

# UKIBC REPORT INDIA AGRI-FOOD SUPPLY CHAINS: OVERVIEW AND OPPORTUNITIES



The **LOGISTICS**  
Business  
SUPPLY CHAIN CONSULTANCY

in association with UK  
TRADE &  
INVESTMENT



**UK INDIA**  
BUSINESS COUNCIL

<b>INTRODUCTION</b>	
<b>BACKGROUND</b>	
INDIA OVERVIEW	04
LOGISTICS	06
AGRICULTURE	07
FOOD PROCESSING	08
FOOD AND BEVERAGE RETAIL	09
GOVERNMENT INITIATIVES	10
SCHEMES	11
<b>CURRENT SCENARIOS &amp; CASE STUDIES</b>	
LOCAL FOOD SUPPLY CHAINS	12
REGIONAL FOOD SUPPLY CHAINS	14
EXPORT FOOD SUPPLY CHAINS	16
<b>SUPPLY CHAIN CHARACTERISTICS</b>	
INDIA	18
UNITED KINGDOM	19
<b>OPPORTUNITIES</b>	
AREAS	20
APPROACH	21

<b>DEVELOPMENT PATHS</b>	
COMMERCIAL OPPORTUNITIES	22
<b>APPENDICES</b>	
MAP OF INDIA	24
INDIA STATES AND UNION TERRITORIES	25
REFERENCES	26
USEFUL CONTACTS	27
<b>CASE STUDIES</b>	
LOCAL FOOD SUPPLY CHAINS	
JAIN IRRIGATION (BANANAS)	12
ONIONS	12
RICE PRODUCTION	12
REGIONAL FOOD SUPPLY CHAINS	
FRESH & HEALTHY ENTERPRISES (APPLES)	14
POTATOES IN BIHAR	14
YAKULT DANONE (PROCESSED FOODS)	14
EXPORT FOOD SUPPLY CHAINS:	
TESCO (GRAPES)	16
PUNJAB (VEGETABLES)	16
LITCHI	16

**EXECUTIVE SUMMARY**

This report has been prepared on behalf of the UK India Business Council as a part of its work that contributes towards the JETCO (Joint Economic and Trade Committee) initiatives developed between the UK and Indian Governments. The purpose of the report is to provide an overview of typical agri-food supply chains in India. It is aimed at those companies and individuals who are interested in developing food chains to either serve domestic Indian markets, supply goods and services to India or source products and services from India.

The report provides some high level statistics for the food supply chain sector, along with an overview of Agricultural, Logistics, Food Processing and Retail practices in India. It also describes a number of the schemes and initiatives that have been put in place by the Indian Government to assist companies in developing the infrastructure, techniques and technology required to develop food supply chains in India.

The current status of food supply chains in India is summarised in a number of case studies in local, regional and export markets. The case studies include some examples of best practice in these areas, and also some of the opportunities for the further developments.

We have provided lists of the main characteristics of Indian and Western food supply chains to provide a greater insight into some of the differences between these. This summarises some of the cultural,

economic and social differences that should be taken into account when applying Western techniques and equipment to Indian supply chains.

The final part of the report covers some of the areas of opportunity for Western companies to do business in India.

Some of the key points covered in the report are as follows:

- There are a wide range of opportunities for all sizes of UK companies from multinational to Small and Medium Enterprises (SMEs) to develop business opportunities in India and with Indian Companies.
- There are cultural, economic and technological differences between the UK and India that manifest themselves in food supply chains. These are identified in the report and examples given of how companies have understood and worked with these difference.
- There are a number of organisations that can assist UK companies develop their business interests in India. These are referenced at the back of the report.

The report has been compiled from studies and statistics available on food supply chains in India, which are referenced throughout the document, along with the authors combined practical experience of working in and evaluating agri-food supply chains in India, and other developing countries, over a number of years.

POPULATION  
MAJOR CITIES

- 1 DELHI NCR  
19.23 MILLION
- 2 KOLKATA  
13.1 MILLION
- 3 MUMBAI  
19.23 MILLION
- 4 HYDERABAD  
5.39 MILLION
- 5 CHENNAI  
6.58 MILLION
- 6 BANGALORE  
6.14 MILLION



MUMBAI / MASHARASHTRA	19,230,000	11,978,450
DELHI / NCR	18,680,000	9,879,172
KOLKATA / WEST BENGAL	13,100,000	4,572,876
CHENNAI / TAMIL NADU	6,580,000	4,343,645
BANGALORE / KARNATAKA	6,140,000	4,301,326

HYDERABAD / ANDHRA PRADESH	5,390,000	3,637,483
AHMEDABAD / GUJARAT	3,959,432	3,520,085
PUNE / MAHARASHTRA	3,446,330	2,538,473
SURAT / GUJARAT	3,344,135	2,433,835
KANPUR / UTTAR PRADESH	3,221,435	2,551,337

JAIPUR / RAJASTHAN	3,210,570	2,322,575
LUCKNOW / UTTAR PRADESH	2,750,447	2,185,927
NAGPUR / MAHARASHTRA	2,447,063	2,052,066
PATNA / BIHAR	1,875,572	1,366,444

POPULATION 2010 EST.  
POPULATION 2001 CENSUS

02 / BACKGROUND  
INDIA OVERVIEW

INDIA OVERVIEW

India has a thriving economy, with a GDP growth rate currently around 7.5% per annum. Sir Thomas Harris of Standard Chartered Bank – in India for 152 years – observed recently: “India is expected to grow faster than China over the next couple of years and will be a \$30-trillion economy by 2030. India is going to be the third-largest economy in the world after the US and China. It has a young, energetic and vibrant business environment. UK companies should look at India to expand their business.”

In terms of scale India has a land area of 2.9 million km<sup>2</sup>, which makes it the seventh largest country in the world, and a coastline of 7,000 km. The terrain is diverse: from the Deccan plateau uplands in the south, deserts in the west, the Ganges valley and plain, to the Himalayas in the north. Climates range from tropical to temperate, with the Monsoon rainy season from May to October.

New Delhi is the capital city and the nation is organised into 28 states and 7 Union Territories (see Appendix 1). The main religions are Hindu (80.5%), Muslim (13.4%), Christian (2.3%), and Sikh (1.9%). There are 15 official languages with Hindi, spoken by 41% of the population, the most widely used. Hindustani is also popular in the north. India gained independence from British rule in 1947. English remains the main business language and is spoken throughout the country.

India has a population of 1.2 billion people and a median age of 25.9 years. Some 29% of the population is urban, with high densities in 6 major cities of between 5 and 20 million people in each. Within the cities about a third of expenditure per capita is on food and drink<sup>(1)</sup> (NCAER Research). Trends also show shifts from purchasing food predominantly on the basis of price, to consideration of other factors such as quality, branding and ease of preparation. One of the factors affecting this trend is the proportion of women in employment, which continues to grow. This provides a higher disposable income per family and less time for buying and preparing foods.

SECOND AND THIRD TIER CITIES

The dividing line between the first, second and third tier cities can vary depending on the criteria used, but it is clear that growth is not only in first tier, but also second and third tier cities in India. This is the home of a large proportion of the fast growing Indian middle classes. Several second and third tier cities have good universities producing thousands of graduates and engineers. Industries such as outsourcing, retailing and IT are therefore developing quickly as a result of the available employees and the consumer base.

India recognises the need to educate and train the young people entering its workforce, thereby utilising its demographic dividend of an average age of around 26 years. This includes developing and training enough supply chain professionals, managers, and operatives to tackle its logistical challenges.

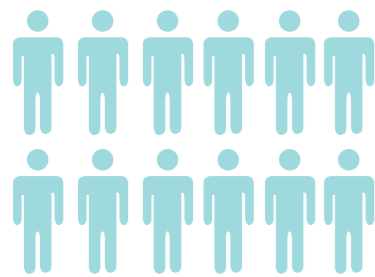
POPULATION  
1.2 BILLION

INDIA IS GOING TO BE THE THIRD-LARGEST ECONOMY IN THE WORLD AFTER THE USA AND CHINA

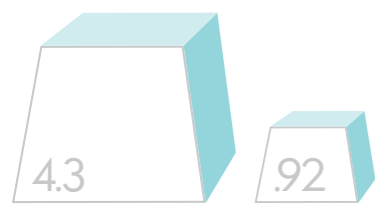


URBAN  
POPULATION

India is a land of logistics contrasts<sup>(2, 3)</sup> (Logistics in India; Multi Modal Logistics). It combines transport and storage methods that go back over centuries with some that use the very latest technological innovation. However, logistical integration is rare and cold chain infrastructure development is patchy. Most supply chain investment has come from government agencies, with little private sector involvement. This is now set to change.



12.5 MILLION  
RAIL PASSENGERS  
EVERY DAY



2007 AIR FREIGHT VOLUME:  
4.3 MILLION TONNES  
DOMESTIC  
0.92 MILLION TONNES  
INTERNATIONAL

#### ROAD FREIGHT

General purpose vehicle types typically range from 2-axle and 3-axle rigid trucks, to some 4- and 5-axle articulated vehicles in the more developed areas. Dry freight trucks are often end-loaded and have fixed side bodywork with sheeted tops. Articulated vehicle types used for food transport include trailers carrying 20' and 40' ISO units – with dry freight, bulk tank or reefer bodies. These are mainly used for export. Vehicles are also often old. Maintenance and operating standards are generally below what would be expected in Europe.

#### RAIL FREIGHT

With a total track length of nearly 108,000 km the Indian rail network is highly developed. Every day it carries 12.5 million passengers and 1.3 million tonnes of freight. The 760km Konkan Railway from Mumbai to the port of Mangalore, which opened in 1998, was a major achievement. The government Container Corporation of India (ConCor) is still a leader in development of container terminals and services.

#### SEA FREIGHT

There are two leading container ports in India. Jawaharlal Nehru (JNP) near Mumbai (4,175,790 TEUs in 2008) handles 60% of India's container traffic. Terminal operators are the government, DP World, and an APM/ConCor JV. Chennai (1,199,619 TEUs in 2008) handles 16% of India's container traffic, with terminals operated by DP World and CITPL. Major expansion is planned at both ports.

#### AIR FREIGHT

Principal airports are Mumbai, Delhi, Chennai, Bengaluru, Hyderabad, Thiruvananthapuram, Cochin and Kolkata. In 2007, air freight volumes were 4.3m tonnes domestic / 0.92m tonnes international, with Delhi and Mumbai handling 80% of international air cargo. The need for investment in air cargo centres and automated handling facilities has been recognised, as reflected in government initiatives.

#### WAREHOUSING

Many warehouses are small and labour intensive. State taxation arrangements have encouraged high numbers of inefficient, small warehouses. This in turn results in high stock levels and fragmented supply chains. A new national government tax reform scheme is designed to alleviate this situation.

#### AGRICULTURE

India, along with Brazil, China and the USA, is one of the world's largest food producers.

- Largest producer of milk in the world (105 million tonnes per annum)
- Largest livestock population (485 million tonnes per annum)
- Second largest producer of fruits and vegetables (197 million tonnes per annum)
- Third largest producer of food grain (230 million tonnes per annum)
- Third largest producer of fish (7 million tonnes per annum)

Its 20 diverse agro-climatic conditions, from tropical to temperate, combined with its 46 different soil types, make India an ideal location for a vast range of crops grown throughout the seasons<sup>(4)</sup> (India Beckons). Key agri-food sectors are:

- Fruits and vegetables
- Meat and poultry
- Fish and marine products
- Milk and dairy
- Grain Spices

In addition, the packaged/ready-to-eat/consumer foods and beverage sectors are important. However, overall processing activity is concentrated on primary processing. The further processing opportunities have yet to be developed. In addition, as the level of post-harvest and related supply chain losses is high, at times equal to 30% plus of production, there are major improvement and development opportunities across the agri-food chain.

A close examination of each sector indicates its scale and potential.

As an example, for fruit and vegetables India has 4.8 million hectares of land for fruit cultivation and 7.59 million hectares for vegetable cultivation. The fruit and vegetable market is expected to grow at a compound annual growth rate around 6% over the next 5 years<sup>(5),(6)</sup> (Ministry of Food Processing of India; KPMG Analysis). India's export of fresh fruit and vegetables was estimated at £500 million, and processed fruit and vegetables at £425 million, in 2008-09.

Some of the major fruit and vegetable crops grown and exported from India are listed below:

- Major fruit crops in India are Banana, Mango, Pomegranate, Apple, Orange, Litchi and Grape
- Major vegetable crops are Onion, Potato, Cauliflower, Cabbage, Green Peas, Tomato and Ocra

A feature of current agri-food supply chains, as described later in this report, is their fragmented nature. Most farms in India are small and distribution of their products is usually by means of complex chains involving local markets and many intermediaries.

105 M TONNES  
LARGEST GLOBAL MILK PRODUCER



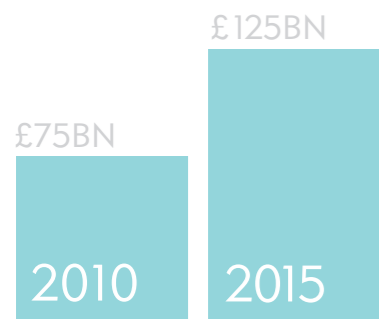
485 M TONNES  
LARGEST GLOBAL LIVESTOCK POPULATION



7 M TONNES  
3RD LARGEST GLOBAL FISH PRODUCER



30% OF FARM PRODUCE IS WASTED OR LOST BEFORE IT REACHES THE MARKET



PROCESSED FOOD IS EXPECTED TO GROW FROM £75BN IN 2010 TO £125BN 2015

#### FOOD PROCESSING

India faces an enormous challenge to modernise food production and distribution. Currently about 30% of farm produce is wasted or lost before it reaches the market; mainly as a result of poor infrastructure combined with both structural and operational supply chain and logistical deficiencies. Food processing in India is still relatively undeveloped. However, the market for processed food is expected to grow from a current level of £75bn in 2010 to £125bn in 2015. The reasons for this include:

- Growth of organised retail
- Expanding food variety
- New consumption patterns in urban areas
- Higher per capita incomes
- Increasing presence of women in workforce

With increasing numbers of consumers – with significant time pressures – India expects the move from staple food items to value-added processed items to increase. The Indian Ministry of Food Processing provides the following overview of degrees of processing:

#### PRIMARY PROCESSING

- Fruits and vegetables
- Grains and cereals
- Oil seeds
- Beverages
- Milk
- Meat, poultry, marine products

#### SECONDARY PROCESSING

- Pulp, dried, preserved, paste, sliced, etc.
- Rice puff, flour, malt, rawa, etc.
- Oil cakes
- Powder, dust, leaf, etc.
- Khoya, cottage cheese, cream, etc.
- Cut, fried, preserved, frozen, chilled, & eggs

#### TERTIARY PROCESSING

- Ketchup, jams, juices, pickles, candies, chips, etc.
- Biscuits, noodles, flakes, cakes, namkeens, etc.
- Sunflower, mustard, soya, olive oil, etc.
- Tea bags, soft drinks, alcoholic beverages, etc.
- Spreadable fats, butter, cheese, yoghurt
- Preparations such as ready meals

Current processing levels in many segments are low (with significant proportions in the unorganised sector): fruit and vegetables 2.2%, milk and milk products 35%, buffalo meat 21%, poultry 6%, and marine products<sup>(7)</sup> (Fuelling New Cycles of Success in Food Sector through Infrastructure Development).

The move to value-added items will logically lead to industry consolidation and rationalisation of manufacturing and processing facilities. At present the commodity-based processing sector is dominated by unorganised and small-scale processing plants such as grain mills. In order to encourage this movement, government initiatives to attract investment and facilitate development centre on:

- Mega Food Parks Scheme
- Scheme for Integrated Cold Chain, Value Addition and Preservation Infrastructure
- Scheme for Setting up / Modernisation of Abattoirs
- Setting up / Modernisation of Food Processing Units
- Scheme for Food Testing Laboratories and R&D

#### TERTIARY PROCESSING (CONT)

In line with the above initiatives, the Indian Government's 'Vision 2015' is as follows:

- Treble the size of the processed foods sector
- Increase level of processing of perishables from 6% to 20%
- Value addition to increase from 20% to 35%
- Share in global food trade to increase from 1.5% to 3%

This drive for growth, and its speed, has significant implications for development of the agri-food supply chain. It will be necessary not only to improve the efficiency and reliability of existing arrangements, but also to create new networks that operate to world-class standards.

#### FOOD AND BEVERAGE RETAIL

India has some 15 million retail outlets, with the majority in the unorganised sector. In fact organised retail accounts for less than 5% of the market and is contributing far less than it could to the overall economy. However, the fast expansion of the organised retail market – which is predicted to increase threefold in the next five years – is one of the drivers of food processing growth<sup>(8)</sup> (Introduction to Indian Economy, Retail and Food Market). Approximately 30% of the organised retail market in India is accounted for by the food and beverages segment.

The organised retail sector has faced considerable challenges to its development, including:

- Lack of availability of good quality real estate
- A fragmented supplier base with negative consequences for stock positioning & levels
- Difficulties in promoting brand awareness
- Shortages of trained staff and managers

- Government restrictions on Foreign Direct Investment (FDI) for multi-brand retailing

However, improvements now under way include:

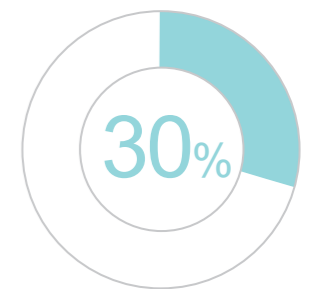
- Revenue-sharing real estate agreements
- Partnerships with international retailers (e.g. Tesco with Trent, Tata's retail arm)
- Better focus on store level profitability
- IT-enabled initiatives such as CRM, vendor management, and supply chain management
- Government proposals to ease restrictions on FDI in the retail sector

While the Indian Government at national and state levels has moved to encourage FDI in food processing industries, it has been slower to take up a similar challenge in the retail environment. Also, while wishing for a properly resourced and managed end-to-end food supply chain, the Indian government has been slow to break free from state intervention. For example in December 2010, The Times in London reported that a doubling in the price of onions, an essential food item for much of India's population, had triggered emergency government intervention<sup>(9)</sup> (Onions off the menu as speculators force prices to record highs).

However, the experience of the UK's grocery retailers from the 1970s onwards demonstrates that improvement comes only from an effective response to the demands of the consumer for variety, affordability, quality and above all, safety from the food that they buy and consume. Providing what the consumer wants, "better, simpler, cheaper", has driven progress across the supply chain from the retail store all the way back to the grower.



INDIA HAS SOME 15 MILLION RETAIL OUTLETS



30% OF ORGANISED RETAIL MARKET IN INDIA IS ACCOUNTED FOR BY FOOD AND BEVERAGES



FREE TRADE WAREHOUSING ZONE CONSISTS OF FIVE WAREHOUSING ZONES IN STRATEGIC AREAS ACROSS THE COUNTRY LINKED BY RAIL AND ROAD

ESTIMATED INVESTMENT OF US \$28 BILLION REQUIRED

**GOVERNMENT INITIATIVES**

There are a wide range of Indian Government initiatives being undertaken to improve the infrastructure within the country and introduce supply chain techniques and technologies. These include the introduction of Food Parks and Cold Chains, Multi-modal Logistics Parks, Dedicated Freight Corridors, and Free Trade Warehousing Zones.

The government offers tax incentives and Public Private Partnerships to encourage these developments. An overview of each of these schemes is provided in the UK Trade and Investment document "Supply Chain Management Industry Landscape in India"<sup>(10)</sup> (Supply Chain Management Industry Landscape in India 2010). Each of these initiatives is underway and provides opportunities for foreign investment in the development of the infrastructure, and also use of the new facilities to develop new supply chains.

One of these schemes is the Free Trade Warehousing Zone (FTWZ), which consists of five warehousing zones in strategic areas across the country. These are linked by rail and road. Each zone will offer a range of facilities such as container handling, contract warehousing, exhibition and business facilities. These facilities also offer tax exemption and speed of export clearance.

An overview of the initiative is shown in Figure 1. The Mumbai scheme is due to be operational from August 2010 and the Delhi scheme by the 3rd quarter of 2010. It should also be noted that many schemes are implemented at state, as opposed to national, level. For example, in Haryana the

Haryana State Industrial and Infrastructure Development Corporation Ltd. has some 18 industrial estates under development, including food parks at Rai (Sonipat) and Saha (Ambala), with assistance from the national government<sup>(11)</sup> (Modern Industrial Estates in Haryana).

**COLD STORAGE OPPORTUNITIES**

There are enormous volumes of fresh food transported across India every day. The distances are large, the road and rail infrastructure is not good in all areas, the temperatures are high, and there is a great deal of waste. This is recognised by the Indian Government, and to address the point they have developed a number of initiatives to attract organisations to develop cold chains.

Tax incentives are offered for the import and implementation of cold chain technology, and there are many projects that can attract Government funding on a Public Private Partnership basis.

Realisation of the goals of the Ministry of Food Processing Industries (MoFPI), as described previously, will require an estimated investment of US \$28 billion (Rs100,000 crore) to facilitate major investment in food processing and to link farmers and supplier groups to markets. The Mega Food Park Model is the flagship "infrastructure-enabling" programme<sup>(12), (13)</sup> (Mega Food Park; Delicious Investment Opportunities in India).

**MEGA FOOD PARKS SCHEME (MoFPI)**

The Mega Food Park (MFP) Scheme is intended to link agricultural production to the market in order to assure maximisation of value addition, minimise waste and improve farmers' income. This infrastructure project will be implemented in identified agricultural clusters across India. Each Park has the following components:

**FIELD COLLECTION CENTRES**  
 Consolidating supplies from farmer groups, self-help groups, and individual farmers

**PRIMARY PROCESSING CENTRES**  
 Pre-cooling, grading, pulping, sorting, waxing, packing, temporary storage

**CENTRAL PROCESSING CENTRE**  
 Pulping, aseptic packing, CA chamber, cold store, QC laboratory, logistics centre, processing units

MFPs will be set up through Special Purpose Vehicles (SPVs) and, subject to strict criteria, will be eligible for public funding of basic infrastructure (e.g. roads, effluent treatment) and core infrastructure (e.g. integrated cold chain facilities).

**INTEGRATED COLD CHAIN, VALUE ADDITION AND PRESERVATION INFRASTRUCTURE (MOFPI) SCHEME**

The objective of this scheme is to enable provision of complete cold chain and preservation infrastructure, from farm gate to the consumer. The Ministry provides grant aid up to 50% of the cost of plant & machinery and technical civil works.

**SETTING UP / MODERNISATION OF ABATTOIRS SCHEME**

This scheme is designed to ensure that hygienic and safe meat is available to the consumer. Financial grant assistance is available for establishing/modernising of abattoirs.

**SETTING UP / MODERNISATION OF FOOD PROCESSING UNITS SCHEME**

This scheme is intended to promote and develop the food processing industry, attract private sector investment and encourage agricultural diversification. A range of financial grants are available depending on geographical location.

**FOOD TESTING LABORATORIES AND R&D SCHEME**

This provides financial assistance to public and private sector organisations for R&D, and for establishing/upgrading food testing facilities associated with quality systems and standards such as HACCP, ISO 22000, ISO 14000 etc.

THE MEGA FOOD PARK SCHEME IS INTENDED TO MINIMISE WASTE & IMPROVE FARMERS INCOME



The supply chain for the majority of fruit and vegetables taking the traditional route to market to the small retailer is shown below. Over 95% of fruit and vegetables are retailed by small (unorganised) retailers in India. This leads to multiple handling of produce, damage, waste and price increases due to multiple mark-ups.

**LOCAL FOOD SUPPLY CHAINS**

Waste in a fresh food supply chain is estimated between 30% and 40% before the produce reaches the retailer. This is widely recognised in India, and many of the government initiatives are designed to assist operators and equipment suppliers to reduce these figures.

Some of the key elements of local supply chains are as follows:

- Many stages and small organisations in the supply chain
- Multiple mark-ups from the different stages
- Product is handled many times leading to damage and waste
- Packing can be of poor quality and is introduced late in the supply chain

**CASE STUDY 1: JAIN IRRIGATION (BANANAS)**

Jain Irrigation is an excellent example of how modern high-tech farming techniques can be implemented within the structure of Indian farms. Jain have modern laboratories within the banana growing areas of Maharashtra where they produce vast quantities of banana plants, initially from bio cultures, and then through their nurseries. As farms in India are small, the young plants are supplied to the local farmers on a franchise basis and assistance is provided with the planting and growing. Jain drip irrigation systems are also provided to ensure steady growth throughout the seasons. The crop will then be purchased by Jain and sorted, graded, ripened and packed in their modern facilities. Jain will then take care of the sale and distribution of the product. To differentiate these quality

bananas from others on the market, Jain have developed the FarmFresh label that is becoming recognised throughout India.

**CASE STUDY 2: ONIONS**

The majority of onions are stored in simple constructions that provide protection from the sun and allow natural ventilation in ambient conditions. Many are raised above ground level to prevent damp, infestation and improve airflow. A common problem is for onions to start to rot. The solution shown bottom left is to remove all onions in this area of storage, remove the rotten ones and dry the remainder in the sun before returning to storage. This leads to intensive manual handling, damage and shrinkage of the product due to water loss in the high temperatures (whilst drying and in storage). There are many opportunities to improve the equipment and processes in this area.

**CASE STUDY 3: RICE PRODUCTION**

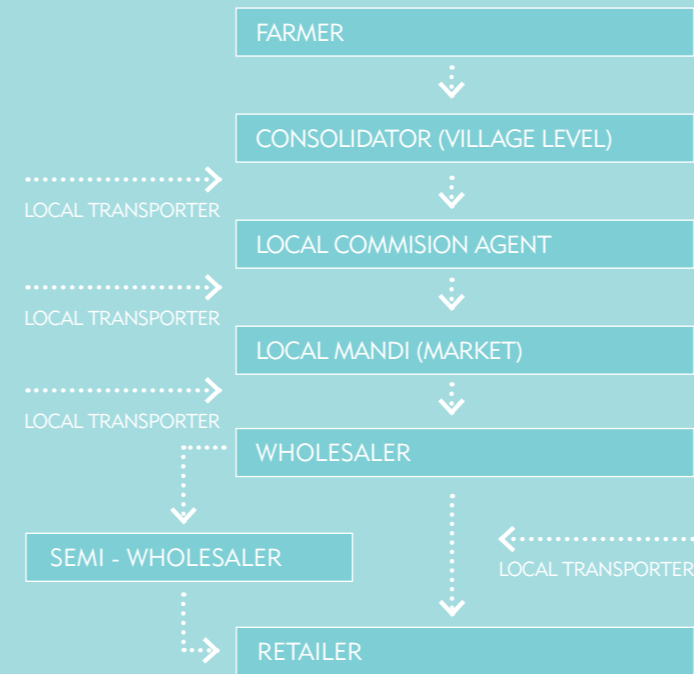
India is the second largest producer of rice in the world, with some 22% of global production. Rice is the staple food for two thirds of the population, particularly in the eastern and southern parts of India. It is grown in all states, and India has the largest area for cultivating rice in the world. The principal growing regions are West Bengal, Uttar Pradesh, Madhya Pradesh, Orissa and Bihar. There are more than 600 varieties, including the Basmati long-grain varieties grown primarily through paddy-field farming in the Punjab region. Because of the importance of rice to the national economy, rice exports may be restricted at times of shortage.



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LOCAL FOOD SUPPLY CHAINS SCHEMATIC



INDIA HAS THE LARGEST AREA FOR CULTIVATING RICE IN THE WORLD

INDIA IS THE SECOND LARGEST PRODUCER OF RICE IN THE WORLD

THERE ARE MORE THAN 600 RICE VARIETIES GROWN IN INDIA



30% - 40% ESTIMATED WASTE IN FRESH FOOD SUPPLY CHAIN BEFORE PRODUCE REACHES RETAILER



As crops are produced in different areas during different seasons, food is traded across regions. The supply chain for regional trade follows the same model as local trade, with the addition of a stage where a trader purchases from local markets and transports the product to markets in other regions.

**REGIONAL FOOD SUPPLY CHAINS**

The key elements in this supply chain are similar to the local supply chain, with the added points:

- There are large distances between markets
- Roads can be poor away from the major built up areas
- Road and rail transport is predominantly in ambient vehicles

**CASE STUDY 4: FRESH & HEALTHY ENTERPRISES (APPLES)**

Fresh & Healthy Enterprises Ltd is a wholly-owned subsidiary of ConCor (Ministry of Railways). The facility shown top left is on the Rai industrial park in Haryana State. Dedicated to apple processing and storage for the domestic market, it receives fruit by truck. It has a footprint of nearly 10,000m<sup>2</sup>, 78 chambers offering temperature-controlled and/or controlled atmosphere storage, and automated grading and packing equipment. Boxed product is stored on industrial pallets and bulk product in plastic pallets. Sorting equipment came from Italy and the refrigeration systems from a UK supplier.

**CASE STUDY 5: POTATOES**

A major crop in the Bihar region is potato. This is one of the few crops that are commonly stored in cold stores. Many of these stores use old refrigeration technology; concrete stores with poor insulation and no gas or humidity controls. Potatoes are

typically stored at 1°C or 2°C, which is below the usual temperatures used in Europe. Stores suffer from frequent power cuts, requiring diesel engines and generators to drive the refrigeration equipment. These are typically stand-alone stores, renting cold storage space to farmers on a monthly basis. There are many opportunities in this area to implement modern cold storage equipment and offer transport and distribution services.

**CASE STUDY 6: YAKULT DANONE (PROCESSED FOODS)**

The Yakult Danone plant is situated on the Rai industrial park, in Haryana State to the north of New Delhi. It produces the company's Yakult range of probiotic fermented milk products. India is the world's largest milk producing country, with an annual production of more than 100 million tonnes. Some 35% of this is currently processed. The setting up of Yakult Danone India Pvt. Ltd. provides a good example of an international food processor seeing the potential of the Indian market, especially in regard to the well-developed dairy sector.



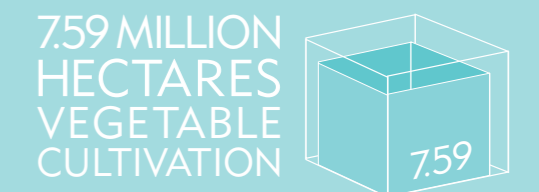
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REGIONAL FOOD SUPPLY CHAINS SCHEMATIC



INDIA IS THE WORLD'S LARGEST MILK PRODUCING COUNTRY



YAKULT DANONE INDIA PROVIDES A GOOD EXAMPLE OF AN INTERNATIONAL FOOD PROCESSOR SEEING THE POTENTIAL OF THE INDIAN MARKET

MANY OPPORTUNITIES TO IMPLEMENT MODERN COLD STORAGE EQUIPMENT & DISTRIBUTION SERVICES





**EXPORT SUPPLY CHAINS**

Exporters are in a better position to develop and maintain control of a major part of the supply chain. These supply chains can therefore be simplified. Consolidators may still be used to collect from a number of smaller farms, but packhouses, storage, transport and export facilities can be organised by the exporter.

Key features are:

- Exporters from India can develop and control most of their supply chain – packhouses, stores and transport.
- Relationships are required with the local communities and operators to run the supply chains.



**CASE STUDY 7: TESCO (GRAPES)**

The world's third largest supermarket has developed contracts for the supply of grapes from local farmers in Maharashtra. A packhouse for washing, sorting, grading and packing has been developed in the area to take the crops directly from the vineyards. This facility includes pre-coolers to remove the field heat and cold storage facilities to hold the grape until vehicles with refrigerated containers arrive. The fresh grape is exported to the UK. The facility is also used for the storage of raisins for export and domestic use.

**CASE STUDY 8: PUNJAB (VEGETABLES)**

The Punjab is a major vegetable growing region. Winter vegetables grown include cauliflower, eggplant, pea and carrot. Summer vegetables include cucurbits,

tomato, capsicum and chilli. Some growers are already supplying UK supermarkets. However, there is scope for innovation and improvement in areas such as yield, water conservation, fertiliser reduction and crop protection. Greenhouse and pack house development are also priorities. Progress will help more producers meet the quality, consistency, and traceability standards required for supply of UK and European markets.

**CASE STUDY 9: LITCHI**

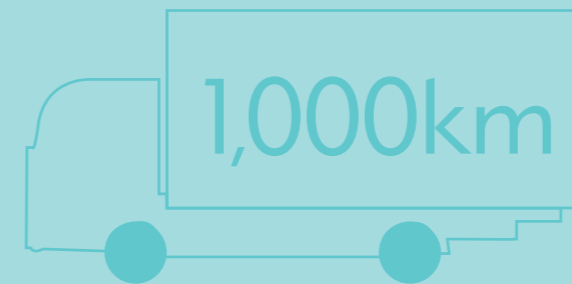
High quality Litchi is grown in Bihar. Within this State, improvements are required to the road network and supply chain infrastructure. As Litchi is a delicate fruit with a short shelf life, there are many risks of damage, deterioration and waste from harvesting to retailing in Bihar and other States. Some local cold store owners have developed contracts with multinational food producers, such as P&G, Unilever and Pepsi, to supply frozen litchi pulp. To achieve this they are using their facilities to pasteurise, pulp and pack the fresh litchi to plastic tubs before freezing in cold stores. The tubs are transported in refrigerated vehicles to the processing plants. Refrigerated vehicles will often travel over 1,000 km from Delhi to pick up these loads, as there are no local providers of refrigerated transport.

EXPORT FOOD SUPPLY CHAINS SCHEMATIC



WINTER VEGETABLES GROWN  
 CAULIFLOWER  
 EGGPLANT  
**PEA**  
 CARROT

CUCURBITS  
 TOMATO  
 CAPSICUM  
 CHILLI  
 SUMMER VEGETABLES GROWN

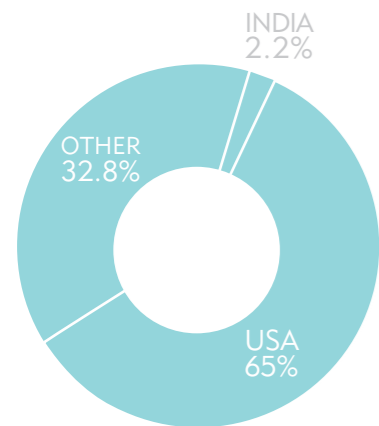


REFRIDGERATED  
**VEHICLES**  
 WILL OFTEN TRAVEL  
 OVER 1,000 KM  
**FROM DELHI**  
 TO PICK UP LITCHI  
 AS THERE ARE NO LOCAL PROVIDERS  
 OF REFRIGERATED TRANSPORT





© THE LOGISTICS BUSINESS



**FRUIT & VEG**  
GROWN & PROCESSED  
FOR INDIAN MARKET

**1.4 HECTARES**  
AVERAGE FARM SIZE  
THROUGHOUT INDIA

**AGRICULTURE**

In India there are many small farms, with the average size 1.4 hectares. Farms over 10 hectares account for about 1% of the 120 million farms in India (USDA). Indian laws currently restrict the size of landholding by individuals, and farms become smaller as they pass from one generation to another. Small farmers are not able to invest in agricultural equipment and get the benefits of scale. There are few direct links between food retailers and the farms.

**FOOD PROCESSING**

A small proportion of food supplied to the Indian market is processed. India is thought to process about 2.2% of fruit and vegetables grown, compared to USA at 65%<sup>(14)</sup> (MOFPI Annual report, 2009-10).

**SUPPLY CHAIN AND DISTRIBUTION**

The supply chain is long, involving many parties, with the product being handled many times. This leads to damage and additional costs. Whilst infrastructure such as good road and rail links are being developed on major routes, there is a need for further development in many rural areas.

The trading methods in India require many parties to check and purchase the product. This means that packaging is introduced later in the supply chain and does not always provide good protection of the product. Cold chain infrastructure is used for the dairy industry but very rarely used for fresh food.

**RETAIL**

Currently around 95% of food retail is undertaken by small retailers, known as "unorganised retail". These often take the form of market stalls and carts. Overheads are low and prices are low.

**CONSUMERS**

Consumers shop more frequently due to the easy availability of produce on many of the streets. Food is therefore typically consumed within a day or two of purchase. Foods for domestic consumption are mostly produced in India and most crops are seasonal.

**AGRICULTURE**

In the UK the average size of a farm is about 50 hectares, with extensive use of mechanised equipment. Many food retailers will have direct links to the farms.

**FOOD PROCESSING**

Around 65% of fruit and vegetables are processed in western markets.

**SUPPLY CHAIN AND DISTRIBUTION**

Supply Chains have been optimised from the farms to the retailers. Protective packaging is introduced at the pack houses and the amount of times the food is handled and moved is minimised. Cold chains are used extensively for practically all fresh foods. Nearly 50% of food consumed in the UK has been imported, requiring supply chains and cold chains to many countries.

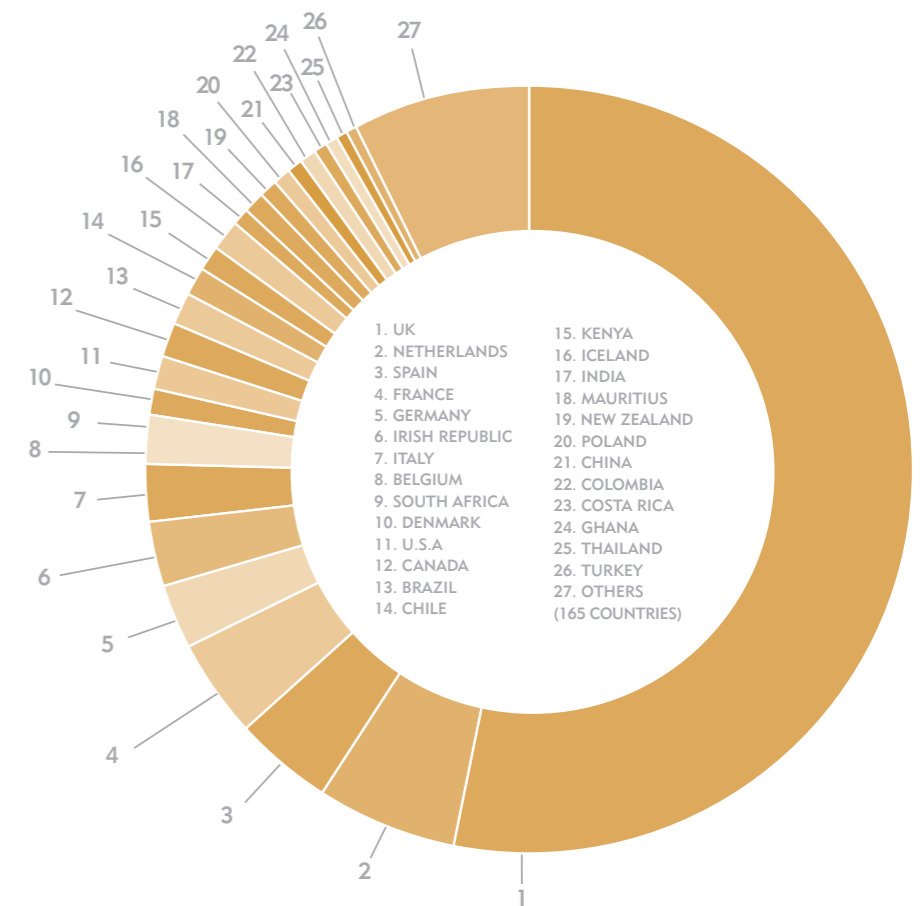
**RETAIL**

90% of groceries are sold through the supermarket chains in western countries. These retailers have visibility or control of the entire supply chain to ensure they are optimised, to reduce the handling of products and improve speed.

**CONSUMERS**

Consumers typically shop for food about once a week, requiring products with a good shelf life after purchase. A large proportion of food is imported from different parts of the world with a range of climates. Foods are typically not only available seasonally. Much fresh food is wasted after purchase.

**ORIGIN OF FOOD CONSUMED IN THE UK 2008**



As can be seen from the characteristics of the Indian and UK markets, there are many differences regarding agriculture, food processing, supply chain, retail and consumer habits. These differences are driven by cultural, religious, economic and political factors and need to be taken into account when undertaking and setting up businesses in India. When introducing new technology and techniques to the Indian market, these different sets of requirements and constraints should be recognised. The case study for Jain Irrigation provides a good example of how new technologies can be successfully implemented in the Indian market.

Source: Defra analysis of HMRC overseas trade statistics

INDIA HAS A LAND AREA OF 2.9 MILLION KM<sup>2</sup> WHICH MAKES IT THE SEVENTH LARGEST COUNTRY IN THE WORLD AND A COASTLINE OF 7,000 KM

29% OF THE POPULATION IS URBAN WITH HIGH DENSITIES IN 6 MAJOR CITIES OF BETWEEN 5 & 20 MILLION PEOPLE IN EACH

**AREAS**

Business opportunities exist throughout the agri-food supply chain in India. In some cases it will be the opportunity to improve existing operations. In other cases the need will be to start from scratch.

A high-level summary of some of the possible opportunities for each area of the supply chain is provided in the following tables:

**Supply Chain Design**

- Strategic consultancy

**Operations**

- Audit and assessment
- Performance improvement

**Contract Logistics**

- Third-party logistics services – specification and provision

**Logistics Parks**

- Design, funding and development

**Ports and airports**

- Design, funding and development
- Operational improvement

**Transport**

- Vehicle fleet specification
- Performance improvement

**Warehousing**

- Facilities design and construction
- Implementation

**Refrigeration Systems**

- Supply, design and commissioning

**Storage Systems**

- Supply, design and commissioning
- Performance improvement

**Handling Systems**

- Supply, design and commissioning
- Performance improvement

**Packaging**

- Specification of packaging and unit load devices

**Information Systems**

- Forecasting and demand planning
- Order administration
- Inventory planning/control
- Fleet management
- Vehicle routing/scheduling
- Telematics

**Education & Training**

- Management development & operative training

**Food Chain**

- Food safety
- Traceability
- Certification
- Market access compliance

**APPROACH**

Early in 2010 the UK India Business Council surveyed companies that had successfully expanded their businesses into India about when, why and how they entered the Indian market, the challenges they faced and how they overcame them. The key findings of the survey<sup>(15)</sup> (Expanding Your Business into India – Strategies for Success) were as follows:

- Quality research is of critical importance when approaching the Indian market
- A partnership arrangement with a local company was the most common method of market entry
- Taking adequate time to identify the correct partner was a key determinant of success
- Having a long-term view of the market opportunity was important
- An understanding of the local culture and approach to doing business was necessary for an effective transition

Another important finding was that the commonly cited difficulties of Indian market entry – such as stifling bureaucracy, poor infrastructure or difficulty hiring suitable staff – were often erroneous and never insurmountable. Another was that there are significant opportunities for SMEs. A related report<sup>(16)</sup> (Opportunities for UK plc in Emerging Cities of India) published in 2009 highlighted that India's emerging cities should also be taken into account when thinking about where to do business. It is not just the major cities where there are commercial opportunities.

The top 10 emerging cities identified in this report are listed below:

City	State
1. Pune	Maharashtra
2. Ahmedabad	Gujarat
3. Kochi	Kerala
4. Nagpur	Maharashtra
5. Jaipur	Rajasthan
6. Vadodara	Gujarat
7. Thiruvananthapuram	Kerala
8. Surat	Gujarat
9. Chandigarh	Chandigarh
10. Indore	Madhya Pradesh

EARLY IN 2010 THE UK INDIA BUSINESS COUNCIL SURVEYED COMPANIES THAT HAD SUCCESSFULLY EXPANDED THEIR BUSINESSES INTO INDIA

NO.1 EMERGING CITY: PUNE MAHARASHTRA

UK companies wishing to develop the commercial opportunities presented by the Indian market should take into account the background characteristics of each area, as shown below. In addition, further research will be essential in order to provide the necessary level of detail.

TRADE IN GOODS 2009

**27.5** BILLION  
 EU EXPORTS TO INDIA

**25.4** BILLION  
 EU IMPORTS FROM INDIA

TRADE IN SERVICES 2009

**8.6** BILLION  
 EU EXPORTS TO INDIA

**7.4** BILLION  
 EU IMPORTS FROM INDIA

FOREIGN DIRECT INVEST 2009

**3.2** BILLION  
 EU OUTWARD INVESTMENT TO INDIA

**0.4** BILLION  
 INDIA INWARD INVESTMENT TO EU

**SOURCING FROM INDIA**

The Agricultural and Processed Food Products Export Development Authority (APEDA)<sup>(17)</sup> (Apex Update) is part of the Indian Ministry of Commerce & Industries. In the last three years it has provided assistance to more than 350 exporters in different segments to set up or improve their infrastructure facilities. Assistance is provided for establishment of common infrastructure facilities by APEDA or other government or public sector agency.

Help is also available to exporters, producers, growers, and cooperatives across the horticulture and floriculture sectors in areas such as harvest mechanisation; the setting up of sheds for intermediate storage, grading, and cleaning of produce; mechanised handling facilities; pre-cooling and cold storage; and a range of other export-related requirements.

Another important area of APEDA activity is its Scheme for Market Development Assistance. All these aspects and their relationship to supplier capabilities need to be researched and understood when considering how to source agricultural and processed foods from India.

**SUPPLYING GOODS AND SERVICES TO INDIA**

During the past 20 years, India has undertaken a process of economic reform and progressive integration with the global economy that has contributed to its rapid and sustained growth.

This change has been reflected in greatly increased trade between the EU and India, with current levels shown on the left.

India's trade regime and regulatory environment has been comparatively restrictive, in 2008 India was ranked number 120 (of 178 economies) by the World Bank in terms of the 'ease of doing business'. In addition to tariff barriers to imports, India has imposed non-tariff barriers in the form of quantitative restrictions, import licensing, mandatory testing and certification for a large number of products, as well as complicated and lengthy customs procedures.

The rules for Foreign Direct Investment (FDI) have varied by industry, with FDI encouraged in sectors such as the food processing industry but restricted or prohibited in ones such as retail. India approves FDI through two routes: automatic and government approval. Automatic approvals are in place for FDI up to 100% equity in the food processing industry sector, the exceptions being alcoholic beverages and certain reserved items.

Furthermore, in 2004 India became an EU strategic partner and negotiations for an EU-India Free Trade Agreement (FTA), launched in 2007, are set to continue. These developments in both investment and trading scenarios reinforce the country's appeal to overseas companies.

**OPERATING IN INDIA**

There are many examples of UK companies successfully operating in India such as Tesco and Marks and Spencer. There are some restrictions on the share capital ownership of companies operating in India in a number of sectors. Many of these constraints are however being relaxed and the Indian Government is encouraging Foreign Direct Investment (FDI) in all sectors.

**UK COMPANIES OPERATING IN OTHER COUNTRIES**

In the authors' opinion, UK supply chain experience can translate well to other geographies, as demonstrated by the examples of sophisticated food processing in Brazil and of retail development in Thailand.

In India, value addition to agricultural produce is 20%. In Brazil it is 70%. Major Brazilian food producers such as Sadia and Perdigão (now merged as Brasil Foods), have taken the initiative to manage their entire product flows from the farm, through processing and manufacture, and on to delivery of the finished product to their customers in multiple sectors in domestic and international markets. Since the late 1990s they have successfully adapted UK supply chain knowledge and experience.

Similarly, since opening its first stores in Thailand in 1997, Tesco has invested heavily in both its people and its logistical infrastructure, such as modern distribution centres. It has also contributed to the technical development of more than

9,000 Thai suppliers – mainly SMEs – in order to introduce new ways of working to increase crop yields, reduce wastage, and boost productivity. These investments and improvements have been required to meet the availability and affordability demands of its customers, while taking into account the need to keep costs manageable and eliminate waste.

Key enablers of progress in the UK have included joined-up thinking, good logistics, effective commercial relationships, and the right regulatory environment. There is huge potential in India, in view of the country's scale and ambitions, for agri-food chain development and retail sector growth, provided a similar approach is adopted to meet its needs.



IN INDIA  
 VALUE ADDITION  
 TO AGRICULTURAL  
 PRODUCE  
 IS 20%



IN BRAZIL  
 IT IS 70%

# INDIA STATES AND UNION TERRITORIES



## APPENDIX 1 & 2 INDIA MAP/ STATES/ UNION TERRITORIES

### STATES

NAME	POPULATION %	POP. RANK	CAPITAL CITY
1 Andhra Pradesh	7.21	5	Hyderabad
2 Arunachal Pradesh	0.10	27	Itanagar
3 Assam	2.52	14	Dispur
4 Bihar	7.85	3	Patna
5 Chhattisgarh	1.97	17	Raipur
6 Goa	0.13	26	Panaji
7 Gujarat	4.79	10	Gandhinagar
8 Haryana	1.99	16	Chandigarh
9 Himachal Pradesh	0.57	21	Shimla
10 Jammu & Kashmir	0.96	19	Jammu (winter) & Srinagar (summer)
11 Jharkhand	2.55	13	Ranchi
12 Karnataka	5.00	9	Bangalore
13 Kerala	3.01	12	Thiruvananthapuram
14 Madhya Pradesh	5.71	7	Bhopal
15 Maharashtra	9.15	2	Mumbai (formerly Bombay)
16 Manipur	0.23	23	Imphal
17 Meghalaya	0.22	24	Shillong
18 Mizoram	0.08	30	Aizawi
19 Nagaland	0.19	25	Kohima
20 Orissa	3.47	11	Bhubaneswar
21 Punjab	2.30	15	Chandigarh
22 Rajasthan	5.34	8	Jaipur
23 Sikkim	0.05	31	Gangtok
24 Tamil Nadu	6.28	6	Chennai (formerly Madras)
25 Tripura	0.30	22	Agartala
26 Uttaranchal	18.06	1	Dehra Dun
27 Uttar Pradesh	0.80	20	Lucknow
28 West Bengal	7.59	4	Kolkata (formerly Calcutta)

### UNION TERRITORIES

NAME	POPULATION %	POP. RANK	CAPITAL CITY
1 Andaman & Nikobar Islands	0.03	32	Port Blair
2 Chandigarh	0.09	29	Chandigarh
3 Dadra & Nagar Haveli	0.02	33	Silvassa
4 Daman & Diu	0.02	34	Daman
5 Lakshadweep	0.01	35	Kavaratti
6 National Capital Territory	1.30	18	New Delhi
7 Pondicherry	0.09	28	Pondicherry

## APPENDIX 3 REFERENCES

### AUTHORS

#### JEFF REES

Jeff Rees is a Director of The Logistics Business and has worked on the development and implementation of Supply Chains over the past 25 years. He has worked across all industries including the major International food manufacturers and retailers. This knowledge has been used on projects to design strategic distribution centres and supply chains for fresh food in India over the last three years.

#### ANDREW MORGAN

Andrew Morgan, Managing Director of Supply Chain Europe Limited, is the supply chain sector specialist for the UK's International Agri-Technology Centre. He has more than thirty years experience in all sectors of logistics and supply chain management in the UK and overseas. He is the co-author with Beatriz Luz of 'Creating and Managing a Sustainable Food Supply Chain' (2010). Andrew is also a Chartered Member of the Chartered Institute of Logistics and Transport CILT (UK), and holds the Diploma of the Institute.

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14	MoFPI Annual report, 2009-10
15	Expanding Your Business into India – Strategies for Success, UK India Business Council, London, 2010
16	Opportunities for UK plc in Emerging Cities of India, UK India Business Council, London, 2009
17	Apex Update, Agricultural and Processed Foods Export Development Authority (APEDA), New Delhi, July – September Issue, 2010

## APPENDIX 4 USEFUL CONTACTS

### INDIA

ORGANISATION NAME	WEBSITE
UK India Business Council	<a href="http://www.ukibc.com">www.ukibc.com</a>
UK Trade & Investment	<a href="http://www.ukti.gov.uk">www.ukti.gov.uk</a>
Agricultural and Processed Foods Export Development Authority (APEDA)	<a href="http://www.apeda.com">www.apeda.com</a>
Chartered Institute of Logistics – India (CILT-India)	<a href="http://www.ciltindia.co.in">www.ciltindia.co.in</a>
Confederation of Indian Industry (CII)	<a href="http://www.cii.in">www.cii.in</a>
Federation of Indian Chambers of Commerce and Industry (FICCI)	<a href="http://www.ficci.com">www.ficci.com</a>
Indian Industry Directory of Indian Suppliers	<a href="http://www.indianindustry.com">www.indianindustry.com</a>
Mega Food Park Project	<a href="http://www.megafoodpark.org">www.megafoodpark.org</a>
Ministry of Agriculture, Department of Agriculture & Cooperation	<a href="http://www.agricoop.nic.in">www.agricoop.nic.in</a>
Ministry of Commerce and Industry, Department of Industrial Policy and Promotion (DIPP)	<a href="http://dipp.gov.in">http://dipp.gov.in</a>
Ministry of Commerce and Industry, Directorate General of Foreign Trade (DGFT)	<a href="http://dgft.delhi.nic.in">http://dgft.delhi.nic.in</a>
Ministry of Food Processing Industries (MoFPI)	<a href="http://mofpi.nic.in">http://mofpi.nic.in</a>
India Trade Promotion Organisation (ITPO)	<a href="http://www.indiatrdefair.com">www.indiatrdefair.com</a>
Reserve Bank of India	<a href="http://www.rbi.org.in">www.rbi.org.in</a>

### UK

ORGANISATION NAME	WEBSITE
UK India Business Council	<a href="http://www.ukibc.com">www.ukibc.com</a>
UK Trade & Investment	<a href="http://www.ukti.gov.uk">www.ukti.gov.uk</a>
International Agri-Technology Centre Ltd.	<a href="http://www.theiatc.org">www.theiatc.org</a>
The Logistics Business	<a href="http://www.logistics.co.uk">www.logistics.co.uk</a>
The Chartered Institute of Logistics and Transport (UK)	<a href="http://www.ciltuk.org.uk">www.ciltuk.org.uk</a>
Supply Chain Europe Limited	<a href="http://www.supplychaineurope.com">www.supplychaineurope.com</a>
Hull University Business School	<a href="http://www.hull.ac.uk/hubs">www.hull.ac.uk/hubs</a>

## UK TRADE AND INVESTMENT (UKTI)

UK Trade and Investment helps UK-based companies succeed in international markets. UKTI's team in India, with its wide local knowledge and experience, can provide a range of services to British-based companies wishing to grow their business in global markets.

This can include:

- Provision of market information
- Validated lists of agents/distributors
- Alerting you to key market players or potential customers in the Indian market
- Arranging appointments
- Organising seminars or other events for you to meet contacts and promote your company in the Indian market

This work is available via the Overseas Market Introduction Service (OMIS), a chargeable service which assists British-based companies wishing to enter or expand their business in overseas markets.

To find out more about commissioning this work or accessing other UKTI services and specialist advice, please visit the UKTI website: [www.ukti.gov.uk](http://www.ukti.gov.uk)

## UK INDIA BUSINESS COUNCIL (UKIBC)

The UK India Business Council (UKIBC) is the premier business-led organisation promoting bilateral trade and investment between the two countries. Our mission is to help UK companies get business and succeed in India. By facilitating partnerships, and with an extensive network of

influential corporate and individual members, UKIBC provides the resource, knowledge and infrastructure support vital for UK companies to make the most of emerging opportunities in India. Membership of UKIBC can help you succeed in India. It gives you access to networking events which can connect you to professional advisors, contacts in India and other companies already successful in the Indian market.

To learn more about UKIBC membership, events and services, please visit: [www.ukibc.com](http://www.ukibc.com)

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