Global Overview

- Growth is forecast to take place majorly in the developing countries, especially Asia and Pacific regions.
- Urbanization is foreseen to continue at an accelerating pace with urban areas to account for 70% of world population in 2050.
- Increases in per capita food consumption combine with population growth, resulting in overall increases in consumption.
- Maize consumption is expected to increase by 16% by 2027, maize used for animal feed increasing its overall share of total use from 56% in the base period to 58% in 2027.
- Wheat consumption is expected to increase 13% by 2027.

Annual Growth of Key Commodities

Source: OECD-FAO Agricultural Outlook 2018-2027
Value Chain

Agro-processing involves techno economic activities to carry out conservation and handling of agricultural produce and to make it usable as food, feed, fibre, fuel or industrial raw material

Value Chain in Food Processing Sector

Production
• Farmers, Cooperatives & Private Companies

Procurement & Storage
• Warehouse, Cold Storage and Silos

Processing
• Grading, sorting, milking and packing

Retailing
• Retail shops, malls, cash and carry

Agro-processing Activities

Primary Processing
• Crop drying
• Shelling/threshing
• Cleaning
• Grading
• Packaging

Secondary Processing
depending on product type to increase market value. For instance:
• Milling grain into flour
• Grinding groundnuts into peanut butter etc.

Key components involved in Secondary Process

Raw Material Storage

Refining & storage

Value addition/Processing

Testing

Preservation & Storage

Packaging & Warehousing
Fisheries

► Globally, total fish production is anticipated to grow by 1% per annum, which is a reduction from last decade i.e., 2.4% per annum*.
► Average nominal Traded fish prices are projected to grow by 0.8% per annum and 7.3% by 2026*.
► Asian countries will account for 71% of fish consumption Fish and fishery products will continue to be highly traded in Asian countries.

Aquaculture & Fish Capture

Diseases in Aquaculture Production

Factors affecting Aquaculture

El Nino

Regulatory Constraints

Inability of Capture production under exploitation condition

Animal Husbandry and Dairy

► Market shrunk from 2013-14 but expected to recover by 2022
► International Dairy prices increased in 2016, majorly in butter and whole milk powder (WMP)

Production

► While world milk production increased slightly in 2016, production by important exporters (Australia, New Zealand and Argentina) slumped. As a result, prices started to recover in the second half of 2016, especially for butter and whole milk powder (WMP).
► Due to low prices in the beginning of 2016, the average price for the year was lower than in 2015.

Source: OECD-FAO Agricultural Outlook 2017-2026
Floriculture

Total production value of floriculture will reach to 49082.37 million USD in 2023, with the CAGR of 0.84% during the period of 2016-2023*

- Low cost cut flower exporting countries close to equator, such as Kenya, Ethiopia, Ecuador, Colombia and Malaysia, have increased their global market share in cut flower trade
- Market presence strengthening by producers is mainly driven by favourable growing circumstances, rising demand for competitively priced flowers in the destination markets and improved logistics
- In 2013, global exports of cut flowers, cut foliage, living plants and flower bulbs amounted to USD 20.6 billion*.
- Netherland dominates central market position in exports while others being Malaysia and Colombia.
- Emerging markets include Brazil, China, India, Mexico and Turkey

Horticulture

- Greenhouse Horticulture market comprises North America, Europe, China, Japan, Southeast Asia and India
- Production shows rising trend, driven by Asian countries
- At regional level, Asia is the largest producer of fruits and vegetables followed by USA, Europe, Africa and Ocenia
- China is the largest fruit growing market.
- The most grown fruits are bananas, watermelons and apples, followed by grapes and oranges.

Agritech, Agro and Food Processing Industry in India
Total foodgrains production in the country is at 284.83 million tonnes (2017-18).
India is the ninth largest exporter of agricultural products.
Total agricultural exports from India grew at a CAGR of 16.45 percent over FY10-18 to reach US$ 38.21 billion in FY18.

**Fruits and Vegetables**
- World’s 2nd largest producer
- Processing to grow by 25% of the total produce by 2025
- Total production is estimated at 259.3 million tonnes

**Milk**
- World’s largest producer
- Production of 176.35 million tonnes in 2017-18

**Meat and Poultry**
- World’s largest producer of buffalo meat (1.41 MT in 2016-17), second largest producer of goat meat (0.89 MT in 2016-17)
- Second largest egg producer (27.95 bn) and third largest producer of broiler meat (4.2 mn tonnes)

**Marine Products**
- 12.60 MT of fish production in 2017-18
- 50% of the total production is culture fisheries which constitutes about 6.3% of the global fish production.

**Grain Processing**
- Produces more than 200 mn tonnes of different food grains (284.83 mn tonnes in 2017-18)

**Consumer Food**
- Fastest growing sector including packaged food, aerated soft drinks, packaged drinking water and alcoholic beverages

**Area, Production and Yield of Major Crops**

<table>
<thead>
<tr>
<th>Crop</th>
<th>2016-17 Area (in billion hectares)</th>
<th>2016-17 Yield (in kg/ha)</th>
<th>2016-17 Production (in million tonnes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jute</td>
<td>10.6</td>
<td>7.66</td>
<td>2,490</td>
</tr>
<tr>
<td>Cotton</td>
<td>33.09</td>
<td>108.45</td>
<td>69,886</td>
</tr>
<tr>
<td>Sugarcane</td>
<td>43.89</td>
<td>437.2</td>
<td>306.72</td>
</tr>
<tr>
<td>Oilseeds</td>
<td>32.1</td>
<td>262.06</td>
<td>1,225</td>
</tr>
<tr>
<td>Foodgrains</td>
<td>779</td>
<td>275.68</td>
<td>2,153</td>
</tr>
<tr>
<td>Pulses</td>
<td>294.65</td>
<td>22.95</td>
<td>779</td>
</tr>
<tr>
<td>Coarse Cereals</td>
<td>244.19</td>
<td>247.71</td>
<td>1,784</td>
</tr>
<tr>
<td>Wheat</td>
<td>305.97</td>
<td>98.38</td>
<td>3,216</td>
</tr>
<tr>
<td>Rice</td>
<td>431.94</td>
<td>110.15</td>
<td>2,550</td>
</tr>
</tbody>
</table>

Source: Annual Report 2017-18, Department of Agriculture, Cooperation and Farmers’ Welfare
Cumulative FDI Inflows (April 2000 to March 2018) in food and agriculture sector (INR crores)

<table>
<thead>
<tr>
<th>Sector</th>
<th>FDI Inflow (in INR crores)</th>
<th>%age of total inflows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Processing</td>
<td>50,966</td>
<td>2.24</td>
</tr>
<tr>
<td>Fermentation</td>
<td>13,885</td>
<td>0.67</td>
</tr>
<tr>
<td>Agriculture Services</td>
<td>10,502</td>
<td>0.54</td>
</tr>
<tr>
<td>Vegetable Oil</td>
<td>4,430</td>
<td>0.21</td>
</tr>
<tr>
<td>Agricultural Machinery</td>
<td>2,472</td>
<td>0.12</td>
</tr>
<tr>
<td>Tea and Coffee</td>
<td>646</td>
<td>0.03</td>
</tr>
<tr>
<td>Sugar</td>
<td>1,269</td>
<td>0.06</td>
</tr>
</tbody>
</table>

Source: Department of Industrial Policy and Promotion; Factsheet January to March 2018

Major Destinations of Processed Food and Agriculture Related Product Exports

- Vietnam
- Saudi Arabia
- UAE
- USA
- Iran
- Malaysia
- Nepal
- Egypt
- Bangladesh
- Kuwait

Exports of Key Processed Products (US $ billion)

- Castor Oil: 7.39
- Oil Meals: 1.89
- Cotton: 4.16
- Spices: 3.1
- Non-Basmati Rice: 3.56
- Buffalo Meat: 1.08
- Basmati Rice: 1.04
- Marine Products: 4.03
Agri & Food processing Landscape

Unorganised Sector in India

- Accounts for 42% of India’s food processing industry
- Sizeable presence of small-scale industries points to the sector’s role in employment generation
- Though the market falls under the unorganised sector in the country, the organised sector has a larger share in the secondary processing segment than the primary one
- Rice mills account for the largest share of processing units in the organised sector

Contribution of Food Processing to Employment Generation

- By 2024, food processing sector is expected to employ 9 million people in India

Value Chain in Food Processing Sector and Key Players

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Production</th>
<th>Procurement and Storage</th>
<th>Processing</th>
<th>Retailing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seeds, Fertilizers and Farm Equipment</td>
<td>Farmers, cooperative s and private companies</td>
<td>Warehouses, cold storages and silos</td>
<td>Grading, sorting, milling and packing</td>
<td>Retail shops, malls, cash and carry</td>
</tr>
</tbody>
</table>

Key Activities

- National Seeds Corporation Limited, Cargill, Advanta India
- Farmers, Amul, ITC, Pepsi, Hindustan Unilever Ltd
- Food Corporation of India, Arshiya International
- ITC ltd, Cargill, Adani Enterprises, Olam International
- Future Retail, Bharti Walmart, Aditya Birla Retail Limited
Policy, Schemes and Projects

Pradhan Mantri Kisan SAMPADA Yojana
► Scheme for Agro-Marine Processing and Development of Agro-Processing Clusters
► Allocation of INR 6,000 crores for 2016-20, expected to leverage investment of INR 31,400 crores

Sub- schemes
► Mega Food Parks
► Integrated Cold Chain and Value Addition Infrastructure
► Creation / Expansion of Food Processing & Preservation Capacities
► Infrastructure for Agro-processing Clusters
► Creation of Backward and Forward Linkages
► Food Safety and Quality Assurance Infrastructure
► Modernization of Abattoirs

Karnataka Agribusiness and Food Processing Policy 2015
► Focussed towards sustainable development for the entire value chain of the sector
► Declares the state as a single zone, providing incentives uniformly.

Details of Projects Approved by MoFPI

► Setting up and Modernization of 41 abattoirs in India
KARNATAKA
► Hospet (INR 3.8 crores), Mysore (INR 15 crores), Chitradurga (INR 3.29 crores), Chamrajnagar (INR 5.8 crores)

► 41 mega food parks
KARNATAKA
► Tumkur (INR 144.3 crores)
► Mandya (INR 125.79 crores)

► 33 fully funded food parks
► 14 partially funded food parks
KARNATAKA
► Fully funded : Malur, Hiriyur (INR 400 lakhs each)
► Partially funded: Bagalkot, Jevargi

► 232 integrated cold chain projects
KARNATAKA
► Hassan, Belagavi, Bengaluru, Bijapur, Kolar, Ramanagara, Uttar Kannada, Kundapura

Source: MoFPI website
Agritech, Agro and Food Processing Industry in Karnataka
Karnataka’s Unique Advantages

Backbone of Karnataka’s Economy

- **Large resource base:** Karnataka has over 65% of its total geographical area under agriculture cultivation

- **Leading Producer:** Coffee, Gherkins, Silk, Green Chilli, Tamarind and Sunflower. **Major producer** of Maize, Coarse Cereals, Sugarcane and Pulses in the country

- **Significant Production:** Karnataka Coffee production accounts for 70%

- **Strong input base:** Agriculture & allied activities contributed 20.36% to GSDP in 2017-18

- **Diverse competencies**
  - Leader in horticultural products and spices
  - Leader in floriculture, accounting for 75% of India’s total flower production
  - One of the largest producers of Cashew nut in India
  - Only producer of Rose Onions in the Country
  - Known for Byadgi Chilli. Oleoresin extracted from them is used in preparation of nail polish and lipstick
  - 2nd largest milk producing cooperative (KMF)
  - 320 km coastline yields annual marine production of 3.93 lakh tonne. State offers varieties like Oil Sardines, Indian Mackerel, Threadfin Breams and Squids

- Excellent Supporting Infrastructure & Skilled Workforce
- Established Market Linkages
- Availability of Land - around 380 acres in Food Parks across the state
- Investor friendly, proactive and well defined sector specific policies

40+ Agri and Food Based Biotech Start-ups Biotechnology Centre at Hulimavu, Bengaluru
Export performance of Coffee (Rs crore)

- 2015-16: 3096
- 2016-17: 3284.48
- 2017-18: 3708.81

Destination countries for coffee exports include Italy, Germany, Belgium, Jordan.

Crop is grown in about 10,000 acres mainly in Kolar, Benagaluru Urban, Bengaluru Rural, and Chikbaballapur districts.

Rose onion exports from the State stood at USD 42 billion during 2016-17.

State is the largest exporter of Gherkins in the country, stood at USD 160 million in 2016-17.

Export destinations include USA, France, Germany, Australia, Spain, South Korea, Canada, Japan, Belgium, Russia, China, Srilanka, Israel.

State is a major contributor to country’s production with respect to spices like vanilla, cinnamon, tamarind, chilli and ginger.

Spice exports from Karnataka stood at USD 37 million in 2011.

Spice growing regions include Dakshin Kannada, Coorg and Chikkmagalur.
Sub-sector Snapshot

Horticulture

Floriculture

Agriculture

Animal Husbandry

Wineries

Fisheries
Karnataka, with a good agricultural base is a home for various food crops, offers immense scope for the development of food processing industries

- Karnataka is pioneer in organic farming & millet production
- 5th in organic certified area and 3rd in certified produce
- Programme on Organic Farming “Savayava Bhagya Yojane” under which an area of 63,677 ha has been brought under certified organic cultivation benefiting 53,829 farmers in 566 hoblis
- Government has set up 14 Federation of Organic farmers association to facilitate the procurement, processing, and marketing of organic produce

Cluster Mapping

<table>
<thead>
<tr>
<th>Processing Opportunities</th>
<th>Districts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oil, De-oiled cake</td>
<td>Vijayapura, Raichur, Gadag, Koppal, Gulbarga, Bagalkot</td>
</tr>
<tr>
<td>Corn Flour, Corn Grit, Protein Feed, Glucose, Rava, Starch, Corn Oil, Corn Flakes etc.</td>
<td>Davangere, Haveri, Belagavi, Bellary, Shivamogga, Chitradurga</td>
</tr>
<tr>
<td>Dal, Tur Milling</td>
<td>Gulbarga, Vijayapura, Bidar, Raichur, Yadgir</td>
</tr>
<tr>
<td>De-huskings of Millet into Rice, Rava, Flour</td>
<td>Bellary, Koppal, Chitradurga, Belagavi, Davangere</td>
</tr>
<tr>
<td>Fortified Atta-</td>
<td>Chitradurga, Haveri, Tumkur, Belagavi, Chikkamagalur</td>
</tr>
<tr>
<td>Hurihittu, Malt, Vermicelli, Dosa / Idli Flour, Bakery products, Beverages</td>
<td>Tumkur, Hassan, Ramanagar, Kolar, Mandya</td>
</tr>
<tr>
<td>Flour, Idli Mix</td>
<td>Koppal, Vijayapura, Raichur, Kalaburagi, Bagalkot</td>
</tr>
</tbody>
</table>

As per Economic Survey of Karnataka 2016-17, there are 1,970 food products and beverages units in employing 11,782 person with the investment of Rs 28,392 Lakhs

Units approved
SLSWCC- 148
SHLCC- 36


<table>
<thead>
<tr>
<th></th>
<th>Employment</th>
<th>Investment (in Cr)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLSWCC</td>
<td>40,512</td>
<td></td>
</tr>
<tr>
<td>SHLCC</td>
<td>9,329.20</td>
<td></td>
</tr>
</tbody>
</table>

Area coverage in Lakh Ha 2017-18

- Cereals: 30.24
- Pulses: 46.24
- Oilseeds: 10.99

Cluster Mapping

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2015-16</td>
<td>2016-17</td>
<td>2017-18</td>
</tr>
<tr>
<td>Cereals</td>
<td>85.92</td>
<td>77.53</td>
</tr>
<tr>
<td>Pulses</td>
<td>10.52</td>
<td>14.01</td>
</tr>
<tr>
<td>Oilseeds</td>
<td>7.09</td>
<td>7.18</td>
</tr>
</tbody>
</table>

Investment (in Cr)

- SLSWCC: 8,694.82
- SHLCC: 13,607

Employment

- SLSWCC: 148
- SHLCC: 36

Area coverage (in Lakh Ha)

- Cereals: 46.24
- Pulses: 30.24
- Oilseeds: 10.99

Cluster Mapping
Separate Horticulture Department in the Country

Area under Horticultural Crops (lakh Ha.)

- 8.86% Fruits
- 4.18% Spice Crops
- 2.48% Vegetables
- 4.92% Garden Plantation
- Others

Cover an area of 20.76 lakh hectare

Productivity of Horticultural crops in the state is 9.10 metric tonne per hectare

Annual production is 189.02 lakh metric tonne

Annual value of Horticultural products produced in the state is Rs.43,403 crore

Bal Copra

Tumakuru district is notable for its copra (Dried Coconut Kernel) which is used to extract Virgin Coconut Oil. Copra produced here are naturally dried under shade for nine to twelve months.

Byadgi Chilli

A variety of chilly grown only in Karnataka, known for its unique low pungency and deep red colour. Oleoresin extracted from them is used in preparation of nail polish and lipstick.

Cluster Mapping

<table>
<thead>
<tr>
<th>Processing Opportunities</th>
<th>Districts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Juice, Jelly, Jam, Syrup, Aril, Juice Concentrate</td>
<td>Chitradurga, Bellary, Vijayapura, Tumkur, Koppal, Bagalkot</td>
</tr>
<tr>
<td>Mango Pulp, Squash, Pickles, Dehydrated Fruits, Powder</td>
<td>Kolar, Ramanagar, Tumkur, Chikkaballapura, Mandya, Belagavi, Dharwad</td>
</tr>
<tr>
<td>Tomato Squash, Ketchup, Sauce, Pickles, Sun Dried</td>
<td>Kolar, Mandya, Belagavi, Haveri, Davangere, Bengaluru Rural, Chikkaballapura,</td>
</tr>
<tr>
<td>Onion dehydrated flakes, Powder, Paste</td>
<td>Gadag, Dharwad, Vijayapura, Chitradurga, Bagalkot, Haveri</td>
</tr>
</tbody>
</table>

Source: Department of Horticulture
Floriculture

Floriculture exports from Karnataka stood at USD 7.65 million in 2015-16

The state is the largest exporter of Flowers in the country

More than 30,000 Ha of area under floriculture cultivation

Setting up of international air cargo services and cold storage at the Bengaluru Airport has resulted in boosting export of the floriculture sector

► International Flower Auction Bengaluru (IFAB) has also helped growth of floriculture sector

► It is India’s first and only flower auction centre located in Karnataka

► Its is the first International Flower Auction Company in Asia

► IFAB is a joint venture company of public and private shareholders.

► At present daily average volume of flowers auctioned in IFAB has gone up from 20,000 to 2,50,000 stems

Cluster Mapping

<table>
<thead>
<tr>
<th>Processing Opportunities</th>
<th>Districts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oil Extraction from Aromatic plants, Crude from Medicinal plant, phytochemicals, dehydration of herbs</td>
<td>Bellary, Tumkur, Kolar, Vijayapura, Gadag, Chikkaballapura, Uttara Kannada, Koppal, Shivamogga, Kalaburagi</td>
</tr>
<tr>
<td>Extractions of dye, colours &amp; essential oils, Cut flower</td>
<td>Haveri, Bellary, Tumkur, Mandya, Chikkaballapura, Chitradurga, Kolar</td>
</tr>
</tbody>
</table>
Karnataka is a Milk Surplus state supported by the largest Milk Federation in South India

- Milk Produced in 2017-18: 7.13 Million tonnes
- Number engaged in dairy farming: 2.3 Million farmers
- Number of dairy cooperatives: 42,551
- Number of Dairy Plants: 31
- Per capita milk availability: 313 gm/day
- Number of milch bovine: 69,61,000

**Other Products**

<table>
<thead>
<tr>
<th>Year</th>
<th>Wool (in Tonnes)</th>
<th>Meat (in Tonnes)</th>
<th>Egg (in Lakh)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Source: Economic Survey of Karnataka 2018-19</td>
</tr>
<tr>
<td>2013-14</td>
<td>7,755</td>
<td>1,69,894</td>
<td>41,223</td>
</tr>
<tr>
<td>2014-15</td>
<td>8,822</td>
<td>1,81,312</td>
<td>-43,948</td>
</tr>
<tr>
<td>2015-16</td>
<td>8,191</td>
<td>1,96,600</td>
<td>-47,661</td>
</tr>
<tr>
<td>2016-17</td>
<td>6,588</td>
<td>2,09,012</td>
<td>-50,672</td>
</tr>
<tr>
<td>2017-18</td>
<td>4,304</td>
<td>2,28,032</td>
<td>55,661</td>
</tr>
<tr>
<td>2018-19</td>
<td>1,935</td>
<td>1,72,899</td>
<td>39,090</td>
</tr>
</tbody>
</table>

**Processing Opportunities**

<table>
<thead>
<tr>
<th>Milk Powder, Ghee, Butter, Paneer, Beverages, Curd, Ice cream, Chocolate</th>
<th>Belagavi, Tumkur, Hassan, Mandya, Mysuru, Kolar, Chikkaballapur, Davangere</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frozen Boneless Halal Meat, Canned Meat-</td>
<td>Bengaluru Urban, Haveri, Bengaluru Rural, Mandya, Kolar, Mysuru, Chikkamagalur, Dharwad</td>
</tr>
<tr>
<td>Egg Powder, Instant Baby Foods, Pasteurised Egg Albumen</td>
<td>Koppal, Davangere, Mysuru, Bellary, Bagalkot, Belagavi, Mandya</td>
</tr>
</tbody>
</table>

**Cluster Mapping**

- Leader in sale of Tetra-fino UHT Milk
- 11th Largest producer of milk in India
- Karnataka Milk Federation
- 2nd Largest milk producing cooperative

- India's largest producer of milk is Karnataka.
- Karnataka is a Milk Surplus state supported by the largest Milk Federation in South India.
Fisheries

Karnataka is in 6th position in marine fish production and 8th position in inland fish production in the country.

There are about 9.61 lakh fishermen in the state of which 3.28 lakh fishermen in marine and 6.33 lakh fishermen are in inland.

Upgradation / Modernization of infrastructure facility for Marine products in Tadadi port, Kumta Taluk, Karwar for promoting exports of Marine products.

Source: Economic Survey of Karnataka 2016-17

### Fish Production in Karnataka (in MTs)

<table>
<thead>
<tr>
<th>Year</th>
<th>Marine</th>
<th>Inland</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-18</td>
<td>1,88,174</td>
<td>4,14,348</td>
<td>6,02,522</td>
</tr>
<tr>
<td>2016-17</td>
<td>1,58,000</td>
<td>3,99,000</td>
<td>5,57,000</td>
</tr>
<tr>
<td>2015-16</td>
<td>1,68,828</td>
<td>4,11,762</td>
<td>5,80,590</td>
</tr>
<tr>
<td>2014-15</td>
<td>2,23,419</td>
<td>3,89,822</td>
<td>6,12,241</td>
</tr>
<tr>
<td>2013-14</td>
<td>1,97,952</td>
<td>3,57,359</td>
<td>5,55,310</td>
</tr>
</tbody>
</table>

* Details up to November 2018

### Infrastructure facilitating sector

- **Harbours**: 8
- **Jetties and beach landing centres**: 93
- **Shrimp Hatchery**: 5
- **Inland Farms**: 408
- **Co-operative societies**: 346 inland, 109 marine
- **3 federations**
- **Cold storages**: 53
- **Ice plants**: 253
- **Frozen storage**: 15
- **Training centres**: 4

There are 22 Fish Sanctuaries in Karnataka.

---

### Cluster Mapping

#### Processing Opportunities

- Fish oil, Frozen Fish, Fish Protein Concentrate, Pharmaceuticals
- **Marine**: Dakshina Kannada, Uttara Kannada, Udupi
- **Inland**: Bellary, Davangere, Hassan, Mandya, Shivamogga, Tumkur, Raichur

---

Karnataka’s coast is popularly known as “Mackerel Coast.”
Sericulture

India is 2nd largest producer of silk and Karnataka produced approximately 47% of India’s silk in the year 2015-16

► Production of cocoons account for 53.78 MT in 2017-18
► Area under mulberry cultivation in the State was about 98.13 Ha at the end of December 2016
► Sector generates employment of 13.47 lakh people in 2017-18

Coffee

Karnataka is the Coffee Capital of India producing 70% of India’s output

► As per economic survey of Karnataka 2016-17, there are 2547 Coffee estates (operational pulping Units)
► More than 2,30,000 Ha of area under floriculture cultivation
► Coffee roasting, Powders, Chocolates processing opportunities in districts of Kodagu, Chikmagalur, Hassan

Wineries

► Grape Processing & Wine Policy 2007 is one of its kind in the country
► The Board has been able to promote 17 new wineries in the State
► Home to wines like KRSMA and Grover Zampa
► Grape Juice, Concentrate, Raisins, Wine processing opportunities in districts of Vijayapura, Chikkaballapura, Belagavi, Bengaluru Rural, Bagalkot

During the year 2014-17, a budgetary provision of Rs.500.00 lakhs has been made for the developmental activities of the Karnataka Wine Board.
Food parks and food processing special economic zones demonstrate investor interest and industry efforts to increase influence of agriculture and food processing sectors on state’s economy.

**Proposed Food Parks under State Scheme**

- Sea food park in Mangaluru, Dakshin Kanada 30 Acres
- Shivamogga Food Park 97 Acres
- Bijapur Food Park 75 Acres
- Spice park at Byadagi, Haveri District 50 Acres

**Six Parks under Central & State Scheme**

- **Innova Agri Bio Tech Park, Malur, Kolar**
  - 89 Acres
  - Earmarked 13 processing units
  - Total project cost INR 2315 lakhs

- **Akshaya Food Park Limited, Hiriyyur, Chitradurga**
  - 100 Acres
  - Earmarked 18 processing units
  - Total project cost INR 2507 lakhs

- **Jewargi Agro Food Park Limited, Jewargi, Kalaburagi**
  - 100 Acres
  - Total project cost INR 1386 lakhs
  - Cold storage, warehouse, sorting, grading, Dal processing & 2 packaging lines

- **Green Food Park Limited, Bagalkot**
  - 100 Acres
  - Land allotted to 113 entrepreneur processing units
  - Total project cost INR 2241 lakhs

- **India Food Park, Tumakuru**
  - 95 Acres
  - Total project cost INR 144.3 crores
  - Products- Staples, Fruits & Vegetables

- **Favorich Mega Food Park, Mandya**
  - Total project cost INR 125.79 crores
  - R&D Centre, grading & packing centres, cold storage facilities etc
Proposed Food Parks

**Bidar District**
- Soya Processing Park

**Vijayapura District**
- Wine Park at Hampi valley

**Ballari District**
- In-land Fishier Park

**Chikkamagaluru, Hassan, Kodagu District**
- Coffee Park

<table>
<thead>
<tr>
<th>Place</th>
<th>Proposed Food Park</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bellary</td>
<td>In-land fishier</td>
</tr>
<tr>
<td>Karwar</td>
<td>Spice Park</td>
</tr>
<tr>
<td>Chikmagaluru, Hassan, Coorg</td>
<td>Coffee</td>
</tr>
<tr>
<td>Nandi Valley, Hampi Valley</td>
<td>Wine park</td>
</tr>
<tr>
<td>Bidar</td>
<td>Soya Processing</td>
</tr>
</tbody>
</table>
## Karnataka’s Unique Agro Markets

### Proposed Technology Parks by Department of Agriculture Marketing

<table>
<thead>
<tr>
<th>Technology Park</th>
<th>Project Cost</th>
<th>Land – Acre</th>
<th>Location</th>
<th>Project Details</th>
</tr>
</thead>
</table>
| Rice Technology Park     | INR 128 Crore            | 315         | Karatagi, Koppal   | ► 75 acre: roads, drainage & open space  
                          |                           |             |                                 | ► 85 acre: rice milling zone  
                          |                           |             |                                 | ► 45 acre: by-product zone  
                          |                           |             |                                 | ► 45 acre: warehousing, packing,  
                          |                           |             |                                 | transportation, auction centre, knowledge  
                          |                           |             |                                 | resource centre |
| Maize Technology Park    | INR 128 Crore            | 315         | Karatagi, Koppal   | Boost maize processing and production in the State.  
                          |                           |             |                                 | ► Maize flour, maize flakes, poultry  
                          |                           |             |                                 | feed, dry maize, maize chips popcorn  
                          |                           |             |                                 | mills to be developed in the park. |
| Tur Technology Park      | INR 36 Crore             | 250         | Kalaburagi         | Infrastructure for cleaning, grading,  
                          |                           |             |                                 | sorting, processing, branding,  
                          |                           |             |                                 | marketing and export of tur and its products |
| Coconut Technology Park  | 100 Acre                 |             | Tiptur, Bidar      | Infrastructure for cleaning, grading,  
                          |                           |             |                                 | sorting, processing, branding,  
                          |                           |             |                                 | marketing and export of  
                          |                           |             |                                 | coconut/copra and its products are  
                          |                           |             |                                 | provided |
# Potential Processing Opportunities

<table>
<thead>
<tr>
<th>Processing opportunities</th>
<th>Districts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milk Powder, Ghee, Butter, Paneer, Beverages, Curd, Ice Cream, Chocolate</td>
<td>Belagavi, Tumkur, Hassan, Mandya, Mysuru, Kolar, Chikkaballapur, Davangere</td>
</tr>
<tr>
<td>Frozen Boneless Halal Meat, Canned Meat</td>
<td>Haveri, Bengaluru Rural, Mandya, Kolar, Mysuru, Chikkamagalur, Dharwad, Tumkur</td>
</tr>
<tr>
<td>Egg Powder, Instant Baby Foods, Pasteurised Egg Albumen</td>
<td>Koppal, Davangere, Mysuru, Bellary, Bagalkot, Belagavi, Mandya</td>
</tr>
<tr>
<td>Fish Oil, Frozen Fish, Fish Protein Concentrate, Pharmaceuticals</td>
<td>Marine: Dakshina Kannada, Uttara Kannada, Udupi Inland: Bellary, Davangere, Hassan, Mandya, Shivamogga, Tumkur, Raichur</td>
</tr>
</tbody>
</table>

**Copa:**
Tumkuru district is notable for its copra (Dried Coconut Kernel) which is used to extract Virgin Coconut Oil.

**Byadgi Chill:**
Variety of chilly grown only in Karnataka, known for its unique low pungency and deep red colour. Oleoresin extracted from them is used in preparation of nail polish & lipstick.
Clusters Mapping

Approved Clusters

► Jaggery Cluster, Hipparagi, Bagalkote District
► Kudchi Jaggery Cluster, Belgaum District
► Jaggery processing Cluster, Chikkodi, Belgaum District
► Athani Raisins processing cluster, Athani, Belgaum district
► Rice Mill Cluster, Siraguppa, Bellary District
► Raisin Cluster, Bijapur District
► Food Products Cluster, Sakrayapatna, Chickmagalur District
► Silk Reeling & Twisting Cluster, Chikkadasarahalli, Chikkaballapur
► Wool Cluster, Challakere, Chitradurga District
► Wool Cluster, Hosadurga, Chitradurga District
► Puffed Rice Cluster, Holalkere Road, Chitradurga District
► Spices Manufacturing Cluster, Betageri, Gadag District
► Food Processing Cluster, Narasapura, Gadag
► Food Cluster, Gulbarga District
► Rice Mill Cluster, Mandya District
► Agricultural Implements Cluster, K.M.Doddi, Mandya District
► Desiccated Coconut Cluster, Tiptur Tq, Tumkur District
► Silk Textile Cluster, Kudur, Magadi Tq
► Cashew Processing Cluster, Murur, Kumta Tq, Uttarakannada District
► Food Cluster, Yogamandira, Sirsi, Uttarakannada District

Source: Karnataka State Industrial Profile 2015-2016
Key Players

Manufacturing in Karnataka
Karnataka’s Agriculture Produce Market Committee

Central Government Initiatives

- The central government plans to integrate 585 wholesale markets (mandis) into an electronic National Agriculture Market (e-NAM) by December 2017
- The Centre provides each mandi a one-time grant of Rs 30 lakh to set up the e-NAM infrastructure, software and an information technology expert for a year to each mandi

Initiatives by State and Key Results

- Scientific storage godowns (400MT to 500MT) - 182
- Covered auction platform on different sizes - 66
- Development Sheep and Goat markets - 27
- Facilities for e-trading - 87
- Processing units for Cleaning, Grading and Packing - 61
- Capacity cold storages (10,000MT) by KAPPEC - 2

First of its kind Unified Market System

- Reduction of post-harvest loss, elimination of distress sale by farmers, increased shelf life for agro-produce, availability of scientific storage ware house for farmers at their doorstep.

Central Government Initiatives

- The Centre is planning to bring a fresh model Agricultural Produce Market Committee Act
- The new Act, expected by 2017, will also have provisions for setting up private marketing yards within a designated area of a market to increase competition and promoting e-national agriculture market

Number of APMC’s

- State 202
- Central 50
- Private 54
- Rural Godown 90

Capacity in MT

<table>
<thead>
<tr>
<th></th>
<th>State 2,36,19,484</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural Godown</td>
<td>54,025</td>
</tr>
<tr>
<td>Private</td>
<td>2,63,998</td>
</tr>
<tr>
<td>Central</td>
<td>4,66,400</td>
</tr>
</tbody>
</table>
Prominent institutions providing wide range of courses in agricultural and veterinary sciences, farm machinery, food engineering and various other lines

<table>
<thead>
<tr>
<th>Institution</th>
<th>Location</th>
<th>Courses Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Food Technological Research Institute</td>
<td>Mysuru</td>
<td>Food science &amp; technology</td>
</tr>
<tr>
<td>National Dairy Research Institute</td>
<td>Bengaluru</td>
<td>Dairy microbiology, animal genetics, breeding, livestock, etc.</td>
</tr>
<tr>
<td>Defence food Research Laboratory</td>
<td>Mysuru</td>
<td>Food R &amp; D</td>
</tr>
<tr>
<td>Indian Veterinary Research Institute</td>
<td>Bengaluru</td>
<td>FMD Virus vaccine</td>
</tr>
<tr>
<td>Indian Institute of Horticulture Research</td>
<td>Bengaluru</td>
<td>Precision farming, biotech interventions, crop yields, etc.</td>
</tr>
<tr>
<td>University of Agricultural Sciences</td>
<td>Bengaluru, Shivamogga, Raichur, Dharwad</td>
<td>Mushroom Cultivation &amp; Baking</td>
</tr>
<tr>
<td>Indian Institute of Science</td>
<td>Bengaluru</td>
<td>Reproductive Biology, Agriculture &amp; Veterinary Sciences</td>
</tr>
<tr>
<td>College of Agricultural Engineering</td>
<td>Raichur</td>
<td>Soil &amp; water engineering, Machinery, Food engineering</td>
</tr>
<tr>
<td>University of Horticultural Sciences</td>
<td>Bagalkot</td>
<td>New Crop development and protection methods</td>
</tr>
<tr>
<td>Karnataka Veterinary, animal and fisheries Sciences University</td>
<td>Bidar</td>
<td>Veterinary and animal sciences, dairy, fisheries and other allied sectors</td>
</tr>
</tbody>
</table>

Incubation Centre for Agriculture Start-ups at UAS Dharwad
Support Infrastructure

Warehouse and Logistics

<table>
<thead>
<tr>
<th>Agency</th>
<th>Capacity (MT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Warehousing Corporation in Karnataka</td>
<td>5,78,436</td>
</tr>
<tr>
<td>Karnataka State Warehousing Corporation (KSWC)</td>
<td>15,19,380</td>
</tr>
<tr>
<td>KAPPEC</td>
<td>8,400</td>
</tr>
<tr>
<td>Food Corporation of India in Karnataka</td>
<td>2,36,000</td>
</tr>
<tr>
<td>Additional Warehousing Capacity &amp; Cold Storage (by end of March 2018)</td>
<td>25,00,000</td>
</tr>
<tr>
<td></td>
<td>40,000</td>
</tr>
</tbody>
</table>

The State Warehouse Corporation is creating 32,000 MT of planned scientific cold storage facilities in Bengaluru Urban, Bengaluru Rural, Mysuru, Kalaburagi, Vijayapura, Bagalkote and Bidar. O&M will be outsourced in PPP Basis.

Establishment of Modern Abattoirs in Urban Local Bodies

<table>
<thead>
<tr>
<th>Location</th>
<th>Project Cost (INR Crore)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Haveri</td>
<td>7</td>
</tr>
<tr>
<td>Davangere</td>
<td>4</td>
</tr>
<tr>
<td>Madikeri</td>
<td>9</td>
</tr>
<tr>
<td>Udupi</td>
<td>3</td>
</tr>
<tr>
<td>Koppal</td>
<td>6</td>
</tr>
<tr>
<td>Gadag</td>
<td>6</td>
</tr>
<tr>
<td>Ranebennur</td>
<td>5</td>
</tr>
<tr>
<td>Hubballi-Dharwad</td>
<td>5</td>
</tr>
<tr>
<td>Ballari</td>
<td>10</td>
</tr>
</tbody>
</table>

Existing Abattoirs for Sheep and Goat

- Project cost-INR 2655.86 Lakh
- Land- 20 acres
- Location- Cheelanahalli, Tumakuru District

Projects to promote Exports

Two major Cold Chain Facility for Export of Mango and other Horticulture Products, Storage and Packing Facilities are completed in APMC Yard, Hubbali and KIADB, Bagalkote by KAPPEC

COOLPORT at Bengaluru under ASIDE scheme

International Flower Auction Centre has been established with coordination from Horticulture Department in Bengaluru
Cashew Technology Development Centre at Kumta in Uttara Kannada District

Upgradation / Modernization of infrastructure facility for Marine products in Tadadi port, Kumta Taluk, Karwar District

Source: KSWC Bengaluru
### Institutional Development and Policy Support

Declaring the entire State as Single Zone

Karnataka Agri-Business & Food Processing Policy 2015

<table>
<thead>
<tr>
<th>Particulars</th>
<th>Incentives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment Promotion Subsidy</td>
<td>35% of fixed assets up to a maximum of INR 65 lakhs for MSME</td>
</tr>
<tr>
<td>Exemption from Stamp Duty for MSME and Category A, B, C enterprises</td>
<td>Exempted @ 100%</td>
</tr>
<tr>
<td>Concessional Registration Charges</td>
<td>Concessional rate @ INR 0.50 per INR 1,000</td>
</tr>
<tr>
<td>Reimbursement of land conversion fee</td>
<td>Reimbursement @ 100%</td>
</tr>
<tr>
<td>Exemption from Entry Tax for plant and machinery and capital goods</td>
<td>100% exemption for 3 years for MSMEs</td>
</tr>
<tr>
<td>Exemption from Entry Tax for raw materials, inputs &amp; component parts</td>
<td>100% exemption for 6 years for MSMEs</td>
</tr>
<tr>
<td>Subsidy for setting up Effluent treatment Plant (ETP)</td>
<td>One time capital subsidy to 75% of the cost and a ceiling for INR 50 lakhs for MSME, INR 100 lakhs for A,B,C category and INR 200 lakhs for common ETP</td>
</tr>
<tr>
<td>Interest Subsidy for micro Enterprises</td>
<td>6% per annum for 7 years</td>
</tr>
<tr>
<td>Exemption from tax on Electric tariff</td>
<td>100% exemption for 8 year</td>
</tr>
<tr>
<td>Subsidy for technology adoption from recognized national labs</td>
<td>50% of the cost (max INR 1 Lakh) for MSMEs</td>
</tr>
</tbody>
</table>

**Objectives:**

- To reduce wastage and increase industry value-add, thereby generating higher returns for the farmer
- To maximize direct & indirect employment generation opportunities
- To increase the flow of investments across the supply chain from farm to market
Pioneering Reforms

Introduction of Unified e-trading Platform

- **Deposits** needed for direct purchase reduced from INR 50 Lakhs to INR 5 Lakhs
- **Free to establish market under private sector** by removing zonal restrictions
- **Exemption of market fee** for new agricultural produce processing industries for a period of 10 years
- **Private markets will also be considered as procurement centres** for MSP operations on case to case basis by issuing an executive order
- **Rebate in the payment of market fee (70%)** by the licensee operating the direct purchase centre for food grains, fibres, pulses, spices, etc
- **Levy of market fee** on perishable abolished
- **Site allotment** in the market yard for setting up of cold storages, a rebate of 50% in sital value is given
- Agri produce export/caused to be exported by any person either on his own or as an agent for another person from the market area to outside the country is **Exempted from the payment of market fee for a period of 10 years**

Farmers Producers Organisation

- There are 86 registered FPOs in the State and 6 FPOs are under the process of registration.

Group Crop Insurance Scheme

- Scheme to support farmers engaged in the contract farming in association with the industry partners
- Safeguard the interest of farming community and the industry

Establishment of Facilitation Cell

- Establish an exclusive facilitation cell to assist and handhold the exporters of agribusiness & food processing sector
- Government’s effort in effectively introducing the concept of Ease of Doing Business
Integrated Policy Support

- Wineries declared as Horticulture & Food Processing Industries
- Subsidy for grape processing
- Incentives for marketing and distribution of wines
- Setting up of Grape Processing Industries Board
- Establishment of Wine Parks
- Simplification of rules for getting lands for production of grape wine varieties, production of wine and for issuing License and Permit to the Wineries
- Improvement in soil fertility and productivity through safe farming
- Efficient and sustainable crop production and protection technologies
- Sustainable management of natural resources for achieving food nutritional environmental and livelihood security
- Encourage public-private partnership
- Single Window Agency at State Level to approve projects under PPP up to INR 50 Crore
- Attract investments worth INR 5 Lakh crore in the five years
- Enhance Ease of Doing Business in the State
- The contribution of Manufacturing sector to be enhanced
- New Age Incubation Network with grants and financial support
- Technology Business Incubators in agriculture and allied fields
- Idea2PoC (Proof of Concept) funding providing early stage support
- Research and Development Labs
- Marketing Incentives

Supporting the entire value chain and niche sectors
Karnataka Drip-to-Market Agro Corridor (DMAC)

Investment Opportunities
- Drip Irrigation
- Sprinkler Irrigation
- Cold Chain Infrastructure
- Other Infrastructure (e.g., logistics, packing houses, processing plants)
- Market linkages

Activities
- Large-scale production of high value agricultural and horticulture produce
- Economies of scale for development of infrastructural requirements (e.g., cold storage, logistics, packing houses, processing plants)
- Knowledge base for best practice value chain development, including agricultural practices, technologies, product quality standards, food safety assurance, financial solutions, etc. for market development

Ramthal Project

4-way MOUs between:
- Government of Karnataka
- Water Resources Department
- Agri Department
- Horti Department
- Private sector offtaker

6 MOUs facilitated between private sector offtakers and government:
- ADM Agro (Sunflower, soyabean)
- Global Green (gherkins)
- Jain Farm Fresh Foods (Mango, Guava, Papaya, Soyabean, Tomato)
- Krishi Organic (Turmeric, Marygold, Spices, Vegetables)
- Neo Foods (gherkins, baby corn, jalapeno)
- RSM Hitech Foods (Maize, Sunflower, Bajra, Green Gram, Red Gram)

* Community Micro Irrigation schemes (MIS) aim to set a fixed infrastructure for water intake, storage and distribution to a large number of farmers. MIS are generally managed by third parties.

Another 7 MOUs in the pipeline
Investment Opportunities

Agriculture and food processing

- Karnataka is a front runner in this sector with a CAGR of 20% outperforming even the national average.
- Raw material, a skilled workforce, a strong supporting ecosystem and an industry-friendly policy environment with world class infrastructure.
- Special Economic Zones and Agri parks are built.
- **Utopia Cashew Cluster** is coming up in Kumta (Uttar Kannada District)
- Establishment of 14 exclusive farmer federations for Organic & Millet Products

Agri Engineering

- Farm Mechanization Programme is being implemented both under State and Central Sector.
- Infrastructure for post harvest collection centre, storage house, grading and sorting, controlled storage, precooling, Ripening chambers and Modified atmospheric packing
- Development of Cold Chains including Storage and Reefer Trucks
- R&D collaboration for new variety of products to meet the changing consumer demand and vast export market Technology collaboration in the areas of Organic Farming

Horticulture

- Farmers - Work in peer groups at specific location for specific crops and Co-operative response to new technologies
- Farmer Producer Organisation (FPO) – Create collection centre, cold storage facility, refrigerated transport facility, processing and value addition centres
- Department of Horticulture- Provide technical support to the growers in collaboration with suitable technical organizations

Animal Husbandry & Dairy Products

- Dairy projects in various districts under KMF and other Cooperative coming up under PPP
- Many projects in the pipeline including fully automatic liquid milk plants, automated milk conversion plants, fully automated UHT Plant
- Modern fishing harbour, Fish landing center
- Subsistent Livestock farming to sustainable & viable sheep & poultry farming
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