



Euromonitor
International

Fresh Food in India

April 2024

Table of Contents

Fresh Food in India

EXECUTIVE SUMMARY

Fresh food in 2023: The big picture

2023 key trends

Retailing developments

What next for fresh food?

MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2018-2023

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2018-2023

Table 3 - Retail Sales of Fresh Food by Category: Volume 2018-2023

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2018-2023

Table 5 - Retail Sales of Fresh Food by Category: Value 2018-2023

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2018-2023

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2018-2023

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2018-2023

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2023-2028

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2023-2028

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2023-2028

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2023-2028

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2023-2028

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Eggs in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Despite inflation, demand for eggs remains steady

Quick commerce gains prominence amongst urban consumers

PROSPECTS AND OPPORTUNITIES

Consumers' increasing focus on maintaining a healthy lifestyle will drive sales of eggs

Foodservice volumes will continue to witness strong demand

Summary 2 - Major Processors of Eggs 2023

CATEGORY DATA

Table 15 - Total Sales of Eggs: Total Volume 2018-2023

Table 16 - Total Sales of Eggs: % Total Volume Growth 2018-2023

Table 17 - Retail Sales of Eggs: Volume 2018-2023

Table 18 - Retail Sales of Eggs: % Volume Growth 2018-2023

Table 19 - Retail Sales of Eggs: Value 2018-2023

Table 20 - Retail Sales of Eggs: % Value Growth 2018-2023

Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2018-2023

Table 22 - Forecast Total Sales of Eggs: Total Volume 2023-2028

Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2023-2028

Table 24 - Forecast Retail Sales of Eggs: Volume 2023-2028

Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2023-2028

Table 26 - Forecast Retail Sales of Eggs: Value 2023-2028

Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2023-2028

Fish and Seafood in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fish continues to be the most widely consumed form of fish and seafood in India
Government initiatives help to sustain and develop a good fish production network

PROSPECTS AND OPPORTUNITIES

Government aims to establish seafood consumer foodservice outlets, which will drive foodservice volumes
Its low fat, high protein content, and affordability will help drive sales of fish
Summary 3 - Major Processors of Fish and Seafood 2023

CATEGORY DATA

- Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2018-2023
- Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2018-2023
- Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2018-2023
- Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2018-2023
- Table 32 - Retail Sales of Fish and Seafood by Category: Value 2018-2023
- Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2018-2023
- Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2018-2023
- Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2023-2028
- Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2023-2028
- Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2023-2028
- Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2023-2028
- Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2023-2028
- Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2023-2028

Fruits in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fruits are a healthy option to beat the summer heat
Exotic fruits continue to gain traction

PROSPECTS AND OPPORTUNITIES

Increasing prominence of fatigue will drive the growth of fruits
Return to travel and mobility set to increase demand for fruits through juice vendors
Summary 4 - Major Processors of Fruits 2023

CATEGORY DATA

- Table 41 - Total Sales of Fruits by Category: Total Volume 2018-2023
- Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2018-2023
- Table 43 - Retail Sales of Fruits by Category: Volume 2018-2023
- Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2018-2023
- Table 45 - Retail Sales of Fruits by Category: Value 2018-2023
- Table 46 - Retail Sales of Fruits by Category: % Value Growth 2018-2023
- Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2018-2023
- Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2023-2028
- Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2023-2028

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2023-2028

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2023-2028

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2023-2028

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2023-2028

Meat in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Poultry remains the most widely consumed type of meat in India

Consumers look for good quality meat, given rising health concerns

PROSPECTS AND OPPORTUNITIES

Foodservice and institutional volumes will continue to grow along with increased mobility and outlet expansion

Need for regular protein will drive sales of meat

Summary 5 - Major Processors of Meat 2023

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2018-2023

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2018-2023

Table 56 - Retail Sales of Meat by Category: Volume 2018-2023

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2018-2023

Table 58 - Retail Sales of Meat by Category: Value 2018-2023

Table 59 - Retail Sales of Meat by Category: % Value Growth 2018-2023

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2018-2023

Table 61 - Forecast Sales of Meat by Category: Total Volume 2023-2028

Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2023-2028

Table 63 - Forecast Retail Sales of Meat by Category: Volume 2023-2028

Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2023-2028

Table 65 - Forecast Retail Sales of Meat by Category: Value 2023-2028

Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2023-2028

Nuts in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising popularity of the concept of superfoods drives sales of coconuts

Festive and celebratory occasions drive sales of nuts

PROSPECTS AND OPPORTUNITIES

Increasing dietary choices coupled with recovery in travel activities will drive demand for nuts

Branded players set to gain momentum going forward

Summary 6 - Major Processors of Nuts 2023

CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2018-2023

Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2018-2023

Table 69 - Retail Sales of Nuts by Category: Volume 2018-2023

Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2018-2023

Table 71 - Retail Sales of Nuts by Category: Value 2018-2023

Table 72 - Retail Sales of Nuts by Category: % Value Growth 2018-2023

Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2018-2023

Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2023-2028

Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2023-2028

Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2023-2028

Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2023-2028

Table 78 - Forecast Retail Sales of Nuts by Category: Value 2023-2028

Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2023-2028

Pulses in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Pulses continue to be a favourite amongst vegans and vegetarians due to their high protein content
Consumers look for economical options amidst high inflation

PROSPECTS AND OPPORTUNITIES

Health and wellness will continue to drive growth for pulses
Government incentives will help boost local production to manage prices
Summary 7 - Major Processors of Pulses 2023

CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2018-2023

Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2018-2023

Table 82 - Retail Sales of Pulses by Category: Volume 2018-2023

Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2018-2023

Table 84 - Retail Sales of Pulses by Category: Value 2018-2023

Table 85 - Retail Sales of Pulses by Category: % Value Growth 2018-2023

Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2018-2023

Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2023-2028

Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2023-2028

Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2023-2028

Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2023-2028

Table 91 - Forecast Retail Sales of Pulses by Category: Value 2023-2028

Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2023-2028

Starchy Roots in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health-conscious consumers turn towards healthier forms of starchy roots
Offline stores continue to dominate retail distribution of cassava and sweet potatoes

PROSPECTS AND OPPORTUNITIES

Demand for healthier menus in consumer foodservice outlets will continue to drive foodservice volumes
Growing significance of gut health will drive demand for starchy roots
Summary 8 - Major Processors of Starchy Roots 2023

CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2018-2023

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2018-2023

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2018-2023

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2018-2023

Table 97 - Retail Sales of Starchy Roots by Category: Value 2018-2023

- Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2018-2023
- Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2018-2023
- Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2023-2028
- Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2023-2028
- Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2023-2028
- Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2023-2028
- Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2023-2028
- Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2023-2028

Sugar and Sweeteners in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Retail growth for white table sugar remains low due to health concerns
- Foodservice volumes show growth, with increased instances of celebratory occasions

PROSPECTS AND OPPORTUNITIES

- Unrefined and natural alternatives set to gain traction due to health concerns
- Online platforms make market entry easier for smaller brands
- Summary 9 - Major Processors of Sugar and Sweeteners 2023

CATEGORY DATA

- Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2018-2023
- Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2018-2023
- Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2018-2023
- Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2018-2023
- Table 110 - Retail Sales of Sugar and Sweeteners: Value 2018-2023
- Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2018-2023
- Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2018-2023
- Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2023-2028
- Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2023-2028
- Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2023-2028
- Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2023-2028
- Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2023-2028
- Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2023-2028

Vegetables in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

- High price rises on tomatoes lead to steep declines in retail, institutional and foodservice volumes
- E-commerce and modern grocery retailers gain traction amongst urban consumers

PROSPECTS AND OPPORTUNITIES

- Direct farm to door players likely to gain traction going forward
- Increasing number of vegetarian and vegan consumers will continue to drive demand for vegetables
- Summary 10 - Major Processors of Vegetables 2023

CATEGORY DATA

- Table 119 - Total Sales of Vegetables by Category: Total Volume 2018-2023
- Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2018-2023
- Table 121 - Retail Sales of Vegetables by Category: Volume 2018-2023

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2018-2023

Table 123 - Retail Sales of Vegetables by Category: Value 2018-2023

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2018-2023

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2018-2023

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2023-2028

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2023-2028

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2023-2028

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2023-2028

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2023-2028

Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/fresh-food-in-india/report.