

Impact of Policy Measures on Growth of Fruits and Vegetables Processing Industry (FVPI) and Expectations of the Producers

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ABSTRACT

Realising the need for encouraging Fruit and Vegetable Processing Industry, during the end of Seventh Five Year Plan and more so during Eighth Plan period, some concrete measures were initiated by the Government of India to boost the horticultural sector. These measures are aimed at both strengthening the production base which is a must for increased processing, exports etc., and to encouraging the development of Fruit and Vegetable Processing Industries. Several other steps were taken by the Government to boost the sector after Eighth Five Year Plan. This paper is an attempt to see the growth of the industry, especially fruits and vegetables food processing units, based on primary survey done in fruits and vegetables processing units in Allahabad division. In view of the governments' measures taken in the last two and half decades, it is important to see the policy impact on the sector in terms of number of units and expectations of the entrepreneurs. It is interesting to see that although the number of units have increased and it clearly shows the policy boost up for the sector, but 'inspector Raj' is still alive in its full strength, industry/ entrepreneur is still expecting more easiness of the rules and regulations from government side.

Key Words : Food-processing Industry, Fruits and Vegetable based Processing Industry, Horticulture, Policy Measures, Government Initiatives, Inspector Raj

INTRODUCTION

India has wide variability of climate and soil. It produces a large range of horticultural crops, various types of fruits and vegetables. The government has identified horticultural crops as a means of diversifying agriculture, through efficient land use and optimum utilisation of natural resources (soil, water and environment) and as a way to create employment for rural masses (GoI, 2003). India is the second largest producer of fruits and vegetables after China in the world. Yet its share in the world trade of horticultural products is less than 1 per cent. The commercial processing of fruits and vegetables is less than 2 per cent. This compares very unfavourably with countries like Malaysia (83 %), Philippines (78 %), Brazil (70 %) and US (70 %). The main reason is that domestic consumption of processed items is quite meagre because of economic reasons and due to habit.

Indian consumers by and large prefer fresh fruits and vegetables. The domestic market mostly comprises defence purchases by Army Purchase Organisation (APO) and Canteen Stores Department (CSD) and hotels and restaurants (Financial Express). Nearly 45 per cent of total processed fruits and vegetables are exported (ibid). The household sector mainly uses items like ready to serve beverages and ketchups. The industry's growth in the post-reform period is attributed to various fiscal relief and policy initiatives like the delicensing of food processing, declaring a number of them high-priority industries, permitting foreign equity investments up to 51 per cent of the paid-up capital and removing restrictions under the Monopolies and Restricted Trade Practices (MRTP) Act. In spite of all these policy initiatives, the capacity utilisation of the industry has remained below 50 per cent in the post-reform period (Siddhu).

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Therefore, an attempt has been made in this paper to know the growth of fruit and vegetable processing industry, especially in Allahabad Division in the post-reform period. The paper is based on primary data collected from the entrepreneurs in the division. Some data are also taken from the secondary sources such as Annual Report of the department of food processing industries, ministry of agriculture, Economic Survey, news papers and Statistical Outline of India.

Food processing Industry In India:

Food processing sector is a prominent sunrise sector in India. It has gained prominence in the recent years due to easy availability of raw materials, changing lifestyles and favourable fiscal policies. These units serve as a vital link between the agriculture and manufacturing sectors of the economy. Strengthening these forward and backward linkages is critical to reduce wastage of agricultural raw materials, improve the value of agricultural produce by increasing shelf-life as well as by fortifying the nutritive value of the food products and ensure remunerative prices to farmers as well as affordable prices to consumers. Thus Food processing industry in India is increasingly seen as a potential source for driving the rural economy.

With huge population of more than 130 crore and changing life style India has vast growing opportunities for processed food. It has also immense opportunities in employment generation and export revenue. India is a leading exporter of the processed food products. Its socio-economic impact in income and employment generation makes it very important for the economy as a whole.

Government is trying to support the industry by formulating favourable policies. With adequate government focus on the infrastructural support, research and development and technological innovation in this sector, India could alleviate its domestic concerns on food security, malnutrition and food inflation.

Various studies have estimated that due to poor post harvest management, the value of post production losses in food commodities is of Rs. 75,000-1,00,000 crore per annum. It is also estimated that the extent of losses could be easily brought down to less than 50 per cent. But despite of efforts and initiatives of the Governments to provide the required stimulus to the sector, processing activity is still at a nascent stage with low penetration.

The industry is largely unorganized, with a small but growing organized sector. The organized sector

contributes approximately 30 per cent of the food processing industry in India. The highest share of the organized processed food is contributed by the meat and poultry segment, contributing approx. 27 per cent of the total food processing sector. Presently, in fruits and vegetables only 10 per cent of the products are processed. It is expected that the processing will grow to 25 per cent by 2025. This sector is highly export oriented as the domestic penetration is low. Small And Medium Enterprises are operating in both the organized and unorganized segments. Organized players mostly produce juices and pulp products; while unorganized players have a foothold in traditional areas like pickles, sauces and splashes. Pickles hold the major share in this segment.

Advantage Uttar Pradesh:

Uttar Pradesh is the most populous state in the country accounting for 16.4 per cent of the country's population. It is also the fourth largest state in geographical area covering 9.0 per cent of the country's geographical area, encompassing 2, 94,411 square kilometres and comprising of 83 districts, 901 development blocks and 112,804 inhabited villages. The density of population in the state is 473 person per square kilometres as against 274 for the country.

Uttar Pradesh is primarily an agrarian economy with more than 60 per cent of the population depends on agriculture for their livelihood. The state is the largest producer of food grain in India and offers a diverse agro climatic condition which is conducive for agricultural production. Uttar Pradesh is known for its highest contribution to nation's sugarcane basket. However, the state offers excellent investment opportunities for industrial development.

The small scale industries constitute an important segment of the state economy in terms of employment generation, source of foreign exchange earnings and exports. The favourable government policies coupled with availability of large pool of human resource makes the state one of the best location for setting up SSI units within the state. The state has set up 679703 units, which has generated employment for 2742766 persons and has attracted investment of more than Rs. 12000 crore.

Uttar Pradesh has initiated several schemes for the development of SSIs, such as Transport Assistance Scheme, Technology Up-gradation Scheme and has introduced Single Table System for providing prompt and quick solutions to the entrepreneurs in the state. In addition

to this, the state has also implemented Market Development Assistance Scheme to facilitate marketing of products of Khadi and Village industries.

The major crops grown in the state are paddy, wheat, sugarcane, potato, mustard, groundnut, gram, pea and lentil. The state is well established for the export of rice, mangoes, vegetables and potatoes. The state has set up as many 485 fruits and vegetable processing units. Uttar Pradesh has implemented “e-Choupal” model to tackle the challenges faced by the sector through delivering of valued service to the customers. Uttar Pradesh is also one of the major agri-exporting states in the country.

Uttar Pradesh two-third of the population depends on agriculture. During 2008 to 2013 state GSDP has increased at a rate of 7 per cent. U.P. is the single largest market of India with more than 200 million population and increasing per capita income of the state is giving more purchasing power to the consumers. Agriculture is the mainstay of India’s third largest economy. Physical infrastructure of the state is improving rapidly. Highly attractive infrastructure industrial investment policy and other food sector specific policies are providing better environment for investment in the sector.

U.P. contributes 30 per cent in total vegetable production and 19 per cent in total fruit production of India. It is on first rank in production of mango and aonla, fourth in guava and also major producer of banana and lichi. In Allahabad division there are three fruits belt aonla and mango fruit belt in Pratapgarh and guava fruit belt in Allahabad. The major vegetables cultivated in the state are peas, potato, cabbage, tomato, okra and other leafy vegetables. Major spices grown are chillies, garlic, ginger and turmeric.

Policy Initiatives*:

After liberalization several policy measures have been taken with regard to regulation and control, export and import, fiscal policy, exchange and interest rate control taxation, export promotion and incentives to high priority industries. Food processing and agro industries have been accorded high priority with a number of important relieves and incentives. Some of the important policy changes towards food processing industry are as follows

Regulation and control:

Most of the processed food items have been exempted from the purview of licensing under the Industries, Development and regulation, Act, 1951, except

items reserved for small-scale sector and alcoholic beverages. As per extent policy Foreign Direct Investment up to 100 per cent is permitted under the automatic route in the food infrastructure like Food Park, Cold Chain and warehousing. As far as food retail is concerned the FDI policy does not permit FDI into retail sector except Single Brand Product Retailing. This policy is uniform for all retailing activity. FDI policy for manufacture of items reserved for the Small Scale Industry sector is uniform for all items so reserved and a separate dispensation for items in the food-processing sector is not contemplated. The policy for distillation of alcohol has been announced vide Press Note 4 (2006) according to which FDI upto 100 per cent is permitted on the automatic route for distillation and brewing of alcohol subject to licensing by the appropriate authority. No industrial license is required for almost all of the food and agro processing industries except for some items like beer, potable alcohol and wines, cane sugar, hydrogenated animal fats and oils etc. and items reserved for exclusive manufacture in the small scale sector. Items reserved for S.S.I. include pickles and chutneys, bread, confectionery, excluding chocolate, toffees and chewing-gum etc., rapeseed, mustard, sesame and groundnut oils (except solvent extracted), ground and processed spices other than spice oil and oleoresins, sweetened cashew nut products, tapioca sago and tapioca flour.

Use of foreign brand names is now freely permitted the government. MRTP (Monopolies and Restrictive Trade Practices Act) rules and FERA (Foreign Exchange Regulation Act) regulations have been relaxed and given more freedom to encourage investment and expansion by large corporates. Most of the items can be freely imported and exported except for items in the negative lists for imports and exports. Capital goods are also freely importable, including second hand ones in the food-processing sector.

Fiscal policy and taxation:

Custom duty rates have been substantially reduced on food processing plant and equipments, as well as on raw materials and intermediates, especially for export production.

Wide-ranging fiscal policy changes have been introduced progressively in food processing sector. Excise and Import duty rates have been reduced substantially. Many processed food items are totally exempt from excise duty.

Corporate taxes have been reduced and there is a shift towards market related interest rates. There are tax incentives for new manufacturing units for certain years, except for industries like beer, wine, aerated water using flavouring concentrates, confectionery, chocolates etc.

Indian currency, rupee, is now fully convertible on current account and convertibility on capital account with unified exchange rate mechanism is foreseen in coming years.

Repatriation of profits is freely permitted in many industries except for some, where there is an additional requirement of balancing the dividend payments through export earnings.

Export promotion:

Food processing industry is one of the growing areas identified for exports. Free Trade Zones (FTZ) and Export Processing Zones (EPZ) have been set up with all infrastructures. Also, setting up of 100 per cent Export oriented units (EOU) is encouraged in other areas. They may import free of duty all types of goods, including capital goods. Capital goods, including spares upto 20 per cent of the CIF value of the Capital goods may be imported at a concessional rate of Customs duty subject to certain export obligations under the EPCG scheme, Export Promotion Capital Goods. Export linked duty free imports are also allowed.

Units in EPZ/FTZ and 100 per cent Export oriented units can retain 50 per cent of foreign exchange receipts in foreign currency accounts. 50 per cent of the production of EPZ/FTZ and 100 per cent EOU units is saleable in domestic tariff area.

METHODOLOGY

This study is mainly based on primary data. But data regarding number of food processing units, their scale of production and locations are collected from government sources. I also verified these data in my survey. Primarily I visited all the locations and found that a large number of units are only on paper. Amongst all the working units I selected some sample from all the districts. I have been also taken care of representation of all the categories according to their population while selecting the samples.

Data about registered fruits and vegetables based food processing units in Allahabad division were collected from various sources namely Principal, Food Processing Training School, Mumfordganj, Allahabad; FPO office,

Lucknow; MSME Development Institute, Allahabad. The data has been taken for two different years *i.e.* 2005 and 2015 in order to see the change, if any.

In Allahabad division comprising of Fatehpur, Kaushambi, Pratapgarh and Allahabad total 41 units were in 1997, which have increased to 67 units in 2005 and 76 units in 2010. In 2015 there were 85 units. Based on the government reports and available data about the units an initial survey of 50 processing units has been conducted in the Allahabad division in 2005, 2010 and 2015. Some of the units were only on papers. Finally I selected 30 industrial units by dividing them into four different classes constituting one large industry, 04 medium industries, 05 small industries and 20 cottage industries to find out the problems, these units are facing, and their suggestions to the government to improve the industry environment. In 2015 a short survey is conducted only to know the problems, which processing units are still facing, and suggestions/expectations of the entrepreneurs.

The categorization of industries has been done on the basis of production done by industries as:

1. Large Scale Units- production more than 250MT
2. Medium Scale Units- production between 250-100MT
3. Small Scale Units- production between 100MT-50MT
4. Cottage and Household Units- production less than 50MT

RESULTS AND DISCUSSION

Increase in number of Units:

Table 1 provides the data about registered fruits and vegetables based food processing units in Allahabad division between 1997 and 2010. In Allahabad division comprising of Fatehpur, Kaushambi, Pratapgarh and Allahabad total 41 industrial units were present in 1997, which have increased to 67 units in 2005 and further to 76 units in 2010. It shows 85.4 per cent increase in number of units during the survey period. The annual growth rate of nos. of units, during 1997 to 2010, was 4.86 per cent while it was 6.33 per cent during 1997 to 2005. It explicitly revealed the facts that increase in nos. of units are more rapid till 2005.

The single large scale unit situated in Allahabad division is in Allahabad district. The large scale fruits and vegetable processing unit, Allahabad Canning, a subsidiary of Awadh Sugar Mills of Birla's, is the one of the oldest unit in Allahabad division. The maximum number of

industrial units are belong to cottage and household unit, with total of 28 units in 1997 which has increased to 58 units in 2005 and to 66 units in 2010, the highest increase in any category. During the period it show absolute growth of 135.7 per cent and annual growth of 6.82 per cent, during 1997 to 2005 the annual growth rate was 9.53 per cent,

In 1997 there were 3 medium scale units in Allahabad division which increased to 5 units in 2005, but it came down to 4 units in 2010. The number of small scale units decreased from 9 to 3 units between 1997 to 2005 but in 2010 total 5 small scale units were present in Allahabad division. It is interesting to note that between 1997 and 2010 no industrial unit exited in Kaushambi district in any category.

The maximum number of industrial units was present in Allahabad between 1997 and 2010 with 28 units in 1997, which increased to 34 units in 2005 and to 44 units in 2010. In Allahabad the maximum number of industrial

units was present in the category of cottage and household units with 18 units in 1997 and 38 units in 2010. The maximum growth of industrial units too was recorded in cottage and household units with 47.4 per cent growth between 1997 and 2005, 50 per cent growth between 2005 and 2010 and 40.7 per cent growth between 1997 and 2010.

The maximum annual growth rate recorded among all industrial category in Allahabad district was 7.1 per cent for cottage and household units between 2005 and 2010 and annual growth rate for 1997 to 2010 was 5.9 per cent. Both medium scale units and small scale units recorded negative growth rates. In 1997 there were 3 medium scale units, but no new unit was set up in this category till 2005, although shutdown of one medium scale unit was witnessed between 2005 and 2010 thereby registering a negative growth rate of 7.8 per cent and 3.1 per cent between 2005 and 2010 and between 1997 and 2011. In 1997 six small scale units were present in

Table 1 : Registered fruits and vegetables based Food Processing Units in Allahabad Division

District	Industry category	Year			Per cent change between 1997 to 2005	Per cent change between 2005 to 2010	Per cent change between 1997 to 2010	Annual growth rate 1997 to 2005	Annual growth rate 2005 to 2010	Annual growth rate 1997 to 2010
		1997	2005	2010						
Allahabad	A	01	01	01	00	00	00	0	0	0
	B	03	03	02	00	33.3	33.3	0	-7.8	-3.1
	C	06	03	03	-50	00	-50	-8.3	0	-5.2
	D	18	27	38	47.4	50	40.7	5.2	7.1	5.9
	Total	28	34	44	21.4	29.4	57	2.5	5.3	3.5
Pratapgarh	A	00	00	00	00	00	00	--	--	--
	B	00	02	02	--	00	--	--	0	--
	C	02	00	02	-100	--	00	--	--	0
	D	10	29	28	190	-3.45	180	14.2	-0.70	8.24
	Total	12	31	32	158	3.2	166.7	12.60	0.64	7.84
Fatehpur	A	00	00	00	00	00	00	--	--	--
	B	00	00	00	00	00	00	--	--	--
	C	01	00	00	-100	00	-100	--	--	--
	D	00	02	00	--	-100	00	--	--	--
	Total	01	02	00	100	-100	-100	9.05	--	--
Allahabad Division	A	01	01	01	00	00	00	0	0	0
	B	3	5	4	66.67	-20	-33.33	6.59	-4.36	2.24
	C	9	3	5	-66.67	66.67	-44.44	-12.83	10.76	-4.42
	D	28	58	66	107	13.8	135.7	9.53	2.62	6.82
	Total	41	67	76	63.4	13.4	85.4	6.33	2.55	4.86

A- more than 250MT production (Large Scale Units),
 B- 250-100MT production (Medium Scale Units),
 C- 100MT - 50MT production (Small Scale Units),
 D- less than 50MT production (Cottage & Household Units).

Allahabad but by 2005 half of them were shutdown registering a negative growth rate of 8.3 per cent between 1997 and 2005.

In 1997 there were only two small scale units in Pratapgarh, both of which came under the category of medium scale units by 2005, because of their increased production. In Pratapgarh there was no medium scale unit in 1997 but 02 entrepreneurs have done wonderful job and increased their scale of production tremendously; while on the paper they belongs to small scale units but their actual production were much more than the level of small scale unit. By 2005 their levels of production were more than the level of even medium scale units and they increase their production level at continuous basis. By definition, adopted above, these two medium scale units may be called large scale units in 2010 (and 2015), but due to entirely different nature of the only large scale unit in the division I placed these two units in medium scale units.

There were 10 cottage and household units in 1997

in Pratapgarh which have increased to 29 by 2005 but witnessed closure of one unit by 2010. Thus, 190 per cent of change was registered during 1997 and 2005 but because of the closure of one unit there was a negative percentage change of 3.45per cent and negative annual growth rate of 0.7 per cent between 2005 and 2010 for Cottage and Household Units.

Fatehpur had no industrial unit in large scale and medium scale category during 1997 to 2015, there was only one small scale unit in 1997, which too got closed down by 2005. In 1997 Fatehpur had no cottage and household industrial unit, by 2005 two units were opened up which too were shut down by 2015. Thus by the end of 2015 none of the industrial unit in any of the category was there in Fatehpur.

Expectations/ Suggestions to the Government:

Table 2 compares suggestions and expectations of the entrepreneurs between two periods on 1 to 10 scales. These suggestions are based on the problems faced by

Table 2 : Expectations/ Suggestions to the Government (Average, on 1 to 10 scales)											
Sr. No.	Expectations/ Suggestions	Large (01)		Medium (04)		Small (05)		Cottage (20)		Total (30)	
		2005	2015	2005	2015	2005	2015	2005	2015	2005	2015
1.	Reduction/elimination of government intervention	10	10	10	10	10	10	10	10	10	10
2.	Government as facilitator	8	8	6	5	8	7	8	8	7.5	7
3.	Government should focus only on quality of processed foods	9	10	10	10	8	8	6	6	8.25	8
4.	Govt should provide infrastructure facilities and tax concessions in production area for establishment of units	9	9	8	8	9	9	7	7	8.25	8.25
5.	Elimination of mandi tax	7	7	8	8	8	8	5	5	7	7
6.	Sale tax should not be more than 4percent	9	8	9	9	8	8	8	8	8.5	8.25
7.	Ensure continues supply of electricity	8	8	8	8	8	8	7	7	7.75	7.75
8.	Electricity rate should be reduced	7	6	6	5	7	8	8	8	7	6.75
9.	Government should help in marketing of processed food products	2	2	4	3	5	7	7	7	4.5	4.75
10.	Government provide capital to entrepreneurs	3	3	4	4	7	7	8	8	7.50	7.50
11.	Government should provide technical assistance also	1	1	3	1	7	7	5	5	4	3.5
12-	Government should use modern communication techniques to advertise processed product	7	6	8	8	7	8	8	8	7.50	7.50
13-	Government should provide facilities/information regarding export of the products	8	8	7	7	6	5	5	5	6.50	6.25
14-	Government should also help to producers of raw materials by providing them high yielding/quality varieties of seeds	8	8	7	7	6	7	7	7	7	7.25

With in brackets () no. of units surveyed

fruits and vegetables processing units in Allahabad division. The average of the ratings given by different industry categories has been calculated by treating each class of industry as a single unit.

The table tries to seek the suggestion of entrepreneurs on a average sale of 1 to 10 in order to address the problems faced by various food processing industrial units. It is interesting to note down that the ratings given on various suggestions mentioned remained almost same both in 2005 and 2015.

In general all the units believed that the role of government should be of a facilitator and not of a regulator, in fact both in 2005 and 2015 cent per cent entrepreneurs said that the government intervention should be reduced or should be completely eliminated. It clearly shows the level and intensity of intervention by officials of different departments of the government. The reactions of the entrepreneurs was very much sharp on this issue because over the year they serve officials in terms of money or kinds (bribes) for smooth functioning of the unit. The entrepreneurs strongly supported the suggestion that government should only provide infrastructural facilities, should provide technical assistance to entrepreneurs and should focus only on to ensure the quality of processed food by providing them quality raw materials.

All the units believed that Sale Tax should not be more than 4 per cent and tax concession should be given in production areas for establishment of units. The government should ensure continuous supply of electricity along with reduced electricity rate. In contrast to large and medium industries small scale industries and cottage industries want much more assistance in marketing of processed products using modern communication techniques. Availability of capital is a matter of greater concern for small and cottage industries in contrast to large and medium industries. In order to enhance exports facilities and information regarding export of the products should be given.

Conclusion and suggestions:

Some areas of Allahabad division, especially districts Allahabad and Pratapgarh, have been major fruits and vegetables producer and also a food processor. Presently, in Allahabad division, there are three fruits belts, aonla and mango fruit belt in Pratapgarh and guava fruit belt in Allahabad. Kaushambi is now a major banana producer from some years. In 1933, the first food processing

programme was started from Allahabad in U.P.. A food processing unit, S.R. Canary, situated in Allahabad is the oldest food processing of Uttar Pradesh. Some years ago this unit was exporting some vegetables like Palak, Bhindi and Sahjan to gulf countries; till 1987 it had been exported guava in some African Countries. A large scale unit Allahabad Canning was established in 1959 by K.K. Birla Group.

It is very clear that Allahabad division has a long tradition of food processing. But entrepreneurs are not satisfied with the government policies and the very working of the officials. Centre and state governments have started various programmes, schemes, policies to facilitate the sector but due to increasing corruption, benefits of these measures did not reach to the real entrepreneurs. Therefore are large numbers of units which are only on the paper to utilise (misutilise) the government grants with collision of bureaucrats and politicians.

The number of units registered with the government department show that most units are small scale units. But in survey two contradictory results were found. One, as mentioned above, most units are present only on the paper, not producing at all or production is only for the save the face. Second are those types of units which are not interested in any type of any government assistance but doing very well and producing much more than the limit prescribed by their category. It clearly shows a big lack or deficiency and misuse of the policy.

It is also very explicitly concluded from the survey that Government must be tried to control corruption and for good governance very seriously on ground level. Industry wants to see the state as a facilitator only not as a regulator or controller in the name of various laws and regulations. For small producers state should also work for his credit availability, technical assistance, cheap electricity, tax concessions etc.

FICCI gave some recommendations regarding improvement in food processing sector, it highlighted that a Comprehensive National Level policy on Food Processing is need of the hour. After robust success of First Green Revolution there is need for Second Green Revolution in Agriculture, need to enhance private sector investment in infrastructure development, increasing farm productivity and up gradation of quality.

The Government should set up Inter Ministerial Working Group (IMWG) under the leadership of Ministry of Food Processing to look at comprehensively addressing

various issues that are holding this sector back. Skill gap issue need to be addressed in order to generate quality manpower and there should be proper implementation of FSSA act. The Government should establish a National bank, on the lines of NABARD, to lend credit to food processing industries; state specific plan should be formulated to attract domestic and foreign investment in this sector.

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