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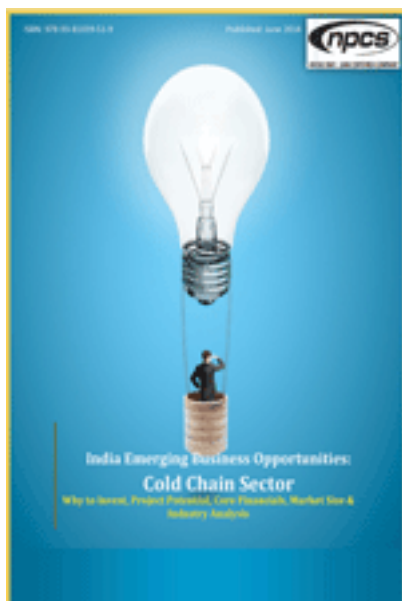
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India Emerging Business Opportunities: Cold Chain Sector (Why to Invest, Project Potential, Core Financials, Market Size & Industry Analysis)



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Often termed as the sunrise sector, cold chain logistics hold immense growth potential in India. Rising Indian Population, mounting consumer incomes and changing preferences have led to increased focus on food security and health services. The demand for processed food has also risen sharply necessitating the support from efficient cold chain logistics of the country. Responding to the high growth opportunities in the cold chain logistics sector, Niir Project Consultancy Services has released a new research report titled 'India Emerging Business Opportunities: Cold Chain Sector (Why to Invest, Project Potential, Core Financials, Market Size & Industry Analysis)' which identifies cold chain sector as a promising & lucrative investment option. The report classifies the sector after scrutinizing the various aspects like value drivers of the sector, the regulatory environment and prevalent subsidies, potential buyers, present players and the project details.

While expanding a current business or while venturing into new business, entrepreneurs are often faced with the dilemma of zeroing in on a suitable product/line. And before diversifying/venturing into any product, they wish to study the following aspects of the identified product:

- Good Present/Future Demand
- Export-Import Market Potential
- Raw Material & Manpower Availability
- Project Costs and Payback Period

We at NPCSC, through our reliable expertise in the project consultancy and market research field, have identified cold chain project which satisfies all the above mentioned requirements and has high growth potential in the Indian markets.

The report, at first, discusses the present scenario and components of the industry as a whole covering the structure, segmentation and components. And then moves on to elaborately illustrate the factors that make case for investing in the sector. Industries like organized food retail and QSR (Quick Service Restaurants) owe much of their growth to the cold chain sector. An effective cold chain infrastructure forms the very backbone of the food industry in India. In the view of rising population and appalling healthcare status, ensuring food security to every Indian and easy availability of medicines has scored as a top priority in government agenda. The sector has effervescent future with the much revered government backing, apparent growth in user industries and favorable demographics of the country. Elaborating on the government support, the report disseminates information on various subsidies and government schemes applicable for cold chain development in the country followed by the outlook of the sector.

The report further navigates through the key player information of the sector. It includes company profiles of players like Kausar India, Snowman Logistics and Fresh & healthy Enterprises along with a snapshot of their financials and contact details of other players as well. Now, the part which forms the core of the report is the 'Project Details' segment. It includes project details like list of machinery and basic project financials. Project financials like plant capacity, costs involved in setting up of project, working capital requirements, projected revenue and profit are listed in the report.

Indian market is evolving with changing lifestyles, rising urbanization and growing disposable incomes which will be the key benefactors of growth in cold chain user industries like Food service industry, processed food industry and organized retail industry. Additionally mounting government endeavors towards reducing food wastage and penetrating healthcare in deep corners of the country will help in strengthening cold chain infrastructure in India. The cold chain sector in India is still in the nascent stage with enormous growth potential on the back of climatic diversification and geographically vast size of the country. Indian cold chain sector was estimated to be at INR 245 billion in 2013 and we anticipate it to cross INR 600 billion mark in the next 4 years.

Reasons for buying the report:

- This report helps you to identify a profitable project for investing or diversifying into by throwing light to crucial areas like industry size, market potential of the product and reasons for investing in the product
- This report provides vital information on the product like its definition, characteristics and segmentation
- This report helps you market and place the product correctly by identifying the target customer group of the product
- This report helps you understand the viability of the project by disclosing details like machinery required, project costs and snapshot of other project financials
- The report provides a glimpse of important subsidies applicable on the industry
- The report provides forecasts of key parameters which helps to anticipate the industry performance and make sound business decisions

Our Approach:

- Our research reports broadly cover Indian markets, present analysis, outlook and forecast for a period of five years.
- The market forecasts are developed on the basis of secondary research and are cross-validated through interactions with the industry players
- We use reliable sources of information and databases. And information from such sources is processed by us and included in the report

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1 OVERVIEW

Cold chain, a series of temperature controlled logistics and storage facilities, forms the very backbone of all industries with perishable products like food, agricultural produce and pharmaceutical products. Companies invest huge sums of money to ensure their products reach consumers in its original form. In India, cold chain sector is termed as the sunrise sector gauging its indispensability in an industry's growth and the investment potential present in the sector.

1.1 Definition

A cold chain is a combination of temperature controlled surface transport and storage facilities or simply temperature controlled supply chain.

It helps in extending the shelf life of products such as fresh agricultural produce, seafood, frozen food, photographic film, chemicals and pharmaceutical drugs. The presence and development of impeccable cold chain industry is therefore important for reducing the wastages of perishable yet vital products.

1.2 Components

Cold chain is a series of activities under controlled temperature conditions. The key steps involved in a cold chain are as follows:

1. Procurement of product from source
2. Pre-cooling
3. Transportation to warehouses
4. Cold Stores/warehouses
5. Transportation to retail outlets
6. End Consumer

An effective cold chain has an imperative role till the product reaches the doorstep of consumers. Right from the transportation of products from their source point to temperature controlled warehouses in temperature controlled vehicles till the retail outlets where they are made available for consumption in their freshest form.

The above mentioned steps take place under the two components of a cold chain: Temperature controlled Vehicles (TCV) and Temperature Controlled Storage (TCS) or Cold Stores. Cold storage solutions form about 80-85% of the Indian cold chain (or integrated cold chain) market by value and the balance 15-20% is contributed by transportation.

Figure 2 Key Steps Involved in a Cold Chain

1.3 Structure

Indian cold storage market is highly fragmented with a large number of units under small & unorganized sector. Organized sector gets small part of the pie with ~20% share while unorganized sector has a large bite in its mouth with ~80% of the market.

1.4 Segmentation

The Indian cold chain facilities are used by various industries extensively like pharma, food service, dairy and meat & poultry. Also the industry is segmented between wholesalers and retailers with the former holding a major share.

The charts below will decipher the information stated above.

Figure 4 Indian Cold Chain Industry- User Segments

Source: NPCS Research

NIIR Project Consultancy Services (NPCS) is a reliable name in the industrial world for offering integrated technical consultancy services. Its various services are: Pre-feasibility study, New Project Identification, Project Feasibility and Market Study, Identification of Profitable Industrial Project Opportunities, Preparation of Project Profiles and Pre-Investment and Pre-Feasibility Studies, Market Surveys and Studies, Preparation of Techno-Economic Feasibility Reports, Identification and Selection of Plant and Machinery, Manufacturing Process and or Equipment required, General Guidance, Technical and Commercial Counseling for setting up new industrial projects and industry. NPCS also publishes various technology books, directory, databases, detailed project reports, market survey reports on various industries and profit making business. Besides being used by manufacturers, industrialists and entrepreneurs, our publications are also used by Indian and overseas professionals including project engineers, information services bureau, consultants and consultancy firms as one of the input in their research.

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