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</table>
Situated between the Arabian Sea in the West and the Western Ghats in the East with a coastline of around 580 kms, Kerala region is a part of the South Indian Precambrian terrain. The state has the highest literacy rate (around 94%) in the country (Census 2011).

### Why Kerala

1. Leader in food production and consumption (20% share in country’s food exports in 2014-15 and highest per capita food consumption) - Rank 2 in the production of Pineapple, Pepper, Cocoa, Sweet potato, Tapioca, Coffee. Some of the food items in Kerala have been awarded geographical indication*

2. Enabling investment environment with stable and proactive government, skilled manpower (93.91% literacy rate) and presence of a large expatriate community

3. Enabling infrastructure- 123 Industrial parks/estates; 2 mega food parks, 4 food parks, 9 SEZs (1 agro-processing), 11 quality control laboratories

4. Presence of prominent players including Eastern group, Elite Group of Companies, Pepsi, Synthite Group, Tata Group, AVT McCormik, Marico, Abad, Parayil, Amalgm

Food items include: Navara Rice, Malabar Pepper, Alleppey, Green Cardamom, Palakkadan Matta Rice, Vazhakulam Pineapple, Waynad Gandhakasala Rice, Waynad Jeerakasala Rice, Kaipad Rice, Central Travancore Jaggery, Chengalikodan Nendran Banana

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*Geographical area, population, and other statistics are as of Census 2011.*
Food processing is recognized as a priority sector in Kerala with a host of incentives available for investors. It is majorly an agrarian state. 10.38% is the share of agriculture & allied sectors in GSDP (2015-16)

The state has 13 agro-climatic zones favouring cultivation of a multitude of crops, vegetables and fruits round the year

<table>
<thead>
<tr>
<th>Raw material base (1/2)</th>
</tr>
</thead>
</table>

### Onattukara
District: Quilon, Chavara, Karunagappally, Ochira, Kayamkula, Mavelikkara, Muthukulam, Haripad

### Coastal Sandy
District: Ambalapuzha, Alleppey, Aryad, Kanjikuzhy, Cherthalai, Thykkattussery, Vaikom

### Southern midlands
District: Trivandrum, Trivandrum Rural, Kazhakkuttam, Chirayinkeezh, Attingal

### Central midlands
District: Pampakuda, Vadavucode, Koovappady, Perumbavoor, Vazhakkulam, Aluva Alangad

### Northern midlands
District: Pandalayani, Balusseri, Perambra, Meladi, Vadakara, Thodannur, Kunnimmel

### Malappuram type
District: Tirur, Kuttipuram, Tanur, Tirurangadi, Vengara, Malappuram, Manjeri, Kondotty

### Chittoor black soil
District: Chittur, Kollengode

### Red loam
District: Nemom, Neyyattinkara, Athiyannur, Parassala

### Palakkad plains
District: Alathur, Palakkad, Palakkad, Kuzhalmannam, Nemmara

### Malayoram
District: Perumkadavila, Vellanad, Nedumangad, Vamanapuram, Anchal, Pathanapuram

### Riverbank alluvium
District: Distributed as narrow stretches in the riverbanks all over Kerala

### Malappuram type
District: Tirur, Kuttipuram, Tanur, Tirurangadi, Vengara, Malappuram, Manjeri, Kondotty

### High ranges
District: Arudai, Devikulam, Attapadi, Kalpetta, Sultan Battery, Mananthavady

### Riverbank alluvium
District: Chambakulam, Veliyanad, Pulikeezhu

### Kuttanad
District: Chambakulam, Veliyanad, Pulikeezhu

### SNAPSHOT OF LAND UNDER CULTIVATION

<table>
<thead>
<tr>
<th>Land Type</th>
<th>Area (000 hectares)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arable land</td>
<td>2122</td>
</tr>
<tr>
<td>Net sown area</td>
<td>2,051</td>
</tr>
<tr>
<td>Total area sown</td>
<td>2,617</td>
</tr>
</tbody>
</table>

(2013-14, '000 hectare)
Major crops grown in Kerala include Spices, Cocoa, Seafood, Tea, Cashews, Ethnic food products and Coffee. The State is a major producer of: Spices (such as Pepper, Ginger, Garlic, Cardamom and Cloves), Fruits (including Pineapple, Banana, Citrus Fruits, Coconut and Cashew) and Vegetables (including Tomato, Tapioca, Sweet Potato and Ladyfinger). The major exports comprise of Spices, Marine Seafood, Cashews, Tea, Coffee.

**Key production highlights (2015-16)** of the state include:

- One of the largest producers of Banana in the country
- **Total production** of 560 thousand tonnes of food grains - **Rank 2 in production of Cocoa**
- Total production 2532.94 thousand tonnes of fruit - **Rank 2 in the production of Pineapple** with 305.67 thousand tonnes and **Rank 4 in the production of Passion Fruit**
- Total production of vegetables in Kerala is 2088.66 thousand tonnes - **Rank 2 in the production of Sweet Potato and Tapioca** with production 338.54 and 17.66 thousand tonnes respectively

The key production statistics for the state (year 2015-16) are presented as below:

<table>
<thead>
<tr>
<th>CROPS</th>
<th>Rice</th>
<th>Sugarcane</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5,49,275 (MT)</td>
<td>137 (MT)</td>
</tr>
<tr>
<td>Coffee</td>
<td>69230 (MT)</td>
<td>Tea</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FRUITS ('000 tonnes)</th>
<th>Banana</th>
<th>Mango</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>536155 (MT)</td>
<td>382.52 ('000 tonnes)</td>
</tr>
<tr>
<td>Pineapple</td>
<td>305.67 ('000 tonnes)</td>
<td>Jack fruit</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VEGETABLES ('000 tonnes)</th>
<th>Tapioca</th>
<th>Sweet Potato</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2662610 (MT)</td>
<td>3922 (tonnes)</td>
</tr>
<tr>
<td>Elephant Foot Yam</td>
<td>110.37</td>
<td>Tomato</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIVESTOCK &amp; FISHERIES</th>
<th>Milk</th>
<th>Eggs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2.65 mn tonnes</td>
<td>2.44 bn</td>
</tr>
<tr>
<td>Fish (tonnes)</td>
<td>Marine : 0.46 mn</td>
<td>Meat</td>
</tr>
<tr>
<td></td>
<td>In-land : 0.22 mn</td>
<td></td>
</tr>
</tbody>
</table>

Source: MOSPI
The major production clusters of Kerala include:

### Rice
- Alappuzha, Ernakulam, Idukki, Kannur, Kasaragod, Kollam, Kottayam, Palakkad

### Elephant Foot Yam
- Kollam, Pathanamthitta, Palakkad, Wayanad, Kannur, Malappuram, Thiruvananthapuram, Kasaragod

### Coffee
- Idukki, Palakkad, Wayanad

### Tomato
- Wayanad, Palakkad, Alappuzha, Kollam

### Tea
- Ernakulam, Idukki, Kollam, Kottayam, Mallapuram, Palakkad, Pathanamthita

### Banana
- Wayanad, Ernakulam, Palakkad, Malappuram, Kottayam, Pathanamthitta, Alappuzha, Idukki

### Tapioca
- Kollam, Alappuzha, Thiruvananthapuram, Idukki, Pathanamthita, Kannur, Thrissur

### Mango
- Kozhikode, Palakkad, Kannur, Kasaragod, Malappuram, Wayanad, Ernakulam, Alappuzha, Kottayam

### Pineapple
- Kottayam, Ernakulam, Pathanamthitta, Idukki, Malappuram, Palakkad, Kasaragod

### Sweet Potato
- Pathanamthitta, Alappuzha, Kasargod, Malappuram, Palakkad

### Jack Fruit
- Kannur, Kozhikode, Palakkad, Malappuram, Kasaragod, Ernakulam, Alappuzha, Idukki, Pathanamthitta, Wayanad, Kottayam
Production Clusters

- Rice
- Coffee
- Elephant foot yam
- Tomato
- Banana
- Jack fruit
- Sweet Potato
- Pineapple
- Tea
- Tapioca
- Mango

Kasaragod
Kannur
Wayanad
Kozhikode
Palakkad
Malappuram
Thirussur
Ernakulam
Kollam
Pathanamthitta
Idukki
Thiruvananthapuram
Processing clusters

Some of the major processing clusters in the state include:

**Rice processing**
- Ernakulam (Perumbavoor), Idukki, Kollam

**Seafood processing**
- Alleppy, Alappuzha

**Cashew processing**
- Kollam, Thiruvananthapuram, Ernakulam, Kollam

**Spice processing**
- Ernakulam, Thiruvananthapuram, Thrissur, Kollam

Note: In addition to the above 4, in Kerala the food parks represent aggregation of food processing units / food processing clusters. The food parks are located in the districts of Malappuram, Ernakulam, Pathanamthita, Alappuzha, Palakkad (new mega Food Park, upcoming).
Infrastructure

The status of key physical and agricultural infrastructure in Kerala is as follows:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inland container depots*</td>
<td>2</td>
</tr>
<tr>
<td>Existing Industrial Areas/SEZs</td>
<td>2 agri-export zones</td>
</tr>
<tr>
<td></td>
<td>123 Industrial parks and growth centers</td>
</tr>
<tr>
<td>Installed power 24</td>
<td>Thermal– 1806.87 MW</td>
</tr>
<tr>
<td></td>
<td>Hydro– 1881.50 MW</td>
</tr>
<tr>
<td></td>
<td>Renewables- 255.47 W</td>
</tr>
</tbody>
</table>

Utilities

Electricity cost 26

- **Food processing unit:** The power tariff is based on KSEB rates, which are revised from time to time. The present rates are:
  - (A) Energy Charges
    - (i) LT Consumer– INR 5.20/kWh
    - (ii) HT Consumer– INR 5.20 to 5.60/kWh
  - (B) Fixed Charges
    - (i) LT Consumer– INR 100 to Rs 125/kVA/month
    - (ii) HT Consumer– INR 300/kVA
- **Cold storage and dairies with chilling plants:** HT Rates would apply

Water rates 27

- Connection Charges: INR 1000
- Meter Charges: INR 40 per kilolitre

Kerala has a number of industrial areas and food parks for investors keen on setting up food processing units in the state. The key food parks in the state include:

<table>
<thead>
<tr>
<th>S. No.</th>
<th>Food Park</th>
<th>Location</th>
<th>Area (in acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>KINFRA Food Processing Park</td>
<td>Kakkancherry, Malappuram District</td>
<td>35 (27 units operating and 2 acres land available)</td>
</tr>
<tr>
<td>2</td>
<td>Seafood Park India</td>
<td>Aroor, Alappuzha District</td>
<td>4.5 (10 units operating and fully allotted)</td>
</tr>
<tr>
<td>3</td>
<td>Special Economic Zone (Agro Processing)</td>
<td>Kakkancherry, Malappuram District</td>
<td>25 (5 units operating and 15 acres available)</td>
</tr>
<tr>
<td>4</td>
<td>Food Zone KINFRA Small Industries Park</td>
<td>Mazhuvanoor, Ernakulam District</td>
<td>30</td>
</tr>
</tbody>
</table>
### Investment environment & opportunities in food processing – Kerala

<table>
<thead>
<tr>
<th>S. No.</th>
<th>Food Park</th>
<th>Location</th>
<th>Area (in acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>KINFRA Food Park</td>
<td>Adoor, Pathanamthitta, District</td>
<td>(33 units operating and fully allotted)</td>
</tr>
<tr>
<td>6</td>
<td>KSIDC Mega Food Park</td>
<td>Cherthala</td>
<td>68</td>
</tr>
<tr>
<td>7</td>
<td>KINFRA Mega Food Park</td>
<td>Palakkad</td>
<td>79</td>
</tr>
</tbody>
</table>

Land is also available at various industrial parks/ growth centres across the state:

<table>
<thead>
<tr>
<th>S. No.</th>
<th>Industrial Park/Growth Centre</th>
<th>Location</th>
<th>Owner/Developer</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Alappuzha Growth Centre</td>
<td>Pallippuram, Cherthala</td>
<td>KSIDC</td>
<td>Engineering solutions: Coir clusters/ marine/ silica/ cement-based / educational/ engineering projects, Engineering, coir, etc.</td>
</tr>
<tr>
<td>2</td>
<td>Kannur Growth Centre</td>
<td>Valiyavelicham, Koothuparamba</td>
<td>KSIDC</td>
<td>Light engineering, rubber-based, food processing industries</td>
</tr>
<tr>
<td>3</td>
<td>Kozhikode Growth Centre</td>
<td>Kinalur, Balussery</td>
<td>KSIDC</td>
<td>Small Industries– General Industries, Light engineering</td>
</tr>
<tr>
<td>4</td>
<td>Panakkad Growth Centre</td>
<td>Malappuram</td>
<td>KSIDC</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Kunnamthanam Park</td>
<td>Pathanamthitta</td>
<td>KINFRA</td>
<td>General Industries</td>
</tr>
<tr>
<td>6</td>
<td>Hi Tech Park</td>
<td>Kalamassery</td>
<td>KINFRA</td>
<td>Hi Tech Industries</td>
</tr>
<tr>
<td>7</td>
<td>Wayanad Park</td>
<td>Wayanad</td>
<td>KINFRA</td>
<td>Food processing units, Small Industries– General Industries</td>
</tr>
<tr>
<td>8</td>
<td>Textile Centre</td>
<td>Kannur</td>
<td>KINFRA</td>
<td>Textile / Garments / General</td>
</tr>
<tr>
<td>9</td>
<td>Adoor Park</td>
<td>Adoor</td>
<td>KINFRA</td>
<td>Food processing</td>
</tr>
</tbody>
</table>
Further, the state also has 4 cold chain units set up with assistance from MoFPI:\textsuperscript{16}

<table>
<thead>
<tr>
<th>S. No.</th>
<th>Cold Chain Project</th>
<th>Location</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Inkal Ventures Private Limited</td>
<td>Pattanamthitta</td>
<td>Dairy</td>
</tr>
<tr>
<td>2</td>
<td>S H Cold Storage Pvt. Ltd.</td>
<td>Kozhilode, Palakkad</td>
<td>F&amp;V\textsuperscript{**}</td>
</tr>
<tr>
<td>3</td>
<td>Abad Fisheries Pvt. Ltd.*</td>
<td>Kochi</td>
<td>Fishery</td>
</tr>
<tr>
<td>4</td>
<td>Sun Aquatic Products Pvt. Ltd.*</td>
<td>Alapuzha</td>
<td>Fishery</td>
</tr>
</tbody>
</table>

\textsuperscript{*} Under implementation

\textsuperscript{**} Fruits and Vegetables

S. No. | Industrial Park/Growth Centre | Location | Owner/Developer | Type               |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Integrated Industrial &amp; Textile Park</td>
<td>Palakkad</td>
<td>KINFRA</td>
<td>General / Textile Industries</td>
</tr>
</tbody>
</table>
For enabling an investor–friendly climate for conducting business, the state government has undertaken various reforms. Some of these are as highlighted below:

**Simplification of procedures and reduced documentation**
- Easing of registration norms for SSI/ MSMEs* wanting to start business operations.
- Single window clearance facility is available for all statutory clearances and approvals.
- The regulations have been eased to obtain no objection certificate for construction, license, power and water connections

**Helpline number**: A dedicated helpline has been setup to share information and resolve queries regarding the application and approval process

**Simplified trade procedures** for facilitating exports from Kerala

**Information and transparency**
- Enhanced transparency on tariff rates with online availability of information on effective tariff (and notification of change, if any, ahead of billing cycle)
Investment environment & opportunities in food processing – Kerala

## State government initiatives (2/2)

Food processing is a prominent sector of Kerala’s industry. The Government of Kerala has accorded “Priority Status” to the sector due to its huge potential for development. Kerala’s association with food exports dates back to the 16th century making it a “leader state” in Food Processing. A Draft “Food Processing Policy” for the State of Kerala is under formulation. Some of the key incentives are as under:

### Key incentives

<table>
<thead>
<tr>
<th>Capital Investment Subsidy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Govt. of Kerala promotes incentives in the form of “Entrepreneur Support Scheme,” for providing financial assistance for setting up of food processing units. The highlights of the scheme are:</td>
</tr>
<tr>
<td>- Financial assistance of 15% of capital investment up to a maximum of INR 20 lakhs. Being priority sector Food Processing Units are eligible for additional 10% of capital investment up to a maximum of INR 10 lakhs.</td>
</tr>
<tr>
<td>- For units set up in Idukki, Waynad, Kasaragod and Pathanamthitta, additional incentives of capital investment up to a maximum of INR 10 lakhs is available</td>
</tr>
<tr>
<td>- For women scheduled caste and tribes, young entrepreneurs, financial assistance of 20% of capital investment up to a maximum of INR 30 lakhs</td>
</tr>
<tr>
<td>- For technology transfer from reputed institutions, 10% of capital investment up to a maximum of INR 10 lakhs</td>
</tr>
<tr>
<td>Maximum limit including all categories of incentives is INR 30 lakhs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stamp duty and registration fee waiver</th>
</tr>
</thead>
<tbody>
<tr>
<td>100% waiver for units in KINFRA Parks</td>
</tr>
</tbody>
</table>

### Other incentives

- The State has excellent supporting facilities which can strengthen food processing activities and initiatives in the State. Some of them are:
  - 10 leading product development boards and R&D institutes
  - 13 Institutes offer specialized academic courses in food processing and allied subjects
  - 11 Quality Control Laboratories offer testing and analytical services in the State
  - The State Government has promoted “National Centre for HACCP Certification (NCHC)” to facilitate adoption of Quality Management System at most economical terms
  - The State Government has promoted cluster development in the food processing sector. Two clusters namely the Rice Cluster at Kalady and the Ethnic Food Cluster at Palai have been established
  - Several initiatives in food processing at micro level have been undertaken by Kudumbashree, a poverty eradication and women empowerment programme implemented by the State Poverty Eradication Mission (SPEM) of the State.
Snapshot of potential investable projects

Kerala, God’s own country, offers potential opportunities for investment. The project profiles are presented in the table below:

<table>
<thead>
<tr>
<th>Project name</th>
<th>Processed Products</th>
<th>Value Proposition</th>
</tr>
</thead>
</table>
| **Rice bran oil processing** | Edible rice bran oil | ▶ Global rice bran oil market is worth 1.5 mn tonnes in 2016, expected to grow at 5.14% between 2017-21  
▶ India caters to 25% of global rice bran oil market and exhibits a rising trend in the production levels to cater the upcoming market. Kerala is among of the major producers of rice in the country and is known as the ’rice bowl of the state’  
▶ The major factors that are currently driving the rice bran oil market include its diversified applications, numerous cooking benefits compared to other edible oils, growing health consciousness, aggressive promotions by manufacturers and increasing penetration levels  
▶ Growing awareness, changing lifestyles, health consciousness has led to a shift in the tastes and preferences of consumers  
▶ There is a huge surge in the global demand as matta rice has high nutritional value, proteins and vitamins  
▶ Palakkadan Matta rice, Kerala Red rice, or Red parboiled rice is an indigenous variety of rice grown in Palakkad District of Kerala. It is different from brown rice.  
▶ Palakkadan Matta rice has acquired the Geographical Indication (GI) tag, which brings uniqueness to the production of rice. |
| **Aswathy palakadan matta rice processing** | Whole grain matta rice, matta rice powder, rice frylets and flakes | |
| **Pineapple processing** | Dried pineapple, canned and tinned pineapple, jam, concentrate, squash, juice, frozen pineapple juice concentrate, pulp | ▶ Globally, the market for pineapple is expected to expand. The global trade accounts for fresh fruit (50%), canned product (30%) and juice concentrate (20%)  
▶ India has been ranked 6th and contributes 8% of the total world production  
▶ Kerala is one of the major producers of Pineapple in the country. Production and marketing of Mauritius variety of pineapple in Kerala is centered around Vazhakulam and Kew is mainly grown in the districts of Ernakulam, Kannur, Kottayam, Thrissur, Pathanamthitta  
▶ The Pineapple (Mauritius variety) from Vazhakulam is already very popular for its flavor and as it got branded protection (“Vazhakulam Pineapple”) by Geographical Indication Registration, which permits its worldwide export |
| **Organic fruits and vegetable processing** | Processing space (freezing, drying, heat conservation, conservation by fermentation), product storage, warehouse, cold storage, packing and | ▶ Organic fruits & vegetable market is projected to reach USD 62.97 bn by 2020, at a CAGR of 9.4% from 2015  
▶ Lifestyles changes, health awareness, rising incomes and more purchasing power has led to a paradigm shift to organic market  
▶ Kerala has well established organic market with many initiatives from the government. An organic fruit and vegetable cleanser , prepared from extracts of microbes |
waste management and citric acid has been invented to clean pesticide and insecticide residues.

- The organic market in India is growing 25-30% and is expected to touch $1.36 bn by 2020.
Investment environment & opportunities in food processing – Kerala

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