



Processed Meat, Seafood and Alternatives To Meat in India

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Processed Meat, Seafood and Alternatives To Meat in India - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and convenience trends stimulate category growth

INDUSTRY PERFORMANCE

Protein-focused value proposition drives robust demand for soya chunks

Frozen processed poultry rides strong health perception to post the fastest retail value sales growth in 2025

WHAT'S NEXT?

Strong retail volume and value growth forecast is driven by health-focused propositions

Modern retail formats and government initiatives to drive the penetration of frozen products

Processed meat and seafood consumption to remain an urban phenomenon

COMPETITIVE LANDSCAPE

Legacy brands continue to lead the field

Digital-first brands gain momentum among young, tech-savvy urban consumers

CHANNELS

Small local grocers enjoy wide reach to dominate the landscape

Quick-commerce platforms fuel robust growth for e-commerce

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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Staple Foods in India - Industry Overview

EXECUTIVE SUMMARY

Rice remains central to staple foods' performance

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Convenience is a consumption driver

Consumers look for nutritional value

Pursuit of wellness covers a myriad of aspects in staple foods

WHAT'S NEXT?

Further fast retail value growth projected for staple foods
Modern channels to increase the pressure on small local grocers
Government regulations to improve transparency and affordability

COMPETITIVE LANDSCAPE

The competitive landscape remains highly fragmented
Health consciousness increases the focus on brands offering quality, transparency and minimal processing

CHANNELS

Small local grocers enjoy unmatched last-mile connectivity
Large modern grocery retailers and e-commerce increase their weight in staple foods distribution

MARKET DATA

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