources whole dressed birds from many plants listed in Section A of this table as well as from Ghazipur <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. <a href="http://www.meatzza.com">http://www.meatzza.com</a> .                                                                                                                                                                                                                                        |
| 78 | <b>Doon Valley Poultry's</b> <b>500 BPH</b> plant supplied by Storm Engg. Commissioning expected in first quarter of 2022.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 79 | <b>Dr Srinivasa</b> , promoter of the debunked 500 BPH Bayle plant called Pragathi Broilers at Doddballapur, is planning another facility in Karnataka, this time of 1000 BPH.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 80 | <b>Empire Foods</b> , Talaja, Maharashtra. <b>1000 BPH</b> 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 81 | <b>Farm Suzanne</b> , 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 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 above. They partnered with Pizza Hut to make pepperoni for the first time when the Indian Government banned its import in 2006. In 2015 they were planning a new plant. <a href="http://www.farmsuzanne.com">http://www.farmsuzanne.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 82 | <b>Farm Value</b> Foods Private Limited owned by Anshu Sibbal Chatli runs an RND plant of <b>350 BPH</b> capacity at Barnala, which was commissioned in 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 83 | <b>Five Star Chicken</b> , a unit of CP, acquired in 2005 and brought to India in 2012 with in-house production of RTE fried chicken products for sale through franchise outlets to cater to a QSR market, then valued in 2016 at INR 60 billion. They opened some 350 outlets across states like Andhra Pradesh, Goa, Karnataka, Kerala, Tamil Nadu and Telangana and cities like Bangalore, Hyderabad, Mumbai and Pune within 2-3 years. They also used delivery websites of Food Panda, Ola, Road Runners, Swiggy and Zomato. Chicken was initially sourced from a small processor in Bangalore, to be cooked at a pilot facility in Hoskote, later, commencing 2016, from their 2000 BPH Meyn processing plant at Chittoor where they also have an RTE plant. In 2016 they shut 133 non-performing outlet, because of sluggish market growth, bringing their total down to around 270 today. However CP's lease of Penn Foods in Maharashtra and use of ProTAC contract-processing indicates their continued drive in this market. <a href="https://www.fivestarchicken.com">https://www.fivestarchicken.com</a> |
| 84 | <b>Food and Flavours</b> , 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 85 | <b>Gitwako Farms</b> , headquartered at Jangpura Extension, New Delhi, is owned by Ajay Beri at Ferozepur Jirka. They operate an RND plant of <b>unknown</b> capacity and also process goat meat. Mainly produce RTE products for which they possess a retort.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 86 | <b>Godrej Tyson</b> , 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 87 | <b>Golden Hatcheries</b> Bangalore, operate a manual dressing facility of <b>500 BPH</b> within municipal limits. Under orders to                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |



|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|     | relocate. Setting up a 3000 BPH Meyn plant at Davangere.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 88  | <b>Hayagreeva Poultry</b> Solution has a <b>500</b> 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 89  | <b>Hitech Hatch</b> Fresh, Kolkata. Already have a manual dressing plant of <b>unknown</b> capacity and plan to set up a modern processing unit soon.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 90  | <b>Higrow Chicken</b> , owned by Deepak Raj Garg, runs an RND plant of <b>500</b> BPH at Ludhiana, which was commissioned in 2017.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 91  | <b>Hygienic Chickens</b> , 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, <b>300</b> BPH by RND.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 92  | <b>Ideal Chicken</b> (Anupama Feeds and Farms), Kulshekar, Mangalore, run by Vincent Cutinha. Commenced processing around 2017 with a locally sourced plant of <b>unknown</b> capacity which runs its own home delivery and also process for Fresh-To-Home and Licious <a href="http://www.idealchicken.in">http://www.idealchicken.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 93  | <b>Indian Broilers</b> (IB Group, Rajnandgaon) located at Nagpur, Madhya Pradesh. It is a <b>500</b> BPH plant by RND, started in 2016.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 94  | <b>Indian Hospitality</b> 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 Adelie Foods of UK, who are contract caterers and suppliers to airlines, in 2012. Subsequently they acquired Skygourmet, Mars Restaurant chain, Birdy's, Dosa Diner, Roti, Pizzeria & Pasta Bar, and Tendulkar's. Owing to these, IHC is now fully into QSR and RTE foods businesses, and given the market potential, may make an entry into the chicken RTE sector.                                                                                                                                                                                                                                                                                                                                                                                                                |
| 95  | <b>International Food Products</b> , Chandigarh. Small RTE producer in chicken and other meats.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 96  | <b>Irani Chicken</b> Products LLB, Daman, Gujarat, <b>500</b> BPH plant by Bayle, commissioned Dec, 2013.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 97  | <b>ITC Welcomegroup</b> made its entry into the branded & packaged foods business in August 2001 with inspiration from its successful restaurants Bukhara and Dum Pukht. In June 2003 they launched their <i>Kitchens of India</i> brand comprising a range of heat-and-eat Aashirvaad brand RTE meals. This range was available in heat-resistant packaging form, produced using a retort process at Chatha Foods. Their Indian meal packs are sold in Australia, Canada, Germany, Japan, New Zealand, South Korea and USA. Although this range contributed only 1% of group sales, it sold 6 times as much in USA than in India in 2012 and was the second most sold Indian meal in USA after <i>Tasty Bites</i> . It set up a new plant for these product lines at Bangalore.                                                                                                                                                                                                                               |
| 98  | <b>Knowledge Foods</b> , Neral. Manual-dressing <b>300</b> BPH. Also making RTE products                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 99  | <b>KSIDC</b> , Kerala, <b>300</b> BPH by RND in 2005.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 100 | <b>McDonalds India</b> , 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. <a href="https://vistafood.com">https://vistafood.com</a>                                                                                                                                                                                                                                                                                                                                             |
| 101 | <b>MTR</b> . Started in 1924 as a restaurant called Brahmanara Coffee Club and later in 1951, changed to Mavalli Tiffin Room in Bangalore. During the Emergency, unable to conform to the prescribed pricing orders of Indira Gandhi, they diversified into packaged convenience foods. Around 2008 they were acquired by Norway's Orkla Foods. They produce seasonings, RTE foods, curries and RTE meals. In 2012 the original owner P.S. Maiya, no longer encumbered by the agreement with Orkla, re-entered the RTE foods segment with a new company. Given the dynamism of Maiya and Orkla, they are both quite likely to enter the RTE chicken sector, given its growth potential.                                                                                                                                                                                                                                                                                                                        |
| 102 | <b>Maval Agro</b> , Chakan Road, Talegaon, Maharashtra. A <b>700</b> 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 103 | <b>Meat Masters</b> . Incorporated in 2000, a producer & supplier of frozen vegetarian & non-vegetarian (fish, mutton and chicken) and RTE products in retort pouches and filled products like sausages. They have set up a new processing facility for further processed meat products at Ladhawal Food Park near Ludhiana in Punjab. Meat Masters sells through own stores BigNMeat, other retailers, and directly to hotels and restaurants in that region <a href="http://www.meatmasters.co.in">http://www.meatmasters.co.in</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 104 | <b>Meat Products of India</b> , a Kerala government company established in 1973, operating in Chalakudy and Edayar, with bought-out chicken meat and pork from own farms. Produce feed and RTE products. Accumulated losses exceed 3 years' turnover.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 105 | <b>MP Pashudhan Nigam</b> , Bhopal, <b>500</b> 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 106 | <b>Monrovia Foods</b> , Bhandgaon, Pune, Maharashtra, <b>500</b> BPH by Storm Engg in Jan 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 107 | <b>Nagpal Frozen Foods</b> , Barwala, Haryana, 1000 BPH plant commissioned by RND in 2007 and operated by Nagpal's relative Mulk Raj and his sons under the name of Chandigarh Poultry, suppliers to the armed forces. Chandigarh Poultry was later renamed AV Ventures. Nagpal Frozen was closed in 2017 for non-compliance with pollution control laws and has probably been scrapped. Following this, AV Ventures decided to set up their own plant in Panchkula. It is listed in table 1, part A.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 108 | <b>Navi Nutrix</b> , <b>750</b> BPH by RND at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Shreya Foods                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 109 | <b>Nandus Foods</b> 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, |



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|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                                                                                                                                                                                                                                                                                                              | 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 and Narendra Pasuparth                                                                                                                                                                                                                                                     |
| 110                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Nensey's Poultry</b> , Valsad, Gujarat, <b>300 BPH</b> by RND around 2002. It is learnt to have been sold to an unknown party.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 111                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Peninsula Foods</b> 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.                                                                                                                                                                                                                            |
| 112                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Perfect Poultry</b> 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 <b>2000 BPH</b> is probably available for sale.                                                                                                                                                                                                                                                             |
| 113                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Pioneer</b> , Hyderabad, Andhra Pradesh, 500 BPH by Dhopeswar. It has been scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 114                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>PL-480 plants</b> . Even before VH set up their first poultry processing plant in India in 1986, several carousel track type prototypes from Diamond of USA arrived 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 <b>Mafco</b> , Mumbai, the latter being bought in an auction by VH and mothballed at Kamshet. The Mafco plant is probably scrapped, but the remaining machines may yet be put to use if auctioned by the government |
| 115                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Prabhat Foods</b> . Established in the year 1963. They sell Chicken RTE products directly to some institutions and also retail through half a dozen outlets in Mumbai. Mhatre, the owner, is related to J. Desai of VH. <a href="https://www.prabhatpoultry.com">https://www.prabhatpoultry.com</a>                                                                                                                                                                                                                                                                                                                                 |
| 116                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Pragathi Broilers</b> Pvt Ltd, Doddballapur, Karnataka, <b>500 BPH</b> by Bayle in 2013. Closed or probably sold. See also Dr Srinivasa                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>Ratnagiri Cooperative</b> , Chiplun, Maharashtra, <b>300 BPH</b> by RND in 2003 (closed).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 117                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Riverdale Foods</b> , Somatne, Maharashtra, 1000 BPH by Meyn around 1995 installed for Harianawala brothers, ex-employees of VH. It closed around 2003 when its arrangement with McDonalds became unprofitable. Was bought by ANC Holdings, Dubai. The plant equipment has suffered pilferage and is now scrapped.                                                                                                                                                                                                                                                                                                                  |
| 119                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Ruchi Agro</b> Industries Ltd, Chikmagalur: It is an RND manual plant of <b>unknown</b> capacity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 120                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Royal Foods</b> Pvt Ltd/Shakir Shaikh, Lohegaon, Pune, Maharashtra, <b>500 BPH</b> by Storm Engg in Nov 2013                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 121                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Sai Agri</b> , Kakinada, Andhra Pradesh, 500 BPH used Linc plant imported and installed around 2001 to cater to nearby oil platform workers. Closed shortly thereafter. Bought and mothballed by Srinivasa Hatcheries Ltd, Vizag.                                                                                                                                                                                                                                                                                                                                                                                                   |
| 122                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Shiva Chicken</b> , Coimbatore. Manual dressing of <b>unknown</b> capacity <a href="http://www.shivaachicken.com">http://www.shivaachicken.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 123                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Shiva Farms</b> , Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 124                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Shiva Poultry Equipment</b> , Barnala city is operating a <b>500 BPH</b> processing plant supplied by RND at GADVASU university in Ludhiana. Their brand name as “ <i>Hygrow Chicken</i> ”                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 125                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Sirsa Foods</b> , at Sirsa, Haryana. A <b>500 BPH</b> plant supplied by Storm. Expected to be commissioned in first quarter of 2022.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 126                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Sood Poultry</b> at Jullunder, Punjab. A <b>500 BPH</b> plant commissioned by Storm in 2020.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 127                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Sujay Feeds</b> , SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, <b>200 BPH</b> manual slaughter.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 128                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Swift Foods</b> , 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.                                                                                                                                                                                                                                                                                                                                                                                       |
| 129                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Taurus Foods</b> was set up in the mid 1990's. It produces marinated, smoked and cooked chicken RTE products at its plant at EPIP, Kasna Site 5 Greater Noida, for which it sources raw chicken meat from SHL Agro and others. It has a capacity of 25 tonnes of RTE products per month <a href="https://www.taurusfoods.in">https://www.taurusfoods.in</a>                                                                                                                                                                                                                                                                         |
| 130                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Unitas Foods</b> 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. <a href="http://www.unitasfoods.com">http://www.unitasfoods.com</a>                                                                                                                                                                                                                                  |
| 131                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Unnat Feeds</b> , 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                                                                                                                                                                                                                                                                                                                                        |
| 132                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Violet Industries/Souza Hatcheries</b> , Mangalore, <b>500 BPH</b> by RND. Not yet commissioned.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 133                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Vista Agriculture &amp; Food Products</b> , Khurdah Road, Bhubaneswar, Orissa, <b>500 BPH</b> by Storm Engg in 2013. Now closed;                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 134                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Walvekar Hatcheries</b> 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                                                                                                                                                                                                                                                                             |
| 135                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>WBFCSL/R. K. Doloi</b> , MLA, Midinapore, West Bengal, <b>300 BPH</b> by RND in 1998, ostensibly for the economic up-liftment of local tribals. It was never commissioned. Meanwhile the owner tried selling the equipment or the company, first to Amrit Feeds and then recently (15 Jan 2020) to VH but failed each time.                                                                                                                                                                                                                                                                                                         |
| 136                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Zorabian</b> , Khopoli, Maharashtra, Originally a drum plucker manual dressing facility, upgraded to <b>500 BPH</b> by RND in 2007.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 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. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

### 3.6.1 Corporates Specializing in Building Processed Broiler Brands



Hiding behind dry and uninteresting statistics that the 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 or regional brand of processed broilers is the only way to go. Which players are we talking about? Table 26 lists them.

| <b>Table 26 Shifting Focus of Broiler Corporate Houses</b> |                                                                                                                                                                                                                                                                             |
|------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Group</b>                                               | <b>Remark</b>                                                                                                                                                                                                                                                               |
| Godrej Tyson                                               | Two locations – Hoskote in Karnataka and Taloja in Maharashtra. No new location after 2008 when Tyson & Godrej Agrovet formed JV. First expanded both plants; then steadily lost market share over for 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                                                                                                                                                                                                        |
| Ideal Chicken                                              | Vincent Coutinho started with the purchase and re-installation of small locally fabricated plants and installing them near Mangalore to serve Southern Karnataka and Kerala. His collection includes Provit Foods, Anupama Farms and Bharat Agrovet.                        |
| 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                                                                                   |

What are the requirements for establishing a national or regional 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 a 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 capacities. When a major part of the wet market gets replaced by such players it will mark a major revolution in this industry. It will cause displacement of workers in the wet market and herald a social changes. APTEC believes that a simultaneous focus on social engineering and re-education must accompany this change. For all of this to happen.

### 3.6.2 Evolution In Slaughter & Farming

APTEC's Handbook (Chapter 13 on "Offal Rendering Technology - Evolution & Design Options") carries the story of transformation of animal slaughter over the past two centuries, taking New York, Chicago, Moscow and Ghazipur Mandi in New Delhi as examples. In it we have contrasted the evolution of sociological, ideological, technological, and engineering changes that these transformations displayed. Our motivation for this was our belief that it was time for us to learn from the past and act wisely, before we usher in such major transformations in this industry. We were also concerned with the history of the topic for the same reason why we writing this commemorative issue.

YouTube carries a large number of videos on broiler breeders and commercial broiler farms upgrading their facilities to EC sheds. Most of these postings are in the vernacular,

indicating that they are catering directly to local farmers. An examination of some of them shows that with strong competition in equipment supply for EC sheds, the price differential between open sheds (which still dominate) and EC sheds, has shrunk. Here are some comparative figures.

| <b>Objective</b>                    | <b>Housing Density</b>              | <b>Investment in INR/bird</b> |
|-------------------------------------|-------------------------------------|-------------------------------|
| New construction of EC shed         | 0.7 SqFt/bird                       | 350-400                       |
| Upgradation of open shed to EC shed | From 1.5 SqFt/bird to 0.7 SqFt/bird | 225-275                       |

**Table 27 Investment in open and EC houses**

These prices predict an acceleration in switchover to EC sheds with its attendant improvement in choice of commercial broiler breeds for broiler farmers. Speaking to some experts in the EC sheds business, we learnt



that there is indeed a surge of interest in them and starting from a 5% share of EC sheds in the broiler commercial farms sector in India some 6 years ago, the share has increased to around 15-20% now. They expect this trend to continue.

### 3.7 APTEC Industry Report Uploaded 30 October 2023 (Grosscap 165,400, 61 units )

| <b>Table 28 List uploaded in October, 2022 of organised sector poultry processing plants (existing, ordered and under construction with a Grosscap of 1,65,400 in 61 units)</b> |                                                                                                                                                                                                                                                   |           |          |                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A                                                                                                                                                                               | Plant, location                                                                                                                                                                                                                                   | Make      | Capacity | Remarks                                                                                                                                                                                                                                                                                                                                                    |
| 1                                                                                                                                                                               | Alchemist Foods & Hospitality Ltd, Kurali, Punjab (Leased to Star Foods)                                                                                                                                                                          | Meyn      | 2000     | Commissioned in 2004. Since 2017 it is operated by Star Foods under a lease which is to end shortly, with the brand name Star. 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 Republic of Chicken brand.                                            |
| 2                                                                                                                                                                               | Al Halal Foods, Thane, Maharashtra                                                                                                                                                                                                                | RND       | 1000     | Commissioned in 2016                                                                                                                                                                                                                                                                                                                                       |
| 3                                                                                                                                                                               | Ambica Chicken, Deumol Shirvai Quepam, Near Peace Valley, South Goa, 403705                                                                                                                                                                       | Storm     | 1200     | Commissioned in 2016. Suffered financially during the 2020 lock-down, particularly as most of their business was with hotels.                                                                                                                                                                                                                              |
| 4                                                                                                                                                                               | AOV Agro Foods Pvt Ltd, Khasra Nos. 20, 21, 22, Village Tapkan, Tehsil Nuh, Haryana 122107. HQ at C-22/25 Sector 57 Noida 201301                                                                                                                  | Meyn      | 4000     | Promoted by O. P. Arora of AOV Group (mainly in red meat), who acquired the Nuh facilities from Moin Akhtar Qureshi, one time biggest buffalo meat exporter in India. It was an RND line, commissioned in 2016. Then modified to 2000 BPH in 2017. Replaced with a 4000 BPH line from Meyn in 2nd quarter, 2022.                                           |
| 5                                                                                                                                                                               | Arambagh Hatcheries. Plant at Birbhum, West Bengal. HQ at 59 B Chowringhee Road, Kolkata. Plant at Bolpur, Singhbhum District, West Bengal <a href="https://arambagh.com">https://arambagh.com</a>                                                | Meyn      | 4000     | Commissioned as 1000 BPH in Sept 1999, expanded to 2000 BPH in 2002 and 4000 in 2004. Now the plant is closed by banks for failure to service their loans                                                                                                                                                                                                  |
| 6                                                                                                                                                                               | AV Ventures, Plot Number-72 A, Panchkula Industrial Area Phase 1, Panchkula, Haryana. (Also known as Chandigarh Poultry Centre)                                                                                                                   | Storm     | 1200     | Initially AOV operated Nagpal Frozen Foods, Barwala, Haryana, a 1000 BPH plant set up by RND in 2007. After its closure on non-compliance with zoning laws, AV Ventures set up a new 1200 BPH poultry & 100 goats per day plant on industrial estate land in Panchkula. Both lines came into operation in January 2023. Mainly serving the defence sector. |
| 7                                                                                                                                                                               | Baramati Agro, Baramati, Maharashtra Baramati Agro Ltd. 4th Floor, Farena Corporate Park, Kharadi Bypass Rd., Hadapsar, Pune- 411028, India. Plant at Pimpri, Baramati. <a href="https://www.baramatiagro.com/">https://www.baramatiagro.com/</a> | RND/Storm | 2000     | Baramati is owned by the political family of Sharad Pawar. Their first 300 BPH plant was commissioned around 2002, rebuilt to 750 BPH in 2009, doubled to 1500 BPH in 2020 by RND. It was finally expanded to 2000 BPH in end 2022 by Storm. They also operate a CFS facility for RTE products, producing around 80 t/month.                               |
| 8                                                                                                                                                                               | Bharat Agrovets, Plant at Ganjimutt, Mangaluru, Karnataka. HQ behind Annapoorneshwari Building, Mahaveer Circle, Pumpwell, Mangaluru, Karnataka.                                                                                                  | RND/Storm | 2000     | Old plant of Lifeline Feeds built by RND. Was reconditioned & reinstalled by Storm in Nov 2015 with a capacity of 1500 BPH. Now expanding to 2000 BPH. Expect commissioning by mid 2024                                                                                                                                                                    |
| 9                                                                                                                                                                               | Charoen Pokphand India Pvt Ltd (CP). Plant at Chittoor, Andhra Pradesh. HQ at CPF Tower, 1, 100-Feet Road, Stage 2, Hoysala Nagar, Indiranagar, Bengaluru, Karnataka <a href="https://cpbrandindia.com">https://cpbrandindia.com</a>              | Meyn      | 2000     | 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 Five Star Chicken (ref part B of this table). In early 2023 they were learnt to face short supply of breeding stock. Are now in the process of revamping their operation & plant.                    |
| 10                                                                                                                                                                              | Coastal Farms, Plant at Kannur, Mangalore, Karnataka. HQ near Navdurga Bus Garage,                                                                                                                                                                | Marel     | 2000     | Partnership started in 1996 by P. S. Prakash Shetty and his wife. Initially had a drum                                                                                                                                                                                                                                                                     |



|    |                                                                                                                                                                                                              |        |      |                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Mangalore, Karnataka                                                                                                                                                                                         |        |      | plucking plant from RND. Existing plant was commissioned in 2021. Learnt to be planning revamping their plant.                                                                                                                                                                                                                                                                                                                         |
| 11 | Doon Valley Poultry, 54 A Race Course Dehradun, khand.                                                                                                                                                       | Storm  | 1500 | Ordered in first quarter 2023. Under fabrication, expect to be in operation my mid 2024                                                                                                                                                                                                                                                                                                                                                |
| 12 | Godrej Tyson Foods. Plant at Taloja, Maharashtra<br><a href="https://www.godrejagrovet.com/godrej-tyson-foods">https://www.godrejagrovet.com/godrej-tyson-foods</a>                                          | Marel  | 3000 | Expanded from original 2000 BPH of 2001 to 3000 BPH. It is located in an industrial estate that lies between two nearby village whose inhabitants regularly protest against the smell nuisance. May be planning relocation.                                                                                                                                                                                                            |
| 13 | Godrej Tyson Foods. Plant at Hoskote, Karnataka<br><a href="https://www.godrejagrovet.com/godrej-tyson-foods">https://www.godrejagrovet.com/godrej-tyson-foods</a>                                           | Marel  | 3000 | Set up in 1999 as a 1000 BPH RND plant which was scrapped in 2007 after an Aptec audit. A 2000 BPH Marel plant was set up in an adjacent plot of land. Expanded in 2012. In 2008 Godrej tied up with Tyson. Their brand is Real Good . They also produce RTE products on a 400Kg/hour used line sourced from The Waterbase of Nellore, a failed fish RTE unit. Falling within a smart city zone, it is now under pressure to relocate. |
| 14 | Goel Foodworld, Plot no 23A, Industrial Area, Shogi, Shimla, Himachal Pradesh<br>Plant at Khasara No.-22, 47, 48 UP Mohal Bumbli, Tehsil- Ghanari, District Una 177201, Himachal Pradesh.                    | Storm  | 3000 | A replacement of the existing 500 BPH plant by Dhopeswar commissioned over a 5 years back. First expansion executed by Storm. Now relocating to industrial area. This plant will include existing machines, refurbished Meyn machines from Europe, and new machines from Storm. To be installed by end 2023 for operation in early 2024.                                                                                               |
| 15 | Goldchick Hatcheries and Foods Ltd. Plant at Sadashivpet near Hyderabad, Telangana. HQ at Plot No.151, Kavuri Hills, Madhapur, Hyderabad, Telangana<br><a href="http://goldchick.in">http://goldchick.in</a> | Marel  | 2000 | Commissioned in Sept 1998, and in intermittent operation since then. First to export Indian processed chicken and also the first in the world to install an automatic re-hanging machine and continuous rendering plant at 2000 BPH capacity.                                                                                                                                                                                          |
| 16 | Golden Hatcheries Pvt Ltd, Plant at Davangere, Karnataka. HQ at Golden Hatcheries Building #3, Queen's Road Cross near Congress Committee office, Bangalore                                                  | Meyn   | 3000 | Part of the Golden Group companies started in 1985 and incorporated in 1988. Placed order on Meyn in 2021 for setting up a green field unit close to VH in Davangere. Their manual slaughterhouse within Bangalore city is expected to have been closed with commissioning of this plant in August 2023.                                                                                                                               |
| 17 | Healthy Choice Poultry, village and post Wadala, Tehsil Majitha, Distt Amritsar                                                                                                                              |        | 1300 | Plant owned by Gurpuran Singh Randhawa. To be commissioned by end 2023                                                                                                                                                                                                                                                                                                                                                                 |
| 18 | Huda Foods Pvt Ltd. Plant at Kondhwa. HQ at FL-I-403 Unity Park, SN-43 Kondhwa Kd, behind Sheetal Petrol Pump, Pune                                                                                          | Deccan | 1500 | Incorporated in 2020 by Sarfraz Momin. The plant processes around 10,000 BPD, with live birds procured from Japfa Farms. The company proposes a second slaughterhouse of 3000 BPH at Sukhed near Satara in Maharashtra.                                                                                                                                                                                                                |
| 19 | Hybro Foods Pvt Ltd. Plant at Lahe, Taluka Shahpur, District Thane, Maharashtra. HQ at 8, Shah Industrial Estate, Opposite Veera Desai Road, Andheri West, Mumbai                                            | RND    | 3000 | Installed in 2004 as a 1800 BPH plant, then expanded to 3000 BPH. The plant is closed at present under pressure from the banks for non payment of dues.                                                                                                                                                                                                                                                                                |
| 20 | Japfa                                                                                                                                                                                                        | Marel  | 3000 | Work has commenced constructing a 3000/6000 BPH plant at Village Pedgaon, Tal Daund, Distt Pune in Maharashtra. Expected to be commissioned in first quarter 2024. Meanwhile they continue to sell raw chicken sourced from their 1000 BPH leased plant of Maval Agro at Talegaon and Penn Foods at Karjat. RTE chicken was sourced from Hybro Foods, Thane in the past but that has been discontinued.                                |
| 21 | Kuljas Rai Poultry, Amritsar. Also known as Rai Poultry. Plant at Wadala Viram Majitha, Amritsar -143601, Punjab                                                                                             | Storm  | 3000 | Kuljas Rai Poultry set up a 300 BPH Dhopeswar plant at Chamrang Road, Amritsar, Punjab. Under orders to exit municipal limits,                                                                                                                                                                                                                                                                                                         |



|    |                                                                                                                                                                                                                                                                                                                   |                  |      |                                                                                                                                                                                                                                                                                                                                            |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                                                                                                                                                                                                   |                  |      | they shut this plant and put it up for sale. The new Storm plant near Amritsar, is in operation from first quarter 2020. Also make RTE poultry products for local markets.                                                                                                                                                                 |
| 22 | KGN Processed Poultry, Pimpri, Maharashtra. Dehu Alandi Road, Shelar Basti, Chikhali, District Pune 412114.                                                                                                                                                                                                       | Storm            | 1500 | Started as a manual plant of 300 BPH. Storm plant was commissioned in 2018.                                                                                                                                                                                                                                                                |
| 23 | Kavi Proteins, Krishnagiri, Karnataka HQ 26, 1st Cross, Sindhi Colony, behind VISL House, JC Road, Bengaluru                                                                                                                                                                                                      | Storm            | 1000 | Suffered closure with the onset of the lock-down. Operated at 700 BPH by Sriya Farms. See also Navi Nutrix in part B of this table.                                                                                                                                                                                                        |
| 24 | Khazir Agro. Plant I.G.C. Lassipora, Srinagar, Srinagar U.T. HQ 4th Floor, Opp New Era School, Rai Bagh, Srinagar, Srinagar U.T.                                                                                                                                                                                  | RND              | 1000 | Production commenced in January 2021. Production is irregular and output is at minimal capacity, mainly owing to problems of live bird procurement logistics.                                                                                                                                                                              |
| 25 | Kwality Animal Feeds Pvt Ltd. Plant 763/19, A/P-Rajgoli, Chandgad, District Kolhapur, Maharashtra. HQ 12, Kwality House Machhe, Industrial Area, Belgaum, Karnataka <a href="http://kwalityhouse.in/">http://kwalityhouse.in/</a>                                                                                 | Meyn             | 3000 | Ordered as a 2000 BPH plant in Dec 2014. Commissioned in June 2016. Expanded to 3000 end 2018. Sell under the brand name Belchick.                                                                                                                                                                                                         |
| 26 | Lifeline Feeds (India) Pvt Ltd. HQ at Shri Manjunatha Chambers, Ratnagiri Road, Chikmagalur, Karnataka. Plant at nearby industrial estate in 8 acres occupying four adjacent industrial plots separated by 3 roads. <a href="https://www.lifelinefeeds.com">https://www.lifelinefeeds.com</a>                     | Meyn             | 3000 | Owned by K. Kishore Kumar Hegde. 300 BPH RND plant commissioned in 2002; sold to Amrit Feeds and replaced by 1900 BPH RND plant around 2005. Again replaced by a Meyn 3000 BPH plant in June 2015. Sell through 40 company-owned retail outlets in Karnataka. They are expanding, starting with hatching capacity, now already undertaken. |
| 27 | Maval Agro, Talegaon                                                                                                                                                                                                                                                                                              | Deccan/<br>Storm | 1000 | Leased from their owners (Premium Chick Feeds) by Japfa. Expanded from the original to 1000 BPH in 2023 by Storm under orders from Japfa.                                                                                                                                                                                                  |
| 28 | Mayuri Broiler Breeding Farms Pvt Ltd at Sy 537/A, 537/E, Village Yellikall, Kalwakurthy Mandal, Nagarkurnool District, Telangana 509324                                                                                                                                                                          | Storm            | 1000 | Mayuri Farms, owned by Harsha Poultry, operated a manual dressing plant of 400 BPH in Telangana. Their new plant may be commissioned in early 2024.                                                                                                                                                                                        |
| 29 | Miki Exports International, Taloja, Maharashtra<br>Domain name <a href="http://mikichicken.com">http://mikichicken.com</a> has expired.                                                                                                                                                                           | RND              | 2000 | Established in 1950 as Miki Food Stuffs, for export of frozen buffalo meat from a plant at Muzaffarnagar, U.P. In 2015 they commissioned this poultry plant. It was shut down during the Covid lock-down. The facility now processes for Fresh To Home and Licious. It is not clear whether this facility has been sold or leased.         |
| 30 | Nafees Poultry Plot No 129, East Marredpally, Hyderabad 500026, Near Delhi Public School, Shanthi Niketan Society, Mahindra Hills, Hyderabad.                                                                                                                                                                     | RND              | 1000 | Operated by Sarabjot Singh, son-in-law of Harbans Singh, one time owner of Starchick (see Sethwala). This plant started around 2013.                                                                                                                                                                                                       |
| 31 | Penn Foods Pvt Ltd. Plant at Karjat, Maharashtra. HQ at Clucky's Products LLP, 294, S. Bhagat Singh Road, Fort, Mumbai<br><a href="http://cluckys.co/the-processing-plant/">http://cluckys.co/the-processing-plant/</a>                                                                                           | Bayle            | 1500 | Commissioned in 2016. Contract processing for CP, McDonald and Licious. Also selling through Amazon, Metro Cash and Carry, Walmart and others. Brand name is Clucky's.                                                                                                                                                                     |
| 32 | Perfect Poultry Pvt Ltd. Plant and HQ at 27 Ft Road, Chowk Green Field, Majitha Road, Amritsar, Punjab.                                                                                                                                                                                                           | Meyn             | 4000 | Commissioned at 1000 BPH in July 2015 by Storm Engineering. Has been replaced by Meyn's 4000 BPH plant which was commissioned in December 2021.                                                                                                                                                                                            |
| 33 | Premium Chick Feeds Pvt. Ltd 401-404, C Wing, Nyati Millenium, Datta Mandir Chowk, Pune 411014, Plant at Yeral Gut No. 330 Near Rockhill Hotel Sutarwadi, Kolad-Pune Road 402308<br><a href="https://www.premiumchickfeeds.in/">https://www.premiumchickfeeds.in/</a><br>Plant at Sutarwadi, Alibaug, Maharashtra | Storm            | 1500 | Construction in Raigad district commenced in early 2022 after Maval Agro, which they had been using earlier, was snapped up by Japfa. Commissioning in progress, expect to come into full production in November 2023                                                                                                                      |
| 34 | Pragati Broilers, Krishnagiri, Karnataka                                                                                                                                                                                                                                                                          | Meyn             | 2500 | This order, for a 2500/4500 BPH plant is expected to be commissioned by mid 2024                                                                                                                                                                                                                                                           |
| 35 | ProTAC Foods International Pvt Ltd, Plant                                                                                                                                                                                                                                                                         | Meyn             | 2500 | Commissioned in June 2016 at 2000 BPH.                                                                                                                                                                                                                                                                                                     |



|    |                                                                                                                                                                                                                                          |                 |       |                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | and HQ at 115 Allasandra, behind RTO Check Post, NH4, Mulbagal Taluk, Karnataka                                                                                                                                                          |                 |       | Planned as a merchant processor with mandi sourced live birds. Operating now on contract at 24,000 BPD for Tri Star (Kerala), Nandus, Licious, Shanti (Fortune) and Fresh to Home. Commissioning to 4400 BPH was completed in mid 2023. Next planned expansion is to 7000 BPH                                                                                                                                           |
| 36 | RM Delicious Foods, Khatoni No 102, Khewat No 92, VPO Seenk, near Bus Stand Tehsil Israna, Panipat, Haryana 132103,                                                                                                                      | Meyn            | 1300  | Owned by R Malik as part of his RM Agro Group of Companies. Plant expected to be commissioned by end 2023.                                                                                                                                                                                                                                                                                                              |
| 37 | Royal Foods/Ave Miriam, plant at Salsette, Goa. HQ at Mario Valladares, 142/2, Near Metastrip, Nauta, Cortalim, Goa                                                                                                                      | RND             | 1500  | Originally 500 BPH. Expanded in 2009 to 1000 BPH, later again to 1500 BPH. Suffered losses during the Covid lock-down. Recently resumed operations in a limited way.                                                                                                                                                                                                                                                    |
| 38 | Sabir Qureshi (formerly Sneha Farms)                                                                                                                                                                                                     | RND             | 1000  | Mohd Sabir Qureshi, one time employee of Phoenix Poultry, bought the 2011 RND plant of Sneha Farms, relocated and re-commissioned it at Jabalpur in 2019.                                                                                                                                                                                                                                                               |
| 39 | Saffa Foods, Coimbatore Sethwala Foods Pvt Ltd, plant at Talasari, Palghar, Maharashtra.                                                                                                                                                 | Storm           | 1000  | Under fabrication.                                                                                                                                                                                                                                                                                                                                                                                                      |
| 40 | Sethwala                                                                                                                                                                                                                                 | Marel/RND/Storm |       | Stork imported and installed a refurbished, used 500 BPH plant in the 1990s for Shiraz Hotels, Agra. They sold it to Harbans Singh of Starchick, Hyderabad, who operated it as Star Chicks and later sold it to Hanifbhai of Sharon Broilers, who in turn sold it to Sethwala in 2012. Installed by Dhopeswar shortly thereafter; expanded and re-commissioned with inputs from RND and Storm. The brand name is Seth's |
| 41 | Shalimar Corporation, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata <a href="http://shalimarcorp.in">http://shalimarcorp.in</a>                                                            | Meyn            | 6000  | Commissioned in Sept 2014 at 2000 BPH. Expanded to 2600 in 2018. Expanded to 6000 BPH and commissioned in mid 2023. Shalimar sells under the brand name Total Chicken.                                                                                                                                                                                                                                                  |
| 42 | Shalimar Corporation, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata <a href="http://shalimarcorp.in">http://shalimarcorp.in</a>                                                            | Meyn            | 2500  | This new plant of initial capacity of 2500 BPH is coming up at Una in Himachal Pradesh. Commissioning is expected by mid 2024                                                                                                                                                                                                                                                                                           |
| 43 | Shanthi Feeds. Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore <a href="http://shanthifeeds.com">http://shanthifeeds.com</a>                                                                                           | Meyn            | 12000 | Originally a 1000 BPH Meyn plant commissioned in 2009. Expanded in 2 stages to 3000 BPH till 2014. Then expanded and re-commissioned at 6000 BPH in Feb 2016. Expanded to 12000 BPH in first quarter of 2021.                                                                                                                                                                                                           |
| 44 | Sivasakthi Agro Foods, plant at Udumalpet, Tamil Nadu. HQ 793/18, Kumaralingam West Village, Rudrapalayam Post, Madathukalam Taluk, Tirupur Dist. Tamil Nadu <a href="http://www.sivasakthifoods.com">http://www.sivasakthifoods.com</a> | Marel           | 5000  | Originally planned as a 1000 BPH facility in mid 2012. Changed to 2000 BPH in 2013 and came into production in early 2016. Expansion to 3000 BPH commenced in May 2019. By 2022 they had expanded to the present capacity. Brand name is Supriya                                                                                                                                                                        |
| 45 | Skylark Foods, plant at Rai Food Park, Sonapat, Haryana. HQ at Dharamgarh Road, Safidon, Distt. Jind, Haryana <a href="http://skylarkfoods.com">http://skylarkfoods.com</a>                                                              | Meyn            | 1000  | 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 Nutrich.                                                                                                                                                             |
| 46 | SKM Feeds (earlier known as VKS Farms). Plant at Dindigul, Tamil Nadu. HQ Nanjai Uthukuli, Modakurichi Tamil Nadu <a href="https://www.skmpornafoods.com">https://www.skmpornafoods.com</a>                                              | Meyn            | 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 3rd quarter 2022.                                                                                                                                                                                           |
| 47 | Sneha Farms Pvt Ltd, plant at Addakul, Hyderabad-Bangalore Highway, Telangana. HQ at Plot No 30, Survey No. 22, 17AA,                                                                                                                    | Marel/Meyn      | 12000 | Ordered initial 6000 BPH plant from Marel in March 2014. Commissioned in April 2016. Procured equipment from Meyn for doubling                                                                                                                                                                                                                                                                                          |



|                                                                                                                                                                                                            |                                                                                                                                                                                                                                            |               |                 |                                                                                                                                                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                                                                            | Kondapur, Hyderabad<br><a href="http://snehagroup.co">http://snehagroup.co</a>                                                                                                                                                             |               |                 | their capacity. Commissioned in end 2021.                                                                                                                                                                                                                                |
| 48                                                                                                                                                                                                         | Souza Hatcheries, Mangalore, Karnataka.<br>HQ at Souza Commercial Complex,<br>Highlands, Falnir Road, Mangalore<br><a href="http://www.souzahatch.com">http://www.souzahatch.com</a>                                                       | Bayle         | 1000            | Commissioned 2013 for Lester D'Souza. Fate of RND plant of 500 BPH bought earlier by them is yet not known. A local company called Ideal Chicken operates this facility now.                                                                                             |
| 49                                                                                                                                                                                                         | Srinivasa Farms Private Limited, plant at Taniki Village, Kowdipally Mandal, Medak District, Andhra Pradesh. HQ at 169, Road 13A, Jubilee Hills, Hyderabad.<br><a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a> | Bayle         | 1000            | Ordered May 2015. Commissioned in Sept 2017. Operating at 1500 BPH.                                                                                                                                                                                                      |
| 50                                                                                                                                                                                                         | Star Foods Pvt Ltd, proposed plant at Ladhawal Food Park, Ludhiana. HQ at Sampoorana Feeds, Phagwara, Punjab<br><a href="http://sampoornafeeds.com">http://sampoornafeeds.com</a>                                                          | Marel         | 4000            | Construction in progress at site. Commissioning expected by mid 2024                                                                                                                                                                                                     |
| 51                                                                                                                                                                                                         | Star Poultry, Johrawar Singh, Jammu                                                                                                                                                                                                        | Storm         | 1000            | Order placed on Storm. Fabrication in progress. May be in operation by mid 2024                                                                                                                                                                                          |
| 52                                                                                                                                                                                                         | Suguna Foods Pvt Ltd, Vyalur, Tamil Nadu<br>HQ at Unitea Building, No 3, Savithri Shanmugam Road, Race Course, Coimbatore.<br><a href="https://www.sugunafoods.co.in">https://www.sugunafoods.co.in</a>                                    | Meyn<br>Marel | 3000<br>1000    | Commissioned 2000 BPH in Aug 2002. Grew in 2009 to 3000 BPH. This plant has been reconfigured for increased value added products. Equipment for current expansion to 4000 BPH was sourced from Marel and it is due for commissioning by end 2023                         |
| 53                                                                                                                                                                                                         | Suguna Foods Pvt Ltd acquisition of Alpha Agro & Cold Storage Pvt Ltd), Belgaum, Karnataka                                                                                                                                                 | Meyn          | 1000            | Commissioned in April, 2014, as a Meyn 1000 BPH plant to function as a merchant processor mainly for the armed forces, Goa and local markets by promoters Alpha Agro who sold the facility to Suguna in 2019.                                                            |
| 54                                                                                                                                                                                                         | Suguna Foods Pvt Ltd acquisition of SHL Foods Private Ltd (Sagri) Plant at Lalru, Punjab.                                                                                                                                                  | Meyn          | 2500            | Originally a 1000 BPH plant set up in 2009 at Chanalon Industrial Park, on a mere 1000 SqM plot of land by Surjit S. Kohli. Relocated, expanded, re-commissioned in Feb 2014. Sold in 2018 to Suguna.                                                                    |
| 55                                                                                                                                                                                                         | Swami Feeds. Plant at Dharapuram. HQ SF 324/2C Nathapalayam, Mulanur, Dharmapuri, Tamil Nadu                                                                                                                                               | Marel         | 3000            | During construction parts of the structure were gutted in a fire in mid-2020. Came on stream in mid 2021.                                                                                                                                                                |
| 56                                                                                                                                                                                                         | Syra Foods. (Redefining Taste) W-8/L, Industrial Area, Yamunanagar, 135001, Haryana, India.                                                                                                                                                | Linco         | 2500            | Ran into local resistance successively at two proposed plant sites. They have now started work at a site near Mohali in Punjab. Equipment arrived at site in March 2023 end and the plant by end of 2023.                                                                |
| 57                                                                                                                                                                                                         | Venkateshwara (VH) Plant at Kamshet near Pune. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune.<br><a href="http://venkys.com">http://venkys.com</a>                                                                | Meyn/Marel    | 3000            | Oldest operating plant since 1986 in India. It was commissioned as 1000 BPH Meyn plant. Expanded to 3000 BPH by Marel during the early 1990's. Old Marel equipment has been progressively replaced by Meyn's Walvekar consignment. See Walvekar in part B of this table. |
| 58                                                                                                                                                                                                         | Venkateshwara. Plant at Davangere, Karnataka. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. <a href="http://venkys.com">http://venkys.com</a>                                                                    | Linco         | 6000            | Commissioned in March 2012. Since the commissioning of this unit they have preferred to focus on RTE instead of primary processing. VH has large RTE facilities at both locations.                                                                                       |
| 59                                                                                                                                                                                                         | West Bengal Livestock Dev Corp, Haringhata.                                                                                                                                                                                                | RND/Storm     | 1000            | Order taken from WBLDC by Dr Froeb (India) Pvt Ltd, then the agent of Linco and sub-contracted to RND/Storm, Commissioned in 2015.                                                                                                                                       |
| 60                                                                                                                                                                                                         | West Bengal Livestock Dev Corp, Siliguri                                                                                                                                                                                                   | Linco         | 1000            | Combined poultry, goat, beef and pork slaughterhouse commissioned in 2022                                                                                                                                                                                                |
| 61                                                                                                                                                                                                         | West Bengal Livestock Dev Corp, Haringhata.                                                                                                                                                                                                | Meyn          | 4000            | Letter of Credit received for a 4000/8000 BPH plant at their Haringhata location in late April 2023. Commissioning expected by early 2025                                                                                                                                |
| Integrated processing capacity expected by early 2025 based on current orders, on-stream and under-construction projects                                                                                   |                                                                                                                                                                                                                                            |               | <b>1,65,400</b> | Average plant capacity is 2711 BPH.                                                                                                                                                                                                                                      |
| 1 Anjaneya 2500 BPH project at Mavin Honda. Project delayed as they continue to await approval of grant of capital subsidy from the government. Civil work initiated at site. No equipment ordered so far. |                                                                                                                                                                                                                                            |               |                 |                                                                                                                                                                                                                                                                          |
| 2 Srinivasa Farms Pvt. Ltd, 2000 BPH, Mega Food Park, Kurichedu, Prakasam district. Equipment delivered to the site over                                                                                   |                                                                                                                                                                                                                                            |               |                 |                                                                                                                                                                                                                                                                          |



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| <p>six years ago by Marel. No response to Aptec's repeated reminders seeking information on their plans for installation and commissioning. Equipment supplier Marel is equally unaware of any plans related to commissioning.</p> <p>3 RFK Green, Pulwama, J&amp;K. HQ at C-37, First Floor NSM, Azadpur New Delhi. The 2500 BPD plants was ordered in July 2017 and installation was completed in 2019. Commissioning is delayed due to social unrest in the area.</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| B                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <p>This Table lists (1) small un-organized sector processing plants with manual dressing, drum plucking and conveyORIZED or partially conveyORIZED poultry processing plants with capacities under 1000 BPH (2) closed and scrapped poultry processing plants of all sizes – many of which were re-sold and subsequently grew to become organized sector processing houses- at which time they cease to be listed in this section, (3) Plants on which some work has been done but commissioning remains under abeyance for several years, (4) RTE plants who source chicken meat from processing plants, and even if their repertoire only marginally includes chicken, they have the machinery, experience and general potential to follow market trends and become noteworthy for poultry processors (4) Web based poultry and poultry based RTE order suppliers, many of which have also acquired, or lease idle facilities and are either reviving them or setting up <i>cloud kitchens</i> for captive use.</p> <p>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 underlined capacity figures.</p> |
| 62                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>AgriTech Hatcheries Ltd</b> promoted by Damania brothers, started with a 1000 BPH Meyn plant in early 1990's at Ahmadnagar, Maharashtra. It then expanded in 1995 to 4500 BPH and at that time was the most advanced and the largest facility in India. It then closed when the group became insolvent around 1997. Leased for a year from the State Bank of India by C&amp;M with a view to re-commission it, they failed and surrendered it in 1999. Later the plant was scrapped</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 63                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>63 Al Arif Poultry</b>, Vakwady Road, Kumbhashi Post Kundapura Taluq, Udupi District – 576257 Karnataka. Operate a 700 BPH manual dressing plant. They ordered a 500 BPH processing plant from Storm Engineering recently. Fabrication is in progress.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 64                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Al Kabeer</b> Group has been in processed foods in the Middle East since 1978, establishing a unit in India with a processing facility in Hyderabad, Cascade Marine Foods in Sharjah and Falcon Foods in the U.K. In Hyderabad it produces, besides other products, RTE items with chicken sourced from nearby processors. <a href="http://www.al-Kabeer.in">http://www.al-Kabeer.in</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 65                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Amalgam Group</b>, Cochin, Kerala (Innovative Foods – Sumeru brand) was started in 1977 as a family owned seafood and spice exporting company. Later in 1989 they diversified into processed foods – partnering with Nissin Foods of Japan for freeze drying and with Mitsubishi and Unilever to develop cold chains, besides Ristic GmbH, Saudi Fisheries and others, consolidating their business around Innovative Foods, a clearing and forwarding agency for Hindustan Lever ice cream. Headquartered at Bangalore. Their first attention was to frozen vegetables, followed by <i>parathas</i> and finally to RTE chicken based products under the 'Buffet' range, offering sausages, nuggets and popcorns, <i>samosas</i>, spring rolls and burger patties in chicken and pork. Production is distributed between two plants – at Cochin and Chittoor where they have breeding, battering, frying, IQF and soup making machinery. Lacking a primary processing plant, they source chicken and pork from nearby processors which exceeds INR 60 million. They also produce cup chicken noodles using dehydrated chicken. Recently they launched innovative recipes curated by Michelin Star Chef Alfred Prasad and now propose to venture into vegetarian and meat based momos. <a href="http://www.sumeru.net">http://www.sumeru.net</a></p>  |
| 66                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Amrit Feeds</b>, Jangalpur, Howrah, West Bengal, bought original RND plants from Lifeline Feeds and Ave Mariam and installed the combination as a 300 BPH unit at Jangalpur. Later expanded to <b>700 BPH</b> in 2009. Along with this primary processing facility they also set up a sausage and ham plant in 2010 with an investment of around INR 30 million for sale under the brand name <i>Fresco Pollo</i>. Now all facilities are closed. Planned relocation of this plant to Assam in 2016 was dropped.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 67                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Amrit Feeds</b>, Beldanga Mouza, Raghunathpur, PO Bonkati KanksaI, Panagarh, West Bengal. A Linto plant of 4000 BPH plant commissioned in first quarter 2014 and promptly closed a year later on June 1, 2015. This facility has been available for sale ever since but is unlikely to find buyers because the asking price is too high. <a href="http://www.amritgroup.net">http://www.amritgroup.net</a>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 68                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>AOV</b> old plant with <b>2000 BPH</b> machinery from both RND and Storm may be on sale after commissioning of the Meyn plant</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 69                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Arthur's Food Company</b>, Bangalore. This RTE plant retails through Big Basket, Food Basket, Foodhall, Foodworld, Metro Cash &amp; Carry, Nature's Basket, Scootsy, Spar, Spencer's and Star Bazar. <a href="http://www.arthursfood.com">http://www.arthursfood.com</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 70                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Assam livestock &amp; Poultry Corporation</b>, Panjabari Road Khanapara, Guwahati 781022. Ordered a 500 BPH plant from Storm which was installed and commissioned in 2023.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 71                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Barafwala Co</b>, 11 High Street, Camp, Belgaum, Karnataka. Had so far been confined to the red meat industry. Recently they have set up a pilot plant for processing poultry using some Deccan Automation Technology machines and some made by themselves and are slaughtering 2000-3000 birds daily.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 72                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Brahmagiri Dev Society</b>, Wynaad, Kerala, <b>500 BPH</b> by RND in 2010.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 73                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Broiler Master</b>, Punjab, <b>200 BPH</b> by RND in 2011. This is a "dry processing" plant, having neither scalding nor plucking and does wet market style evisceration.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 74                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Caris Pure</b> Processing Company Pvt Ltd. Plant at Paramankeni Village, Kancheepuram, Tamil Nadu. HQ at 23 C, Kohinoor Complex, East Coast Road, Village Vettuvankeni, Injambakkam, Chennai, Tamil Nadu. Tae-Jin supplied the <b>3000 BPH</b> 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[i]</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 75                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Central Avian Research Institute</b>, (IVRI) Bareilly, <b>200 BPH</b> by Dhopeswar.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 76                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Century Farms</b>, Erampalli, P.O. Shivalli Udupi Taluka &amp; District- 576102 Karnataka. A <b>500 BPH</b> plant built by Storm Engineering, in operation from 2015.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 77                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>Chatha Foods</b>, launched by P.S. Chatha in 1998 at village Chaundheri, Dapper, on the Chandigarh - Ambala highway in the Mohali district of Punjab, market their RTE products under the brand names <i>Gusto</i> and <i>Swiss Naturen</i>. With their retort packaged</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |



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|    | 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 78 | Taj Air Caterers, Sugar and Spice and ITC Welcomegroup. They also retail through some 1100 outlets <b>Coastal Hatcheries</b> , Mangalore, <b>500 BPH</b> by RND. To be scrapped now that their Marel plant is commissioned.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 79 | <b>College of Vet &amp; Animal Sciences</b> , Kerala, <b>200 BPH</b> by RND in 2003.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 80 | <b>CP India</b> , Chennai, <b>500 BPH</b> by RND in 2002. Scrapped soon after commissioning.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 81 | <b>Contai Golden Hatcheries</b> Pvt. Ltd, Contai, E. Midnapore, West Bengal, <b>300 BPH</b> by RND in 2003. It is owned by Shalimar Hatcheries and is available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 81 | Computerized web based delivery platforms for order booking and order tracking using purpose-designed apps. These include <b>Amazon, Food Panda, Fresh to Home, Licious, Ola, Road Runners, Swiggy, Zapp Fresh, Zomato</b> and others                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 82 | <b>Darshan Foods</b> or <b>Meatzza</b> . Established in 1969 as a buffalo meat exporter. Started an RTE division in 1996 with facilities for delicatessens, Indian products like <i>seekh kabab, shami kabab, samosa, tikka</i> etc. and breaded products for retail & institutional customers. Now operate through their own plant at Lawrence Road Delhi, several leased premises at Udyog Vihar, Gurgaon and a purpose-built plant at Behror, in Rajasthan. It has a combined capacity of 750 tonnes per month from chicken, pork & mutton/lamb. It sources whole dressed birds from many plants listed in Section A of this table as well as from Ghazipur <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. <a href="http://www.meatzza.com">http://www.meatzza.com</a> .                                                                                                                                                                                                                                                       |
| 83 | <b>Doon Valley Poultry's 500 BPH</b> plant supplied by Storm Engg. Commissioning expected in first quarter of 2024.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 84 | <b>Dr Srinivasa</b> , promoter of the decommissioned and eventually trashed 500 BPH Bayle plant called <b>Pragathi Broilers</b> at Doddaballapur in a disused feed mill shed. He is planning another facility in Karnataka, this time with an ambitious capacity of 1000 BPH but there is no news of any progress.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 85 | <b>Empire Foods</b> , Taloja, Maharashtra. <b>1000 BPH</b> plant purchased from RND some 12 years ago, not yet installed. It has probably been resold to and installed by another company, or listed here under a different name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 86 | <b>Farm Suzanne</b> , 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 tonnes per day, as a branch of a larger sea-foods company. They sell to institutions and through retail chains and also perform as ship chandlers. Procure chicken meat from several processors listed above in section A. They partnered with Pizza Hut to make pepperoni for the first time when the Indian Government banned its import in 2006. In 2015 they were planning a new plant. <a href="http://www.farmsuzanne.com">http://www.farmsuzanne.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 87 | <b>Farm Value</b> Foods Private Limited owned by Anshu Sibbal Chatli runs an RND plant of <b>350 BPH</b> capacity at Barnala. It was commissioned in 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 88 | <b>Five Star Chicken</b> , a unit of CP, acquired in 2005 and brought to India in 2012 with in-house production of RTE fried chicken products for sale through franchise outlets to cater to a QSR market, then valued in 2016 at INR 60 billion. They opened some 350 outlets across states like Andhra Pradesh, Goa, Karnataka, Kerala, Tamil Nadu and Telangana and cities like Bangalore, Hyderabad, Mumbai and Pune within 2-3 years. They also used delivery websites of Food Panda, Ola, Road Runners, Swiggy and Zomato. Chicken was initially sourced from a small processor in Bangalore, to be cooked at a pilot facility in Hoskote. Later, commencing 2016, from their 2000 BPH Meyn processing plant at Chittoor where they also have an RTE plant. In 2016 they shut 133 non-performing outlet, because of sluggish market growth, bringing their total down to around 270. They also terminated lease of Penn Foods in Maharashtra and ProTAC contract-processing. They are now learnt to be reviving and revamping their presence in India. <a href="https://www.fivestarchicken.com">https://www.fivestarchicken.com</a> |
| 89 | <b>Food and Flavours</b> , 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 90 | <b>Gitwako Farms</b> , headquartered at Jangpura Extension, New Delhi, is owned by Ajay Beri at Ferozepur Jirka. They operate an RND plant of <b>unknown</b> capacity and also process goat meat. Mainly produce RTE products for which they possess a retort. <b>Godrej Tyson</b> , Hoskote, Karnataka, 1000 BPH plant from RND in 1999, which was scrapped in 2007 and replaced by a Marel 2000 BPH plant, which was later expanded to 3000 BPH. They have a 400 Kg/hour formed products line and a sausage, salami and cold cuts lines – part of which was reconditioned and procured from The Waterbase Nellore facility of the Ballarpur group – a fish further processing facility that failed.                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 91 | <b>Golden Hatcheries</b> Bangalore, operate a manual dressing facility of <b>500 BPH</b> within municipal limits. Under orders to relocate. Have set up a 3000 BPH Meyn plant at Davangere.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 92 | <b>Hayagreeva Poultry</b> Solution has a <b>500 BPH</b> RND plant located at Doddaballapur near Bangalore which was commissioned in 2020. The plant was earlier owned by Chicken Stop, sold to another owner, then shifted to its present location.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 93 | <b>Hitech Hatch Fresh</b> , Kolkata. Already have a manual dressing plant of <b>unknown</b> capacity and plan to set up a modern                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 94 | <b>Higrow Chicken</b> , owner Deepak Raj Garg, runs an RND plant of <b>500 BPH</b> at Ludhiana, which was commissioned in 2017.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 95 | <b>Hygienic Chickens</b> , 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, <b>300 BPH</b> by RND.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 96 | <b>Ideal Chicken</b> (Anupama Feeds and Farms), Kulshekar, Mangalore, run by Vincent Cutinha. Commenced processing around 2017 with a locally sourced plant of <b>unknown</b> capacity which runs its own home delivery and also process for Fresh-To-Home and Licious <a href="http://www.idealchicken.in">http://www.idealchicken.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 97 | <b>Indian Broilers</b> (IB Group, Rajnandgaon) located at Nagpur, Madhya Pradesh. It is a <b>500 BPH</b> plant by RND, started in 2016. They are planning a major foray into poultry processing, with several 6000 BPH plants at several locations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 98 | <b>Indian Hospitality</b> Company Group was registered in Caymen Islands in 2006 to make investments in hospitality and QSR                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |



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|     | sectors. To help them do so, they recruited the founder of Barista and CEO of Yum and acquired Adelie Foods of UK, who are contract caterers and suppliers to airlines, in 2012. Subsequently they acquired Skygourmet, Mars Restaurant chain, Birdy's, Dosa Diner, Roti, Pizzeria & Pasta Bar, and Tendulkar's. Owing to these, IHC is now fully into QSR and RTE foods businesses, and given the market potential, may make an entry into the chicken RTE sector.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 99  | <b>International Food Products</b> , Chandigarh. Small RTE producer in chicken and other meats                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 100 | <b>Irani Chicken Products LLB</b> , Daman, Gujarat, <b>500 BPH</b> plant by Bayle, commissioned Dec, 2013.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 101 | <b>ITC Welcomegroup</b> made its entry into the branded & packaged foods business in August 2001 with inspiration from its successful restaurants Bukhara and Dum Pukht. In June 2003 they launched their <i>Kitchens of India</i> brand comprising a range of heat-and-eat Aashirvaad brand RTE meals. This range was available in heat-resistant packaging form, produced using a retort process at Chatha Foods. Their Indian meal packs are sold in Australia, Canada, Germany, Japan, New Zealand, South Korea and USA. Although this range contributed only 1% of group sales, it sold 6 times as much in USA than in India in 2012 and was the second most sold Indian meal in USA after <i>Tasty Bites</i> . It set up a new plant for these product lines at Bangalore.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 102 | <b>Khushbaksh Poultry</b> , Near Kashmir Glass House, Phase 3RD, Industrial Estate, Srinagar- 190001, Jammu & Kashmir. A 500 BPH plant under order from one Mr Bashir under fabrication by Storm Engg and slated for commissioning by mid 2023                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 103 | <b>Knowledge Foods</b> , Neral. Manual-dressing <b>300 BPH</b> . Also making RTE products.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 104 | <b>KSIDC</b> , Kerala, <b>300 BPH</b> by RND in 2005.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 105 | <b>McDonalds India</b> , now owned by OSI, set up their first plants at Taloja in 1995 as Vista Foods and Kitran Foods to cater separately to non-vegetarian and vegetarian products respectively. Recently they set up a vegetarian products facility in Punjab and acquired the facility of Global Nutri Foods Ltd at Madanapalle in AP. Altogether they possess an RTE capacity of 625t/m at Taloja and 1750t/m at Madanapalle. They get approximately 95% of their supplies from 38 local sources – with raw chicken coming from the Godrej Taloja plant. Have recently installed a cone de-boner sourced from Meyn. <a href="https://vistafood.com">https://vistafood.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 106 | <b>MTR</b> . Started in 1924 as a restaurant called Brahmanara Coffee Club and later in 1951, changed to Mavalli Tiffin Room in Bangalore. During the Emergency, unable to conform to the prescribed pricing orders of Indira Gandhi, they diversified into packaged convenience foods. Around 2008 they were acquired by Norway's Orkla Foods. They produce seasonings, RTE foods, curries and RTE meals. In 2012 the original owner P.S. Maiya, no longer encumbered by the agreement with Orkla, re-entered the RTE foods segment with a new company. Given the dynamism of Maiya and Orkla, they are both quite likely to enter the RTE chicken sector, given its growth potential.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 107 | <b>Meat Masters</b> . Incorporated in 2000, a producer & supplier of frozen vegetarian & non-vegetarian (fish, mutton and chicken) and RTE products in retort pouches and filled products like sausages. They have set up a new processing facility for further processed meat products at Ladhawal Food Park near Ludhiana in Punjab. Meat Masters sells through own stores BigNMeat, other retailers, and directly to hotels and restaurants in that region <a href="http://www.meatmasters.co.in">http://www.meatmasters.co.in</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 108 | <b>Meat Products of India</b> , a Kerala government company established in 1973, operating in Chalakudy and Edayar, with bought-out chicken meat and pork from own farms. Produce feed and RTE products. Accumulated losses exceed 3 years' turnover. In mid May 2003 they were planning a captive 1000 BPH primary processing facility.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 109 | <b>MP Pashudhan Nigam</b> , Bhopal, <b>500 BPH</b> by RND in 1997. Scrapped. When newly commissioned, this plant inspired Dr Anaokar, then MD of Godrej Agrovet, to model his Hoskote unit on it. Eventually his Hoskote facility was also scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 110 | <b>Monrovia Agro Foods</b> , Bhandgaon, Pune, Maharashtra, <b>500 BPH</b> by Storm Engg in Jan 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 111 | <b>Nagpal Frozen Foods</b> , Barwala, Haryana, 1000 BPH plant commissioned by RND in 2007 and operated by Nagpal's relative Mulk Raj and his sons under the name of Chandigarh Poultry, suppliers to the armed forces. Chandigarh Poultry was later renamed AV Ventures. Nagpal Frozen was closed in 2017 for non-compliance with pollution control laws and has probably been scrapped. Following this, AV Ventures decided to set up their own plant in Panchkula. It is listed in table 1, part A.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 112 | <b>Navi Nutrix</b> , <b>750 BPH</b> by RND at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Sriya Foods                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 113 | <b>Nandus Foods Pvt Ltd</b> . Headquartered at Bangalore, the Nanda Group, comprises 11 small companies promoted by P. S. Nandakumar, an old business associate of Rao of VH. As integrators, Nandus skipped the processing stage, venturing directly into RTE in 1989 with a 400mm Koppens forming-frying line and a 32 tonne frozen store. They initially ran it themselves, and at one stage even fought and lost a legal battle in 2007 with the international restaurant chain Nandos Indage Restaurants P. Ltd over brand ownership. The RTE line was leased to Suguna in 2007 for a five year period. At the turn of the century they acquired a small Linco slaughterhouse, which had been closed down and mothballed for sometime by its previous owners in UAE, in collaboration with Godrej Agrovet and Sheikh Hamed bin Butti under the name of Al Rahba. Around 2015 they turned their attention to processing with a used RND line in Karnataka which is now closed. Planned a 2000 BPH processing plant, placing an order with Marel. Later abandoned the project to work instead as a Spoke facility in Bangalore, integrating it with their existing RTE kitchen. They get 6000 birds from their farms contract-processed every day by ProTAC and distribute raw and RTE chicken products through 55 stores within the city. Run by Nandakumar's two sons Naveen & Narendra Pasuparthi. |
| 114 | <b>Nensey's Poultry</b> , Valsad, Gujarat, <b>300 BPH</b> by RND around 2002. It is learnt to have been sold to an unknown party.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 115 | <b>Peninsula Foods Pvt Ltd</b> , a division of DeeJay Group, Bangalore, owned by David Lobo, set up a 1000 BPH Meyn plant in the late 1990's. For tax benefits it was run by a complex arrangement of four DeeJay companies. Closed around 1998 following labour unrest which coincided with Lobo's unsuccessful foray into broiler pure-lines with Ross – in direct competition with his one-time partner Dr B. V. Rao of VH. The plant was scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 116 | <b>Perfect Poultry Pvt Ltd</b> . Plant and HQ at 27 Ft Road, Chowk Green Field, Majitha Road, Amritsar, Punjab. Earlier 1000 BPH Storm plant which was replaced by Meyn's 4000 BPH plant. For the expansion they retained only one plucker, screw chillers and some secondary processing machines. Storm equipment, suitable after balancing, for <b>2000 BPH</b> is probably available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 117 | <b>Pioneer</b> , Hyderabad, Andhra Pradesh, 500 BPH by Dhopeswar. It has been scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |



|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 118                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>PL-480 plants.</b> Even before VH set up their first poultry processing plant in India in 1986, several carousel track type prototypes from Diamond of USA arrived as grant to the Indian Government under the PL-480 scheme. As far as we are able to ascertain, they were installed in Chandigarh, Mumbai, Aligarh, Orissa, Kerala and Andhra Pradesh. We have seen the one at Chandigarh (CPDO) and the one of <b>Mafoo</b> , Mumbai, the latter being bought in an auction by VH and mothballed at Kamshet. The Mafoo plant is probably scrapped by now, but the remaining machines may yet be put to use if auctioned by the government. |
| 119                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Prabhat Foods.</b> Established in the year 1963. They sell Chicken RTE products directly to some institutions and also retail through half a dozen outlets in Mumbai. Mhatre, the owner, is related to J. Desai of VH. <a href="https://www.prabhatpoultry.com">https://www.prabhatpoultry.com</a>                                                                                                                                                                                                                                                                                                                                            |
| 120                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Ratnagiri Cooperative</b> , Chiplun, Maharashtra, <b>300 BPH</b> by RND in 2003. Now closed and possibly scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 121                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Riverdale Foods</b> , Somatne, Maharashtra, 1000 BPH by Meyn around 1995 installed for Harianawala brothers, ex-employees of VH. It closed around 2003 when its arrangement with McDonalds became unprofitable. Was bought by ANC Holdings, Dubai for its prime location near the Mumbai-Pune expressway. The plant has been scrapped.                                                                                                                                                                                                                                                                                                        |
| 122                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Ruchi Agro Industries Ltd</b> , Chikmagalur: It is an RND manual plant of <b>unknown</b> capacity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 123                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Royal Foods Pvt Ltd/Shakir Shaikh</b> , Lohegaon, Pune, Maharashtra, <b>500 BPH</b> by Storm in Nov 2013.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 124                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Saaras Breeding Farms</b> , Odisha, a 500 BPH plant, currently under fabrication by Storm                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 125                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Sai Agri</b> , 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Sandip Mukherjee</b> , One time plant manager of <b>Arambagh Hatcheries</b> , is operating a 500 BPH manual processing plant at Gariahat, near Kolkata in West Bengal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 127                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Shiva Chicken</b> , Coimbatore. Manual dressing of <b>unknown</b> capacity <a href="http://www.shivaachicken.com">http://www.shivaachicken.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 128                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Shiva Farms</b> , Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 129                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Shiva Poultry Equipment</b> , Barnala city, is operating a <b>500 BPH</b> processing plant supplied by RND at GADVASU University in Ludhiana. Their brand name as “ <i>Hygrom Chicken</i> ”                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 130                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Sirsa Foods</b> , at 2, Lavkush Dharamshala, Balmiki Chowk, Opp. Khunger Sweets, Sirsa, Haryana. A <b>500 BPH</b> plant supplied by Storm. Expected to be commissioned by first quarter of 2024.                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 131                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>S.M. Feeds &amp; Farms Pvt. Ltd</b> , No. 294, Thiruvallur High Road, Alamathy Village, CCBF Post, Redhills Chennai – 600052. A 500 BPH plant commissioned by Storm in 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 132                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Sood Poultry</b> at Jullunder, Punjab. A <b>500 BPH</b> plant commissioned by Storm in 2020.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 133                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Srinivasa Farms Private Limited</b> . Plant at Mega Food Park, Kurichedu, Prakasam, AP. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. <a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a> . Order for the 2000 BPH plant was placed on Marel in late 2017. The plant is delivered but six years on we still have no information on its commissioning schedule.                                                                                                                                                                                                                                                       |
| 134                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>S.S.S Hatcheries</b> , 258/1-1, N.S.R.Road, Venkitapuram, Coimbatore-641025, Tamil Nadu. A 500 BPH plant set up by Storm in 2023                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 135                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Sujay Feeds</b> , SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, <b>200 BPH</b> manual slaughter.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 136                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Swift Foods</b> , Dadri, Uttar Pradesh. An automatic Stork 4000 BPH processing plant commissioned in the early 1990's by Jagdish Prasad, in competition with VH's Kamshet plant of 1000 BPH. It had an RTE section. Closed around 1995, then scrapped.                                                                                                                                                                                                                                                                                                                                                                                        |
| 137                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Taurus Foods</b> was set up in the mid 1990's. It produces marinated, smoked and cooked chicken RTE products at its plant at EPIP, Kasna Site 5 Greater Noida, for which it sources raw chicken meat from SHL Agro (now Suguna) and others. It has a capacity of 25 tonnes of RTE products per month <a href="https://www.taurusfoods.in">https://www.taurusfoods.in</a>                                                                                                                                                                                                                                                                      |
| 138                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Unitas Foods Pvt. Ltd</b> M. G. Road, Ghitorni, Delhi. Was incorporated in 2004 and operates QSR and food kiosks business as well as serving bulk buyers. It offers chicken meat, vegetable frozen <i>dimsums</i> or <i>momos</i> , rolls and <i>samosas</i> and claims to be the largest producer of <i>dimsums</i> in India. <a href="http://www.unitasfoods.com">http://www.unitasfoods.com</a>                                                                                                                                                                                                                                            |
| 139                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Unnat Feeds</b> , Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana. An order was placed on Lark Engineering. Learnt to be under fabrication from early 2021, but lack important approvals from the government, therefore commissioning date is unknown. The project may have been scrapped.                                                                                                                                                                                                                                                                                                                                            |
| 140                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Violet Industries/Souza Hatcheries</b> , Mangalore, <b>500 BPH</b> by RND. Not yet commissioned.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 141                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Vista Agriculture &amp; Food Products</b> , Khurdah Road, Bhubaneswar, Odisha, <b>750 BPH</b> by Storm Engg in 2013. Plant is closed                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 142                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Walvekar Hatcheries Ltd</b> , Pune. 1000 BPH plant was confiscated by the Mumbai Customs due to some irregularities. When auctioned several years later, the lot was picked up by Dr C. R. Behl of VH with a view to install it near Bangalore. Later, most of the machines were used by VH to replace run-down Marel machines at their Kamshet facility.                                                                                                                                                                                                                                                                                     |
| 143                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>WBFCSL/R. K. Doloi</b> , MLA, Midinapore, West Bengal, <b>300 BPH</b> by RND in 1998, ostensibly for the economic up-liftment 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.                                                                                                                                                                                                                                                                                                                           |
| 144                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Zorabian</b> , Khopoli, Maharashtra, Originally a drum plucker manual dressing facility, upgraded to <b>500 BPH</b> by RND in 2007. Following the death of Khorram Zorabian, the plant is now run by his daughter.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Note: This list is as exhaustive as we could make it and covers slaughter operations in the un-organized sector. Counting from within this list, we arrive at a total active or potentially re-deployable capacity of 38,350 BPH (34,450 in 44 plants + 5 of unknown cap) for primary slaughter. Where capacity is not known – we have assumed it to equal the average capacity of the remaining plants within this category. The total capacity includes Srinivasa Hatcheries and RFK Green because their equipment is physically at site, whether or not. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

### 3.7.1 Processing Building - Construction Methods and Proneness to Fire Hazards



I have included this section on safety with sandwich panel construction following news of a conflagration that occurred in Tamil Nadu in July 2021. Most people in the poultry processing industry know of this event but there is no news on it on the internet. On talking to the owners, I learnt that the fire occurred when the machinery was not in operation. There was only a small lighting load on the cables. Yet the fire occurred and took down the entire sandwich panel structure.

Sandwich panels are designed for thermal insulation and should be used for that purpose. In preferring to design poultry slaughterhouses in two parts – from arrival to screw chilling in brick masonry with RCC roof and the subsequent portioning, de-boning, packing, blast freezing and cold storage areas with sandwich panels and truss roof with drop ceiling, I have perhaps echoed the sentiments of IFBS Galileo<sup>[35]</sup> who write "In recent years, insurers in Europe, for example in the United Kingdom, have increasingly been confronted by major damage due to fires where sandwich panels were evidently involved in the construction. As a result, these light buildings have come in for increased scrutiny from insurers."

Do fires occur in poultry processing plants which apparently contain nothing combustible and are often too wet to light up? Yes, they do. We need to first admit that fires do occur with a high frequency in poultry and meat processing establishments and any other food processing plant where sandwich panels and ammonia gas refrigerant coexist. This might sound counter-intuitive, and one may be inclined to lightly dismiss the thought. Here is a list of some such fires that should convince you otherwise.



**Figure 29** Dense Black Smoke at Chinese Carrot Plant Fire *Source:* [www.dailyexcelsior.com/18-killed-fire-accident-chinas-food-factory](http://www.dailyexcelsior.com/18-killed-fire-accident-chinas-food-factory), 2 December, 2014

There may be three or more participants to fires in such premises. **First** there is ammonia gas, which is combustible. Since it is lighter than air, it tends to accumulate near the ceiling. Ammonia gas often leaks from joints in valves and flanges. You may not believe this but the US armed forces were at one time developing an internal combustion engine that could run on ammonia gas! However, ammonia has a strong smell and people can detect a leak and seek safety readily.

**Second**, there is sandwich panel. There are two types of panels in use for thermal insulation. These are *polyurethane* type (PUR) in which a foamed layer of this material is sandwiched between sheets of galvanized steel or stainless steel. The other 'improved variety' is touted as fire-retardant panels and carries a similar sandwich holding foamed *polyisocyanurate* (PIR) foam with added fire retardant between steel or SS sheets. **Both types burn** – the fire-retarding variety in turn produces vast quantities of dense black smoke (figure 28 – this plant had PIR panels) which causes asphyxiation and obscures exit signs in workplaces and corridors. Also, more importantly, when these polymers burn in limited air, they produce *methyl isocyanate* gas – the same that caused widespread deaths of over 1500 people in Bhopal in 1984.

Fire in sandwich panels can spread at a speed of 1.5 metres per second! See the eyewitness comment in event 7 in Table 29. In sections 3.7.2 and 3.7.3, I mention some important methods to reduce loss from fire, personal injury and death associated with such structures.

| <b>Table 30</b> Some Recent Refrigerant Gas Related Accidents in the Food Industry |                                                                                                                                                                                                                                                                                              |                                                                                         |
|------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
|                                                                                    | <b>Event</b>                                                                                                                                                                                                                                                                                 | <b>Probable Cause</b>                                                                   |
| 1                                                                                  | 3 June, 2013 at Jilin Baoyuanfeng Poultry Processing plant in Dehui, Jilin province, China. Facility completely gutted, 121 dead. (I did a detailed analysis of this event and posted the report on my website Chapter 5 of the Handbook on <a href="http://www.aptec.in">www.aptec.in</a> ) | Ammonia leak, in association with sandwich panels                                       |
| 2                                                                                  | 27 June, 2013 Imperial Food Products chicken processing plant at Hamlet. The fire resulted in the death of 25 people and 56 injuries.                                                                                                                                                        | Hydraulic oil leaks into an oven, fire spreads in sandwich panels & embedded gas pipes. |
| 3                                                                                  | 14 June, 2015 the Tyson plant at Farmington Hills Ice Arena plant in Michigan, USA. Facility gutted. Workers evacuated to safety.                                                                                                                                                            | Power surge caused ammonia leak at relief valve                                         |
| 4                                                                                  | 17 June, 2015 at Frigorio Allana in Ghaziabad, India. Packing buffalo meat. Facility gutted. 5 injured but survived.                                                                                                                                                                         | Suspected ammonia leak, in association with sandwich panels                             |



|                         |                                                                                                                                                                                                                                                                                                                                                                                   |                                                                   |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| 5                       | 17 June, 2015 at Koch Food Plant at Montgomery, USA. Facility gutted. Workers evacuated to safety                                                                                                                                                                                                                                                                                 | Ammonia leak                                                      |
| 6                       | 15 March, 2017 at Katiyar Cold Storage for potato in Shivrajnagar, Kanpur, India. Facility gutted. 5 dead.                                                                                                                                                                                                                                                                        | Ammonia leak, in association with sandwich panels                 |
| 7                       | 17 November, 2017 at Longyuan Food Co Ltd's carrot packaging plant in Shouguang City, China. Facility gutted. 18 killed, 13 injured, 3 missing. There were many evacuation routes but none visible in the dark. <b>"The fire engulfed 100 metres of workshop in less than a minute"</b> , Liu Fangping, a migrant worker from northwest China's Gansu Province told Industryweek. | Ammonia leak, in association with flame retardant sandwich panels |
| 8                       | 28 January, 2021 at Foundation Food Group poultry plant, Georgia USA. The plant uses liquid nitrogen as a cryo-refrigerant. Facility gutted. Killed 6 and injured 12 before the premises were evacuated.                                                                                                                                                                          | Nitrogen leakage displaced air and caused asphyxiation.           |
| 9                       | 21 March, 2021 at South Pacific Meats in Awarua, Invercargill a Southland meat processing plant, New Zealand. There was full evacuation of personnel and no injuries were reported.                                                                                                                                                                                               | Ammonia leak possibly following a power cut                       |
| Sources <sup>[36]</sup> |                                                                                                                                                                                                                                                                                                                                                                                   |                                                                   |

**Third** there may be packing material consisting of plastic, paper or wood in the workplace. And **finally** there may be a gas or liquid fuel line passing close to the sandwich panel structure!

### 3.7.2 Historic Plant Fires that led to New Standards

**Table 31 A Summary of Important Rules to Follow With Sandwich Panels and Ammonia Refrigeration**

| <b>1 Planning Stage</b>                            |                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.1                                                | Planning adequate and sensible exits. [Exit routes are divided into exit access, exit (route) and exit discharge]. | Exit access and exit discharge shall not be lockable either from inside or from outside.                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|                                                    |                                                                                                                    | Emergency exits access shall consist of easily shatter-able glass pane, and for shattering the same a hammer shall be provided at a convenient location near the door.                                                                                                                                                                                                                                                                                                                                                      |
|                                                    |                                                                                                                    | Exits routes consisting of corridors leading to exit discharge shall be a minimum 720mm wide & 2300mm high and shall not be obstructed by stored material.                                                                                                                                                                                                                                                                                                                                                                  |
|                                                    |                                                                                                                    | Exit signs shall be in local language(s) + English + pictogram on exit access.                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|                                                    |                                                                                                                    | Exit signs shall be lit by a self-contained power supply, so that outage of power lines do not cause the sign to blank out.                                                                                                                                                                                                                                                                                                                                                                                                 |
|                                                    |                                                                                                                    | Exit signs shall be at both the top of the door and the bottom. With the use of PIR panels billowing black smoke hangs close to the ceiling and obscures signs close to the ceiling. See figure 9.                                                                                                                                                                                                                                                                                                                          |
| 1.2                                                | Planning Fire Blocks                                                                                               | Every workplace shall have two exits, preferably placed at opposite ends of the workspace. Doors shall be side hinged, swinging out of the work place.                                                                                                                                                                                                                                                                                                                                                                      |
| 1.3                                                | Planning RTE Areas                                                                                                 | Fire blocks may be required in the design of certain concealed spaces, and at penetrations into pipe chases and ventilation shafts.                                                                                                                                                                                                                                                                                                                                                                                         |
|                                                    |                                                                                                                    | Polyurethane should not be used in areas immediately adjacent to or above combustion equipment (such as furnaces and chimneys), high temperature process equipment or piping                                                                                                                                                                                                                                                                                                                                                |
|                                                    |                                                                                                                    | Where open flame cooking is to be done such as in commercial fryers, ovens woks etc, the space shall be separated from urethane foam structures by a masonry wall/thermal barrier that can contain flames for a period of 2 hours                                                                                                                                                                                                                                                                                           |
| <b>2 Installation or Construction Stage</b>        |                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 2.1                                                | Safety during storage and construction                                                                             | Foam board-stock shall be stored at construction site in limited quantities, in divided lots, in accessible locations, free from ignition hazards, with fire alert & water spraying system.                                                                                                                                                                                                                                                                                                                                 |
|                                                    |                                                                                                                    | There shall be no welding or metal cutting metal in contact with these foams.                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 2.2                                                | What is permitted                                                                                                  | PUR or PIR foamed-on-site foams may be used to fill cavities within masonry walls or under grade-level concrete floors. Such foamed-on-site polyurethane chemicals should be mixed and applied only by applicators trained in their proper use and familiar with their limitations.                                                                                                                                                                                                                                         |
| <b>3 Interaction With Other Systems for Safety</b> |                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 3.1                                                | Refrigeration Piping                                                                                               | Within the workspace all pipes/fixtures carrying ammonia shall be of welded construction only. Any fixtures requiring flanges being bolted shall not be allowed inside the workspace                                                                                                                                                                                                                                                                                                                                        |
| 3.2                                                | Ammonia sniffers                                                                                                   | Are required in all work areas where ammonia is likely to spread in the event of leaks                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 3.3                                                | Open flame in cooking equipment                                                                                    | Such sections shall be housed only within masonry enclosures or rooms (thermal barrier). The masonry enclosure shall be able to withstand and contain a fire for at least 2 hours, not letting it spread out of the enclosure.                                                                                                                                                                                                                                                                                              |
| 3.4                                                | Sandwich panel roofs                                                                                               | Shall not support electrical power or signalling cables directly because when so supported, in the event of a fire, these cables burn rapidly. Since these cables may be part of the fire safety installations such as emergency lighting, alarm system, fire and smoke sensors, emergency exit signs on doors, etc, they will fail in the event of a fire and not be able to perform the function they were intended to. If cables are required to traverse above a sandwich panel roof, they may be supported by trusses. |
| 3.5                                                | Thermal Barriers                                                                                                   | Building codes may require foam insulation to be separated from the interior of a building by an approved thermal barrier such as 13mm gypsum wallboard (drywall). Although some PUR/PIR                                                                                                                                                                                                                                                                                                                                    |

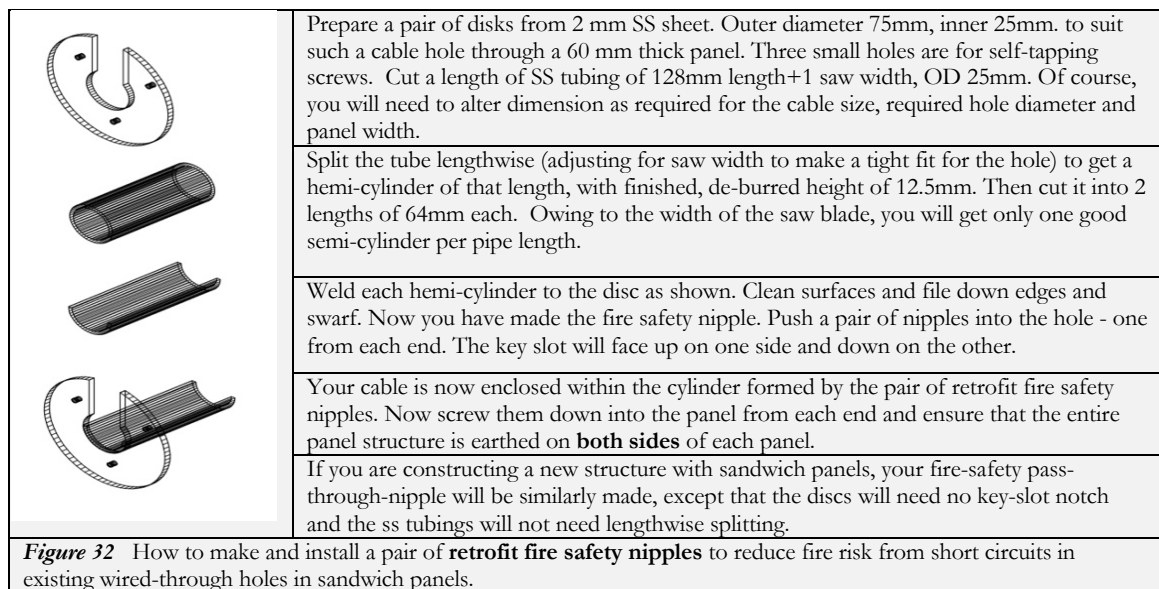


|                                                |                  |                                                                                                                                                                                                                                                                                                           |
|------------------------------------------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                |                  | panels have earned approval without thermal barriers through fire tests such as ANSI/UL 1256, FM 4450, UBC Standard 26-3, FM 4880 and DIN 4102-2.                                                                                                                                                         |
|                                                |                  | Where thermal barrier conditions prevail thermal barrier are required both above and below the panel for suspended ceiling. This makes them unsuitable for wet processing plant areas because kraft paper liners on gypsum boards attract fungal infestation in wet conditions.                           |
| 3.6                                            | Sprinklers       | In many cases, type of occupancy and type of construction also may require the addition of sprinkler protection and/or smoke detectors. Sprinklers are required except in wet areas, walk-in coolers or freezers of less than 400-square-foot area are considered fixtures and do not require sprinklers. |
| <b>4 Orientation and Training of Personnel</b> |                  |                                                                                                                                                                                                                                                                                                           |
|                                                | Training, Drills | All personnel to be trained about emergency response, and periodic fire and disaster response drills done to orient them.                                                                                                                                                                                 |

In table 30, I lay down a selection of procedures that need to be followed in such constructions. They have been culled from the efforts of Tyson, who experienced a number of fires at their meat plants<sup>[37]</sup>, the work of US fire department, emergency response teams, safety management experts, an inspection and analysis of the Hamlet<sup>[38]</sup> fire in the Loss Prevention Bulletin of 2018 summarizing the events of April 2018 in a copyrighted article by the Institution of Chemical Engineers. They also take into account Galileo Kreatives<sup>[39]</sup> and US Alliance for the polyurethane industry<sup>[40]</sup>

The Hamlet chicken processing plant, operated by Imperial Foods in the town of Hamlet, North Carolina, USA was located in a single-storey brick and metal building that was eleven years old and had been modified from an older building going back to early 20th century. The fire caused 25 deaths and 56 injuries. Following this fire, the company never recovered.

Almost at the same time a fire occurred at the Tyson Foods turkey plant in Little Rock, Arkansas. All workers were evacuated within minutes without any loss of life or limb. The difference lay in the fact that the Hamlet plant did not meet safety standards and dodged inspections, while the Tyson plant incorporated full safety measures, complied with standards and followed GMP. Those who wish to examine the contrast between the two plants may refer the US Fire Administration Report on the subject<sup>[41]</sup>



Because a large number of PUR/PIR constructions exist in the broiler and meat industry today, many of which may have been constructed without complying with proper standards, I believe they need to make corrections where ever possible. I have listed the fire-safety standards to be followed when working with sandwich panels.

If you undertake such construction jobs, make sure that you follow them. If you are an insurer, make your policies conditional upon your insurer, his contractors, sub-contractors and suppliers follow them. And if you are an entrepreneur setting up new facilities which use these materials, make sure your efforts nurture, protect



and save your employees instead of creating death traps. Now I will describe a device to correct one of the most important defects in sandwich panel constructions – one that can use this retrofitting correction.

### 3.7.3 Retrofitting Threaded-through Nipples for Cable Entry Through Sandwich Panels

When lay fabricators work with PUR and PIR sandwich panels, they display their ignorance of safety standards that are essential for working with these materials. All such construction requires one to pass electrical cables through panels. The sloppy approach is to drill a hole and thread the cables through the holes thus drilled. Such an approach is dangerous.

When you drill through panels, the steel cladding develops sharp edges and retains drilling swarf. As you pull cables through, the insulation gets stripped off and exposes the conductor to metal surfaces of the panel. As a result short circuits are bound to occur sooner or later. With relative movement between the cable and panel, that sort circuit may occur at any time, with heavy current flowing through the cables or even with practically no current flowing through. The short circuit is accompanied by a spark which may set alight the insulating polymer.

So if you are about to begin construction, run wires through SS sleeves. If you are building a new sandwich panel structure, then the thread through nipple will consist of two discs without key slots and a round piece of SS tubing (see figure 32).

### 3.8 APTEC Industry Report Upload Of 9 April 2024 (Grosscap 1,74,700)

**Table 33** List uploaded in April 2024 of organized sector poultry processing plants (existing, ordered and under construction, with a Grosscap of 1,74,700 BPH in 69 units)

| 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) <a href="http://www.alchemist.co.in/">http://www.alchemist.co.in/</a> This link is no longer functional. | Meyn   | 2000     | Commissioned in 2004. Since 2017 it has been operated by Star Foods under a lease agreement. Also leased is the 135 t per month RTE capacity of Alchemist. Within the premises Alchemist operates a manual dressing unit to service web orders for their Republic of Chicken brand. The Star Foods plant will be commissioned in the second quarter of this year and this plant will then be available for processing its own brand or may again be available for lease. |
| 2                                                                         | Al Golden, Dera Bassi, Punjab                                                                                                                                                     | -      | 2500     | Being set up by a commission agent at Ghazipur Mandi who operates under four identities viz Aizal Foods Pvt Ltd, Al Golden Foods Pvt Ltd, Golden Foods Specialities Pvt Ltd and Labib Foods Pvt Ltd. This group of entities has purchased land and erected the compound wall. Their plant may be on stream by mid 2025.                                                                                                                                                  |
| 3                                                                         | AOV Agro Foods Pvt Ltd, Khasra Nos. 20, 21, 22, Village Tapkan, Tehsil Nuh, Haryana 122107. HQ at C-22/25 Sector 57 Noida 201301                                                  | Meyn   | 4000     | Promoted by O. P. Arora of AOV Group (mainly in red meat), who acquired the Nuh facilities from Moin Akhtar Qureshi, one time biggest buffalo meat exporter in India. It was an RND line, commissioned in 2016. Then modified to 2000 BPH in 2017. Replaced with a 4000 BPH line from Meyn in 2nd quarter, 2022.                                                                                                                                                         |
| 4                                                                         | AV Ventures, Plot Number-72 A, Panchkula Industrial Area Phase 1, Panchkula, Haryana. (Also known as Chandigarh Poultry Centre)                                                   | Storm  | 1200     | Initially AOV operated Nagpal Frozen Foods, Barwala, Haryana, a 1000 BPH plant set up by RND in 2007. After its closure on non-compliance with zoning laws, AV Ventures set up a new 1200 BPH poultry & 100 goats per day plant on industrial estate land in Panchkula. Both lines came into operation in January 2023. Mainly serving the defence sector.                                                                                                               |
| 5                                                                         | Ayishas Foods Methala, Eriyad, Kandamkulam P.O, Kodungallur, Thrissur, Kerala 680669. <a href="mailto:info@ayishasfoods.com">info@ayishasfoods.com</a>                            | Deccan | 1500     | Starting in 2016 as a wheat and rice miller, this company transformed itself into a seller of ready to cook pre-mixes and in 2022 set up the poultry processing plant to expand its product mix. They sell under the brand name Ayisha's Tasty Magic.                                                                                                                                                                                                                    |



|    |                                                                                                                                                                                                                                                       |           |      |                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 6  | Baraka Overseas Pvt Ltd, Kallai, 1st Cross Road Oddedagully, Harekala, Mangalore.                                                                                                                                                                     | Deccan    | 1500 | Established as a partnership firm in 1979 and incorporated in 2006. This company has extensive national and international presence is processed seafood. In 2022 its poultry processing plant came on stream.                                                                                                                                                                                                                              |
| 7  | Baramati Agro, Baramati, Maharashtra Baramati Agro Ltd. 4th Floor, Farena Corporate Park , Kharadi Bypass Rd., Hadapsar, Pune- 411028, India. Plant at Pimpri, Baramati.<br><a href="https://www.baramatiagro.com/">https://www.baramatiagro.com/</a> | RND/Storm | 2000 | 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, doubled to 1500 BPH in 2020 by RND. It was finally expanded to 2000 BPH in end 2022 by Storm. They also operate a CFS facility for RTE products- around 80 t/month.                                                                                                                        |
| 8  | Bhagyashree Chicks, Rajguru Nagar, Pune                                                                                                                                                                                                               | Deccan    | 1000 | This company is a broiler integrator with 18000 Cobb breeders. The plant is under installation and expected on stream by this year end.                                                                                                                                                                                                                                                                                                    |
| 9  | Bharat Agrovet, Plant at Ganjimutt, Mangalore, Karnataka. HQ behind Annapoorneshwari Building, Mahaveer Circle, Pumpwell, Mangalore, Karnataka.                                                                                                       | RND/Storm | 2000 | Bharat Agrovet started with the old plant of Lifeline Feeds built by RND. Was reconditioned & reinstalled by Storm in Nov 2015 with a capacity of 1500 BPH. Now expanded to 2000BPH. The group has plans 10 for a modern 3000 BPH imported plant for which land has already been purchased and capital subsidy approved. This facility will come under the Provit name. See also Provit and Ideal Chicken                                  |
| 10 | 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<br><a href="https://cpbrandindia.com">https://cpbrandindia.com</a>               | Meyn      | 2000 | Commissioned in January 2016. It is the only air-chilling plant in India. Planned expansion went into abeyance for lack of space. Their RTE sold as Five Star Chicken (ref part B of this table). In early 2023 they were learnt to face short supply of breeding stock. Are now in the process of revamping their operation & plant.                                                                                                      |
| 11 | 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 which is listed in part B of this table Existing plant was commissioned in 2021. Learnt to be planning revamping it.                                                                                                                                                                                                        |
| 12 | Doon Valley Poultry, 54 A Race Course Dehradun.                                                                                                                                                                                                       | Storm     | 1500 | Ordered in first quarter 2023. Under fabrication, expect to be in operation by mid 2024                                                                                                                                                                                                                                                                                                                                                    |
| 13 | Fresh Culture, Plot No 30 Jasmine Sri Ganesh Nagar 625/1b Mannur Koot Road Mannur, Sriperumbudu Tamil Nadu 602105                                                                                                                                     | Deccan    | 1000 | Operate a hand dressing facility producing fresh and frozen chicken and portions which they sell from their own store. Their plant is expected to be on stream by last quarter 2024                                                                                                                                                                                                                                                        |
| 14 | Godrej Tyson Foods. Plant at Taloja, Maharashtra<br><a href="https://www.godrejagrovet.com/godrej-tyson-foods">https://www.godrejagrovet.com/godrej-tyson-foods</a>                                                                                   | Marel     | 3000 | Expanded from original 2000 BPH of 2001 to 3000 BPH. It is located in an industrial estate that lies between two nearby village whose inhabitants regularly protest against the smell nuisance. May be planning relocation.                                                                                                                                                                                                                |
| 15 | Godrej Tyson Foods. Plant at Hoskote, Karnataka<br><a href="https://www.godrejagrovet.com/godrej-tyson-foods">https://www.godrejagrovet.com/godrej-tyson-foods</a>                                                                                    | Marel     | 3000 | Set up in 1999 as a 1000 BPH RND plant which was scrapped in 2007 after an Aptec audit. A 2000 BPH Marel plant was set up in an adjacent plot of land. Expanded in 2012. In 2008 Godrej tied up with Tyson. Their brand is Real Good . They also produce RTE products on a 400Kg/hour used line sourced from The Waterbase of Nellore, a failed fish RTE unit. Falling within a smart city zone, the plant now under pressure to relocate. |
| 16 | Goel Foodworld, Plot no 23A, Industrial Area, Shogi, Shimla, Himachal Pradesh<br>Plant at Khasara No.-22, 47, 48 UP Mohal Bumbli, Tehsil- Ghanari, District Una 177201, Himachal Pradesh.                                                             | Storm     | 3000 | A replacement of the existing 500 BPH plant by Dhopeswar commissioned over a 5 years back. First expansion executed by Storm. Now relocated to industrial area. This plant includes existing machines, old Meyn machines from European refurbishers, and new machines from Storm. The plant was commissioned early this year.                                                                                                              |
| 17 | Goldchick Hatcheries and Foods Ltd. Plant at Sadashivpet near Hyderabad, Telangana. HQ at Plot No.151, Kavuri Hills, Madhapur, Hyderabad,Telangana<br><a href="http://goldchick.in">http://goldchick.in</a>                                           | Marel     | 2000 | Commissioned in Sept 1998, and in intermittent operation since then. First to export Indian processed chicken and also first in the world to install an automatic re-hanging machine and continuous rendering plant at 2000 BPH capacity.                                                                                                                                                                                                  |



|    |                                                                                                                                                                                                                                                                             |           |      |                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 18 | Golden Hatcheries Pvt Ltd, Plant at Davangere, Karnataka. HQ at Golden Hatcheries Building #3, Queen's Road Cross near Congress Committee office, Bangalore, Karnataka. <a href="http://goldengrp.co.in/">http://goldengrp.co.in/</a>                                       | Meyn      | 3000 | Part of the Golden Group companies started in 1985 and incorporated in 1988. Placed order on Meyn in 2021 for setting up a green field unit close to VH in Davangere. Their manual slaughterhouse within Bangalore city is expected to have been closed with commissioning of this plant in August 2023.                                                                                                                                        |
| 19 | Healthy Choice Poultry, village and post Wadala, Tehsil Majitha, Distt Amritsar, Punjab                                                                                                                                                                                     | Meyn      | 1200 | Plant owned by Gurpuran Singh Randhawa. Commissioned in end 2023.                                                                                                                                                                                                                                                                                                                                                                               |
| 20 | Hitech Hatch, Metropolitan Co-Op. Housing Society Ltd., Sector B Plot 28, Canal South Road, Kolkata 700105. West Bengal. <a href="mailto:help@hitechhatchfresh.com">help@hitechhatchfresh.com</a> <a href="https://hitechhatchfresh.com/">https://hitechhatchfresh.com/</a> | -         | 2500 | A major integrator in West Bengal, owned by Radheyshyam Roy. This company entered the contract farming business in 2004-05. It now produces 5 lakh eggs per week, the DOCs hatched from which are distributed among 6000 contract farmers. It has already purchased land for its processing facility and been awarded capital subsidy by the government.                                                                                        |
| 21 | Huda Foods Pvt Ltd. Plant at Kondhwa. HQ at FL-I-403 Unity Park, SN-43 Kondhwa Kd, behind Sheetal Petrol Pump, Pune, Maharashtra.                                                                                                                                           | Deccan    | 1500 | Incorporated in 2020 by Sarfraz & Aijaj Momin. The plant processes around 10,000 BPD, with live birds procured from their own integration of 6 lakh per month.. The company proposes a second slaughterhouse of 3000 BPH at Sukhed near Satara in Maharashtra.                                                                                                                                                                                  |
| 22 | Ideal Chicken Highlands, Falnir Road, Mangalore <a href="http://www.idealchicken.in">http://www.idealchicken.in</a>                                                                                                                                                         | RND/Bayle | 1000 | A 500 BPH plant from RND commissioned in 2013, later to be replaced by a 1000 BPH plant from Bayle was purchased by Ideal Chicken, owned by Vincent Cutinha around 2017. Ideal Chicken runs its own home delivery and also processes for Fresh-To-Home and Licious.                                                                                                                                                                             |
| 23 | Japfa Comfeeds Pvt Ltd, 91 Sakore Nagar Vimannagar, Pune 411014, India <a href="https://japfaindia.com/">https://japfaindia.com/</a>                                                                                                                                        | Marel     | 3000 | Work on constructing a 3000/6000 BPH plant at Village Pedgaon, Tal Daund, Distt Pune in Maharashtra is expected to end with the commissioning of the plant in the first quarter 2024. Hitherto they used 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 with the closure of Hybro. |
| 24 | KPF Chicken Kavumkandam Junction, Kadanad P.O Kavumkandam, Pala, Kadanad Meenachil, Kottayam – 686653. Kerala <a href="mailto:kpfchicken@gmail.com">kpfchicken@gmail.com</a> <a href="https://www.kpfchicken.co.in/home">https://www.kpfchicken.co.in/home</a>              | RND       | 1000 | Operate a manual or semi-manual processing shop and are setting up a 1000 BPH processing plant supplied by RND, expected to be on stream by end 2024. The company was started in 1985 by Shaju Sebastian as an integrator of Cobb.                                                                                                                                                                                                              |
| 25 | Kuljas Rai Poultry, Amritsar. Also known as Rai Poultry. Plant at Wadala Viram Majitha, Amritsar -143601, Punjab                                                                                                                                                            | Storm     | 3000 | Kuljas Rai Poultry set up a 300 BPH Dhopeswar plant at Chamrang Road, Amritsar, Punjab. Under orders to exit municipal limits, they shut this plant and put it up for sale. The new Storm plant near Amritsar, is in operation from first quarter 2020. Also make RTE poultry products for local markets.                                                                                                                                       |
| 26 | KGN Processed Poultry, Pimpri, Maharashtra. Dehu Alandi Road, Shelar Basti, Chikhali, District Pune 412114.                                                                                                                                                                 | Storm     | 1500 | This is a franchise operator and commercial broiler farmer who sells processed chicken through its franchise stores and Big Basket. Its processing activities started with a manual plant of 300 BPH. The Storm plant was commissioned in 2018.                                                                                                                                                                                                 |
| 27 | Khazir Agro. Plant I.G.C. Lassipora, Srinagar, Srinagar U.T. HQ 4th Floor, Opp New Era School, Rai Bagh, Srinagar, Srinagar U.T.                                                                                                                                            | RND       | 1000 | Production commenced in January 2021. Production is irregular and output is at minimal capacity, mainly owing to problems of live bird procurement logistics.                                                                                                                                                                                                                                                                                   |
| 28 | Kwality Animal Feeds Pvt Ltd. Plant 763/19, A/P-Rajgoli, Chandgad, District Kolhapur, Maharashtra. HQ 12, Kwality House Machhe, Industrial Area, Belgaum, Karnataka <a href="http://kwalityhouse.in/">http://kwalityhouse.in/</a>                                           | Meyn      | 3000 | Ordered as a 2000 BPH plant in Dec 2014. Commissioned in June 2016. Expanded to 3000 end 2018. Sell under the brand name Belchick.                                                                                                                                                                                                                                                                                                              |
| 29 | Lifeline Feeds (India) Pvt Ltd. HQ at Shri Manjunatha Chambers, Ratnagiri                                                                                                                                                                                                   | Meyn      | 3500 | Owned by K. Kishore Kumar Hegde. 300 BPH RND plant commissioned in 2002; sold to Amrit Feeds and                                                                                                                                                                                                                                                                                                                                                |



|    |                                                                                                                                                                                                                                                                         |              |      |                                                                                                                                                                                                                                                                                                                                                                                                   |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Road, Chikmagalur, Karnataka. Plant at nearby industrial estate in 8 acres occupying four adjacent industrial plots separated by 3 roads.<br><a href="https://www.lifelinefeeds.com">https://www.lifelinefeeds.com</a>                                                  |              |      | replaced by 1900 BPH RND plant around 2005. Again replaced by a Meyn 3000 BPH plant in June 2015. Sell through over 40 company-owned retail outlets in Karnataka. They have now expanded to the present capacity of 3500 BPH.                                                                                                                                                                     |
| 30 | Maval Agro, Talegaon, Maharashtra                                                                                                                                                                                                                                       | Deccan/Storm | 1000 | Leased from their owners (Premium Chick Feeds) by Japfa. Expanded from the original to 1000 BPH in 2023 by Storm under orders from Japfa.                                                                                                                                                                                                                                                         |
| 31 | Mayuri Broiler Breeding Farms Pvt Ltd at Sy 537/A, 537/E, Village Yellikal, Kalwakurthy Mandal, Nagarkurnool District, Telangana 509324                                                                                                                                 | Storm        | 1000 | Mayuri Farms, owned by Harsha Poultry, operated a manual dressing plant of 400 BPH in Telangana. Their new plant has recently been commissioned in early 2024.                                                                                                                                                                                                                                    |
| 32 | Meat & Eat, (incorporating Kavi Proteins & Feed Pvt Ltd), 26, Sindhi Colony, 1 <sup>st</sup> Cross, J C Road, Bengaluru 560002, Karnataka. gcc@kavigroup.in                                                                                                             | Storm        | 1000 | Meat And Eat is a franchisee of home delivery RTE/RTC products. The processing is done at Kavi Proteins plant which has a 1000 BPH Storm plant. The operations suffered business loss during the Covid lockdown but now appear to have stabilised                                                                                                                                                 |
| 33 | Nafees Poultry Plot No 129, East Marredpally, Hyderabad 500026, Near Delhi Public School, Shanthi Niketan Society, Mahindra Hills, Hyderabad.                                                                                                                           | RND          | 1000 | Operated by Sarabjot Singh, son-in-law of Harbans Singh, one time owner of Starchick (see Sethwala). This plant started around 2013.                                                                                                                                                                                                                                                              |
| 34 | Nice Meat Factory, 86 Surabhi Nagar West, 8th Phase, Sadduguntepalya, Bangalore                                                                                                                                                                                         | Deccan       | 1000 | Wholesaler of commercial cold storage, chicken, fish & meat. Their 1000 BPH plant is being set up by Deccan Automation and is expected to be on stream this year.                                                                                                                                                                                                                                 |
| 35 | Penn Foods Pvt Ltd. Plant at Karjat, Maharashtra. HQ at Clucky's Products LLP, 294, S. Bhagat Singh Road, Fort, Mumbai<br><a href="https://cluckysfriedchicken.com/">https://cluckysfriedchicken.com/</a>                                                               | Bayle        | 1500 | Commissioned in 2016. Is functioning as a merchant processor, slaughtering for Licious and McDonalds under their brands at around 14000 BPD. A similar arrangement with CP is learnt to have been terminated. Also selling through Licious, Japfa, Barbecue Nation at Sayaji. Brand name is Clucky's.                                                                                             |
| 36 | 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.                                                                                                                                                                                                                                                   |
| 37 | Premium Chick Feeds Pvt. Ltd 401-404, C Wing, Nyati Millenium, Datta Mandir Chowk, Pune 411014, Plant at Yeral Gut No. 330 Near Rockhill Hotel Sutarwadi, Kolad-Pune Road 402308<br><a href="https://www.premium-chickfeeds.in/">https://www.premium-chickfeeds.in/</a> | Storm        | 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                                                                                                                                  |
| 38 | Pragati Broilers, Krishnagiri, Karnataka                                                                                                                                                                                                                                | Meyn         | 2500 | This plant, for a 2500/4500 BPH capacity is expected to be commissioned by mid 2024                                                                                                                                                                                                                                                                                                               |
| 39 | Premier Breeding Farm, Tirupur                                                                                                                                                                                                                                          | Deccan       | 1500 | Commissioned in 2022                                                                                                                                                                                                                                                                                                                                                                              |
| 40 | ProTAC Foods International Private Ltd, Plat & HQ at 115, Allasandra. Behind RTO Check post, NH4, Mulbaghal Taluk, Karnataka                                                                                                                                            | Meyn         | 4400 | Commissioned in June 2016 at 2000 BPH. Planned as a merchant processor with mandi sourced birds. Operating now on contract at 24,000 BPD for Tri Star (Kerala), Nandus, Licious, Shanthi (Fortune), and Fresh To Home. Commissioning to 4400 was completed in mid 2023. Next planned expansion to 7000 BPH.                                                                                       |
| 41 | Provit Foods Private Limited, Payannoor, Kerala                                                                                                                                                                                                                         | Deccan       | 1000 | This is one of three locally built plants under the Vincent Coutinha Family                                                                                                                                                                                                                                                                                                                       |
| 42 | Provit Foods Private Limited, Payannoor, Kerala                                                                                                                                                                                                                         | -            | 3000 | Provit Foods is the flagship company of Vincent Coutinha, encompassing Bharat Agrovvet and Ideal Chicken. Also operates as integrator under the banner of Anupama Feeds & Farms. It retails processed poultry through over 20 outlets in Kerala & Karnataka. Under the name Provit the group now plans setting up an imported plant when all will be located close to each other, near Mangalore. |
| 43 | RM Delicious Foods, Khatoni No 102, Khewat No 92, VPO Seenk, near Bus Stand Tehsil Israna, Panipat, Haryana 132103,                                                                                                                                                     | Meyn         | 1300 | Owned by Rakesh Malik as part of his RM Agro Group of Companies. Plant was commissioned in 2023.                                                                                                                                                                                                                                                                                                  |



|    |                                                                                                                                                                                                                                          |                 |       |                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 44 | 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.                                                                                                                                                                                                                                                      |
| 45 | 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                                                                                                                                                                                                                                                                  |
| 46 | Safa Foods, 535 Fathima Manzil 1st Floor, Near Old Kavitha Theatre, Dr Nanjappa Road, Gandhipuram-Coimbatore 641012                                                                                                                      | RND             | 1000  | Under fabrication. Expected to be on stream by 2024 end.                                                                                                                                                                                                                                                                                                                                                                  |
| 47 | Samrans Fresh Meat Products Pvt Ltd. Kothamangalam, Ernakulam Kerala                                                                                                                                                                     | RND             | 1000  | Samrans was incorporated in 2022 by Najeeb Salim who is a Logistics & Supply chain professional with experience in Kuwait                                                                                                                                                                                                                                                                                                 |
| 48 | Sethwala Foods Pvt Ltd, plant at Talasari, Palghar, Maharashtra.                                                                                                                                                                         | Marel/RND/Storm | 2000  | 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 as Star Chicks and later sold it to Hanifbhai of Sharon Broilers, who in turn sold it to Sethwala in 2012. Installed by Dhopeswar shortly thereafter; expanded and re-commissioned with inputs from RND and Storm. The brand name is Seth's |
| 49 | Shalimar Corporation, Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata <a href="http://shalimarcorp.in">http://shalimarcorp.in</a>                                                            | Meyn            | 6000  | Commissioned in Sept 2014 at 2000 BPH. Expanded to 2600 in 2018. Expanded to 6000 BPH in mid 2023. Shalimar sells under the brand name Total Chicken.                                                                                                                                                                                                                                                                     |
| 50 | Shalimar Corporation, HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata. <a href="http://shalimarcorp.in">http://shalimarcorp.in</a>                                                                                                  | Meyn            | 2500  | This new plant of initial capacity of 2500 BPH is coming up at Una in Himachal Pradesh. Commissioning was expected by mid 2024, but has been delayed.                                                                                                                                                                                                                                                                     |
| 51 | Shanthi Feeds. Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore <a href="http://shanthifeeds.com">http://shanthifeeds.com</a>                                                                                           | Meyn            | 12000 | 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.                                                                                                                                                                                                             |
| 52 | Sivasakthi Agro Foods, plant at Udumalpet, Tamil Nadu. HQ 793/18, Kumaralingam West Village, Rudrapalayam Post, Madathukalam Taluk, Tirupur Dist. Tamil Nadu <a href="http://www.sivasakthifoods.com">http://www.sivasakthifoods.com</a> | Marel           | 5000  | Originally planned as a 1000 BPH facility in mid 2012. Changed to 2000 BPH in 2013 and came into production in early 2016. Expansion to 3000 BPH commenced in May 2019. By 2022 they had expanded to the present capacity. Brand name is Suprieya                                                                                                                                                                         |
| 53 | SKM Feeds (earlier known as VKS Farms). Plant at Dindigul, Tamil Nadu. HQ Nanjai Uthukuli, Modakurichi Tamil Nadu <a href="https://www.skmpornafoods.com">https://www.skmpornafoods.com</a>                                              | Meyn            | 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 3rd quarter 2022.                                                                                                                                                                                             |
| 54 | Sky Foods, 402/82 Kiluvankattur, Andiyagoundanoor, Udumalpet, Tiruppur Dist, TN 842154 <a href="http://skyfoodagrofarm.com">skyfoodagrofarm.com</a>                                                                                      | Deccan          | 1500  | Incorporated in 2018 by Ram Prasad, an ex-plant manager of Shanthi Feeds. This company is an integrator and sells live broilers, processed chicken and portions under the brand name Sky Fresh.                                                                                                                                                                                                                           |
| 55 | Skylark Foods, plant at Rai Food Park, Sonapat, Haryana. HQ at Dharamgarh Road, Safidon, Distt. Jind, Haryana <a href="http://skylarkfoods.com">http://skylarkfoods.com</a>                                                              | Meyn            | 1000  | 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 under the brand name Nutrich.. Skylark is a major layer integrator.                                                                                                              |
| 56 | Sneha Farms Pvt Ltd, plant at Addakul, Hyderabad-Bangalore Highway, Telangana. HQ at Plot No 30, Survey No. 22, 17AA, Kondapur, Hyderabad <a href="http://snehagroup.co">http://snehagroup.co</a>                                        | Marel/Meyn      | 12000 | 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.                                                                                                                                                                                                 |



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| 57                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Srinivasa Farms Private Limited, plant at Taniki Village, Kowdipally Mandal, Medak District, Andhra Pradesh. HQ at 169, Road 13A, Jubilee Hills, Hyderabad.<br><a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a> | Bayle         | 1000         | Ordered May 2015. Commissioned in Sept 2017. Operating at 1500 BPH.                                                                                                                                                                                                        |
| 58                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Star Foods Pvt Ltd, proposed plant at Ladhwal Food Park, Ludhiana. HQ at Sampoorna Feeds, Phagwara, Punjab<br><a href="http://sampoornafeeds.com">http://sampoornafeeds.com</a>                                                            | Marel         | 4000         | Construction in progress at site. Commissioning expected by mid 2024                                                                                                                                                                                                       |
| 59                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Star Poultry, Johrawar Singh, Jammu                                                                                                                                                                                                        | Storm         | 1000         | Fabrication in progress. May be in operation by mid 2024                                                                                                                                                                                                                   |
| 60                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Suguna Foods Pvt Ltd, Vyalur, Tamil Nadu HQ at Unitea Building, No 3, Savithri Shanmugam Road, Race Course, Coimbatore.<br><a href="https://www.sugunafoods.co.in">https://www.sugunafoods.co.in</a>                                       | Meyn<br>Marel | 3000<br>1000 | Commissioned 2000 BPH in Aug 2002. Grew in 2009 to 3000 BPH. This plant has been reconfigured for increased value added products. Equipment for current expansion to 4000 BPH was sourced from Marel and it was commissioned in 2023                                       |
| 61                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | 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.                                                              |
| 62                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | 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 and refurbished.                                                      |
| 63                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Swami Feeds. Plant at Dharapuram. HQ SF 324/2C Nathapalayam, Mulanur, Dharmapuri, Tamil Nadu                                                                                                                                               | Marel         | 3000         | During construction parts of the structure were gutted in a fire in mid-2020. Came on stream in mid 2021. They are now planning more automation in the cut-up portioning department.                                                                                       |
| 64                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Syra Foods. (Redefining Taste) W-8/L, Industrial Area, Yamunanagar, 135001, Haryana, India.                                                                                                                                                | Linco         | 2500         | Ran into local resistance successively at two proposed plant sites. They later re-located to a site near Mohali in Punjab. The plant is now in production.                                                                                                                 |
| 65                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Venkateshwara (VH) Plant at Kamshet near Pune. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune.<br><a href="http://venkys.com">http://venkys.com</a>                                                                | Meyn/Marel    | 3000         | Oldest operating plant since 1986 in India. It was commissioned as a 1000 BPH Meyn plant. Expanded to 3000 BPH by Marel during the early 1990's. Old Marel equipment has been progressively replaced by Meyn's Walvekar consignment. See Walvekar in part B of this table. |
| 66                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Venkateshwara. Plant at Davangere, Karnataka. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. <a href="http://venkys.com">http://venkys.com</a>                                                                    | Linco         | 6000         | 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.                                                                                         |
| 67                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | West Bengal Livestock Dev Corp, Haringhata. West Bengal                                                                                                                                                                                    | RND/Storm     | 1000         | Order taken from WBLDC by Dr Froeb (India) Pvt Ltd, then the agent of Linco and sub-contracted to RND/Storm, Commissioned in 2015.                                                                                                                                         |
| 68                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | West Bengal Livestock Dev Corp, Siliguri. West Bengal                                                                                                                                                                                      | Linco         | 1000         | Combined poultry, goat, beef and pork slaughterhouse commissioned in 2022                                                                                                                                                                                                  |
| 69                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | West Bengal Livestock Dev Corp, Haringhata. West Bengal                                                                                                                                                                                    | Meyn          | 4000         | Machinery has been received at site and construction is on for a 4000/8000 BPH plant at their Haringhata location. Commissioning expected by early 2025                                                                                                                    |
| <b>Integrated processing capacity expected by mid 2025 based on current orders, on-stream and under-construction projects</b>                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                            |               | 174,700      | Average plant capacity is 2525 BPH.                                                                                                                                                                                                                                        |
| Capacities are mentioned in birds per hour (BPH). For calculating market shares, of the total capacity of (174700-8000 of Provit, Hitech Hatch and Al Golden) 1,66,700 BPH expected on stream by mid 2025, Meyn's market share is 78,500 (47.1%), Marel's is 34,000 (20.4%), Storm Engineering's is 19,200 (11.5%); Deccan's is 12,000 (7.2%), RND's is 10,500 (6.3%); Baader-Linco's is 9,500 (5.7%), Bayle's is 3,000 (1.8%); [Total 1,66,700 (100%)] [Sethwala's capacity divided >> 500 to Marel, balance 750 each to RND and Storm] |                                                                                                                                                                                                                                            |               |              |                                                                                                                                                                                                                                                                            |
| The following proposed projects have been removed from the above table and taken to part B because of ongoing uncertainties about their future:                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                            |               |              |                                                                                                                                                                                                                                                                            |



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| <p>1 Anjaneya 2500 BPH project at Mavin Honda. Project delayed as they continue to await approval of grant of capital subsidy from the government. Civil work initiated at site. No equipment ordered so far.</p> <p>2 Srinivasa Farms Pvt. Ltd, 2000 BPH, Mega Food Park, Kurichedu, Prakasam district. Equipment delivered to the site over six years ago by Marel. No response to Aptec's repeated reminders seeking information on their plans for installation and commissioning. Equipment supplier Marel is equally unaware of any plans related to commissioning.</p> <p>3 RFK Green, Pulwama, J&amp;K. HQ at C-37, First Floor NSM, Azadpur New Delhi. The 2500 BPH plants was ordered in July 2017 and installation was completed in 2019. Commissioning is delayed due to social unrest in the area.</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>B</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <p>This 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 (2) closed and scrapped poultry processing plants of all sizes – many of which were re-sold and subsequently grew to become organized sector processing houses- at which time they cease to be listed in this section, (3) Plants on which some work has been done but commissioning remains under abeyance for several years, (4) RTE plants who source chicken meat from processing plants, and even if their repertoire only marginally includes chicken, they have the machinery, experience and general potential to follow market trends and become noteworthy for poultry processors (4) Web based poultry and poultry based RTE order suppliers, many of which have also acquired, or lease idle facilities and are either reviving them or setting up 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 underlined capacity figures.</p> |
| 70                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 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 and the largest facility in India. It then closed when the group became insolvent around 1997. Leased for a year from the State Bank of India by C&M with a view to re-commission it, they failed and surrendered it in 1999. Later the plant was scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 71                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Al Arif Poultry is an integrator at Vakwady Road, Kumbhashi Post Kundapura Taluq, Udupi District – 576257 Karnataka. Operate a 500 BPH manual dressing plant sourced from Storm Engineering who are now upgrading it to 700 BPH. Installation is in progress and the plant ought to get commissioned this year. They have a 2 TPD RTE plant at Gulbarga for which they seek a lease partner.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 72                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Al Halal Foods, Thane, Maharashtra. A 1000 BPH plant by RND. This plant was commissioned in 2016. Plant is not in operation and may be available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 73                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 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. <a href="http://www.al-Kabeer.in">http://www.al-Kabeer.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 74                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Allana Sons was founded in 1865 as a ship chandler. As part of its planned foray into processed meats, including chicken meat, in recent years it has participated in industry exhibitions at Hyderabad (2022), New Delhi (2022 & 2023), Kolkata (2023), Greater Noida (2024), and launched its Meat-On-Wheels project to deliver Goat & Sheep Meat to various stores in Mumbai in 2022. It is now planning five large poultry slaughterhouses in India and to this end and to set up vertical integrations, it has recruited retired poultry industry manager Dr C.R. Behl on its board. <a href="https://allana.com/">https://allana.com/</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 75                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 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 parathas and finally to RTE chicken based products under the 'Buffet' range, offering sausages, nuggets and popcorns, samosas, 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 exceeds INR 60 million. They also produce cup chicken noodles using dehydrated chicken. Recently they launched innovative recipes curated by Michelin Star Chef Alfred Prasad and now propose to venture into vegetarian and meat based momos. <a href="http://www.sumeru.net">http://www.sumeru.net</a>                |
| 76                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Ambica Chicken</b> , Deumol Shirvai Quepam, Near Peace Valley, South Goa, 403705. Operated a 1200 BPH plant commissioned by Storm Engineering in 2016. Suffered financially during the 2020 lock-down, particularly as most of their business was with hotels. This plant is now closed and may be available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 77                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Amrit Feeds</b> , Jangalpur, Howrah, West Bengal, bought original RND plants from Lifeline Feeds and Ave Mariam and installed the combination as a 300 BPH unit at Jangalpur. Later expanded to <b>700 BPH</b> in 2009. Along with this primary processing facility they also set up a sausage and ham plant in 2010 with an investment of around INR 30 million for sale under the brand name <i>Fresco Pollo</i> . Now all facilities are closed. Planned relocation of this plant to Assam in 2016 was dropped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 78                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Amrit Feeds</b> , Beldanga Mouza, Raghunathpur, PO Bonkati KanksaI, Panagarh, West Bengal. A Lincop plant of 4000 BPH plant commissioned in first quarter 2014 and promptly closed a year later on June 1, 2015. This facility has been available for sale ever since but is unlikely to find buyers because the asking price is too high.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 79                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Arambagh Hatcheries</b> . Plant at Birbhum, West Bengal. HQ at 59 B Chowringhee Road, Kolkata. Plant at Bolpur, Singhbhum District, West Bengal. Commissioned as 1000 BPH in Sept 1999, expanded to 2000 BPH in 2002 and 4000 in 2004. In 2023 the plant was closed by banks for failure to service their loans.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 80                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>AOV</b> old plant with <b>2000 BPH</b> machinery from both RND and Storm may be on sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 81                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Arthur's Food Company</b> , 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. <a href="http://www.arthursfood.com">http://www.arthursfood.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 82                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Assam livestock &amp; Poultry Corporation</b> , Panjabari Road Khanapara, Guwahati 781022. Ordered a 500 BPH plant from Storm which was installed and commissioned in 2023.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |



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| 83  | <b>Barafwala Co</b> , 11 High Street, Camp, Belgaum, Karnataka. Had so far been confined to the red meat industry. Recently they have set up a pilot plant for processing poultry using some Deccan Automation Technology machines and some made by themselves and are slaughtering 2000-3000 birds daily.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 84  | <b>Brahmagiri Dev Society</b> , Wynad, Kerala, <b>500 BPH</b> by RND in 2010.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 85  | <b>Broiler Master</b> , Punjab, <b>200 BPH</b> by RND in 2011. This is a semi-manual processing plant, having neither scalding nor plucking and does wet market style evisceration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 86  | <b>Caris Pure</b> Processing Company Pvt Ltd. Plant at Paramankeni Village, Kancheepuram, Tamil Nadu. HQ at 23 C, Kohinoor Complex, East Coast Road, Village Vettuvankeni, Injambakkam, Chennai, Tamil Nadu. Tae-Jin supplied the <b>3000 BPH</b> 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 87  | <b>Central Avian Research Institute</b> , (IVRI) Bareilly, <b>200 BPH</b> by Dhopeswar.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 88  | <b>Century Farm Products</b> , incorporated in 2008 at Erampalli, P.O. Shivalli Udipi Taluka & District- 576102 Karnataka operates a <b>500 BPH</b> plant built by Storm Engineering since 2015.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 89  | <b>Chatha Foods</b> , launched by P.S. Chatha in 1998 at village Chaundheri, Dapper, on the Chandigarh - Ambala highway in the Mohali district of Punjab, market their RTE products under the brand names <i>Gusto</i> and <i>Swiss Naturen</i> . With their retort packaged products being shelf-stable at ambient temperature, they beat the hurdle of the inadequate cold chain. They source chicken meat from SHL Agro (now Suguna) and Shanthi. Their institutional customers include about 80 five star hotels besides Taj Air Caterers, Sugar and Spice and ITC Welcomegroup. They also retail through some 1100 outlets <a href="http://cfpl.net.in">http://cfpl.net.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 90  | <b>Chicken Factory</b> , Anjananagar, Bangalore – 560091. Has a semi manual operation doing 1000 BPD with Deccan Automation equipment                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 91  | <b>Coastal Farms</b> , Mangalore, <b>500 BPH</b> by RND. Scrapped and probably available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 92  | <b>College of Vet &amp; Animal Sciences</b> , Kerala, <b>200 BPH</b> by RND in 2003.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 93  | <b>College of Vet &amp; Animal Sciences</b> , Parbhani, <b>500 BPH</b> plant by Deccan Automation Technology. Commissioned in 2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 94  | <b>Contai Golden Hatcheries</b> Pvt. Ltd, Contai, E. Midinapore, West Bengal, <b>300 BPH</b> by RND in 2003. It is owned by Shalimar Hatcheries and probably available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 95  | <b>CP India</b> , Chennai, <b>500 BPH</b> by RND in 2002. Scrapped and probably available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 96  | <b>Darshan Foods</b> or <b>Meatzza</b> . Established in 1969 as a buffalo meat exporter. Started an RTE division in 1996 with facilities for delicatessens, Indian products like <i>seekh kabab</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 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. <a href="http://www.meatzza.com">http://www.meatzza.com</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 97  | <b>Deepan Foods LLP</b> , Pune, 2024. A 500 BPH plant supplied by Deccan Automation is under installation and ought to be on stream by this year end                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 98  | <b>Dr Srinivasa</b> , promoter of the decommissioned and eventually scrapped 500 BPH Bayle plant called <b>Pragathi Broilers</b> at Doddaballapur in a disused feed mill shed, is planning another facility in Karnataka, this time with an ambitious capacity of 1000 BPH but there is no news of any progress.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 99  | <b>Empire Foods</b> , Taloja, Maharashtra. <b>1000 BPH</b> plant purchased from RND some 15 years ago, not yet installed. It has probably been resold to and installed by another company, or listed here under a different name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 100 | <b>Farmer Choice</b> , Pune A 500 BPH plant supplied by Deccan Automation is under installation and ought to be on stream by this year end.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 101 | <b>Farm Suzanne</b> , 64, Montith 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 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. Adding new manufacturing unit soon. <a href="http://www.farmsuzanne.com">http://www.farmsuzanne.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 102 | <b>Farm Value</b> Foods Private Limited owned by Anshu Sibbal Chatli runs an RND plant of <b>350 BPH</b> capacity at Barnala. It was commissioned in 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 103 | <b>Five Star</b> 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, 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 outlet, because of sluggish market growth, bringing their total down to around 270. They also terminated lease of Penn Foods in Maharashtra and ProTAC contract-processing. Five Star and CP are now learnt to be reviving and revamping their presence in India. <a href="https://www.fivestarchicken.com">https://www.fivestarchicken.com</a> |
| 104 | <b>Food and Flavours</b> , 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |



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|     | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 105 | <b>Gitwako Farms</b> , headquartered at Jangpura Extension, New Delhi, is owned by Ajay Beri at Ferozepur Jirka. They operate an RND plant of <b>unknown</b> capacity and also process goat meat. Mainly produce RTE products for which they possess a retort.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 106 | <b>Godrej Tyson</b> , Hoskote, Karnataka, 1000 BPH plant from RND in 1999, which was scrapped in 2007 and replaced by a Marel 2000 BPH plant, which was later expanded to 3000 BPH. They have a 400 Kg/hour formed products line and a sausage, salami and cold cuts lines – part of which was reconditioned and procured from The Waterbase Nellore facility of the Ballarpur group – a fish further processing facility that failed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 107 | <b>Golden Hatcheries</b> Bangalore, operate a manual dressing facility of <b>500</b> BPH within municipal limits. Under orders to relocate. Have set up a 3000 BPH Meyn plant at Davangere.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 108 | <b>Hayagreeva Poultry Solution</b> has a <b>500</b> 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 109 | <b>Hybro Foods Pvt Ltd</b> . Plant at Lahe, Taluka Shahpur, District Thane, Maharashtra. HQ at 8, Shah Industrial Estate, Opposite Veera Desai Road, Andheri West, Mumbai. The plant was built by RND initially installed in 2004 as a 1800 BPH plant, then expanded to 3000 BPH. The plant is closed at present under pressure from the banks for non-payment of dues.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 110 | <b>Higrow Chicken</b> , owner Deepak Raj Garg, runs an RND plant of <b>500</b> BPH at Ludhiana, which was commissioned in 2017.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 111 | <b>Hygienic Chickens</b> , 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, <b>300</b> BPH by RND.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 112 | <b>Ideal Chicken</b> 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 <b>unknown</b> capacity which runs its own home delivery and also process for Fresh-To-Home and Licious <a href="http://www.idealchicken.in">http://www.idealchicken.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 113 | <b>Indian Broilers</b> (IB Group, Rajnandgaon) located at Nagpur, Madhya Pradesh. It is a <b>500</b> BPH plant by RND, started in 2016. They are planning a major foray into poultry processing, with several 6000 BPH plants at several locations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 114 | <b>Indian Hospitality</b> Company Group was registered in Cayman Islands in 2006 to make investments in hospitality and QSR sectors. To help them do so, they recruited the founder of Barista and CEO of Yum and acquired Adelie Foods of UK, who are contract caterers and suppliers to airlines, in 2012. Subsequently they acquired Skygourmet, Mars Restaurant chain, Birdy's, Dosa Diner, Roti, Pizzeria & Pasta Bar, and Tendulkar's. Owing to these, IHC is now fully into QSR and RTE foods businesses, and given the market potential, may make an entry into the chicken RTE sector.                                                                                                                                                                                                                                                                                                                                                        |
| 115 | <b>International Food Products</b> , Chandigarh. Small RTE producer in chicken and other meats.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 116 | <b>Irani Chicken Products LLB</b> , Daman, Gujarat, <b>500</b> BPH plant by Bayle, commissioned Dec, 2013.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 117 | <b>ITC Welcomegroup</b> made its entry into the branded & packaged foods business in August 2001 with inspiration from its successful restaurants Bukhara and Dum Pukht. In June 2003 they launched their <i>Kitchens of India</i> brand comprising a range of heat-and-eat Aashirvaad brand RTE meals. This range was available in heat-resistant packaging form, produced using a retort process at Chatha Foods. Their Indian meal packs are sold in Australia, Canada, Germany, Japan, New Zealand, South Korea and USA. Although this range contributed only 1% of group sales, it sold 6 times as much in USA than in India in 2012 and was the second most sold Indian meal in USA after <i>Tasty Bites</i> . It set up a new plant for these product lines at Bangalore.                                                                                                                                                                       |
| 118 | <b>Khushbaksh Poultry</b> , Near Kashmir Glass House, Phase 3RD, Industrial Estate, Srinagar- 190001, Jammu & Kashmir. A 500 BPH plant under order from one Mr Bashir under fabrication by Storm Engg and slated for commissioning by mid 2023                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 119 | <b>Kudumbashree Broiler Farmers Producer Company Ltd</b> at Trivandrum, Kerala. Is a 500 BPH plant.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 120 | <b>Knowledge Foods</b> , Neral. Manual-dressing <b>300</b> BPH. Also making RTE products.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 121 | <b>Ku Koo Ch Ku Poultry Farm Pvt Ltd</b> was set up by Kunal Pathre together with his brother Prashant in October 2020 at Alibag in Raigad, Maharashtra. Is a vertical integration with a background of contract farming with operations in breeder farming (VH breeds), hatching eggs, broiler DOCs and live chicken. In operates commercial farms with a total installed capacity of a lakh broiler chickens per week as in March, 2021. The operations are at Gat No. 230 Mapgaon Road, Alibag, Alibag, Raigad, Maharashtra. During the Covid panic, they invited financially distressed commercial broiler farmers to come into their fold and offered them stability. This allowed them to expand rapidly. 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 to a 500 BPH processing plant supplied by Deccan Automation Technology. |
| 122 | <b>Kongu Herbal Chicken Pvt Ltd</b> was incorporated in December 2015 by a trio of brothers (A Arjunan, A Senthil Kumar and A Boopathi) at Thirunagar Colony, Erode, TN. It is vertically integrated with a quarter century of poultry farming experience and serves a network of commercial farms in that area. The 700 BPH plant was supplied by Deccan Automation. The company claims to have launched India's first antibiotic free chicken as frozen whole carcasses and frozen parts through its own restaurant service activity from their shop at Mogappair West, Opposite Dindigul Thalappakatti.                                                                                                                                                                                                                                                                                                                                             |
| 123 | <b>KSIDC</b> , Kerala, <b>300</b> BPH by RND in 2005.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 124 | <b>Maa Integrators</b> founded by K. S. Ashok Kumar & Mrs Manjula Ashok Kumar in 2007 with interest in poultry, feed, fruit farming, all under the contract farming model. They have plans to venture into poultry processing.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 125 | <b>Malabar Agro Industries P Ltd</b> was registered in Nov 2018 at Ernakulam in Kerala. It operates a 500 BPH plant supplied by RND and commissioned by Storm Engg.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 126 | <b>McDonalds India</b> , now owned by OSI, set up their first plants at Taloja in 1995 as Vista Foods and Kitran Foods to cater separately to non-vegetarian and vegetarian products respectively. Recently they set up a vegetarian products facility in Punjab and acquired the facility of Global Nutri Foods Ltd at Madanapalle in AP. Altogether they possess an RTE capacity of 625t/m at Taloja and 1750t/m at Madanapalle. They get approximately 95% of their supplies from 38 local sources – with raw chicken coming from the Godrej Taloja plant. Have recently installed a cone de-boner sourced from Meyn. <a href="https://vistafood.com">https://vistafood.com</a>                                                                                                                                                                                                                                                                     |
| 127 | <b>Miki Exports International</b> , Taloja, Maharashtra. 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 and is now probably available for sale. Domain name <a href="http://mikichicken.com">http://mikichicken.com</a> has expired.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |



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| 128 | <b>MTR.</b> Started in 1924 as a restaurant called Brahmanara Coffee Club and later in 1951, changed to Mavalli Tiffin Room in Bangalore. During the Emergency, unable to conform to the prescribed pricing orders of Indira Gandhi, they diversified into packaged convenience foods. Around 2008 they were acquired by Norway's Orkla Foods. They produce seasonings, RTE foods, curries and RTE meals. In 2012 the original owner P.S. Maiya, no longer encumbered by the agreement with Orkla, re-entered the RTE foods segment with a new company. Given the dynamism of Maiya and Orkla, they are both quite likely to enter the RTE chicken sector, given its growth potential.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 129 | <b>Meat Masters.</b> Incorporated in 2000, a producer & supplier of frozen vegetarian & non-vegetarian (fish, mutton and chicken) and RTE products in retort pouches and filled products like sausages. They have set up a new processing facility for further processed meat products at Ladhawal Food Park near Ludhiana in Punjab. Meat Masters sells through own stores BigNMeat, other retailers, and directly to hotels and restaurants in that region <a href="http://www.meatmasters.co.in">http://www.meatmasters.co.in</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 130 | <b>Meat Products of India,</b> a Kerala government company established in 1973, operating in Chalakudy and Edayar, with bought-out chicken meat and pork from own farms. Produce feed and RTE products. Accumulated losses exceed 3 years' turnover. In mid May 2003 they were planning a captive 1000 BPH primary processing facility.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 131 | <b>MP Pashudhan Nigam,</b> 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. Eventually his Hoskote facility was also scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 132 | <b>Mohan Breeding Farm,</b> 1/259, Tirchy Road, K.S.N. Puram(PO), Palladam, Tirupur (Dt), Tamil Nadu- 641 662. <a href="https://mbfgroup.in/contact-us.php">https://mbfgroup.in/contact-us.php</a> . Operate a broiler integration selling broiler hatching eggs, broiler chicks, broiler meat & broiler pellet feeds.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 133 | <b>Monrovia Agro Foods,</b> Bhandgaon, Pune, Maharashtra, 500 BPH by Storm Engg in Jan 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 134 | <b>Nagpal Frozen Foods,</b> Barwala, Haryana, 1000 BPH plant commissioned by RND in 2007 and operated by Nagpal's relative Mulk Raj and his sons under the name of Chandigarh Poultry, suppliers to the armed forces. Chandigarh Poultry was later renamed AV Ventures. Nagpal Frozen was closed in 2017 for non-compliance with pollution control laws and has probably been scrapped. Following this, AV Ventures decided to set up their own plant in Panchkula. It is listed in part A of this table.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 135 | <b>Navi Nutrix,</b> 750 BPH by RND at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to Sriya Foods                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 136 | <b>Nandus Foods Pvt Ltd.</b> Headquartered at Bangalore, the Nanda Group, comprises 11 small companies promoted by P. S. 136Nandakumar, an old business associate of Rao of VH. As integrators, Nandus skipped the processing stage, venturing directly into RTE in 1989 with a 400mm Koppens forming-frying line and a 32 tonne frozen store. They initially ran it themselves, and at one stage even fought and lost a legal battle in 2007 with the international restaurant chain Nandos Indage Restaurants P. Ltd over brand ownership. The RTE line was leased to Suguna in 2007 for a five year period. At the turn of the century they acquired a small Linco slaughterhouse, which had been closed down and mothballed for sometime by its previous owners in UAE, in collaboration with Godrej Agrovet and Sheikh Hamed bin Butti under the name of Al Rahba. Around 2015 they turned their attention to processing with a used RND line in Karnataka which is now closed. Planned a 2000 BPH processing plant, placing an order with Marel. Later abandoned the project to work instead as a Spoke facility in Bangalore, integrating it with their existing RTE kitchen. They get 6000 birds from their farms contract-processed every day by ProTAC and distribute raw and RTE chicken products through 55 stores within the city. Run by Nandakumar's two sons Naveen & Narendra Pasupathy. |
| 137 | <b>Nensey's Poultry,</b> Valsad, Gujarat, 300 BPH by RND around 2002. It is learnt to have been sold to an unknown party.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 138 | <b>Parsekar Foods,</b> 615, Devafather Bethoda, Ponda, Goa - 403401. Established in the year 1983 as retailers. Operate a 700 BPH plant supplied by Deccan                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 139 | <b>Peninsula Foods Pvt Ltd,</b> a division of DeeJay Group, Bangalore, owned by David Lobo, set up a 1000 BPH Meyn plant in the late 1990's. For tax benefits it was run by a complex arrangement of four DeeJay companies. Closed around 1998 following labour unrest which coincided with Lobo's unsuccessful foray into broiler pure-lines with Ross – in direct competition with his one-time partner Dr B. V. Rao of VH. The plant was scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 140 | <b>Perfect Poultry Pvt Ltd.</b> Plant and HQ at 27 Ft Road, Chowk Green Field, Majitha Road, Amritsar, Punjab. Earlier 1000 BPH Storm plant which was replaced by Meyn's 4000 BPH plant. For the expansion they retained only one plucker, screw chillers and some secondary processing machines. Storm equipment, suitable after balancing, for 1000 BPH is probably available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 141 | <b>Pioneer,</b> Hyderabad, Andhra Pradesh, 500 BPH by Dhopeswar. It has been scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 142 | <b>PL-480 plants.</b> Even before VH set up their first poultry processing plant in India in 1986, several carousel track type prototypes from Diamond of USA arrived as grant to the Indian Government under the PL-480 scheme. As far as we are able to ascertain, they were installed in Chandigarh, Mumbai, Aligarh, Orissa, Kerala and Andhra Pradesh. We have seen the one at Chandigarh (CPDO) and the one of <b>Mafco</b> , Mumbai, the latter being bought in an auction by VH and mothballed at Kamshet. The Mafco plant is probably scrapped by now, but the remaining machines may yet be put to use if auctioned by the government.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 143 | <b>Prabhat Foods.</b> Established in the year 1963. They sell Chicken RTE products directly to some institutions and also retail through half a dozen outlets in Mumbai. Mhatre, the owner, is related to J. Desai of VH. The website <a href="https://www.prabhatpoultry.com">https://www.prabhatpoultry.com</a> is for sale                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 144 | <b>Ratnagiri Cooperative,</b> Chiplun, Maharashtra, 300 BPH by RND in 2003. Now closed and possibly scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 145 | <b>Riverdale Foods,</b> Somatne, Maharashtra, 1000 BPH by Meyn around 1995 installed for Harianawala brothers, ex-employees of VH. It closed around 2003 when its arrangement with McDonalds became unprofitable. Was bought by ANC Holdings, Dubai for its prime location near the Mumbai-Pune expressway. The plant has been scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 146 | <b>RFK Green</b> RFK Green, Pulwama, J&K. HQ at C-37, First Floor NSM, Azadpur New Delhi. The 2500 BPD plants was ordered in July 2017 and installation was completed in 2019. Commissioning is delayed due to social unrest in the area.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 147 | <b>Ruchi Agro Industries Ltd,</b> Chikmagalur. It is an RND manual plant of <b>unknown</b> capacity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |



|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 148 | <b>Royal Agro Fresh LLP</b> , Chennai, TN. Royal Agro Fresh LLP (RAFL) was incorporated as a limited liability partnership in July 2018 and operates from M. C. Nichols Road 55/21 Buckingham Terrace, Nowroji Road East, West Chetpet, Chennai, TN. It set up a 500 BPH plant supplied by Deccan Automation Technology in 2019 and sells portions through Big Basket                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 149 | <b>Royal Foods Pvt Ltd/Shakir Shaikh</b> , Lohegaon, Pune, Maharashtra, <b>500 BPH</b> by Storm in Nov 2013.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 150 | <b>Saaras Breeding Farms</b> , Odisha, a 500 BPH plant, currently under fabrication by Storm                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 151 | <b>Sai Agri</b> , 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 152 | <b>Sandip Mukherjee</b> , One time plant manager of <b>Arambagh Hatcheries</b> , is operating a 500 BPH manual processing plant at Gariahat, near Kolkata in West Bengal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 153 | <b>Shivaa Chicken</b> , 2/418, Palladam Main Road, Opp. Microwave Station, Puliampatty, Pollachi, Coimbatore, TN. Manual dressing of <b>unknown</b> capacity admin@shivaaChicken.com <a href="http://www.shivaaChicken.com">http://www.shivaaChicken.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 154 | <b>Shiva Farms</b> , Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 155 | <b>Shiva Poultry Equipment</b> , Barnala city, is operating a <b>500 BPH</b> processing plant supplied by RND at GADVASU University in Ludhiana. Their brand name as “ <i>Hygrow Chicken</i> ”                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 156 | <b>Sirsa Foods</b> , at 2, Lavkush Dharamshala, Balmiki Chowk, Opp. Khunger Sweets, Sirsa, Haryana. A <b>500 BPH</b> plant supplied by Storm. Commissioned by first quarter of 2024.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 157 | <b>S.M. Feeds &amp; Farms Pvt. Ltd.</b> , No. 294, Thiruvallur High Road, Alamathy Village, CCBF Post, Redhills Chennai – 600052. A 500 BPH plant commissioned by Storm in 2017                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 158 | <b>Sood Poultry</b> at Jullunder, Punjab. A <b>500 BPH</b> plant commissioned by Storm in 2020.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 159 | <b>Souza Hatcheries</b> , Mangalore, Karnataka. HQ at Souza Commercial Complex, Highlands, Falnir Road, Mangalore <a href="http://www.souzahatch.com">http://www.souzahatch.com</a> . Purchased a local RND plant of 500 BPH, then bought a 1000 BPH plant from Bayle. Both older plants were sold to Ideal Chicken, who revamped the machinery and operate a plant as listed in Part A of this table.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 160 | <b>Srinivasa Farms Private Limited</b> . Plant at Mega Food Park, Kurichedu, Prakasam, AP. HQ at 169, Road 13A, Jubilee Hills, Hyderabad. <a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a> . Order for the 2000 BPH plant was placed on Marel in late 2017. The plant is delivered but seven years on we still have no information on its commissioning schedule.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 161 | Sriya Farms and Feeds Pvt. Ltd., 208 B, 3rd Floor, 80 Feet Road, IndusInd Bank buildings, 2nd Block, HBR Layout, Bangalore- 560043 admin@sriyafarm.com                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 162 | <b>S.S.S Hatcheries</b> , 258/1-1, N.S.R.Road, Venkitapuram, Coimbatore-641025, Tamil Nadu. A 500 BPH plant set up by Storm in 2023                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 163 | <b>Star Agrovet Marketing</b> , Manjri, Pune, 700 BPH set up by Deccan Automation in 2022. They process chicken under contract with Shalimar Corporation.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 164 | <b>Sujay Feeds</b> , SY No 44B Pillaraju Property, Ganganagar, Bengaluru, Karnataka, <b>200 BPH</b> manual slaughter.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 165 | <b>Swift Foods</b> , Dadri, Uttar Pradesh. An automatic Stork 4000 BPH processing plant commissioned in the early 1990's by Jagdish Prasad, in competition with VHP's Kamshet plant of 1000 BPH. It had an RTE section. Closed around 1995, then scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 166 | Taurus Foods was set up in the mid 1990's. It produces marinated, smoked and cooked chicken RTE products at its plant at EPIP, Kasna Site 5 Greater Noida, for which it sources raw chicken meat from SHL Agro (now Suguna) and others. It has a capacity of 25 tonnes of RTE products per month <a href="https://www.taurusfoods.in">https://www.taurusfoods.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 167 | Thai Thirunaal Agro Foods Pvt Ltd. A 500 BPH plant commissioned by Deccan Automation Technology at Coimbatore in 2022.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 168 | 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 dimsums or momos, rolls and samosas and claims to be the largest producer of dimsums in India. <a href="http://www.unitasfoods.com">http://www.unitasfoods.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 169 | Unnat Feeds, Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana. An order was placed on Lark Engineering. Learnt to be under fabrication from early 2021, but lack important approvals from the government, therefore commissioning date is unknown. The project may have been scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 170 | Violet Industries/Souza Hatcheries, Mangalore, 500 BPH by RND. Not yet commissioned.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 171 | Vista Agriculture & Food Products, Khurdah Road, Bhubaneswar, Odisha, 750 BPH by Storm Engg in 2013. Plant is closed                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 172 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 173 | WBFCSL/R. K. Doloi, MLA, Midinapore, 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 174 | Web based delivery platforms for order booking and order tracking using purpose-designed apps and QSR service. Or D2C These include (1) Amazon <a href="https://www.amazon.in/gp/bestsellers/grocery/">https://www.amazon.in/gp/bestsellers/grocery/</a> ; (2) Food Panda <a href="https://www.foodpanda.com/">https://www.foodpanda.com/</a> ; (3) Fresh-to-Home <a href="https://www.freshtohome.com/">https://www.freshtohome.com/</a> ; (4) Licious <a href="https://www.licious.in/">https://www.licious.in/</a> ; (5) Meat And Eat <a href="https://meatandeat.in/">https://meatandeat.in/</a> ; (6) Road Runners <a href="https://www.meatigo.com/">https://www.meatigo.com/</a> ; (7) Swiggy <a href="https://www.swiggy.com/">https://www.swiggy.com/</a> ; (8) Zapp Fresh <a href="https://www.zappfresh.com/">https://www.zappfresh.com/</a> ; (9) Zomato <a href="https://www.zomato.com/india">https://www.zomato.com/india</a> |
| 175 | Zorabian, Khopoli, Maharashtra, Originally a drum plucker manual dressing facility, upgraded to 500 BPH by RND in 2007. Following the death of Khorram Zorabian, the plant is now run by his daughter Perzad.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|     | This list is as exhaustive as we could make it and covers slaughter operations in the un-organized sector. Counting from within this list, we arrive at a total capacity of 60,400 BPH, of which scrapped capacity plus potentially re-deployable capacity is 37,250 BPH                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

### 3.8.1 Prospects



Mitsui & Co headquartered in Tokyo, released a press note on 27th March, 2024 announcing its decision to invest in Sneha Farms Pvt Ltd, a major broiler integrator and the leading processor of broilers in India. Following this investment Sneha will become an associated company of Mitsui and it expects to double its production over the next five years.

In the past Mitsui have had interests in poultry and have likewise invested in Japan, Morocco and Egypt in poultry and Vietnam & Ecuador in marine products. Both the Egyptian and Indian investments have come in quick succession within the first quarter of 2024. We understand that a host of global trends and recent events may have motivated Mitsui. These probably include adverse economic and social trends in China, (which Japan used to source a high tonnage of processed poultry from and has progressively moved away from), a clearly visible rise of the Indian economy with new opportunities opening up in agro-processing, and possibly even the lure of the IMEC corridor. Mitsui's press note says that increasing disposable income of India's vast population, already at \$ 2,400, indicates a growing domestic demand for processed chicken.

Interest in agro-processing in India is also indicated by Japanese investments in the milk industry, a sector in which India leads the world. Japanese companies Marubeni & Akiba Farm Holdings are two such recent ventures.

### 3.9 APTEC Industry Report Uploaded 10 November 2025 (Grosscap 2,52,000, 91 Units)

| <b>Table 34 List Uploaddead on 10 November 2025 of organised sector poultry processing plants (existing, ordered and under construction with a Grosscap of 2,52,300 in 91 units)</b> |                                                                                                                                                                                                                                                          |             |                 |                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>A</b>                                                                                                                                                                             | <b>The Organized Sector - Comprising Plants Of 1000 BPH And Higher Capacities.</b>                                                                                                                                                                       |             |                 |                                                                                                                                                                                                                                                                                                                                                                                                                         |
|                                                                                                                                                                                      | <b>Plant, location</b>                                                                                                                                                                                                                                   | <b>Make</b> | <b>Capacity</b> | <b>Remarks</b>                                                                                                                                                                                                                                                                                                                                                                                                          |
| 1                                                                                                                                                                                    | <b>Abis Proteins P Ltd</b> , Aurangabad, Maharashtra.<br><a href="https://www.ibgroup.co.in/">https://www.ibgroup.co.in/</a>                                                                                                                             | Meyn        | 12000           | Part of the <b>IB Group</b> of Rajnandgaon. Contract signed in 2024, plant may be ready by Q2, 2026.                                                                                                                                                                                                                                                                                                                    |
| 2                                                                                                                                                                                    | <b>Abis Proteins P Ltd</b> , Chittoor, Andhra Pradesh.<br><a href="https://www.ibgroup.co.in/">https://www.ibgroup.co.in/</a>                                                                                                                            | Meyn        | 12000           | Part of the <b>IB Group</b> of Rajnandgaon. Contract signed in 2024, plant may be ready by Q2, 2026.                                                                                                                                                                                                                                                                                                                    |
| 3                                                                                                                                                                                    | <b>Al Arif Foods</b> , Vakwady Road, Kumbashi Post, Kundapur Taluka, Udupi Dist., Karnataka 576257<br><a href="https://www.alariffoods.com/">https://www.alariffoods.com/</a>                                                                            | 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                                                                                                                                                                                    | <b>Alchemist Foods &amp; Hospitality Ltd</b> , Kurali, Punjab (leased to Star Foods)<br><a href="http://www.alchemist.co.in/">http://www.alchemist.co.in/</a> (This link is no longer functional).                                                       | Meyn        | <u>2000</u>     | Commissioned in 2004. Between 2017 & mid 2025 it had been operated by <b>Star Foods</b> 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 <b>Star Foods</b> plant was commissioned in mid 2025 and is now processing its own brand. |
| 5                                                                                                                                                                                    | <b>Al Golden Foods</b> , Dera Bassi, Punjab.<br><a href="https://www.exportersindia.com/al-golden-foods-pvt-ltd/">https://www.exportersindia.com/al-golden-foods-pvt-ltd/</a>                                                                            | Meyn        | 2500            | A Ghazipur Mandi commission agent operating under four identities ( <b>Aizal Foods Pvt Ltd, Al Golden Foods Pvt Ltd, Golden Foods Specialities Pvt Ltd &amp; Labib Foods Pvt Ltd</b> ), 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                                                                                                                                                                                    | <b>Al Halal Foods</b> , 1098, Dohole Village, Kalamboli, Padgha, Taluka Bhiwandi, Dist. Thane, Maharashtra.<br><a href="https://www.exportersindia.com/al-halal-foods-company3354292/">https://www.exportersindia.com/al-halal-foods-company3354292/</a> | 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                                                                                                                                                                                    | <b>Annai Poultry</b> , 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                                                                                                                                                                                    | <b>AOV Agro Foods Pvt Ltd</b> , Khasra Nos. 20-22, Village Tapkan, Tehsil                                                                                                                                                                                | Meyn        | 4000            | Promoted by O. P. Arora of AOV Group (mainly in red meat), who acquired the Nuh facilities from <b>Moin Akhtar Qureshi</b> , one time biggest buffalo meat exporter                                                                                                                                                                                                                                                     |



|    |                                                                                                                                                                                                                                             |       |      |                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Nuh, Haryana 122107. HQ at C-22/25 Sector 57 Noida 201301                                                                                                                                                                                   |       |      | 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  | <b>AV Ventures</b> , Plot 72-A, Panchkula Industrial Area, Phase 1, Panchkula, Haryana. (Also known as <b>Chandigarh Poultry Centre</b> )                                                                                                   | Local | 1200 | Initially AOV operated <b>Nagpal Frozen Foods</b> , 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 | <b>Ayisha Foods</b> , 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 | <b>Baraka Overseas Pvt Ltd</b> , 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 | <b>Baramati Agro Ltd.</b> , HQ 4th Floor, Farena Corporate Park , Kharadi Bypass Rd., Hadapsar, Pune- 411028, India. Plant at Baramati. <a href="https://www.baramatiagro.com/">https://www.baramatiagro.com/</a>                           | Local | 2000 | Baramati is owned by the family of politician <b>Sharad Pawar</b> . 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 | <b>Bhagyashree Chicks</b> , Rajguru Nagar, Pune.                                                                                                                                                                                            | Local | 1000 | 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 | <b>Bharat Agrovvet</b> , 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 <b>Provit &amp; Ideal Chicken</b> . |
| 15 | <b>Cedar Integrated Food Tech Pvt Ltd.</b> , 7/732/9-11 Green Tower, Mannuthy-Nadathara Road, Pattalakunnu, Thrissur, Kerala 680651.                                                                                                        | -     | 3000 | Earlier known as <b>ESAF Retail</b> , 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 | <b>Charoen Pokphand India Pvt Ltd</b> (CP). Plant at Chittoor, Andhra Pradesh. HQ at CPF Tower, 1, 100-Foot Road, Stage 2, Hoysala Nagar, Indiranagar, Bengaluru, Karnataka <a href="https://cpbrandindia.com">https://cpbrandindia.com</a> | Meyn  | 2000 | 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 | <b>Coastal Farms</b> , 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 | <b>Delicious Foods</b> , 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 <b>Hayagreeva Food Processing</b> , also located in Doddballapura Taluk. Performs merchant processing for <b>Anjaneya</b> and <b>Shalimar</b> .                                                                                                                                                                                                    |
| 19 | <b>Food Lovers (Hitech Hatch)</b> , Metropolitan Co-Op. Housing Society Ltd., Sector B, Plot 28, Canal South Road, Kolkata, West Bengal. 700 105. <a href="https://hitechhatchfresh.com/">https://hitechhatchfresh.com/</a>                 | Meyn  | 1500 | A major integrator in West Bengal, owned by Radheyshyam Roy. This company entered the contract farming business in 2004-05. It now produces 5 lakh eggs per week, the DOCs are distributed among 6000 contract farmers. For its Rs 37 crore project the company has been awarded govt capital subsidy of Rs 7.3 crores. Expect commissioning by Q3 of 2026.                                                                   |



|    |                                                                                                                                                                                                                                                                                   |       |      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 20 | <b>Fowl Fusion Kerala Pvt Ltd</b> , 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 | <b>Fresh Culture</b> , 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 | <b>Fresko Choice Meat Products Pvt Ltd</b> , 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 | <b>Godrej Foods</b> , Plant at Taloja, Maharashtra<br><a href="https://www.godrejagrovet.com/businesses/godrej-tyson-foods">https://www.godrejagrovet.com/businesses/godrej-tyson-foods</a>                                                                                       | Marel | 3000 | Expanded from original 2000 BPH of 2001 to 3000 BPH. It is located in an industrial estate that lies between two nearby villages whose inhabitants regularly protest against the smell nuisance. <b>Tyson</b> have exited the 2008 partnership and <b>Godrej Agrovet</b> bought back their 49% stake in Aug 2024.                                                                                                                                                                                                                                                                                                                 |
| 24 | <b>Godrej Foods</b> , Plant at Hoskote, Karnataka<br><a href="https://www.godrejagrovet.com/businesses/godrej-tyson-foods">https://www.godrejagrovet.com/businesses/godrej-tyson-foods</a>                                                                                        | Marel | 3000 | Set up in 1999 as a 1000 BPH locally fabricated plant which was scrapped in 2007 after an Aptec audit. A 2000 BPH Marel plant was set up in an adjacent plot of land. Expanded in 2012. In 2008 Godrej tied up with <b>Tyson</b> . 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 <b>The Waterbase</b> 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 <b>Godrej Agrovet</b> bought back their 49% stake in August 2024. |
| 25 | <b>Goel Foodworld</b> , HQ at Plot no 23A, Industrial Area, Shogi, Shimla, Himachal Pradesh. Plant at Khasara No.-22, 47, 48 UP Mohal Bumblu, 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 | <b>Goldchick Hatcheries and Foods Ltd</b> . Plant at Sadashivpet near Hyderabad, Telangana. HQ at Plot No.151, Kavuri Hills, Madhapur, Hyderabad, Telangana<br><a href="http://goldchick.in">http://goldchick.in</a>                                                              | 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 | <b>Golden Fresh</b> , 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.<br><a href="http://goldengrp.co.in/">http://goldengrp.co.in/</a> . | Meyn  | 3000 | Part of the <b>Golden Group</b> 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 | <b>Hayagreeva Food Processing</b> , Plant at Dodballapur, Karnataka.                                                                                                                                                                                                              | Local | 1000 | Originally a 500 BPH local plant owned by <b>Chicken Stop</b> , 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 | <b>Healthy Choice Poultry</b> , village and post Wadala, Tehsil Majitha, Dist Amritsar, Punjab.                                                                                                                                                                                   | Meyn  | 1300 | Plant owned by Gurpuran Singh Randhawa. Commissioned in end 2023.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 30 | <b>H M A Agro</b> , HQ at 18A/5/3, Tajview Crossing, Fatehabad Road, Agra, Uttar Pradesh 282001. Plant is at Jabalpur, Madhya Pradesh.                                                                                                                                            | Local | 1000 | The plant was originally owned by Sneha Farms who sold it to Mohd Sabir Qureshi, one time employee of <b>Phoenix Poultry</b> and the plant was relocated and re-installed at Jabalpur in 2019. Qureshi then sold it to <b>H M A Agro</b> , an established Agra based buffalo meat processor who also conducts overseas trade in cereals and vegetables with over 40 countries.                                                                                                                                                                                                                                                    |
| 31 | <b>Huda Foods Pvt Ltd</b> . 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 | <b>Ideal Chicken</b> , Highlands, Falnir Road, Mangalore<br><a href="http://www.idealchicken.in">http://www.idealchicken.in</a> Also known as <b>Provit Foods</b> .                                                                       | 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 <b>Ideal Chicken</b> in part B of this table.                                                                                                                                                                                                                                                                     |
| 33 | <b>Indian Chicken</b> , 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 | <b>Japfa Comfeeds Pvt Ltd</b> , 91 Sakore Nagar Vimannagar, Pune 411014, Maharashtra. Plant at village Pedgaon, Daund, Pune, Maharashtra.<br><a href="https://japfaindia.com/">https://japfaindia.com/</a>                                | Marel       | 3000                               | This 3000/6000 BPH plant was commissioned in Q4, 2024. Hitherto RTE chicken was sourced from <b>Hybro Foods</b> , Thane in the past but now discontinued with the closure of Hybro.                                                                                                                                                                                                                                                                                                                  |
| 35 | <b>Indian Poultry Alliance</b> , 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 | <b>Indian Poultry Alliance</b> , Punjab.                                                                                                                                                                                                  | -           | 3000                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 37 | <b>Indian Poultry Alliance</b> , Zaheerabad, Telangana.                                                                                                                                                                                   | -           | 3000                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 38 | <b>Kasturi Poultry Farms</b> , HQ at G-14 Galaxy, Nanjundapuram Road, Coimbatore 641 036. Tamil Nadu. Plant at Pusphathul Village, Palani, Dindigul, Tamil Nadu.<br><a href="https://kasturipoultry.com/">https://kasturipoultry.com/</a> | 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. <b>Kasturi has pulled out of the Indian Poultry Alliance.</b> |
| 39 | <b>KGN Processed Poultry</b> , 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 | <b>Khazir Agro</b> , Plant I.G.C. Lassipora, Srinagar, Srinagar U.T. HQ 4 <sup>th</sup> Floor, Opp New Era School, Rai Bagh, Srinagar, Srinagar U.T.                                                                                      | 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 | <b>KM Feeds &amp; Chicken Agencies</b> , 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 | <b>KPF Chicken</b> , Kavumkandam Junction, Kadanad P.O Kavumkandam, Pala, Kadanad Meenachil, Kottayam, Kerala – 686653<br><a href="https://www.kpfchicken.co.in/home">https://www.kpfchicken.co.in/home</a>                               | 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. 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 | <b>Kuljas Rai Poultry</b> , Also known as Rai Poultry, Amritsar. Plant at Wadala Viram Majitha, Amritsar, Punjab 143601                                                                                                                   | Local       | <del>3000</del>                    | Set up initially as a <del>300</del> 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 | <b>Kupanna Poultry Farm</b> . 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 | <b>Kwality Animal Feeds Pvt Ltd</b> , Plant 763/19, A/P-Rajgoli, Chandgad, District Kolhapur, Maharashtra. HQ 12, Kwality House Machhe, Industrial                                                                                        | Meyn<br>-   | <del>3000</del><br><del>3000</del> | 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 <b>Indian Poultry Alliance</b> , it now proposes to double its capacity by end 2026.                                                                                                                                                                                                                                          |



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|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Area, Belgaum, Karnataka<br><a href="http://kwalithouse.in/">http://kwalithouse.in/</a>                                                                                                                                                                                                               |       |             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 46 | <b>Lifeline Feeds (India) Pvt Ltd</b> , HQ at Shri Manjunatha Chambers, Ratnagiri Road, Chikmagalur, Karnataka. Plant at nearby industrial estate in 8 acres occupying four adjacent industrial plots separated by 3 roads. <a href="https://www.lifelinefeeds.com">https://www.lifelinefeeds.com</a> | Meyn  | 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 | <b>Maval Agro</b> , Talegaon, Maharashtra                                                                                                                                                                                                                                                             | Local | 1000        | Expanded from the original to 1000 BPH in 2023.                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 48 | <b>Mayuri Broiler Breeding Farms Pvt Ltd</b> , at Sy 537/A, 537/E, Village Yellikal, Kalwakurthy Mandal, Nagarkurnool District, Telangana 509324                                                                                                                                                      | Local | 1000        | Mayuri Farms, owned by <b>Harsha Poultry</b> , operated a manual dressing plant of 400 BPH. Their new plant has been commissioned in early 2024.                                                                                                                                                                                                                                                                                                                                              |
| 49 | <b>Meat &amp; Eat</b> , (incorporating <b>Kavi Proteins &amp; Feed Pvt Ltd</b> ), 26, Sindhi Colony, 1 <sup>st</sup> 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 <b>Kavi Proteins</b> plant which has a 1000 BPH facility. The operations suffered business loss during the Covid lockdown but now appears to have stabilised.                                                                                                                                                                                                                                       |
| 50 | <b>Meatin Farms and Foods LLP</b> , 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 | <b>Nafees Poultry</b> , Plot No 129, East Marredpally, Hyderabad, Telangana, 500026                                                                                                                                                                                                                   | Local | <u>1000</u> | Operated by Sarabjot Singh, son-in-law of Harbans Singh, one time owner of <b>Starchick</b> (see Sethwala). This plant started around 2013.                                                                                                                                                                                                                                                                                                                                                   |
| 52 | <b>Nice Meat Factory</b> , 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 | <b>Penn Foods Pvt Ltd</b> , Plant at Karjat, Maharashtra. HQ at Clucky's Products LLP, 294, S. Bhagat Singh Road, Fort, Mumbai <a href="https://cluckysfriedchicken.com/">https://cluckysfriedchicken.com/</a>                                                                                        | Bayle | 1500        | Commissioned in 2016. Is functioning as a merchant processor, slaughtering for <b>Licious</b> and <b>McDonalds</b> under their brands at around 14000 BPD. A similar arrangement with CP is learnt to have been terminated. Also selling through <b>Japfa</b> , <b>Barbecue Nation</b> at Sayaji. Brand name is <i>Clucky's</i> .                                                                                                                                                             |
| 54 | <b>Perfect Poultry Pvt Ltd</b> , 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 | <b>Premium Chick Feeds Pvt Ltd</b> , Plant at Yeral Alibaug, Maharashtra. Office Gat No. 330 Near Rockhill Hotel Sutarwadi, Kolad-Pune Road 402308 <a href="https://www.premiumchickfeeds.in/">https://www.premiumchickfeeds.in/</a>                                                                  | 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 <b>Maval Agro</b> , which they had been using earlier, was snapped up by <b>Japfa</b> . The plant was commissioned in end 2023.                                                                                                                                                                                                             |
| 56 | <b>Pragati Broilers</b> , HQ no 32, MMDA Colony, Ashoka Nagar, Arumbakkam, Chennai, Tamil Nadu and plant at Krishnagiri, Karnataka.                                                                                                                                                                   | Meyn  | 2500        | This plant, for a 2500/4500 BPH capacity has been commissioned in Q1 2025.                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 57 | <b>Premier Breeding Farm</b> , 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 | <b>ProTAC Foods International Pvt Ltd</b> , 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 <b>Tri Star</b> (Kerala), <b>Nandus</b> , <b>Licious</b> , <b>Shanti (Fortune)</b> and <b>Fresh-to-Home</b> . Commissioning to 4500 BPH done in mid 2023. Next expansion will be to 7000 BPH.                                                                                                                                        |
| 59 | <b>Provit Foods Pvt Ltd</b> . Payannoor Kerala. <a href="https://www.provitfoods.com/">https://www.provitfoods.com/</a>                                                                                                                                                                               | Local | 1000        | Provit Foods is the flagship company of Vincent Cutinha family, encompassing Bharat Agrovet and <b>Ideal Chicken</b> . This family is also an integrator operating under the banner of <b>Anupama Feeds &amp; Farms</b> . It retails processed poultry through over 20 outlets in                                                                                                                                                                                                             |
| 60 |                                                                                                                                                                                                                                                                                                       | Marel | 3000        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |



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|    |                                                                                                                                                                                                                                                  |       |              | Kerala and Karnataka. Besides Provit's existing 1000 BPH plant Marel is now building a 3000/6000 BPH plant near Mangalore (awarded govt capital subsidy), to be commissioned by Q1, 2026.                                                                                                                                                                                                                                     |
| 61 | <b>RM Delicious Foods</b> , 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 | <b>Royal Foods/Ave Miriam</b> , 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 | <b>Saaras Breeding Farms Pvt Ltd</b> , NH26, Patnagarh, Balangir, Odisha 767001 <a href="https://ovofarm.in/">https://ovofarm.in/</a>                                                                                                            | 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 | <b>Safa Foods</b> , 535 Fathima Manzil 1st Floor, Near Old Kavitha Theatre, Dr Nanjappa Road, Gandhipuram-Coimbatore 641012                                                                                                                      | Local | 1000         | Commissioned mid 2024.                                                                                                                                                                                                                                                                                                                                                                                                        |
| 65 | <b>Samrans Fresh Meat Products Pvt Ltd</b> . 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 | <b>Sethwala Foods Pvt Ltd</b> , 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>Setb's</i> .                                                                                                                                                                                                                                                           |
| 67 | <b>Shahran Poultry</b> 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 | <b>Shalimar Corporation</b> , Plant at Galsi, Panagarh, West Bengal. HQ 17A, B & C Everest, 46C Chowringhee Road, Kolkata <a href="http://shalimarcorp.in">http://shalimarcorp.in</a>                                                            | Meyn  | 6000         | Commissioned in Sept 2014 at 2000 BPH. Expanded to 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 <b>Star Agrovet Marketing</b> at Manjri in Pune, <b>Hayagreeva Food Processing</b> at Doddballapur, Karnataka and in Punjab. |
| 70 | <b>Shanthi Feeds</b> , Plant at Dindigul, Tamil Nadu. HQ village Pappampatti, Coimbatore <a href="http://shanthifeeds.com">http://shanthifeeds.com</a>                                                                                           | Meyn  | <u>12000</u> | Originally a 1000 BPH Meyn plant commissioned in 2009. Expanded in 2 stages to 3000 BPH till 2014. Then expanded and re-commissioned at 6000 BPH in February 2016. Expanded to 12000 BPH in first quarter of 2021.                                                                                                                                                                                                            |
| 71 | <b>Sivasakthi Agro Foods</b> , plant at Udumalpet, Tamil Nadu. HQ 793/18, Kumaralingam West Village, Rudrapalayam Post, Madathukalam Taluk, Tirupur Dist. Tamil Nadu <a href="http://www.sivasakthifoods.com">http://www.sivasakthifoods.com</a> | Marel | 5000         | Originally planned as a 1000 BPH facility in mid 2012. Changed to 2000 BPH in 2013 and came into production in early 2016. Expansion to 3000 BPH commenced in May 2019. By 2022 they had expanded to the present capacity. Brand name is <i>Supriya</i> .                                                                                                                                                                     |
| 72 | <b>SKM Feeds</b> , (earlier known as VKS Farms). Plant at Dindigul, Tamil Nadu. HQ Nanjai Uthukuli, Modakurichi Tamil Nadu <a href="https://www.skmpornafoods.com">https://www.skmpornafoods.com</a>                                             | Meyn  | <u>8000</u>  | Original capacity of 2000 BPH commissioned in September 2009 by <b>VKS</b> . 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 | <b>Sky Foods</b> , 402/82 Kiluvankattur, Andiyagoundanoor, Udumalpet, Tiruppur Dist, Tamil Nadu 842154 <a href="http://skyfoodagrofarm.com/">http://skyfoodagrofarm.com/</a>                                                                     | Local | 1500         | Incorporated in 2018 by Ram Prasad, an ex-plant manager of <b>Shanthi Feeds</b> . 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 | <b>Skylark Foods</b> , plant at Rai Food Park, Sonapat, Haryana. HQ at Dharamgarh Road, Safidon, Dist. Jind, Haryana. <a href="http://skylarkfoods.com">http://skylarkfoods.com</a>                                                              | Meyn  | <u>1000</u>  | Commissioned March 2006 on an 1800 SqM piece of food-park land with no room for expansion or growth. They have added an RTE plant in a nearby plot of land. Sell through <b>Walmart</b> and to many premium hotels and                                                                                                                                                                                                        |



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|    |                                                                                                                                                                                                                                 |               |              | their franchise outlets under the brand name <i>Nutrich</i> . Skylark is also a major layer integrator.                                                                                                                                                                                                                                                                                                  |
| 75 | <b>Sneha Farms Pvt Ltd</b> , plant at Addakul, Hyderabad-Bangalore Highway, Telangana. HQ at Plot No 30, Survey No. 22, 17AA, Kondapur, Hyderabad. <a href="http://snehagroup.co">http://snehagroup.co</a>                      | Marel/Meyn    | <u>12000</u> | Ordered initial 6000 BPH plant from Marel in March 2014. Commissioned in April 2016. Procured equipment from Meyn for doubling their capacity. Commissioned in end 2021. Have recently joined hands with Mitsui of Japan.                                                                                                                                                                                |
| 76 | <b>Star Foods Pvt Ltd</b> , Plant at Ladhawal Food Park, Ludhiana. HQ at Sampoorana Feeds, Phagwara, Punjab <a href="http://sampoornafeeds.com">http://sampoornafeeds.com</a>                                                   | Marel         | 4000         | Construction in progress at site. Commissioning expected by Q2, 2025. <b>Came into operation in 3<sup>rd</sup> quarter, 2025.</b>                                                                                                                                                                                                                                                                        |
| 77 | <b>Star Poultry</b> , Johrawar Singh, Jammu                                                                                                                                                                                     | Local         | 1000         | Fabrication in progress. Was expected to come into operation in Q3 of 2025.                                                                                                                                                                                                                                                                                                                              |
| 78 | <b>Strategic Hitech Processing LLP</b> , Dharapuram, Tamil Nadu.                                                                                                                                                                | -             | 3000         | Promoted by the <b>Broiler Coordination Committee</b> , Coimbatore. Land has already been bought and water supply assured. Schedule for this plant is unknown.                                                                                                                                                                                                                                           |
| 79 | <b>Suguna Foods Pvt Ltd</b> , Vyalur, Tamil Nadu HQ at Unitea Building, No 3, Savithri Shanmugam Road, Race Course, Coimbatore. Plant at Vayalur <a href="https://www.sugunafoods.co.in">https://www.sugunafoods.co.in</a>      | Meyn<br>Marel | 3000<br>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 <sup>th</sup> project which is now dropped and land is for sale. See <b>Suguna</b> entry in part B of this table. |
| 80 | <b>Suguna Foods Pvt Ltd</b> , 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 <b>Alpha Agro</b> who sold the facility to Suguna in 2019.                                                                                                                                                                                  |
| 81 | <b>Suguna Foods Pvt Ltd</b> , 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 | <b>Sumangal Poultry Farm</b> , Shiv Tirth, Gat no 137/1, near Ravalgaon Fata, Belgaon-Ravalgaon Road, Belgaon, Tal Malegaon (Nashik) Maharashtra. <a href="https://www.sumangalgroups.com/">https://www.sumangalgroups.com/</a> | Local         | 1500         | The company belongs to <b>Sumangal Group</b> head quartered at Nashik. The plant came on stream during 2023-24.                                                                                                                                                                                                                                                                                          |
| 83 | <b>Swami Chickens Pvt Ltd</b> , (Swami Group) Plant at 261, 272 Village Kottathurai, 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 | <b>Syra Foods (Redefining Taste)</b> , 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 | <b>Venkateshwara (VH)</b> , Plant at Kamshet near Pune. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. <a href="http://venkys.com">http://venkys.com</a>                                               | Meyn/Marel    | <u>3000</u>  | Oldest operating plant (since 1986) in India. It was commissioned as 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 <b>Walvekar</b> (See part B of this table) consignment.                                                                                                                                 |
| 86 | <b>Venkateshwara (VH)</b> , Plant at Davangere, Karnataka. HQ Venkateshwara House, 114/A/2, Pune-Sinhagad Road, Vitthalwadi, Pune. <a href="http://venkys.com">http://venkys.com</a>                                            | Linco         | <u>6000</u>  | Commissioned in March 2012. Since the commissioning of this unit they have preferred to focus on RTE instead of primary processing. VH has large RTE facilities at both locations.                                                                                                                                                                                                                       |
| 87 | <b>Vimla Feeds</b> Plant at Tuniki Village, Kowdipally Mandal, Medak District, Telangana. HQ at Chalimeda Vimala Devi Building, Sy. 93/B, NH 7, Kompally, Petbasheerabad, Quthbullapur, Medchal-Malkajigiri Distt, Telangana    | Bayle/Local   | 4000         | Bought original 1000 BPH Bayle plant of <b>Srinivasa Farms</b> 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.                                                                                                                                                              |



|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |       |                 |                                                                                                                                                                                                                                                                                     |
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| 88                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>West Bengal Livestock Dev Corp,</b> Haringhata, West Bengal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Local | 1000            | Order taken from WBLDC by <b>Dr Froeb</b> (India) Pvt Ltd, (then the agent of Linco) and sub-contracted to local fabricators. Commissioned in 2015.                                                                                                                                 |
| 89                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>West Bengal Livestock Dev Corp,</b> Siliguri, West Bengal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Linco | 1000            | Combined poultry, goat, beef and pork slaughterhouse commissioned in 2022.                                                                                                                                                                                                          |
| 90                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>West Bengal Livestock Dev Corp,</b> Haringhata, West Bengal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Meyn  | 4000            | Construction is on for a 4000/8000 BPH plant at their Haringhata location. Commissioning expected by early 2026.                                                                                                                                                                    |
| 91                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Z &amp; M Foods Pvt Ltd,</b> 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 <b>Pragathi Broilers</b> 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. |
| <b>Integrated processing capacity expected by mid 2026 based on current orders, on-stream and under construction projects.</b>                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |       | <b>2,52,300</b> | <b>Average plant capacity is 2770 BPH.</b>                                                                                                                                                                                                                                          |
| 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>B</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Part B of the table lists (1) small un-organized sector processing plants with manual dressing, drum plucking and conveyORIZED or partially conveyORIZED poultry processing plants with capacities under 1000 BPH and (2) closed and scrapped poultry processing plants of all sizes and (3) Plants on which some work has been done but commissioning remains under abeyance for long periods and (4) RTE plants who source chicken meat from processing plants, and even if their repertoire only marginally includes chicken, they have the machinery, experience and general potential to follow market trends and become noteworthy for poultry processors and (5) web based poultry and poultry based RTE order suppliers, many of which have also acquired, or leased idle facilities and are either reviving them or setting up <i>cloud kitchens</i> for captive use.<br>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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>AgriTech Hatcheries Ltd</b> , 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Al Amani Foods Pvt Ltd</b> , 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Al Kabeer</b> , Group has been in processed foods in the Middle East since 1978, establishing a unit in India with a processing facility in Hyderabad, Cascade Marine Foods in Sharjah and Falcon Foods in the U.K. In Hyderabad it produces, besides other products, RTE items with chicken sourced from nearby processors. <a href="http://www.al-Kabeer.in">http://www.al-Kabeer.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |       |                 |                                                                                                                                                                                                                                                                                     |
| 95                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Allana Sons</b> 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. <a href="https://allana.com/">https://allana.com/</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |       |                 |                                                                                                                                                                                                                                                                                     |
| 96                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Amalgam Group</b> , 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 <b>Innovative Foods</b> , 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 'Buffer' 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. <a href="http://www.sumeru.net">http://www.sumeru.net</a> |       |                 |                                                                                                                                                                                                                                                                                     |
| 97                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Ambica Chicken</b> , 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Amrit Feeds</b> , 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |       |                 |                                                                                                                                                                                                                                                                                     |



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| 99  | <b>Amrit Feeds</b> , Beldanga Mouza, Raghunathpur, PO Bonkati KanksaI, Panagarh, West Bengal. A Lincop 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 <b>Anmol Feeds</b> , Jalan Industrial Complex, Gate #1, Bombay Road, Howrah 711411. Amit Saraogi hopes to re-commission it.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 100 | <b>Anmol Feeds</b> . See Amrit Feeds                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 101 | <b>Arambagh Hatcheries</b> , 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 | <b>AOV</b> old plant with 2000 BPH local machinery. May be on sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 103 | <b>Arthur's Food Company</b> , Bangalore. This RTE plant retails through Bigbasket, Food Basket, Foodhall, Foodworld, Metro Cash & Carry, Nature's Basket, Scootsy, Spar, Spencer's and Star Bazar. <a href="http://www.arthursfood.com">http://www.arthursfood.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 104 | <b>Assam Livestock &amp; Poultry Corporation</b> , Panjabari Road, Khanapara, Guwahati 781022. A local 500 BPH plant. Was installed and commissioned in 2023.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 105 | <b>A-One Agro</b> , Pune, unknown capacity, reportedly commissioned in 2024 by a local fabricator.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 106 | <b>Barafwala Co</b> , 11 High Street, Camp, Belgaum, Karnataka. Had so far been confined to the red meat industry. Recently they have set up a pilot plant for processing poultry using some fabricators' machines and some made by themselves and are slaughtering 2000-3000 birds daily.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 107 | <b>Big Bird</b> , Bangalore, unknown capacity, reportedly commissioned in 2020 by a local company.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 108 | <b>Brahmagiri Dev Society</b> , Wynad, Kerala, 500 BPH plant by a local company in 2010.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 109 | <b>Broiler Master</b> , Punjab, 200 BPH in 2011. This is a semi-manual processing plant, having neither scalding nor plucking and does wet market style evisceration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 110 | <b>Caris Pure</b> , Processing Company Pvt Ltd. Plant at Paramankeni Village, Kancheepuram, Tamil Nadu. HQ at 23 C, Kohinoor Complex, East Coast Road, Village Vettuvankeni, Injambakkam, Chennai, Tamil Nadu. Tae-Jin supplied the 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 | <b>Central Avian Research Institute</b> , (IVRI) Bareilly, 200 BPH plant by a local fabricator.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 112 | <b>Century Farm Products</b> , 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 | <b>Chatha Foods</b> , launched by P.S. Chatha in 1998 at village Chaundheri, Dapper, on the Chandigarh - Ambala highway in the Mohali district of Punjab, market their RTE products under the brand names <i>Gusto</i> and <i>Swiss Naturen</i> . With their retort packaged products being shelf-stable at ambient temperature, they beat the hurdle of the inadequate cold chain. They source chicken meat from SHL Agro (now Suguna) and Shanthi. Their institutional customers include about 80 five star hotels besides Taj Air Caterers, Sugar and Spice and ITC Welcomegroup. They also retail through some 1100 outlets. 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. <a href="http://cfpl.net.in">http://cfpl.net.in</a> . |
| 114 | <b>Chicago Foods</b> , Coimbatore. Unknown capacity poultry slaughterhouse, reportedly commissioned in mid 2024 by a local fabricator.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 115 | <b>Chicken Factory</b> , Anjananagar, Bangalore 560091. Has a semi manual locally built operation doing 1000 BPD.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 116 | <b>Coastal Farms</b> , Mangalore, Old 500 BPH local plant. Scrapped and probably available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 117 | <b>College of Vet &amp; Animal Sciences</b> , Kerala, 200 BPH plant by a local fabricator in 2003.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 118 | <b>College of Vet &amp; Animal Sciences</b> , Parbhani, 300 BPH plant by a local fabricator. Commissioned in 2020.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 119 | <b>Contai Golden Hatcheries Pvt. Ltd.</b> , 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 | <b>CP India</b> , Chennai, 500 BPH plant by a local fabricator in 2002. Scrapped and probably available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 121 | <b>Darshan Foods (Meatzza)</b> , Established in 1969 as a buffalo meat exporter. Started an RTE division in 1996 with facilities for delicatessens, Indian products like <i>seekh kabab</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. <a href="http://www.meatzza.com">http://www.meatzza.com</a> .                                                                                                         |
| 122 | <b>Deepan Foods LLP</b> , Pune, 2024. A 500 BPH locally fabricated plant, commissioned at Taloja in 2022-23.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 123 | <b>Doon Valley Poultry (Savoury Delights)</b> , 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 | <b>Dr Meat</b> . See Lotus Farms                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 125 | <b>Empire Foods</b> , 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 | <b>Farmer Choice</b> , Pune A 500 BPH plant supplied a local fabricator who commissioned it during 2023-24                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 127 | <b>Farm Suzanne</b> , 64, Montiet 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. <a href="http://www.farmsuzanne.com">http://www.farmsuzanne.com</a>                                                                                                                                                                                                                                                  |



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| 128 | <b>Farm Value Foods Pvt Ltd</b> , owned by Anshu Sibbal Chatli runs a locally fabricated plant of 350 BPH capacity at Barnala. It was commissioned in 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 129 | <b>Five Star</b> 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. <a href="https://www.fivestarchicken.com">https://www.fivestarchicken.com</a> |
| 130 | <b>Food and Flavours</b> , 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 | <b>Gitwako Farms</b> , 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 | <b>Godrej Foods</b> , 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 | <b>Golden Hatcheries</b> (Now <b>Golden Fresh</b> ), 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 | <b>Henny Fresh</b> , Odisha, 500 BPH plant by a local fabricator, expected commissioning in Q2, 2025.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 135 | <b>Hilary Fluff Pvt Ltd</b> , Lucknow, 500 BPH plant by a local fabricator, expected to be ready for shipment in Q1, 2025.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 136 | <b>Hybro Foods Pvt Ltd</b> , 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 | <b>Higrow Chicken</b> , owner Deepak Raj Garg, runs a local plant of 500 BPH at Ludhiana, which was commissioned in 2017.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 138 | <b>Hygienic Chickens</b> , 356, Akal Market, Chaura Bazaar, Ludhiana, Punjab, 300 BPH by a local fabricator.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 139 | <b>Ideal Chicken</b> , 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 <a href="http://www.idealchicken.in">http://www.idealchicken.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 140 | <b>Indian Broilers</b> , (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 | <b>Indian Hospitality Company Group</b> was registered in Caymen Islands in 2006 to make investments in hospitality and QSR sectors. To help them do so, they recruited the founder of Barista and CEO of Yum and in 2012 acquired Adelle 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 | <b>International Food Products</b> , Chandigarh. Small RTE producer in chicken and other meats.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 143 | <b>Irani Chicken Products LLB</b> , Daman, Gujarat, 500 BPH plant by Bayle, commissioned Dec, 2013.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 144 | <b>ITC Welcomegroup</b> made its entry into the branded & packaged foods business in August 2001 with inspiration from its successful restaurants Bukhara and Dum Pukht. In June 2003 they launched their <i>Kitchens of India</i> brand comprising a range of heat-and-eat Aashirvaad brand RTE meals. This range was available in heat-resistant packaging form, produced using a retort process at Chatha Foods. Their Indian meal packs are sold in Australia, Canada, Germany, Japan, New Zealand, South Korea and USA. Although this range contributed only 1% of group sales, it sold 6 times as much in USA than in India in 2012 and was the second most sold Indian meal in USA after <i>Tasty Bites</i> . It set up a new plant for these product lines at Bangalore.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 145 | <b>Karma Protein P. Ltd</b> , Haryana. A 500 BPH local plant being built by a local company, slated for commissioning in Q2 2025.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 146 | <b>Kenchick Foods</b> , Erode, Tamil Nadu, A locally supplied 700 BPH plant commissioned in Q4, 2024.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 147 | <b>Khushbaksh Poultry</b> , 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 | <b>Kudumbashree Broiler Farmers Producer Company Ltd</b> , at Trivandrum, Kerala. Is a 500 BPH plant supplied by a local company. Commissioning expected Q2 2025.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 149 | <b>Knowledge Foods</b> , Neral. Manual-dressing 300 BPH. Also making RTE products.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 150 | <b>Ku Koo Ch Ku Poultry Farm Pvt Ltd</b> , 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 | <b>Kongu Herbal Chicken Pvt Ltd</b> , 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 | <b>KSIDC</b> , Kerala, 300 BPH local plant in 2005.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 153 | <b>Limra Chicken</b> , Coimbatore. A 500 BPH local plant.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |



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| 154 | <b>Lotus Farms</b> , 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 <b>Dr Meat</b> , a name registered under the name <b>Sukos Foods Private Limited</b> . In 2023 the company comprising all three names was acquired by Zappfresh.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 155 | <b>Malabar Agro Industries Pvt Ltd</b> , was registered in November 2018 at Ernakulam in Kerala. It operates a 500 BPH plant supplied by a local fabricator.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 156 | <b>McDonalds India</b> , now owned by OSI, set up their first plants at Taloja in 1995 as Vista Foods and Kitran Foods to cater separately to non-vegetarian and vegetarian products respectively. Recently they set up a vegetarian products facility in Punjab and acquired the facility of Global Nutri Foods Ltd at Madanapalle in AP. Altogether they possess an RTE capacity of 625t/m at Taloja and 1750t/m at Madanapalle. They get approximately 95% of their supplies from 38 local sources – with raw chicken coming from the Godrej Taloja plant. Have recently installed a cone de-boner sourced from Meyn. <a href="https://vistafood.com">https://vistafood.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 157 | <b>Miki Exports International</b> , 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 <a href="http://mikichicken.com">http://mikichicken.com</a> has expired.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 158 | <b>MTR</b> . Started in 1924 as a restaurant called Brahmanara Coffee Club and later in 1951, changed to Mavalli Tiffin Room in Bangalore. During the Emergency, unable to conform to the prescribed pricing orders of Indira Gandhi, they diversified into packaged convenience foods. Around 2008 they were acquired by Norway's Orkla Foods. 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 | <b>Meat Masters</b> . 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. <a href="http://www.meatmasters.co.in">http://www.meatmasters.co.in</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 160 | <b>Meat Products of India</b> , 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 | <b>Meatyns Farmer Producer Co Ltd</b> , 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 | <b>MP Pashudhan Nigam</b> , 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 | <b>Mohan Breeding Farm</b> , 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. <a href="https://mbfgroup.in/contact-us.php">https://mbfgroup.in/contact-us.php</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 164 | <b>Monrovia Agro Foods</b> , Bhandgaon, Pune, Maharashtra, 500 BPH local plant in Jan 2014.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 165 | <b>Mulpuri Foods &amp; Feeds Pvt Ltd</b> , Ramannagudem, Vattigudipadu, Nuzvid, Andhra Pradesh. In fish, animal feeds & poultry.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 166 | <b>Nagpal Frozen Foods</b> , Barwala, Haryana, 1000 BPH local plant commissioned in 2007 and operated by Nagpal's relative Mulk Raj and his sons under the name of <b>Chandigarh Poultry</b> , suppliers to the armed forces. Chandigarh Poultry was later renamed <b>AV Ventures</b> . 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 part A of this table.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 167 | <b>Navi Nutrix</b> , 750 BPH local plant at Kaveripatnam, Krishnagiri in Tamil Nadu, commissioned end 2017. Now suspended operations and leased to <b>Sriya Foods</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 168 | <b>Nandus Foods Pvt Ltd</b> . Headquartered at Bangalore, the Nanda Group, comprises 11 small companies promoted by P. S. Nandakumar, an old business associate of Rao of VH. As integrators, Nandus skipped the processing stage, venturing directly into RTE in 1989 with a 400mm Koppens forming-frying line and a 32 tonne frozen store. They initially ran it themselves, and at one stage even fought and lost a legal battle in 2007 with the international restaurant chain <b>Nandos Indage Restaurants Pvt Ltd</b> 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 | <b>Nensey's Poultry</b> , Valsad, Gujarat, 300 BPH local plant around 2002. It is learnt to have been sold to an unknown party.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 170 | <b>Nutri Feeds &amp; Farms</b> 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 | <b>Nutrivit Innovation</b> , Hyderabad, local plant of unknown capacity, reportedly commissioned in 2023.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 172 | <b>Ovo Farms</b> , Odisha has been awarded government capital subsidy for setting up an egg powder plant in Odisha.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 173 | <b>Parsekar Foods</b> , 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 | <b>Peninsula Foods Pvt Ltd</b> , a division of DeeJay Group, Bangalore, owned by David Lobo, set up a 1000 BPH Meyn plant in the late 1990's. For tax benefits it was run by a complex arrangement of four DeeJay companies. Closed around 1998 following labour unrest which coincided with Lobo's unsuccessful foray into broiler pure-lines with Ross – in direct competition with his one-time partner Dr B. V. Rao of VH. The plant was later scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 175 | <b>Perfect Poultry Pvt Ltd</b> , 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |



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|     | some secondary processing machines, The plant is suitable, after balancing, for 1000 BPH or more, and is probably available for sale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 176 | <b>Pioneer</b> , Hyderabad, Andhra Pradesh, 500 BPH local plant. It has been scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 177 | <b>PL-480 plants</b> . Even before VH set up their first poultry processing plant in India in 1986, several carousel track type prototypes from Diamond of USA arrived as grant to the Indian Government under the PL-480 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 <b>Mafco</b> , Mumbai, the latter being bought in an auction by VH and mothballed at Kamshet. The Mafco plant is probably scrapped by now, but the remaining machines may yet be put to use if auctioned by the government. |
| 178 | <b>Prabhat Foods</b> . Established in the year 1963. They sell chicken RTE products directly to some institutions and also retail through half a dozen outlets in Mumbai. Mhatre, the owner, is related to J. Desai of VH. <a href="https://www.prabhatpoultry.com">https://www.prabhatpoultry.com</a>                                                                                                                                                                                                                                                                                                                                                                      |
| 179 | <b>Pragathi Broilers</b> , 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 | <b>Ratnagiri Cooperative</b> , Chiplun, Maharashtra, 300 BPH local plant in 2003. Now closed and possibly scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 181 | <b>Riverdale Foods</b> , 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 | <b>RFK Green</b> 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 | <b>Ruchi Agro Industries Ltd</b> , Chikmagalur. It is a manual plant of unknown capacity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 184 | <b>Royal Agro Fresh LLP</b> , 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 | <b>Royal Foods Pvt Ltd</b> /Shakir Shaikh, Lohegaon, Pune, Maharashtra. 500 BPH local plant set up in Nov 2013.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 186 | <b>Sai Agri</b> , 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 | <b>Sandip Mukherjee</b> , One time plant manager of <b>Arambagh Hatcheries</b> , is operating a 500 BPH manual processing plant at Gariahat, near Kolkata in West Bengal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 188 | <b>Sethwala Foods Pvt Ltd</b> , 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 Shahan of Sharon Broilers, who in turn sold it to Sethwala in 2012. Installed and expanded by local fabricators to 3000 BPH in stages.                                                                                                                                                                                                                                                                                             |
| 189 | <b>Shivaa Chicken</b> , 2/418, Palladam Main Road, Opp. Microwave Station, Puliampatty, Pollachi, Coimbatore, TN. Manual dressing of unknown capacity. <a href="http://www.shivaachicken.com">http://www.shivaachicken.com</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 190 | <b>Shiva Farms</b> , Mumbai. A plant producing a variety of RTE products and cold cuts without the use of machinery.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 191 | <b>Shiva Poultry Equipment</b> , Barnala city, is operating a 500 BPH local processing plant at Gadvasu University in Ludhiana. Their brand name as “ <i>Hygrow Chicken</i> ”.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 192 | <b>Simran Farms Ltd</b> , (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 | <b>Sirsa Foods</b> , at 2, Lavkush Dharamshala, Balmiki Chowk, Opp. Khunger Sweets, Sirsa, Haryana. A 500 BPH local plant commissioned in Q1 2024.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 194 | <b>S. K. Chicken</b> , Coimbatore, unknown capacity local plant, reportedly commissioned in 2023.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 195 | <b>S.M. Feeds &amp; Farms Pvt Ltd</b> , No. 294, Thiruvallur High Road, Alamathy Village, CCBF Post, Redhills, Chennai 600052. A 500 BPH local plant commissioned in 2017.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 196 | <b>Sood Poultry</b> at Jullunder, Punjab. A 500 BPH local plant commissioned in 2020.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 197 | <b>Souza Hatcheries</b> , Mangalore, Karnataka. HQ at Souza Commercial Complex, Highlands, Falnir Road, Mangalore <a href="http://www.souzahatch.com">http://www.souzahatch.com</a> . Purchased a local plant of 500 BPH, then bought a 1000 BPH plant from Bayle. Both older plants were sold to <b>Ideal Chicken</b> , who revamped the machinery and operate a plant as listed in Part A of this table.                                                                                                                                                                                                                                                                  |
| 198 | <b>Srinivasa Farms Pvt Ltd</b> , 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. <a href="https://www.srinivasafarms.com">https://www.srinivasafarms.com</a> .                                                                                                                                                                                                                                                                                        |
| 199 | <b>Sriya Farms and Feeds Pvt Ltd.</b> , 208 B, 3rd Floor, 80 Feet Road, IndusInd Bank buildings, 2nd Block, HBR Layout, Bangalore 560043.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 200 | <b>S.S.S Hatcheries</b> , 258/1-1, N.S.R.Road, Venkitapuram, Coimbatore, Tamil Nadu 641025. 500 BPH local plant set up in 2023.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 201 | <b>Star Agrovat Marketing</b> , Manjri, Pune, 700 BPH local plant set up in 2022. They process chicken under contract with Shalimar Corporation.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 202 | <b>Subsara Poultry</b> , Coimbatore, Tamil Nadu. A 700 BPH local plant commissioned during 2021-22                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 203 | <b>Suguna Foods Pvt Ltd</b> . 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. Asking price Rs 1.8-2 crores/ acre.                                                                                                                                                                                                                                                                                                        |
| 204 | <b>Sujay Feeds</b> , SY No 44B Pillaraju Property, Ganganager, Bengaluru, Karnataka, 200 BPH manual slaughter.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 205 | <b>Sukos Foods Private Limited</b> . See Lotus Farms.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 206 | <b>Swift Foods</b> , Dadri, Uttar Pradesh. An automatic Stork 4000 BPH processing plant commissioned in the early 1990's by Jagdish Prasad, in competition with VH's Kamshet plant of 1000 BPH. Closed around 1995, then scrapped.                                                                                                                                                                                                                                                                                                                                                                                                                                          |



|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 207 | <b>Taurus Foods</b> was set up in the mid 1990's. It produces marinated, smoked and cooked chicken RTE products at its plant at EPIP, 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. <a href="https://www.taurusfoods.in">https://www.taurusfoods.in</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 208 | <b>Thai Thirunaal Agro Foods Pvt Ltd.</b> A 500 BPH local plant commissioned at Coimbatore in 2022.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 209 | <b>Unitas Foods Pvt Ltd</b> , 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. <a href="http://www.unitasfoods.com">http://www.unitasfoods.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 210 | <b>Unnat Feeds</b> , Sector 12 Huda, near Mittal Mega Mall, Panipat, Haryana. Learnt to be fabricating the plant themselves from 2021.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 211 | <b>Villa Sita Farm</b> , Hyderabad, local plant of unknown capacity, reportedly commissioned mid 2024.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 212 | <b>Violet Industries/Souza Hatcheries</b> , Mangalore, 500 BPH local plant. Not yet commissioned.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 213 | <b>Vista Agriculture &amp; Food Products</b> , Khurdah Road, Bhubaneswar, Odisha, 750 BPH local plant supplied 2013. Plant is closed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 214 | <b>Walvekar Hatcheries Ltd</b> , 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 Kamshet.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 215 | <b>WBFCSL</b> , set up by Mr R. K. Doloi, MLA, Midnapore, 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 | <b>Web based D2C delivery platforms</b> for order booking and order tracking using purpose-designed apps and QSR service. These include (1) <b>Amazon</b> <a href="https://www.amazon.in/gp/bestsellers/grocery/">https://www.amazon.in/gp/bestsellers/grocery/</a> ; (2) <b>Food Panda</b> <a href="https://www.foodpanda.com/">https://www.foodpanda.com/</a> ; (3) <b>Fresh-to-Home</b> <a href="https://www.freshtohome.com/">https://www.freshtohome.com/</a> ; (4) <b>Licious</b> <a href="https://www.licious.in/">https://www.licious.in/</a> ; (5) <b>Meat And Eat</b> <a href="https://meatandeat.in/">https://meatandeat.in/</a> ; (6) <b>Road Runners</b> <a href="https://www.meatigo.com/">https://www.meatigo.com/</a> ; (7) <b>Swiggy</b> <a href="https://www.swiggy.com/">https://www.swiggy.com/</a> ; (8) <b>Zapp Fresh</b> <a href="https://www.zappfresh.com/">https://www.zappfresh.com/</a> ; (9) <b>Zomato</b> <a href="https://www.zomato.com/india">https://www.zomato.com/india</a> |
| 217 | <b>Zorabian</b> , 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

### 3.9.1 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 big power 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 last 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, they do! For alert poultry feed millers a third scenario exists. It has been proposed by APTEC in Section 3.9.1.2 of this document.

#### 3.9.1.1 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<sup>42</sup> wild grasses crossed, for unknown reasons, to form a new tetraploid species. The second was the addition of the D genome from *Aegilops tauschii* which gave bread wheat its unique properties, including presence of gluten proteins that allows leavening and an increased range of adaptability.



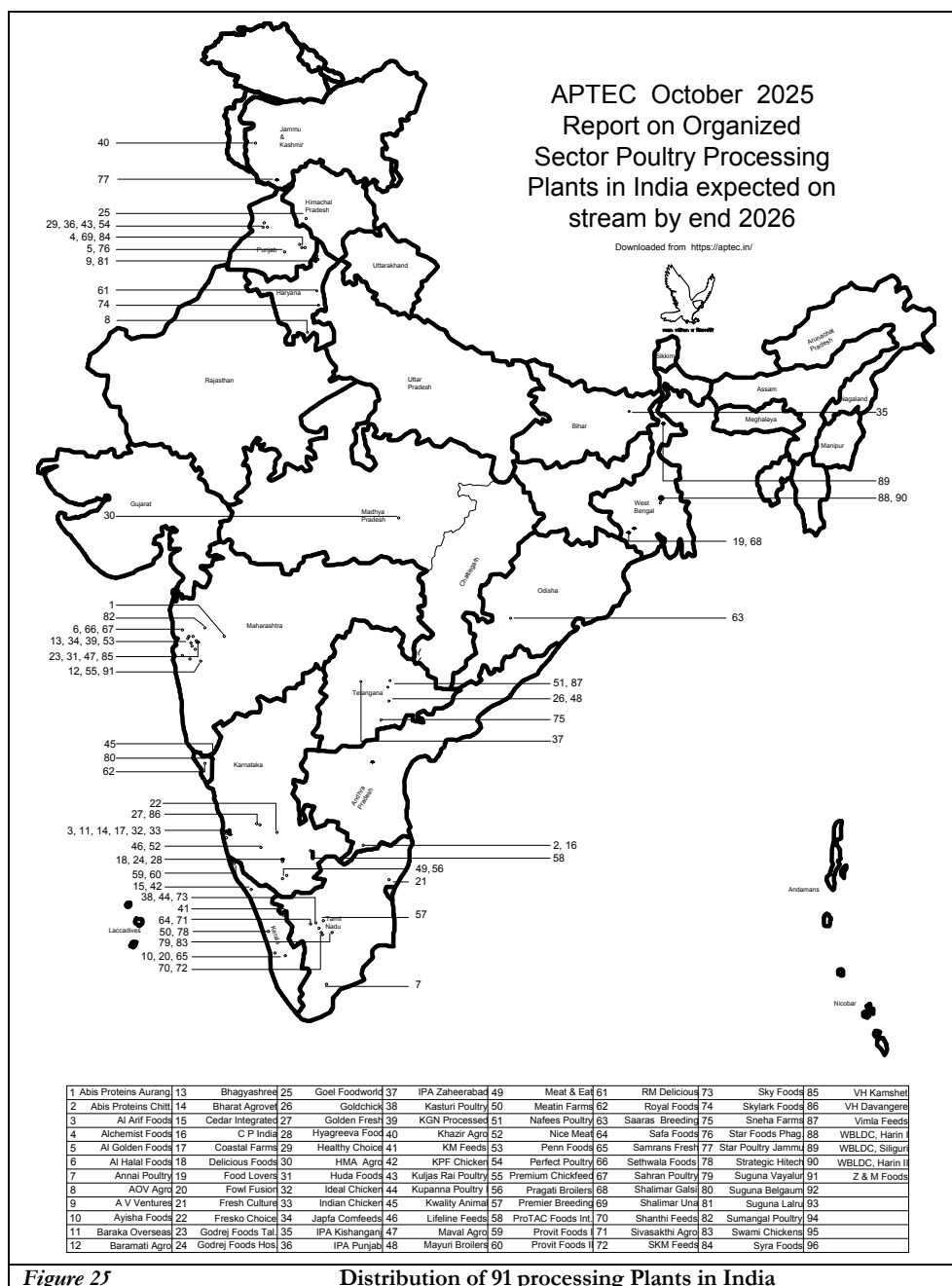


Figure 25

Distribution of 91 processing Plants in India

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? Meanwhile if our dishonest advocacy groups are misdirecting our all too powerful bureaucrats, why not blow the whistle on them?

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 that risk!

One contemporary example where the cost of insurance appears to be unacceptably large, even possibly as

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

Table 36 Timeline For Major Enlargement of Commercial Production



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 minimize and the rest of the time when partial cancellations happen, climate remains 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 close to 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 choosing a balanced mix in these and similar controversial contexts has been accepted as a via media by Indians. 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?

| <b>Table 37 Tracking Processing Capacity Build-up Over The Past Quarter Century</b> |                                                                                                                                                                                                                                                                                    |               |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| 1                                                                                   | Operating capacity in Q3, 2002 (The 2002 capacity comprised Arambagh-Bolpur, West Bengal 2000; Godrej-Hoskote, Karnataka 1000; Goldchick-Hyderabad 2000; Riverdale-Somatne, Pune 1000; Toubro (Alchemist) Kurali 2000; Suguna-Vayalur 2000; Venkys-Kamshet, Pune 3000 = 13000 BPH) | <b>13,000</b> |
| 2                                                                                   | Projected capacity by end 2018 (vide Aptec Feb 2018 Bi-annual Industry Report)                                                                                                                                                                                                     | <b>95,600</b> |
| 3                                                                                   | Less capacities that failed to materialize/delayed Srinivasa Prakasam unit 2000; Coastal Farms, Mangalore 2000; Goel Foods 2000; Nanda Group, Bangalore 2000; RFK Green, Pulwama 2500; VKS expansion delayed 2000. Total = 12500                                                   | <b>12,500</b> |
| 4                                                                                   | Total operating capacity in 2018 was <b>95600-12500=83,100</b>                                                                                                                                                                                                                     | <b>83,100</b> |
| 5                                                                                   | Calculated growth rate over the 16 year period (2018-2002) = $[(13000 \times 1.1229)^{16} = 83109 \sim 83100] = 12.29\%$                                                                                                                                                           | <b>12.29%</b> |
| 6                                                                                   | Projected capacity by Q2, 2026 (vide current Bi-annual Industry Report)                                                                                                                                                                                                            | <b>267800</b> |
| 7                                                                                   | Calculated growth rate over the 8 year period (2018-2026) = $15.75\%$<br>$[(83100 \times 1.1575)^8 = 266297 \sim 267800]$                                                                                                                                                          | <b>15.75%</b> |
| 8                                                                                   | Calculated growth rate over the 24 year period (2002-2026) = $13.43\%$<br>$[(13000 \times 1.1343)^{24} = 267782 \sim 267800]$                                                                                                                                                      | <b>13.43%</b> |

### 3.9.1.2 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 the double our agricultural output, we need to repeal outdated laws and handle built-in structural time-lags in that sector. For broilers, the in-built time lags have been calculated in table 35. The government did bring in three new laws in 2017 but had to withdraw them in November 2021 in the face of sponsored resistance from the grain merchants' lobby.

So what is APTEC's proposal 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 chronically 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/Ha. 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 activists' lobby which objects to direct introduction of GM crops. In short, a win-win for everybody!

### 3.9.2 Rate Of Capacity Build-up

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

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

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

### 3.9.4 Estimating Broiler Production & Consumption In India

For long we have sought reliable macro-data for poultry processing (or any proxy for it) on India's broiler output for estimating the wet market size and consequently quantifying growth opportunities. The most reliable proxy would be broiler breeder placement data from the Broiler Breeder Associations.

| <b>Table 38 Broiler Availability &amp; Processing In India</b> |           |                      |                             |           |
|----------------------------------------------------------------|-----------|----------------------|-----------------------------|-----------|
| Particulars for 2018-2019                                      |           | Apr 2020 to Mar 2024 | 2024-2025                   | 2025-2026 |
| Broiler-breeder placement (millions)*                          | 30 (2018) |                      |                             |           |
| Broiler DOC placement (millions)*                              |           |                      | 5520                        | 6360      |
| Broiler harvesting (millions)*                                 | 4085      |                      | 5244                        | 6042      |
| Growth in broiler availability (CAGR)                          |           | 4.8%                 | <b>15.2%</b>                |           |
| Processing capacity (millions/yr)#                             | 229.4     |                      | 393.4 - 605.5               |           |
| Growth in processing capacity (CAGR)                           |           | 9.3%                 | <b>15.75%<sup>iii</sup></b> |           |
| Share of <i>wet market</i> in India (%)                        | 94.4%     |                      | 92.5%                       | 90%       |
| Poultry meat availability in India (mill. t)                   | 5.89      |                      | 7.59                        | 8.77      |
| Par capita annum availability (grams)                          | 4332      |                      | 5190                        | 6000      |

\* For breeders we have assumed 5% mortality at pullet stage, 8% mortality among hens in lay, mortality half way through laying career, 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 have been taken from APTEC's February 2018, March 2023 and November 2025 Industry Report totals. Processing plants are projected to work 8 hours, 300 days per year.

We have ignored country chicken and layer culls in our estimate of poultry production and per capita consumption. To estimate million tonnes of poultry meat availability, we have used 2200 grams liveweight at harvest. 65% dressing yield in the wet market (you lose skin on removing feathers) and 75% in factory processing. Because published human population data 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.

In a 2017 study we found that at present Indian non-vegetarians are consuming only around 40% of the poultry meat their disposable income gives them the propensity to so do. This is based on the assumption that at 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 populations in 5 other countries 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.

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 37 shows. Table 36 shows 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 36. For the present calculations we have ignored these refinements because we have very limited macro-data 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<sup>43</sup>. It involved selection of several countries that had disposable per capita income similar to ours and comparison of their propensity to consume meat with.

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 furnish details in order to increase their reach. Finally, as the more perceptive among you may have noticed from table 37, 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?

### 3.9.4 Politics & Labour Impact On Poultry

Elections in West Bengal motivated large populations of workers hitherto engaged in processing plants, broiler and commercial farms and even feed mills to migrate. Majority of the migrants were illegal Bangladeshis, ever willing to take up the least pleasant and most demanding work slots in the eastern regions and by a process of osmosis, in other parts of the country. Secondary migration was triggered by the movement of East Indian labour hitherto engaged far afield in western, northern and southern regions to return and fill in the job slots vacated by primary migrants. The fear motivating primary migrants to move was the rumour that they might face confinement in illegal infiltrator camps.

Migration for employment and better opportunities in neighbouring lands or even not the immediate neighbourhood is a normal human urge. It is only when immigrants seek to restructure their new homes or harbour agendas to such ends does it become a problem. And when the host country is more prosperous, offering opportunities for a better life, migration of labour is most common. A byproduct of this recent population movement which will affect the poultry industry is the need for automation.

### 3.9.5 Local Fabricators Or Machine & Plant Manufacturers?

In response to our last Industry Report one of the local plant manufacturer objected in writing to our practice of referring to the entire group (comprising 7 fabricators at last count), as Local Fabricators; they would prefer to be addressed as plant manufacturers.

We are sorry to have hurt sentiments. But this brings up the opportunity to examine the complaint critically by asking - what is the essential difference between a **fabricator** and a **plant or machine manufacturer**?

A fabricator follows a construction drawing, fabricates a structure according to that drawing, paints it and hands it over to the user. He takes no responsibility for functionality of design. He furnishes no basis or proof of having used specific materials, nor of fabrication techniques. He does not provide a maintenance manual, nor set of procedures for cleaning, servicing, trouble-shooting safe handling, operation & maintenance. He furnishes no list of wearing parts, nor gives them any unique identifier numbers, nor their expected life in number of operating hours. He does not specify lubrication types nor a list of safe cleaning agents.

This unfortunately is the harvest of features we find in the offerings made by all local fabricators. When they graduate to the level at which they begin recognizing the importance of these features, they will have become machine or plant manufacturers and we will proudly refer to them as such.



Copying existing designs is an accepted way of growing. Children copy their parents when they are young but rapidly switch to peers at school and playgrounds, till they emerge as individuals with differences, often improvements over their parents. So it was when Japan started copying from USA and Europe. Then China started copying from Japan and the West. Now copying even occurs in the opposite direction. So we are not discriminating against copying provided rights to intellectual property are honoured and royalties are paid.

APTEC is aware of the fact that local fabricators need help. We will shortly upload Chapter 8 of our Handbook, titled “Safety, Equipment Design, Construction & Maintenance”. This should help our fabricators in the matter of design, construction and fabrication methods, choice of materials suitable for making food processing machinery and instruction to the user on cleaning, adjustment and maintenance.

Have you wondered why Chinese fabricators are almost absent from India? In around 2007 there were over 25 local fabricators of poultry processing machinery in China and while we served Meyn as their agent in India till 2018 we were constantly bombarded by them to take up their representation here. We did not. Because we understood one character of the Indian buyer. He does not buy a machine – he buys a lifetime of support and counsel and he is certain to hold the fabricator at fault if his workers were left in the dark about how to repair and service his machines, or how to rapidly replace parts, or clear instructions on safety. Chinese fabricators do not supply operating and maintenance manuals, or if they do, the manuals themselves are also copy-paste-rip-offs just like their machines. So it is that when a Chinese fabricator is repeatedly pestered for spare parts or repair instructions, he would rather send you a new machine and be done with your nagging.

### 3.9.6 Reminiscing & Crystal-Gazing

APTEC has been associated with broiler processing since the mid 1990’s and as we complete three decades of this association we feel a strong urge to reminisce. As agents of Meyn since 1998, what we first set out to do was to open the windows and let in some fresh air. This industry, not unlike others in India, suffered from an allergy to statistics and information sharing. As we have shown in section 1.2, six initial ventures in poultry processing failed and only one, the first to have been set up, (belonging to VH at Kamshet) survived. When I carried out an investigation, I learnt that the principal reason for failure was bad planning and that happened because the vendors had not extended adequate hand-holding.

What emerged was our emphasis on local construction skills, technological adaptation to suit local conditions, cheap and effective economic solutions, skills and techniques to modify and expand plants and perform major engineering “surgeries” on running plants without taking major shut-downs. We also upgraded technologies and married local machinery with imported ones. In short we supplied a compliant engineering service where none had existed before – nor had been delivered by overseas vendors’ talk of superior technology, automation etc.

So, when we parted with Meyn on 1, June 2018, we built on our engineering skills - not on talk of superior technology and automation. Meanwhile ongoing competition amongst the three principal overseas vendors – JBT-Marel, Meyn and Baader-Linco and their local competitors for market share held no interest for us. Unless, in their over-reach for market share they took the industry backwards.

In November 2022 APTEC had determined 7000 BPH as the terminal capacity for Lifeline Feeds located at Chikmagalur, after careful study of their existing structure (which we ourselves had designed). We based that



**BAADER**  
23,935 volgers  
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+ Volgen

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

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

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

**#PoultryProcessing #India #LifelineFeeds #BAADER**

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Inset 39
Baader-Linco's Post on Linked-in



judgment on our experience in India. Here plants are expanded by performing “open heart surgery”, wherein the plant is never allowed to shut down for more than a day or two at a time while additional machinery is configured. This is to ensure that supplies of fresh chilled produce are not interrupted at any time and the client does not lose buyers. And the case for Lifeline is even more complicated because it is built over four adjacent tiny plots of industrial estate land, with public roads separating each from the other.

So when we read this Linked-in post (Inset 39) from Baader-Linco, promising to rely on the hackneyed and tired spiel of “superior technology and automation” in the absence of local engineering staff, we were quite surprised. You see, as I have mentioned in section 1.2, this approach at grabbing market share had nearly shut down all future prospects for this industry in the 1990s. Surely, Baader-Linco’s plant expansion project will merit watching with the same interest as will the future trajectory of their progress in this market.



## Endnotes

<sup>1</sup> The nearest equivalent to this Arabic word which they use to describe their state before the advent of Islam and Muslim conquests is "Barbarism"

<sup>2</sup> Seven blind men and the elephant. Statistics are thrown around with total impunity in this industry. Visit any website or contact any agency or association and you will be confronted with a wide variety of information on the size of the poultry market in India. To illustrate this claim as also to bring much of this data to your notice, we compiled the following, which have appeared from time to time in APTEC's Industry Report.

| Source                                                                                                                                                                                                                                                                                                                                                                                                             | Quoted from the cited report                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Remarks                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Meat International 1999, Vol 9, nr 8.</b><br>Article authored by Rahul Mirchandani, a director of Aries Agro-Vet Industries Ltd, Mumbai.                                                                                                                                                                                                                                                                        | "(India) produces about 400 million broilers and 30 billion eggs every year"<br><br>"Current market for commercial broilers is Rs 36 billion, of which share of processed chicken is Rs 1 billion, amounting to a share of 3%"<br><br>"Only about 1-3% of the (live bird market) is processed"<br><br>"rate of growth of broilers (which) is 20% a year"                                                                                                                                                                                                                                                                                                                                                                 | The same article quoted BNP Prime Peregrine India, India Food Sector Report of 19 July 1999 - "the current commercial broiler market is Rs 36 billion and the share of the processed chicken market is Rs 1 billion, or 3%". At another place it states that only 1-3% of the market was for processed birds. It goes on to state that there were 6 modern integrated poultry processing plants and 6 egg processing plants<br><br>In 1999 Arambagh, Goldchick, Peninsula Foods, Riverdale, Starchick and VH were the 6 functioning modern poultry processing plants. |
| <b>India's Poultry Sector: Development and Prospects.</b> Maurice Landes, Suresh Persaud, and John Dyck. Market and Trade Economics Division, Economic Research Service, US DA Agriculture and Trade Report WRS-04-03. January 2004                                                                                                                                                                                | "Information from industry sources suggests that production and consumption of poultry meat in India has grown by as much as 15 percent annually since the mid-1990s, far faster than indicated by official data".<br><br>"(the backyard poultry) segment is declining and probably accounts for only 10-20 percent of India's total output.... its impact is ignored in this report"                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Rabobank Report Volume II Vision, Strategy and Action Plan for Food Processing Industries in India</b><br><br>Prepared by Rabo India Finance Pvt Ltd for the Ministry of Food Processing Industries, April 2005                                                                                                                                                                                                 | "(Poultry meat) estimated production is 1.5 million tonnes, growing at a CAGR of 11% through 1991-2003"<br><br>"Per capita annual consumption has grown from 420 grams in 1991 to about 1.5 kg in 2003. Excluding the vegetarian population, per capita consumption is approximately 1.75 kg per annum."<br><br>"Contrary to perception, India has a strictly vegetarian population of only about 20% (Source: Survey concluded in the 'People of India' (study report) by the Anthropological Survey of India (1994))".<br><br>"A mere 6% of production (about 100,000 MT) of poultry meat is sold in processed form."<br><br>"The current poultry processing capacity in India is approximately 25000 birds per hour." | Excluding the vegetarian population from the per capita figure is clearly a mistake as it is at conflict with their own data....<br><br>If production is 1.5 million tonnes in 2003, as stated, then 80% of the population, as stated, would account for a per capita consumption of approximately 1.8 Kg, not 1.5 Kg                                                                                                                                                                                                                                                 |
| A 1994 study entitled "People of India," conducted by the Anthropological Survey of India and based on a survey of 2,469 communities, indicated that only 20 percent of the "communities" surveyed were vegetarian. A significant proportion of the remaining 80% (who can be termed "At-home Vegetarians" take non-vegetarian foods outside their homes in deference to their more traditional vegetarian elders. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>USDA Foreign Agricultural Services Report (GAIN IN5093 - 2005)</b> prepared by V. Shanmugam and approved by Chad R. Russel of the US Embassy, New Delhi                                                                                                                                                                                                                                                         | "India's broiler production is forecast to grow by 16% to 2.2 million tons <sup>2</sup> in calendar year 2006"<br><br>"Only about 8% of the total poultry meat production in 2004 was processed"<br><br>"Post forecast poultry meat consumption in 2005 at 1.9 million tons or 1.8 Kg/capita"                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Use of the term "tons" implies either the "US ton" which is 0.907 metric tonne or the "long ton" which is 1.102 metric tonne. This might also be a good opportunity to congratulate USA for the invention of artificial stupidity.                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>World Poultry Vol 22, Nr 6, 2006.</b> India to See Tremendous Changes. Article by Jagdish Rattanani, Mumbai                                                                                                                                                                                                                                                                                                     | Poultry meat production is stated as "1.6 , 1.65, 1.8 and 2.0 million tonnes in 2003, 04, 05 and 06 respectively"                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Approximates to 1.63 million tonnes total consumption.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |



|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                              |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Current consumption is "1.55 Kg/capita consumption of poultry meat"<br><br>"The industry estimates that 98% of consumption is manually processed chicken while only 2% of total consumption is catered t by modern processing plants" | Using the given production estimate of 2 million tonnes, this amounts to a per capita consumption, in 2006, of 1.9 Kg since there was no import and only approximately 9000 tonnes of export.<br><br>The figure of 1.55 Kg/per capita is therefore in conflict with the data in the article. |
| <b>Poultry, Food Security and Poverty in India: Looking Beyond the Farm-Gate.</b> U. Pica-Ciamarra and J. Otte                                                                                                                                                                                                                                                                                                                                                                                                        | "between 1985 and 2005 poultry meat production grew by about 12 percent per year"<br><br>"only 5 percent of all poultry output is marketed in processed form (Reardon and Gulati, 2008; Traill, 2006)"                                |                                                                                                                                                                                                                                                                                              |
| USDA Jan 2004 estimate goes on to say:<br>Available government data consist only of periodic poultry population estimates, with the most recent estimates based on a 1992 livestock census. There are no official statistics on poultry consumption, marketing, processing, or feed use. In the absence of supporting survey information, these estimates do not have a strong statistical foundation. Trade associations, including the Poultry Federation of India, also do not currently compile industrywide data |                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                              |
| FAO estimates, which are based on Government of India (GOI) data, suggest much lower production and growth than the USDA data. A third set of estimates, included in a study by the U.S.A. Poultry & Egg Export Council (USAPEEC) and reportedly derived from official GOI and FAO data, is roughly consistent with USDA data but ends in the mid-1990s.                                                                                                                                                              |                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                              |

<sup>3</sup> <https://www.financialexpress.com/business/industry-cii-unveils-vision-2047-for-fast-growing-poultry-industry-3305103/>

<sup>4</sup> President Eisenhower signed the Agricultural Trade Development and Assistance Act of 1954 into law as US Public Law 480, commonly known as PL-480 and popularly as the Food for Peace Program. It was an extension, in spirit, of the Truman Doctrine which spawned the Marshall Plan that revived the economies of war-torn Europe. Poultry development in India was identified as a thrust sector by Peace Corps volunteers and aid for this followed close on the heels of the initial PL-480 initiative.

<sup>5</sup> August 2006 visit to CPDO and discussions with Dr J. N. Bora, Director, by the author

<sup>6</sup> I am compiling an exhaustive list of all local plants, existing and closed, complete with dates, capacities and names and telephone numbers of plant executives, and will soon place the document on the internet. I would welcome inputs and details from my friends in the industry.

<sup>7</sup> Hind Poultry website [http://hindpoultry.com/news\\_view.php?newsid=82](http://hindpoultry.com/news_view.php?newsid=82).

<sup>8</sup> [http://www.cci.in/pdf/surveys\\_reports/food-processing-india.pdf](http://www.cci.in/pdf/surveys_reports/food-processing-india.pdf)

<sup>9</sup> VH Official Website <http://www.venkys.com/vh-breeds/vencobb-broiler-broiler-breeder/vencobb-400Y/>

<sup>10</sup> Ministry of Food Processing Industries website <http://mofpi.nic.in/ContentPage.aspx?CategoryId=162>

<sup>11</sup> Telecon between the author and Mr M. R. I. Magdum of VH, July 20, 2011

<sup>12</sup> Roadmap for certain Asian Markets (Internal Report of Meyn Food Processing Technology)

<sup>13</sup> Presentation by the Company before a Dutch trade delegation, June 2011.

<sup>14</sup> Private conversation with the manager of the operation

<sup>15</sup> R. W. A. W. Mulder, Spelderholt Institute for Poultry Research, Ministry of Agriculture and Fisheries, Spelderholt 9, 7361 DA Beekbergen, The Netherlands, as excerpted in Meyn Technical Guide

<sup>16</sup> Ashrae/Ishrae place the freezing point at approx -1.7°C. However, biological systems do not have a sharp phase transition temperature – they freeze slowly, in patches, that spread and become homogenous. Therefore a safe temperature above which the product remains unaffected, is -1°C

<sup>17</sup> Popular literature on the subject conjures up the image of cell membranes being pierced by sharp icicles, with the resulting copious loss of cell fluids that it triggers, being the cause of spoilage of meat that is allowed to freeze slowly. While this explanation has the merit of discouraging slow freezing, the imagery is faulty. Ice crystals within animal cells are extremely tiny and they cannot puncture animal cell membranes which, unlike plant cell walls, are quite flexible.

Muscle protein is responsible for a very important property of meat - its ability to retain water and bind added water (water-holding capacity or WHC). Between 84-94% of the water in muscles is free water and this is what gives fresh meat its succulence. This water is not mechanically free to form crystals, as it would be, for instance, in a piece of rubber foam - rather most of it is bound within the myofibrillar spaces. When slow freezing causes changes in the overall intercellular solute concentration and pH, it impacts the environment inside cells as well as outside. Both of which release water, not only unassociated water within and outside cells but also bound water, resulting in protein denaturation and so permanent damage to the product's taste. Finally, when thawed, this denaturation water cascades out of the product as excessive thawing loss - which is bad for the product's image.

<sup>18</sup> The generally accepted specification of -18°C as "standard" freezing temperature is an example more of technical "poetic justice" than technical rigour. The British were the first to recommend it as a standard. Why? Evidently only because it happens to be equivalent to 0°F, which in itself, is an arbitrary datum. Daniel Fahrenheit's zero point was determined by placing the thermometer in an automatically temperature-stabilizing mixture of ice, water, and ammonium chloride. Its stabilization occurs at -17.78°C, which he rounded down and chose as his 0°F. A similar bogus standard is



-40°C for air temperature in blast freezing. Minus 40°C being coincidentally equivalent to -40°F is insufficient ground for it to attain the rank of a “standard”!

<sup>19</sup> Deccan Chronicle, 6 September, 1998. Advertisement by the Company.

<sup>20</sup> LiveMint.com & The Wall Street Journal, April 29, 2011 Corporate news RSS

<sup>21</sup> IndianExpress.com. Posted April 6, 2011

<sup>22</sup> Ibid

<sup>23</sup> The second family of breed is from Aviagen (UK) which has a new great grandparent (GGP) farm near Udumalpet in Tamil Nadu. Three breeds from the Aviagen family along with all their variants, namely Ross 308, Arbor Acres and Lohmann, account for approximately 22% of all broiler placements in India.

Hubbard (Group Grimaud, France) and a local breed called Marshall account for 10% broiler placements. Hubbard operation in India is owned by Godrej who partner with the Skylark Group in GP operations in North India, while Marshall is owned by C&M, Nasik.

Hybro, a Dutch breed established footholds in India with the Pioneer Group of Coimbatore. However, it had only a short stint in India till Pioneer went bankrupt a few years back. Breeders on Pioneer’s farms were taken over by Suguna. Hybro has no breeding stock any more in India. Suguna brought Aviagen into India, offering them a 256 acre plot of bio secure land near Udumalpet and in return Aviagen was to give them a Ross strain. But the breed needed EC sheds to perform well and Suguna were fixated on open shed farming for their contract farmers. So they broke up with Aviagen and migrated to Hubbard. When Hubbard was taken over by Aviagen, they moved to Marshall, a local breed spun by C&M. When Marshall went into a decline, Suguna promoted their own Sunbro through a consortium formed for the purpose. But the fact is that none of the local breeds are performing well. Such was also the case when C&M back-bred Hubbard to create Hubchix and Sheikh Imam produced a breed called Kasila in the 1990s.

<sup>24</sup> India to free up retail sector to foreign investors: Report. June 10, 2011 [http://www.moneycontrol.com/news/business/india-to-freeretail-sector-to-foreign-investors-report\\_556367.html](http://www.moneycontrol.com/news/business/india-to-freeretail-sector-to-foreign-investors-report_556367.html)

<sup>25</sup> Foreign Direct Investment in Indian Retail Sector – An Analysis; Pulkit Agarwal, Esha Tyagi. <http://www.legalindia.in/>

<sup>26</sup> APEDA – Agricultural & Processed Food Products Export Development Authority, Ministry of Commerce & Industry, Government of India <http://www.apeda.gov.in/apedaweb/index.asp>

<sup>27</sup> MOFPI – Ministry of Food Processing Industries, Government of India <http://mofpi.nic.in/>

<sup>28</sup> <https://www.businesstoday.in/lok-sabha-elections-2019/bjp-manifesto-agri-loans-rs-1-lakh-for-farmers-zero-interest/story/335152.html>

<sup>29</sup> Caris Pure assumed that shipments of unpacked carcasses to hotels and restaurants merely replaced wet market supplies and was therefore not subject to GST under the TNVAT Act 2006 Entry 54 of Part B of Schedule IV Section 15. Just as, according to his claim, other processors were exempt. But was compelled to comply with the tax assessment orders passed in respect of the assessment years 2014-15 and 2015-16. Source Indian Kanoon <http://indiankanoon.org/doc/121070941/>

<sup>30</sup> Figures published recently by Ricky Thapar include those for backyard poultry

<sup>31</sup> As mentioned above only 15.8% of the capacity is in industrial zones, the rest preferring green field land

<sup>32</sup> Read my article on the technological difficulties in further reduction in use of water in poultry processing. At a specific consumption level of about 14 litres per bird (only in relatively large capacities), we appear to have come to the lower technological limit: <https://aptec.in/wp-content/uploads/APTEC-Report-Water-Recycling-in-Poultry-Processing-State-of-the-Art.pdf>

<sup>33</sup> Caris Pure assumed that shipments of unpacked carcasses to hotels and restaurants merely replaced wet market supplies and was therefore not subject to GST under the TNVAT Act 2006 Entry 54 of Part B of Schedule IV Section 15. Just as, according to his claim, other processors were exempt. But was compelled to comply with the tax assessment orders passed in respect of the assessment years 2014-15 and 2015-16. Source: *Indian Kanoon* <http://indiankanoon.org/doc/121070941/>

<sup>34</sup> The Industrial Policy of Independent India was introduced in parliament in April 1948. It was a dangerous cocktail of public and private participation shaped after Nehru’s pet (and severely flawed) college fantasy of Fabian Socialism, Gandhian hark back to the traditional village economy and obligatory compliance with inputs from existing business houses who had funded the congress party in its independence movement (remember how Birla fed grapes to Gandhi’s goats so that the saint could be publicly seen perpetually in poverty?

A word on college fashions is necessary at this stage. Just as the humanities departments of American and European universities are fooling around with DEI, Woke and CRT (critical race theory) today, every era produces its own pet idiocy and students of indeterminate intelligence gravitate to these “fashionable” clubs. Nehru had the backing of wealth to attend such a college in Britain, and also the intellect to seek the then fashionable Fabian Socialist club. And when he became India’s prime minister through Gandhi’s undemocratic intervention, he strongly influenced the industrial policy just as effectively as a “useful idiot” in the employ of India’s enemies could.

To be fair, the policy was crafted in the shadow of horrible prospects for the new nation should we again need Western assistance to stabilize. Such a period came when we were experiencing famines and USA came to our aid with PL-480 gifts. In this respect the principal aim of the policy was to conserve foreign exchange. Contrast our early performance with that of South East Asian nations whose policies reflected more courage and confidence.

So while we must question our past, but to be fair, we need to look at the context under which certain policies dominated. Lessons learnt from the hindsight of the 1990s, when the cautious industrial policy of 1948 had established the Licence and Inspector Raj and had brought India to the



point of bankruptcy, eventually made us take corrective action. But the process is not yet complete and we must review past erroneous actions and redress them.

The case of Japan is different. Since the aggressive visit by commodore Perry in 1854 at the ports of Shimoda, to pressure Japan to open up trade, and the Meiji Restoration that followed in response, Japan had been learning and absorbing western methods, which included capitalism and unfettered competition. So even after a crippling defeat in the Second World War, Japanese industrial policy refused to cower in fear of the West.

This is the difference between India and Japan of 1947. Our bureaucrats had become pusillanimous while Japanese bureaucrats had learnt not to interfere with the economy – it always righted itself automatically.

<sup>35</sup> A Risk Analysis of Sandwich Panels, <http://www.sandwichbau.de>

<sup>36</sup> Wikipedia 2021 Georgia poultry plant accident; Richard Fausset and Miriam Jordan, A Georgia Chicken Town Reels After a Plant Disaster, The New York Times, Jan. 29, 2021; Food Plant Fire Kills 25; Exits Blocked : Disaster: Chicken workers in North Carolina are trapped in a facility that had never been inspected for safety. Another 40 workers hurt, LAT Archives from Associated Press, Sep 4, 1991; FP Staff (/author/fp-staff) Kanpur: Ammonia gas leak causes explosion in cold storage; five killed, several still trapped, <http://hindi.firstpost.com>, 15 Mar,2017; Beth Dalbey, Anhydrous Ammonia Leak Forces Evacuation, <https://patch.com/michigan/farmington-mi/>, June 14, 2015; Jethro Mullen, Fire at Chinese food packaging plant kills 18, November 17, 2014- CNN.com;

<sup>37</sup> 1000 evacuated in Tyson food plant fire, Fire Department: Explosion likely started fire, [www.wlfi.com/generic/news/](http://www.wlfi.com/generic/news/), 5 Mar 2010; Tyson Foods begins Missouri poultry plant expansion, <http://www.worldpoultry.net/nr1>, May 1, 2012; Woody Gottburg, Fire Damages Storm Lake Tyson Plant, Jan 4, 2017; Fire at Tyson Chicken Plant, Employees injured in blaze at Nashville's Tyson plant, Jul 9, 2020, <https://www.ktbs.com/fire-at-tyson-chicken-plant/>

<sup>38</sup> Chicken Processing Plant Fires, Hamlet, North Carolina and North Little Rock, Arkansas, US Fire Administration/ Technical Report Series, USFA-TR-057/June/September 1991. Loss Prevention Bulletin of April 2018 as reported in a copyrighted article by the Institution of Chemical Engineers

<sup>39</sup> Ibid, A risk analysis of sandwich panels

<sup>40</sup> Alliance for the Polyurethanes Industry, [http://inspectapedia.com/Energy/Polyisocyanurate\\_Insulation.htm](http://inspectapedia.com/Energy/Polyisocyanurate_Insulation.htm)

<sup>41</sup> U.S. Fire Administration/Technical Report Series, Chicken Processing Plant Fires, Hamlet, North Carolina, and North Little Rock, Arkansas USFA-TR-057/June/September 1991, <http://www.usfa.dhs.gov/>

<sup>42</sup> Diploid & tetraploid. A tetraploid cell or organism is a cell or organism that has four complete sets of chromosomes (symbolized as 4n) instead of the usual two sets found in diploid (2n) species.

<sup>43</sup> Available in the News page of the APTEC website

