



Farm to Fork

An Update on Agriculture & Food Issues



Confederation of Indian Industry

NEWSLETTER

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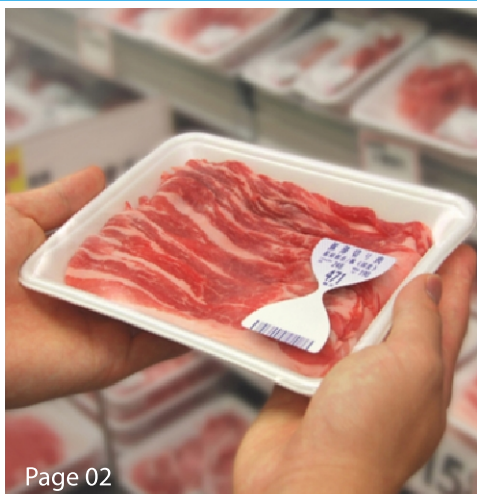
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USHERING IN THE NEW ERA OF VALUE ADDED DAIRYING »

Milk, more than most agricultural products, is closely associated with the transformation of the raw product into processed products and, as a result, the adding of value via processing. Stemming from milk's perishability and high water content, processing can be considered an essential element for storage, preservation and transport. This is reflected by the fact that most milk in the world is not consumed in its original liquid form, but in some processed state: cheese, butter, yogurt, powder etc. Where milk is consumed as a liquid, it is increasingly presented in a wide variety of forms: low to full fat, flavoured, with added vitamins and minerals.

Value added dairy products are designed to decrease chances of diseases, managing the disease conditions and promoting health of the consumers. Some Western countries are also marketing products incorporated with specific health promoting factors and food ingredients derived from fractionation of milk employing emerging technologies like ultra-filtration, micro-filtration, nanofiltration, reverse osmosis, electro dialysis etc.

In India value addition to dairy products is an age-old practice. Most of our traditional milk products such as sandesh, payasam,

burfi, dahi, rasogolla, srikhand, kulfi etc. are value added dairy foods. However the usage of advanced technology for value added dairy products is at a very nascent level in India. This is because of some

LEAD ARTICLE



Mr. M K Jalan, Chairman,
CII National Committee on Dairy
and Chairman, Keventer Group

inherent challenges in the supply chain as; the procurement channels are not hygienic and lead to substantial wastage/spoilage and quality deterioration.

Proper quality assured procurement infrastructure is a pre-requisite for future product development. Some of the suggestions to increase value addition in dairy are;

- Since the era of milk scarcity is over, Indian dairy industry must utilize the opportunity to gainfully exploit the market of value added dairy products.
- Packaging materials along with suitable equipments and technologies

should be developed for packaging the value added dairy products.

- The need for building strong brands of Indian dairy products in global market is long overdue. This is particularly important in context to the free investment climate in foreign countries and availability of sophisticated tools for communication.
- Effective advertisement on mass media like television, newspapers etc. is needed.
- Printing details of compositional & nutritional facts on packages would also be helpful.

Today Indian middle class population with more purchasing capacity is increasing. There is also a clear shift visible in the life style and food habits among people which is increasing the consumption of value added processed foods. As per Economic Survey 2011 of the Government of India, demand for milk & milk products in India will outpace its supply by the end of this decade.

Value addition to dairy foods would provide health benefits to the consumers improve the scale of economy in the dairy industry, help pay remunerative prices to the dairy farmers, if designed, processed & marketed judiciously following scientific principles.

There is great potential for traditional Indian dairy products for innovation and value addition. Indian dairy industry must seize the opportunity and gainfully exploit the highly dynamic, exciting and promising future in the field of value added dairy products. ■

PLASTIC PACKAGING FOR FOOD: IS THERE A FEASIBLE ALTERNATIVE? »

Packaging forms an important part in preserving the quality and safety of the food it contains, and providing food for people.

Foods in the value chain are divided into Processed Foods and Fresh foods (vegetables & fruits), which have different packaging requirements. For food packaging, a number of materials can be used, however to protect the product from physical, chemical or biological damage,

challenge of recycling and management of plastic wastes can be defied. Most of the developed countries have suitable recycling plants which collect the plastic waste (sachets, films and laminates, etc) and send them for composting. These plants segregate various layers, convert them into chips and use them for utility articles. Most of the non- biodegradable packaging materials like glass or tin-plate can be re-cycled similar to plastics.

WORLD BIODEGRADABLE PLASTICS DEMAND BY TYPE

Item	1998	2003	2008	2013	2018
World Plastics Demand (mil metric ton)	148	184	227	285	350
Kg biodegradable/m ton plat.	0.34	0.45	0.78	1.11	2.00
World Biodegradable Plastics Demand	51	82	177	315	700
Starch-Based Resins	14	34	76	130	265
Poly-lactic Acid	3	13	58	115	290
Petroleum-Based Resins	3	7	13	21	35
PHAs	neg	neg	2	15	60
Other Biodegradable	31	28	28	34	50

barrier aspects like moisture and oxygen should be considered before selecting a material.

Today, amongst all Packaging materials, the shelf life requirement & economics are best suited for Polymeric based materials i.e., Polyethylene or co-polymer based, which have been in use by the Food Industry for over 50 years.

Polymeric materials for packaging can be divided into:

- Derived from Hydrocarbons,
- Derived from plant and vegetable sources or combination,
- Derived from plant, vegetable sources and being bio-degradable.

Plastic packaging helps in preserving the food value chain owing to its barrier properties, mechanical strength, ease of processing and manufacturing. But, at the same time, plastic is meant to be discarded, and some of it recycled, use of which can lead to waste disposal problems because of their characteristic resistance to microbial degradation, thus accumulating in the environment.

At the same time, the most indispensable

New packaging forms like bio-polymers or **bio-degradable polymers** are now evolving which may help in reducing the volume of environmental waste. Besides biodegradability, they find application as absorbent materials in horticulture, healthcare and agriculture applications. These types of packaging materials include starch, cellulose, animal or plant-derived proteins or lipids.

However, these plastics are air-permeable and therefore may not assure good moisture or oxygen barrier properties. Moreover, processed food products generally contain enzymes & other organic substances which have a potential to react with these bio-degradable polymers.

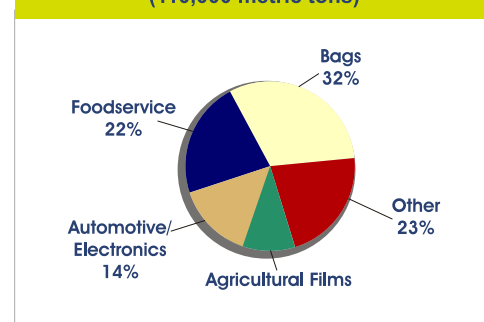
Also, global capacities are extremely limited as bio-polymers are derived from food sources. In the current situation, food sources being scarce, it may not be a feasible alternative for packaging food industry.

Use of biodegradable plastics may be a commercially and technically viable option in case of packaging of Fresh Fruits & Vegetables; and Utility products

like garments etc.

Some researchers have now identified protein based biodegradable edible films and coating materials which may be used to extend the shelf life of a food product. Gelatin is one such example that can be obtained from porcine, bovine or fish skins. The latter has excellent film-forming capacity, providing protection to food against drying, light and oxygen. Gelatin along with other biopolymers such as soy protein, oils and fatty acids or certain polysaccharides may help strengthen the physical, mechanical and water vapour barrier properties of these

WORLD NONPACKAGING DEMAND FOR BIOPLASTICS BY APPLICATION, 2008 (110,000 metric tons)



films.

Gelatin coatings from fish skin, which is a by-product of fish processing industry, is a possible environment friendly alternative to synthetic plastic packaging for preserving food. These gelatin films from

WORLD BIOPLASTICS DEMAND BY MARKET

Item	1998	2003	2008	2013	2018
World Plastics Demand (mil metric ton)	148	184	227	285	350
kg biodegradable/m Ton Plastics	0.41	0.53	0.88	3.16	5.57
World Bioplastics Demand (000 m ton)	61	98	200	900	1950
Packaging	42	50	90	389	790
Nonpackaging	19	48	110	511	1160

fish have shown to have excellent film forming properties.

Production and utilization of fish gelatin not only serves as a means to preserve food but also makes good use of by-products of fishing industry. Thus, the future outlook for development of fish gelatin based packaging materials seems promising. ■

INTERVENTION IN THE APPLE SUPPLY CHAIN : ADANI AGRIFRESH LTD »

Adani Agrifresh Ltd set up a 3 Controlled Atmosphere (CA) facilities for storing 18000 MT of Apple at an investment of Rs. 180 Crore in Shimla district, Himanchal Pradesh. This is perhaps the largest investment in the fresh produce sector in India.

The CA stores are equipped with imported computer controlled grading machines which not only weigh but also measure the color and size of each apple. Based on the color, size and weight of the apple, the farmers are paid unlike the traditional mandi where there is an

opaque system for price discovery and a lot of hidden costs are to be incurred by the farmers. Small Plastic crates are supplied by the company and apple is brought in crates to CA units so that damage to the fruit is minimal. The company procures apple from Shimla and Kinnaur districts.

The apple is sold under the brand name 'Farm-Pik' through a distribution network spread across 40 major cities in India. Adani Agrifresh has also opened three farmer service centres from which it sells agri inputs to farmers and also provides

Extension services. Adani Agrifresh has tied up with major agri input firms to source quality Products. Adani Agrifresh also imports Apple, Pear, Orange, Kiwi etc from China, USA, Chile, Italy and New Zealand and markets in India. ■

“Adani Agrifresh Limited is part of the Adani Group having a turn over of US \$6 Billion”

Computerized colour & size sorting machine



CII CONSTITUTES A SUGAR COMMITTEE AT NATIONAL LEVEL »

NEW INITIATIVE



Ajay S Shriram
Chairman, CII National Committee on Sugar

For the first time, CII has constituted a National Committee on Sugar under the Chairmanship of Mr Ajay S Shriram, Chairman & Sr. Managing Director, DCM Shriram Consolidated Ltd.

The basic objective of the Committee is to streamline all policies related to sugar industry to the best advantage of Farmers, Industry and Consumers and to ensure a buoyant growth to the sector. The Committee, comprised of around 30 CEOs from the Sugar

Industry, met for the first time on 29th June 2011 in New Delhi and discussed key issues in the sugar industry and chalked out an action plan for the year.

Some of the key issues discussed were; Raw material prices and availability, sales volume and selling prices of sugar, stocking of sugar, levy obligations, packaging material, export - import of sugar, adhoc control, cash flow planning etc. ■

FOR INDIAN FOOD PROCESSING INDUSTRY »

STRENGTHS	<ul style="list-style-type: none"> › Abundant availability of raw material › Priority sector status for agro-processing given by the central Government › Automatic approval for 100% FDI in most items in food processing industry › Most processed food items exempt from excise duty › Import duty on processing machine cut › Vast network of manufacturing facilities all over the country › Vast domestic market 	WEAKNESSES	<ul style="list-style-type: none"> › Low availability of adequate infrastructural facilities › Lack of adequate quality control & testing methods as per international standards › Inefficient supply chain due to a large number of intermediaries › High requirement of working capital. › Inadequately developed linkages between R&D labs and industry. › Seasonality of raw material.
OPPORTUNITIES	<ul style="list-style-type: none"> › Large crop and material base offering a vast potential for agro processing activities › Setting of SEZ/AEZ and food parks for providing added incentive to develop greenfield projects › Rising income levels and changing consumption patterns › Favourable demographic profile and changing lifestyles › Integration of development in contemporary technologies such as electronics, material science, bio-technology etc. offer vast scope for rapid improvement and progress › Opening of global markets 	THREATS	<ul style="list-style-type: none"> › Affordability and cultural preferences of fresh food › High inventory carrying cost › High taxation › High packaging cost

IN NEWS »	STATES ASSURE READINESS FOR IMPLEMENTATION OF FOOD SAFETY AND STANDARDS RULES & REGULATIONS	VIEWS ON CONSIDERING SMOKELESS TOBACCO IN FOOD CATEGORY
	<p>Food Safety and Standards Rules have now been notified in the Gazette of India vide G.S.R.362 (E) dated 05.05.2011. These Rules will come into force after 3 months of date of publication.</p> <p>Considering the requirements of funds for implementation of FSS Act the State Governments were impressed upon to prepare details of estimated expenditure and include same in the State government plans.</p>	<p>The Ministry of Health & Family Welfare has called for a crucial consultation with the FSSAI to find out whether smokeless tobacco can be brought into the category of food items.</p>
	IRON FORTIFIED IODIZED SALT TO BE PROMOTED TO COMBAT MALNUTRITION IN THE COUNTRY	FOOD MINISTER LAUNCHES NEGOTIABLE WAREHOUSE RECEIPT SYSTEM: FARMERS CAN SEEK LOAN AGAINST WAREHOUSE RECEIPTS ISSUED FOR THEIR STORAGE.
	<p>In the view of increasing prevalence of anaemia in majority of India's population, particularly among adolescent girls, women and children, NIN has developed technologies for the double fortification of salt with iodine and iron.</p>	<p>These receipts issued by the warehouses registered with the Warehousing Development and Regulatory Authority (WDRA) would become a fully negotiable instrument backed by a Central legislation.</p>

Achieving Food Security through Sustainable Agriculture :

03 March 2011 >>



Mr Martin Taylor, Chairman, Syngenta AG, addressing an Interactive session on "Achieving Food Security through sustainable Agriculture" on 3rd March 2011, New Delhi. (L-R) Ms Amita Sarkar, Senior Director, CII, Mr Salil Singhal Co-Chairman, CII National Council on Agriculture & Dr. Swapan Dutta Deputy Director Gen. (Crop Science) Indian Council of Agriculture Research (ICAR).

Roundtable on Indo- US Cooperation across the Agricultural Value Chain:

30 March 2011 >>



CII-USIBC Roundtable on Indo- US Cooperation Across the Agricultural Value Chain. Mr Paul Conway, Senior VP, Cargill Inc & USIBC Food & Agriculture Mission Leader addressing the gathering. Left to right : Mrs Amita Sarkar, Senior Director, CII; Mr G C Pati, Additional Secretary, Ministry of Agriculture; Mr Salil Singhal, Co-Chairman, CII Agriculture Council; Dr Swapan Dutta, DDG (Crop Science), ICAR.

Indo-Israel Cooperation in Agriculture & Food Processing - An Interactive

Session with HE Ms Orit Noked, Minister of Agriculture, Israel: 2nd May 2011 >>



(L-R) Mr. Mukesh Khullar, Joint Secretary, Ministry of Agriculture; Mr. Rakesh Bharti Mittal, Chairman, CII Agriculture Council; HE Ms. Orit Noked, Minister of Agriculture, Israel; Mr. Yitzhak Ben David, DDG, Ministry of Agriculture, Israel; HE Mr. Mark Sofer, Ambassador of Israel to India at Indo Israel Cooperation in Agriculture & Food Processing on 02 May, 2011 in New Delhi.

Brainstorming Session on 'Creating a Roadmap for Agriculture Development':

10 May 2011 >>



(L-R) Mr. Amit Sachdev, India Representative, US Grains Council; Mr. Joe O'Brien, Regional Director (Middle East & Sub-Continent), US Grains Council; Mr. Sekhar Natarajan, Member, CII Agriculture Council; Ms. Rebecca Bratter, Director (Trade Development), US Grains Council; Mr. R Vaidyanathan, Director, CII at the CII-US Grains Council Brainstorming Session on Creating a Roadmap for Agriculture Development on 10 May, 2011 in Mumbai.

CII organized the interactive session to discuss ways to overcome the major challenge of attaining food security through proper and efficient use of technology. The meeting was chaired by Mr Salil Singhal, Co-Chairman CII National Council on Agriculture and was addressed by Mr Martin Taylor, Chairman, Syngenta International AG, and Dr Swapan Dutta, Deputy Director General (Crop Science), ICAR.

CII in partnership with USIBC organized the roundtable with an objective to enhance the co-operation between India & US in the agriculture sector. The meeting was chaired by Mr Salil Singhal, Co-Chairman CII National Council on Agriculture & was addressed by Mr. Paul Conway, Sr. Vice President, Cargill Incorporated and USIBC Food & Agriculture Mission Leader, Dr Swapan Dutta, Deputy Director General (Crop Science), ICAR and Mr. GC Pati, Add. Secretary, Ministry of Agriculture, GoI.

Coinciding with the visit of HE Ms Orit Noked, Minister of Agriculture, Israel to India, CII organized the interactive session to discuss new areas of co-operation between the two countries. The meeting was chaired by Mr Rakesh Bharti Mittal, Chairman, CII National Council on Agriculture and Mr Mukesh Khullar, Joint Secretary, Ministry of Agriculture, GoI was also present at the meeting.

CII in collaboration with US Grains Council organized the Brainstorming session to specifically identify problems being faced by the stakeholders in procurement of grains, storage etc or a technology that could help.

The meeting was chaired by Mr Sekhar Natarajan, Member, CII National Council on Agriculture and Chairman, Monsanto Holdings Pvt Ltd & was also addressed by Mr Joe O' Brien, Regional Director (Middle East & Subcontinent), US Grains Council Ms Rebecca Bratter, Director of Trade Development, US Grains Council Mr Amit Sachdev, India Representative, US Grains Council.

ICAR-CII Industry meet 2011 :

23 May 2011 >>



(Left to right): Dr S Mauria, ADG, ICAR; Mr Chaman Kumar, Addl Secy, Min of Agriculture; Mr Ashok Sinha, Secretary, MoFPI; Dr Harish Rawat, MoS for Agriculture; Mr Sharad Pawar, Minister of Agriculture; Dr S Ayyappan, DG, ICAR; Mr Rakesh Bharti Mittal, Chairman, CII Agriculture Council; Mr Gokul Patnaik, Chairman, CII Task Force on Agri Marketing; Mr Rajiv Mehrishi, Secretary, ICAR at ICAR-CII Industry Meet 2011 on 23 May, 2011 in New Delhi.

The Agriculture Council in Partnership with ICAR successfully organized the the ICAR-CII Industry Meet 2011 in New Delhi on 23 May 2011. It was inaugurated by Shri Sharad Pawar, Union minister for Agriculture & Food Processing. Other dignitaries present in the meet were Shri Harish Rawat, Union Minister of State for Agriculture & Food Processing Industries, Dr S Ayyappan, Secretary, DARE and Dir. Gen., ICAR, Shri Ashok Sinha, Secretary, DFPI, Dr. S. Mauria, Assit. Dir. Gen., (IP & Technology Management). It was decided that regional formats of the meet will be organized by CII & ICAR in the coming months.

CEO's Interactive Session with Mr Ashok, Sinha, Secretary, Ministry of Food Processing Industries : 22 June 2011 >>



CII Interactive session with Mr. Ashok Sinha, Secretary, Ministry of Food Processing Industries. (L-R) Mr. Ashok Sinha, Secretary, MOFPI, Mr. Piruz Khambatta, Chairman, CII National Committee on Food Processing.

Confederation on Indian Industry under the leadership of Mr Piruz Khambatta, Chairman, CII National Committee on Food Processing organized an Interactive

Session with Mr. Ashok Sinha, Secretary, Ministry of Food Processing Industries on 22 June 2011 in New Delhi. The CEOs of Indian Food Processing

Industry participated and interacted with the Hon'ble Secretary on the following key issues during the session.

- Efficient Supply Chain Management
- Development & Strengthening of Food Parks Models
- Encouraging Backward linkages
- Priority Sector Lending (PSL),
- Capacity Building & Skill Development
- Development of efficient R&D centers
- Tax relaxation for the Food Processing sector.

CII's recommendations & suggestions were very well taken by the Hon'ble Secretary, Ministry of Food Processing industry.

Interaction with FSSAI: CII recommendations towards new legislation : 22nd June 2011 >>



CII Interactive Session with Mr. V N Gaur, CEO, FSSAI (L-R) Mr. V N Gaur, CEO, FSSAI, Mr. Vivek Bharati, Chairman CII National Task Force on Food Regulatory Affairs.

Confederation of Indian Industry (CII) National Taskforce on Food Regulatory Affairs met with Mr. V N Gaur, CEO of Food Safety & Standards Authority of India (FSSAI) in a recent interactive session, held on 22nd June 2011, at New Delhi. Following issues were discussed:

- Need for institutionalizing a consultative mechanism for Industry's periodical engagement with FSSAI,
- Adoption of a defined procedural framework by FSSAI for bringing in new regulations & standards and provide a feedback window on the

basis of acceptance/rejection of Industry recommendations to ensure transparency in the regulation making process.

- Developing a comprehensive manual for sampling and protocol of analytical methods; reviewing Schedule 4 relating to GMP/GHP under FSS Regulations to make it practical and implementable; reviewing the requirement of analyzing all chemical and microbiological contaminants on monthly basis; multiplicity existing within various ministries especially on issues related to amendments leading to labeling changes; and urgent need to initiate work on pending CCFS approvals were some of the main issues of concern put forth to the CEO, FSSAI.

CII TO GIVE SPECIFIC FOCUS ON PRODUCTIVITY DEVELOPMENT OF THE DAIRY SECTOR »



L to R : Mrs Amita Sarkar, Senior Director, CII; Mr M K Jalan, Chairman, CII National Committee on Dairy & Chairman, Keventer Group; Mr Krishan Goyal, Co-Chair and Promoter, Modern Dairies; Mr B Prashant Kumar, Director, Dept of Animal Husbandry & Dairy, GoI

Milk production witnessed a significant growth of 4.5% per annum after Operation Flood, making India the largest producer of milk in the world. As per Economic Survey 2011 of the Government of India, the production of milk in India for 2009-10 (provisional estimate) is 112.5 million tones. Dairy as an economic activity now fits in most appropriately into the country's strategy for increasing food production, rural employment and equitable distribution of income. The dairy sector contributes around 7% of the GDP and 19 million people are directly and indirectly involved in dairying for employment and livelihood. The sector is characterized by very small dairy producers owning 1 to 3 milch animals and largely a rural based activity. Dairying is based on family

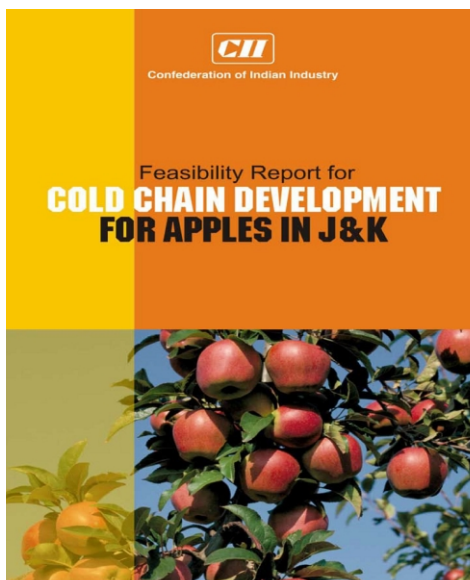
labour, crop residues and natural grasses and is mostly supplementary source of income to producers. Around 750 lakh rural families are engaged in dairying activities.

To come out with a strategic paper on Indian dairy

To deliberate the issues related to the Indian Dairy Sector, CII National Committee on Dairy, led by Mr M K Jalan, Chairman, Keventer Group organized an Interactive Session with Mr B Prashant Kumar, Director (Animal Husbandry & Dairy Development), Government of India on 24th June 2011 at New Delhi.

The Session which was attended by around 30 CEOs in the Dairy Sector across the country, provided a platform for the industry and the Government officials to come together and discuss much needed reforms for the Dairy sector. Mr Prashant Kumar also gave a brief of the various Government schemes available in the Dairy sector and it was agreed that there is a critical need to create publicity across the country, around the various schemes.

Some of the other key issues deliberated were - Increasing Production and Productivity; Need for Investment in Dairy Infrastructure; Breed Improvement through Availability of quality feed; Animal Safety, Milk Safety Standards, Trade etc.



CII Presents the Feasibility Report for Cold Chain Development for Apples in J&K to Omar Abdullah »

A small team led by Mr B Thiagarajan, Chairman, CII National Task Force on Cold Chain Development and President, Blue Star Ltd, met with Mr Omar Abdullah, Chief Minister of J & K in Srinagar on 17th June 2011 and presented the "Feasibility report for Cold Chain Development for apples in J&K".

The Report has been done with the objective to create a modern system for procurement, processing and storage supported by refrigerated logistics to create a cold chain infrastructure in the State of J&K. The infrastructure so developed will have a multiplier effect on inviting private investment in cold chain projects in the apple belt of the State. Three projects were proposed, one each at Anantnag and Sopian in

the heart of apple orchards and a market hub at Jammu.

CII also suggested to the Chief Minister to create a small Core Group 3 members from the Government of J&K and 3 members from CII National Task Force on Cold Chain Development to take it forward and implement the project in the State.

TOP 10 GRAIN IMPORTERS 2010 >>

Top 10 Importers of Corn, Wheat, Rice, and Total Grains, 2010

CORN	Rank	Country	Quantity	WHEAT	Rank	Country	Quantity
	1	Japan	16.1		1	Egypt	9.8
	2	Korea South	8.0		2	Brazil	6.0
	3	Mexico	7.9		3	Algeria	5.3
	4	EU	5.5		4	Indonesia	5.3
	5	Egypt	5.4		5	Japan	5.2
	6	Taiwan	4.7		6	EU	4.5
	7	Colombia	3.6		7	Korea, South	4.0
	8	Iran	3.2		8	Nigeria	4.0
	9	Malaysia	2.8		9	Morocco	3.6
	10	Algeria	2.4		10	Iraq	3.4

RICE	Rank	Country	Quantity	TOTAL GRAIN	Rank	Country	Quantity
	1	Nigeria	1.9		1	Japan	25.1
	2	Philippines	1.8		2	Egypt	15.3
	3	Indonesia	1.8		3	Mexico	14.4
	4	EU	1.4		4	Korea, South	12.4
	5	Iran	1.2		5	Saudi Arabia	12.2
	6	Iraq	1.2		6	EU	12.0
	7	Saudi Arabia	1.1		7	Brazil	8.2
	8	Saudi Arabia	1.0		8	Indonesia	8.2
	9	Bangladesh	0.9		9	Algeria	7.8
	10	Cote d'Ivoire	0.9		10	Taiwan	6.1

Note: Total grain includes barley, corn, millet, mixed grain, oats, rice, rye, sorghum, and wheat.

Source: U.S. Department of Agriculture, Production, Supply and Distribution, electronic database at www.fas.usda.gov/psdonline, updated 9 February 2011.

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Agriculture & Food Processing Division

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