untapping potential

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Organizers

April 23-24  |  Khel Gaon, Ranchi

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Shri Raghubar Das
Hoo'ble Chief Minister, Jharkhand

Jharkhand is endowed with congenial agro-climatic conditions for cultivation of a variety of seasonal as well as off-seasonal agri & horticultural crops offering immense opportunities in agri & food processing.

The State offers excellent infrastructure to food processing industries, has abundant human capital and is an ideal place to work in. We are moving towards becoming the most preferred investment destination in India through our commitment to effective governance, efficient administration and investor friendly policies.

I invite you to invest in Jharkhand agri & food processing sector to leverage the resource available in the State to prosper, shine and be a part of State growth.

Come Invest Prosper Shine be a partner in the growth journey of Jharkhand

The state has great possibilities in Agriculture, Horticulture and Allied Sectors. Jharkhand is strategically located to cater the processed food demand of the country, particularly Eastern India & export demand of SAARC nations.

The state has progressive farming community which is involved in agriculture, horticulture, dairy & organic farming. The state also has 23.6 lakh ha of flourishing forest cover which offers niche minor forest products.

With abundant labour and other inputs and its proximity to industrial and urban centres of West Bengal and Odisha, Jharkhand is an ideal place for value addition through food processing activities.

The state government aims to bring together various stakeholders in the value chain of agri, dairy, fishery, minor forest products and meat & meat products for a common platform showcasing the strengths of the state and facilitating investments in food processing sector. The Summit, as a national level platform, will provide a variety of opportunities for presentation, networking, information and discussions.

Advantage Jharkhand

The summit offers the following attributes to investors & participants:

l Platform for value addition through food processing viz., agri, dairy, fisheries, minor forest products and meat & meat products.

l Awareness to prospective investors & policy makers on the emerging opportunities in food processing.

l Provide platform to discover business opportunities and build alliances which are mutually rewarding.

l Showcase to investors of the recent & upcoming developments in products, research & policy in national & international market.

l Disseminate awareness & knowledge about best practices in technologies/innovations and management processes in food processing.

The Summit offers the following attributes to investors & participants:

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Two day summit organized by the State Government aims to bring together various stakeholders in the value chain of agri, dairy, fisheries, minor forest products and meat & meat products on a common platform showcasing the strengths of the state and facilitating investments in food processing sector. The programme will give a 360° perspective of the industry.

The Summit, as a national level platform, will provide a variety of opportunities for presentation, networking, information and discussions.

“Advantage Jharkhand 2015 - Food Processing Investors Summit”
An ideal destination for investment in Food Processing

Highlights
- Being ideally located in Eastern India, Jharkhand caters food products to large populations of the country.
- Jharkhand cultivates wide variety of fruits & vegetables, both for domestic consumption and export.
- Fruits, Vegetables, Spices & Field Crops are largely organically produced.
- The state has about 35 lakh hec. of high quality surplus vegetables with record paddy production of 16 metric tonnes.
- Dairy being thrust as potential area to spur primary sector growth. Huge scope in Dairy Processing with 52% deficit and a ready market.
- High potential in fisheries export and processing.
- 23.6 lakh ha of flourishing forest cover which offers niche minor forest products.
- Opportunities also in exploiting the commercialization of agro-forestry products, cashew processing, medicinal plants processing, honey production, meat & meat products.
- Proximity to three ports Kolkata, Haldia and Paradeep, makes it suitable for export to SAARC countries.

Infrastructure and Support to Food Processing
- 631 rural markets in addition to 28 APMC markets and 192 secondary APMCs in the state
- Food Processing Sector accorded priority in Jharkhand Industrial Policy, 2012
- Agro-Food Processing Industrial Units with only Rs. 500 million of investment covered under Mega Classification and enjoys the benefit of Preferential Land Allotment by IADA.
- 75% net VAT subsidy and up to 15% investment subsidy
- Successfully running the Central Govt. sponsored National Mission on Food Processing with streamlined application and approval process and under which grant in aid available to investors ranging from Rs. 5 million to Rs. 50 million under various schemes.
- Extensive opportunities exist in - Setting up Food Park, Rice and Wheat Flour Mills, Organic farming of Oilseeds and Pulses, Vegetable Preservation and Processing, Milk and Milk Products, Fish Processing Units for Cattle, Piggery, Fish and Poultry.
- Opportunities also in exploiting the commercialization of agro-forestry products, cashew processing, medicinal plants processing and honey production.

Government Schemes to Upgrade Food Processing
There is a need to focus on food processing and preservation to create more off farm jobs, bring greater value addition and increase the income of rural workforce and farmers. Government is taking steps in developing the sectors and have also made schemes for it.

- Technological Upgradation, Establishment, Modernisation of Food Processing Industries Scheme.
- Scheme for Human Resource Development
- Scheme for Promotional Activities
- Scheme for Reefer Vehicles
- Scheme for Implementation of Partially Completed Projects of Old Food Parks
- Setting up of Primary Processing Centres & Collection Centres in Rural Areas.

Jharkhand Mega Food Park
- Mega Food Park over 56 acres costing Rs. 106 cr being set up at Getalsud, Ranchi
- 6 Primary Processing Centers servicing the Central Processing Center at Ranchi
- Dry Warehouse (4690 MT)
- Cold Storage (4500 MT at CPC and 500 MT at 2 PPCs)
- Individual Quick Freezing (2 MT/day)
- Quality Control Laboratory with R & D Center
- Dehydration Line (2 MT/day)
- Mobile Collection Vans
- Grading & Sorting Facility for Fruits at PPCs
- Provision for Developer of Food Park to sublease Government / RIADA land to other food processing industries

Opportunities Galore

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Opportunities

Primary and Secondary Processing of F&V
- Ketchup, Puree, Pulp, Canned & Frozen Products, Pickles
- Cold chain and Preservation
- Individual Quick Freezing (IQF)

Unique location providing a ready and serviceable market for the processed items

Opportunities Galore

Field Crops
- Cultivable area-38 lakh hectares, Net Sown Area in Jharkhand 25.6 lakh hectares,addy Cultivation-16.52 lakh hectares, Wheat Cultivation-0.84 lakh hectares, Pulses Cultivation-3.8 lakh hectares (Productivity 8 lb against the National Average of 6.4 lb/ha).

Cashew Nut
- Cashew Nut is the major plantation crop grown in the state.
- Remarkable progress has been made in this sector particularly in East Singhbhum, West Singhbhum and Saraikela districts.
- The area under Cashew cultivation is currently more than 10,000 ha with over 4000 MT of production.

Cashew Nut

Opportunities

Investment Opportunities in Horticulture
- Jharkhand has the uniqueness in having excellent climatic conditions for cultivation of wide range of horticultural crops.
- The State has about 2 million tonnes of high quality surplus vegetables suitable for processing or export.
- Around 25% increase in total area under horticultural crops has been recorded in the state during last 5 years.
- Nearly 75,000 ha of fruits cultivation with 8,52,000 MT of production and 3,15,000 ha of vegetables cultivation with 53,70,000MT of production during 2013-14.
- Jharkhand is the 3rd largest producer of pears in India with 359.25 thousand tonnes of production and 13.94% of shares in India. Tomato productions very high.
- 895.4 thousand MT of fruits produced in the state. Primarily mango, guava, jadfruit and litchi in abundant quantity.

Government Initiatives
- Production rate increase 8 - 9% and area rate increase 4.86% per year
- Productivity of vegetable 17.59 MT/ha.
- 6% production of vegetable of total national production.
- 25 - 30% surplus production in ratio of consumption.
- Huge Supply of Tomato, Peas, Potato and other vegetables
- 60% largest producer of Olea, Cauliflower & Cabbage

Horticulture

Potential Investment Clusters
- Jharkhand advantage
- The Jharkhand State Adivasi Co-operative Vegetable Marketing Federation Ltd. (VEGFED)
- Achievements
  - Supporting the vegetable values - chain with following activities,
  - Financial & Technical Support
  - Value addition
  - Training
  - Input Supply
  - Procurement
  - Cold Storage
  - Processing
  - Marketing

- Network of 391 Primary Co-operative Societies affiliated to VEGFED at present near about 25,000 vegetable growers families are getting benefit.

Floriculture

Floriculture

It is one of the emerging areas in which the state is taking great leaps.
- Main varieties grown are Cut flowers (Rose, Gerbera & Carnation).
- Loose Flower and Bulbous flower are being planted in open and in protected conditions.
- Hilsch Fertigation cum production center has been started at cost of Rs. 320 lakhs.
- Under the PPP mode 4 PRC’s are in the process of production.
- Scope for setting up of plants based on Aromatic & Medicinal plants.
- Ranchi is famous for its large variety of roses and especially for its rare pink variety.

Ranches

It is the one of the main producing States in India.
- The State has undisturbed ecosystem with an annual rainfall of 1000 - 1500 mm per annum.
- The agro-climatic condition is conducive for high quality organic vegetable production.
- Climate conducive for round the year cultivation of high value crops viz., cauliflower, broccoli, lettuce etc.
- There is good scope for setting up of Cold Storage, Cold Chains, refrigerated vans in PPP mode.

Ranchi

Lohardaga

Seraikela

Kharsawan

Hazaribagh

Ramgarh

Potential Investment Clusters

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Opportunities Galore

Unlimited Potential in Milk Processing

Major Milestones
- For improvement of Milk Breed, establishment of 760 Dairy Animal Development Centres in collaboration with BIAF and 250 centres are under progress.
- Establishing Dairy Technology Institute at Hansidiha (Dumka District).
- Process for establishment of Dairy Plant under PPP is in progress.

Opportunities
- Untapped potential in production & processing of milk & milk products.
- Estimated gap of 52% in demand and supply.
- Scope for Integrated Milk Processing Units - Packed Milk, Ice Cream, Lassi, Curd & Paneer.

Government Initiative
Jharkhand State Milk Producers Federation Ltd. (Milkfed)

- For development of dairy in the state Jharkhand State Milk Producers Federation Ltd. (Milkfed) has been constituted.
- Integrated Dairy Development in the State is being promoted through association of Milkfed with NDDB. NDDB is managing the State Cooperative Milk Producers Federation Ltd for five years.
- Marketing of Milk, Dahi, Paneer, Lassi and Peda under the umbrella of Mother Dairy Medha Brand.
- 300 project worth Rs 48.32 Crs is being implemented covering 41,500 farmer families across 520 villages in 12 districts.
Key Highlights

- Manifold increase in Meat production from 444.70 lakh kgs in 2001-02 to 16998.0 lakh kgs in 2012-13.
- For vaccination of Livestock, Vaccination Centre as per the GMP has been established in Kanke.
- 433 Artificial Insemination Centre to improve the Livestock population.
- 190 Veterinary Centre is being established in the State.
- Revival of Bacon Factory & Development of Meat Processing Hub in Ranchi under process on PPP Mode.
- Jharkhand Women Self Supporting Poultry Cooperative Federation Ltd. working to provide sustainable livelihood for the rural women. The product has been branded as “Fresco Chicken”, for the identification of the product in the market.

Opportunities Galore

Emerging Processing Opportunities in Fisheries, Meat & Meat Products

Fisheries

Key Achievements

- 6th largest fish producer in the country with over 1.00 Lakh MT production.
- Fish seed production of about Rs 106.01 Crs during the last year.
- 50,334 Ha tanks, 1,15,000 Ha reservoirs and 14,450 Ha water bodies in form of coal pits/mines/ahars & check dams with 1,800 KM rivers available for fisheries.
- Leading state in cage culture production - over 1000 cages being floated in different reservoirs.
- State-of-art Hygienic Wholesale Fish Market established at Ranchi.
- Matiya Mitra initiative by Jharkhand recognised as best in India by NIRD (more than 3600 Matiya Mitra).
- About 40,000 Farmers trained for skill development in the sector.

Opportunities

- Extensive prospects for Fresh Water Fisheries from Supply chain to processing
- Opportunities for supply to domestic and export markets
- Scope for Frozen Fish, Dried Fish, Canned Fish Products, Surimi and other value added products

Potential Investment Clusters

Milk (Lakh MT)

|------------|---------|---------|---------|---------|---------|---------|---------|

Fish Production (in MT)

- 820% Growth

Fish Seed Production (in Cr)

- 1267% Growth

Potential Investment Clusters

Animal Husbandry

Road Map for Development of Animal Husbandry Sector

<table>
<thead>
<tr>
<th>Item</th>
<th>At the end of 11th Plan (2012-13)</th>
<th>12th Plan (2013-14 to 2016-17)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milk (Lakh MT)</td>
<td>16.43</td>
<td>17.90</td>
</tr>
<tr>
<td>Egg (Million)</td>
<td>35.80</td>
<td>37.92</td>
</tr>
<tr>
<td>Meat (Lakh Kg)</td>
<td>1267</td>
<td>1267</td>
</tr>
<tr>
<td>Fish (Lakh Cr)</td>
<td>751</td>
<td>850</td>
</tr>
</tbody>
</table>

Road Map for Development of Animal Husbandry Sector

- Milk (Lakh MT) 16.43
- Egg (Million) 35.80
- Meat (Lakh Kg) 1267
- Fish (Lakh Cr) 751

Potential Investment Clusters

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Potential Investment Clusters
Niche Processing Opportunities in Minor Forest Products

Opportunities Galore

Government Initiative:

Jharkhand has immense scope of collection of minor forest produce as more than 30% of the land is under forest cover. Nearly 23.6 lakh ha., is under forest cover in Jharkhand equivalent to 29.67% of land area.

The state is one of the largest minor forest producing states in India.

Jharkhand is ranked as the second highest producer of Lac in India. The state is known for the wide availability of forest produce, medical plants and herbs securing the livelihood of Tribals.

JHARKHAND is a top State level co-operative organisation with its main aim being ensuring proper return and profit to villagers collecting minor forest produce and setting up related industries at local level.

JHARKHAND has taken an innovative step aimed to extract minor forest produce to its full potential in association with private players.

The initiative, first of this kind in Jharkhand, would process tamarind seed, berry, mango powder and various other produces with proper marketing access.

The agency is eyeing the densely forested areas of Ranchi, Gumla, Lohardaga, Simdega and Palamau because of wide-ranging availability of the raw material.

Achievements

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Potential Investment Clusters

1. Scope of value addition for products sold mainly in raw form.
2. Processing of Lac, Sal Seed, Mahua, Tamarind, Chiraunji, Karanj, Amla and various Medicinal Plants.

Opportunities

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Jharkhand State Minor Forest Produce Cooperative Development and Marketing Federation Limited “JHARKHANCOFED”

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Opportunities Galore

Jharkhand: Paradise of Naturally Grown Organic Commodities

Government Initiative
Organic Farming Authority of Jharkhand (OFAJ)

- The State Govt. of Jharkhand has established Organic Farming Authority of Jharkhand (OFAJ) in 2012 for promotion of organic adoption & organic certification in the state.
- 26,310 ha of area under horticulture has been registered under organic adoption & certification process.
- 1st year scope certificate (in conversion) has been received for 18,310 ha area under horticulture out of 26,310 ha.
- Organic Adoption Certification Schemes launched under OFAJ

Highlights

- Jharkhand state has natural heritage of organic commodities and also well known for its biodiversity.
- The agro-climatic and farming situations of the state are favorable for organic farming.
- Organic Ginger, Turmeric & Cashew are key crop segments which hold huge potential.
- State Govt. has incepted card based subsidy management system for farmers to promote organic farming in the state.
- The state has 10 lakh hectares land without chemical inputs and offers land for future organic cultivation.

The following table shows progress under various State Missions

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Focus Commodities</th>
<th>Year on year Area expansion in (Ha)</th>
<th>2012-13</th>
<th>2013-14</th>
<th>2014-15</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Organic Mission</td>
<td>Pea, French Bean, Okra, Broccoli, Capsicum</td>
<td></td>
<td>15700</td>
<td>2000</td>
<td>400</td>
<td>18100</td>
</tr>
<tr>
<td>State Spices Mission</td>
<td>Ginger, Turmeric, Garlic, Chillies</td>
<td></td>
<td>7610</td>
<td>700</td>
<td>400</td>
<td>8710</td>
</tr>
<tr>
<td>State Medicinal Mission</td>
<td>Kalmegh, Stavar, Aloe vera</td>
<td></td>
<td>3000</td>
<td>480</td>
<td>200</td>
<td>3680</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>26310</td>
<td>3180</td>
<td>1000</td>
<td>30490</td>
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Potential Investment Clusters
robust transport infrastructure

- 15 NHs running through 2,374 km & state highways 6,880 km
- Railway network of around 2,040 km with extensive goods handling facilities available at Ranchi, Bokaro, Dhanbad and Jamshedpur
- Proposed dedicated freight corridor (Eastern Corridor Extension to Kolkata under the Dedicated Freight Corridor Corporation of India)

adequate power supply

- Current total installed power generation capacity of 2,380 MW and expanding further
- 1,980 MW Thermal Power Plant by NTPC - proposed investment US$ 2.58 billion
- 3,960 MW Ultra-mega Power Project at Tilaiya - proposed investment US$ 5.00 billion
- Immense potential for setting up of Thermal, Hydel, Geothermal, Atomic, Methane and Gas based new power plants

skilled manpower

- Birsa Agricultural University, Ranchi
- Birla Institute of Technology, Ranchi
- Central Research Institute for Spices, Ranchi
- Central Tasar Research & Training Institute, Ranchi
- Central Rainfed Upland Rice Research Station, Hazaribagh
- Horticultural Agro-Forestry Research Programme, Ranchi
- ICAR - Indian Institute of Natural Resins and Gums, Ranchi
- ICAR - Eastern Region, Ranchi
- ICAR - Indian Institute of Agricultural Biotechnology, Ranchi
- Indian Institute of Management, Ranchi
- Xavier Labour Relations Institute, Jamshedpur
- Xavier Institute of Social Service, Ranchi
- Xavier Institute of Tribal Education, Ranchi

investment friendly policy support

- Committee under the chairmanship of the Chief Secretary to facilitate speedy clearances for Mega projects
- Jharkhand Industrial Policy - 2012
- Jharkhand State IT Policy
- National Mission on Food Processing
- State Organic Mission
- State Spices Mission
- State Medicinal Mission
Be a part of Advantage Jharkhand
Invest › Prosper › Shine

Inviting Participants from
- Food & Agri Processors and Exporters
- Progressive Farmers, Farmer Groups & NGOs
- Policy makers, Central Govt. & State Govt. Officials
- Investors & Financial Institutions
- Manufacturers of Processing & Packaging Machinery
- Cold Storage, Warehouse & Logistic Service Providers
- Suppliers of Technology, Additives and Other Inputs
- Academicians, Technocrats & Quality Experts
- Certifying Bodies & Quality Analysis Laboratories
- Consumers, Consumer Organizations & Forums

Benefits of Participation
- Expanding business & investment frontiers
- Identifying the key investment opportunities
- Opportunity for backward & forward linkages
- Facilitating business development
- Awareness on technical advancements
- Experience sharing with Food Processing units
- Entering into strategic partnerships
- Awareness on government policies & incentives
- Knowhow on Food Safety & Standards

Reasons for Investing into Food Processing in Jharkhand

Why Jharkhand?
- Strong production base
- Skilled manpower
- Conducive policy framework
- Strong support infrastructure
- Gateway to East
- Untapped market

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