India as an agriculture and high value food powerhouse: 
A new vision for 2030

Food and Agriculture Integrated Development Action 3
April 2013
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Food and Agriculture Integrated Development Action (FAIDA) 3

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Executive Summary

The Indian food and agriculture industry made significant strides in the last three decades. It met the challenge of securing the production of basic staples like rice and wheat to feed India’s growing population. Agricultural GDP increased at an annual rate of 3 per cent between 1980 and 2012, making India the third largest agricultural producer by value (behind China and the United States).

However, the sector is yet to realise its full potential in terms of yield, processing and exports. Given the country’s agro-climatic conditions, the sector fulfils only 50 to 60 per cent of the potential yield for most crops. Private capital participation in processing, branding and marketing that drove the agriculture and food sector in several developed and middle-income countries is yet to take off in India. Despite the volumes, India’s share in global exports is below par compared to the top five agricultural producers.

To examine the sector and its opportunities, McKinsey & Company and CII have jointly developed the third edition of the FAIDA report. This effort builds on the first and second FAIDA reports, and provides detailed suggestions for an integrated roadmap for the sector. FAIDA 3 focuses on mango, banana, potato, soya bean and poultry which represent crop categories that are likely to drive the next wave of growth.

DREAMING BIG: POWERHOUSE BY 2030

The country’s progress in the last decade proved that, despite structural barriers, the Indian farmer matched domestic demand growth with commensurate yield increases. India overcame a structural nutrition-deficit situation early in the last decade and produced enough to feed its people, thanks to the perseverance and resilience of its farmers.

Anchoring an inclusive growth model

Success for the next two decades depends on how India responds to the next wave of demand and ensures sustainable supply to create a win-win situation for consumers and farmers. India’s current average farmer income is 30 to 40 per cent of its per capita income with an ever widening gap with urban counterparts. Robust agricultural growth can ensure poverty levels decrease at a rate faster than most other approaches, making it a necessary component of India’s inclusive and integrated growth model. By overcoming key obstacles, India could become a global agricultural and food powerhouse, and a leader of agricultural practices and techniques for several crops. It can provide the nutrition for a healthy and growing nation and create opportunities in allied business fields, thereby adding momentum to food processing. In fact, a competitive agriculture sector and superior quality nutritious food could make India one of the top five exporters of agriculture and food products, and cement India’s place as a true global powerhouse.

With these aspirations for 2030, India can potentially bring about a balance where rising incomes could improve the lives of millions of farmers, and high quality food at affordable prices could reach 1.5 billion consumers, thereby becoming an integral part of inclusive growth transformation.

Setting an inspirational goal for 2030

India’s per capita GDP is expected to increase by 320 per cent in the next 20 years (from 2012 till 2030, calculated at 2000 prices). This rising affluence and the growing population is likely to increase India’s overall food consumption by 4 per cent per annum to reach INR 23 lakh crore in 2030 from INR 11 lakh crore in 2010 (at 2010 prices). Per capita consumption is expected to increase from INR 9,355 to INR 15,731 (an annual increase of 3 per cent, at 2010 prices). This represents a huge investment opportunity across the food chain.
Urban India’s food consumption will grow by 5 per cent, nearly twice as fast as its rural counterpart (2.5 per cent). It will change from being primarily driven by basic foods to more “high value foods” like fruits, vegetables and complex proteins. This is in line with global trends seen in countries like China, Japan, Indonesia, and Brazil as they transitioned into middle-income economies.

Given the expected rise in consumption, agricultural output (at farm gate prices) could grow from INR 12.69 lakh crore in 2011 to INR 29.28 lakh crore by 2030. At the same time, processing could grow from INR 1.1 lakh crore in 2011 to INR 5.65 lakh crore by 2030, while India’s food exports could grow from INR 1.4 lakh crore in 2011 to INR 7.72 lakh crore by 2030.

As an outcome of the agricultural produce, processing and export growth, the food and agricultural sector could potentially grow at 5.2 to 5.7 per cent (in real terms) over the next 20 years. With such improvements, in 20 years the country can aspire to improve farmer income by over four times (real terms) to keep pace and reduce the gap with the national average income. Consumers could also benefit from the increase in supply to match per capita consumption, and access to safe and healthy food at affordable prices. The challenge for the industry and policy makers is to give the consumer enough choice by making available a world class variety of food products in the most convenient manner. They will have to overcome supply side barriers and ensure seamless end-to-end linkages to realise the true demand potential.

**A 12-POINT PROGRAMME TO REALISE POTENTIAL**

Based on extensive research and inputs from multiple stakeholders, 12 interventions across five themes could transform the sector’s performance to meet its true potential, and achieve the vision of converting India into a global food and agricultural powerhouse. Four of these suggestions—instituting the National Agricultural Sustainability Mission, National Agricultural Technology Mission, setting up of world class food and agricultural universities, and agri-entrepreneurship—are already aligned with the missions and projects announced in India’s 12th Five Year Plan (12th FYP).

The 12 suggested interventions are detailed below.

**Accelerate sustainable yield improvements**

For many crops, India ranks the lowest in terms of yield. This is partly due to structural constraints such as fragmented land and the low use of farm technology and best farming techniques. In spite of these, there is room to accelerate production and ensure sustainable yield increase in the long run. Two new initiatives may address this potential:

1. **Institute a “National Agricultural Technology Mission”**—The lack of high quality seeds and scientific farming techniques is the biggest deterrent to accelerate yield across India. The lack of other necessary inputs like modern water efficient irrigation systems and adequate mechanisation, coupled with poor farming practices impedes yield improvement in several states. Balanced and scientific use of inputs for soil health, plant protection, agronomical practices, etc., is critical to ensure sustainable agricultural growth. Making relevant technology available in a scaled down manner, especially customising mechanisation and offering it as a service, will make it affordable for the small farmers. India needs a focussed programme to create high yielding, disease resistant varieties of seeds across crops; set up a targeted, well marketed “farmer education” and distribution programme to encourage them to adopt high quality seeds; promote relevant mechanisation and modern irrigation practices; catalyse the deployment of modern technology; align farming techniques to best practices; and encourage private participation in ensuring world class farming practices.

2. **Institute a “National Agricultural Sustainability Mission”**—India faces sustainability challenges in its land and water resources. The objective of this Mission should be to dissolve the supply side barriers and provide farmers with seamless linkages to scientific inputs and best practices to realise the true potential of agriculture. To get started, such a Mission must establish soil and water testing facilities and then create a national map of soil type and water availability to identify areas that need to replenish specific nutrients. Integrated nutrient management is critical for India at this stage. Providing incentives to organisations to promote the use of organic manure and micro-nutrients, as well as balanced nutrient management will help in their quick adoption, thereby improving soil health...
and productivity. Farmers need to be supported through soil health cards and trained on seed treatment and prevention of insects, diseases and weeds build up to ensure both quality and yields of crops. Similarly, financial assistance to the private sector to reclaim “problem soils” and allotting area to develop it into special crop zones may significantly improve this sector.

Irrigation is the one of the most critical and scarce resources required for farming. The combination of irrigation with fertigation improves crop yield and quality, while significantly saving water and nutrient losses. For example, Gujarat encourages farmers to adopt drip irrigation and fertigation.

In partnership with state governments and enabled by the Planning Commission’s budgetary support, focussed flagship initiatives need to be launched to address areas of greatest opportunity and risk, starting as pilot projects and scaled up once proof of concept is established. This would better manage India’s resources and create a sustainable basis for a globally competitive agricultural sector.

Promote win-win farmer–industry interaction
Indian farmers have gained knowledge and skills by sharing within the community, through government programmes and through the private sector involved in inputs, processing and trade. However, there has been limited experience sharing with the private sector on yield improvements, good agricultural practices and sustainability. That said, many examples of successful corporate–farmer collaborations have emerged which demonstrate mutually beneficial situations for both. We propose two initiatives to scale up these interaction models rapidly:

3. Encourage scalable farmer–industry partnerships—There are various emerging models of successful interactions. The initiative should be to promote and scale these up rapidly. The first is funding the growth of Farmer Producer Organisations (FPO) and Farmer Producer Companies (FPC) that allow small farmers to use collective strength and increase their competitiveness by offering them easier access to credit and technology, reducing costs of distribution and providing greater marketing power and negotiation capacity. Scaling up FPOs and FPCs can ensure farm competitiveness for domestic and international demand. The government could scale up equity participation in FPOs/FPCs through focussed grants, provide cheaper access to credit and facilitate linkages with the private sector. The National Bank for Agriculture and Rural Development (NABARD) can play this role on the lines of what the Small Industries Development Bank of India is doing for the micro, small and medium enterprises sector.

Promoting local aggregators, who are in direct contact with the farmers helping them with extension services and yield improvement, and are linked to marketers, is another idea. By combining selective incentives and policy and infrastructure support, these aggregators can become the “connective tissue” of a globally competitive food and agriculture sector, linking supply and demand and bridging a major missing link in the current ecosystem. The government could also promote organised agri-input retail, which can deliver suitable technologies and farm inputs to the farmers. The government may also consider enabling other land aggregating measures such as long-term leases (e.g., 10 years) for select crops. Such aggregation could help promote long-term investments in technology.

An interesting framework to make these different partnership models work could be the creation of the open public–private partnership (PPP) model, which will be flexible and dynamic enough to enable multiple farmers, multiple aggregators and marketers to work together.

The government could encourage corporate farming in select high value agriculture areas, particularly for exports (enabled by necessary review of the land ceiling legislation).

4. Consider a favourable policy regime, which improves agricultural marketing mechanisms—An overall policy regime should enable farmers to decide to whom and where they can sell their produce. The current policy framework creates several bottlenecks which impedes farmers from effectively interacting with the private sector. There are seven specific considerations that could address these concerns:
— The effectiveness of the Agricultural Produce Marketing Committee (APMC) Act across states could be revisited. A detailed study is needed to examine the effectiveness of policy reforms in states that have either amended the APMC Act or abolished it completely. For perishables, farmers could be given the freedom to sell directly to processors, aggregators and traders outside the mandi (consider delisting perishables from APMC).

— Caps on subsidies for essential agricultural investments, like drip irrigation and greenhouses, could be reviewed.

— The government could review taxation structures and stock limits so that priority initiatives (processing, branding, exports) are incentivised, while also considering modifying policies which dis-incentivise large farms so that the private sector can play a role.

— The government could promote and fund the scaling up of a number of technology solutions (for example, Kisan Call Centres, mobile solutions) to ensure complete price transparency for the farmer.

— The government could consider a unified regulatory regime for organised input retail providing farmers with access to a “one-stop shop” for all agricultural inputs such as seeds, fertilisers, soil nutrients and pesticides.

— The government could promote aggregation of land through long tenure leases, e.g., for a period of 10 years, while protecting ownership rights and providing no tenancy rights to the lessor to ensure the land reverts automatically to the owner when the lease period expires.

— The government could consider amendments to the Land Ceiling Act to encourage corporate farming in select areas, especially for exports.

Scale up food processing and exports
India is at an inflection point on food consumption with the domestic demand likely to grow at 4 per cent per annum in the next 15 to 20 years. Our analysis suggests that this growth could be much higher (5 to 6 per cent) across high value food items like animal products, fruits and vegetables and processed food (6 to 8 per cent). In addition to this demand, consumers and export markets would require cleaner and healthier food. Three interventions will help open up demand:

5. **Stimulate food processing through an emphasis on branding**—Given India’s affinity towards branded goods in most consumer sectors such as apparel and electronics, and the increasing demand for food, there is a large potential to create a new segment of branded food. The industry sector could generate demand through promotions, campaigns and advertisements to illustrate how consumers could benefit. The development of branded food would assure consumers of its freshness, healthiness, quality and traceability. Once this is done, the enablers need to be put in place, including (a) implementing back-end procurement mechanisms to work directly with farmers; (b) setting up post-harvest infrastructure; (c) working with the evolving modern retail formats to promote and sell.

The brand promise to customers could be delivered through a set of norms to assure freshness, healthiness, quality, traceability. However, this must be industry-led and voluntary. One such example in India is Woolmark. The creation of the Food Safety & Standards Authority of India (FSSAI) is a step in the right direction to promote focus on quality, safety and innovation in food products.

6. **Launch a “National Agriculture and Food Export Mission” in select categories**—The government could consider taking an active part in promoting the export of select crops. Currently, India loses out on exports with other producers due to the failure to be cost competitive, lack of a powerful “Indian” brand in food, weak adherence to quality and safety standards and poor infrastructural linkages. The Mission, set up by the government in association with private players, could enable (a) identifying the right products and markets (e.g., fruits like banana, mango; markets like the Middle East and South Asia); (b) investing in market creation; (c) updating evacuation and access infrastructure such as cold chains and ports; (d) adhering to internationally
acclaimed benchmarks for quality and traceability enabled by a stable long-term agriculture and food exports policy. India should learn from countries who have successfully marketed their products worldwide, e.g., Florida oranges.

7. **Attract private capital and world class expertise**—This would ensure global expertise and the latest technologies in all parts of the agriculture and food value chain. In particular, global food and agriculture companies could bring their experience in enabling emerging country agriculture transformations, provide their expertise in processing, branding and exports, and bring the requisite long-term private capital into the food and agriculture sector needed to achieve India’s potential. Global food majors could be attracted to India through targeted campaigns such as road shows, and by creating a conducive investment environment.

**Invest selectively in infrastructure, with private participation**
The pre-requisites to accelerate yield and attract investment are robust infrastructure, and storage and evacuation points. Two major initiatives are required:

8. **Create a “National Farm Gate to Market Infrastructure Authority” (NFMIA)**—India lacks adequate farm gate infrastructure in terms of sorting, harvesting, packaging, storage and transportation. There are many bodies like the National Center for Cold Chain Development, National Horticulture Board, Agricultural and Processed Food Products Export Development Authority, and Ministry of Food Processing Industries (MoFPI), who are currently involved in building and managing different parts of this infrastructure. However, due to multiple players, there is fragmentation and insufficient accountability for an integrated solution. We propose the creation of an independent body (similar to the National Highways Authority of India) that will have the authority and be accountable for the development of this pan-India infrastructure. The NFMIA will create a national blueprint for viable agricultural infrastructure that will reduce operating costs for agricultural and food producers and then, either build it themselves, or oversee the creation of this infrastructure through the appropriate contracting and Special Purpose Vehicle (SPV) models.

9. **Create mega demand servicing and export hubs**—The government could consider setting up mega hubs that will allow companies to procure, store, process and export from a single location. These could either be set up near production centres of major crops or near a port to facilitate exports. Such hubs will help put in place the necessary forward and backward linkages, along with the storage infrastructure and provide for end-to-end facilities across the value chain.

For example, the MoFPI has announced a mega food parks scheme. They have set out over INR 3,000 crore to develop food parks over the course of the 12th Five Year Plan. The aim is to increase the extent of processing to around 20 per cent of the produce by 2015. This type of scheme could be enhanced and scaled up significantly.

**Nurture the next generation of agri-business technocrats and entrepreneurs**
There is no dearth of quality entrepreneurs in Indian agriculture. Be it the Punjab farmer who has designed his own potato harvesting machine or a Tamil Nadu exporter who set up a best-in-class banana cultivation ecosystem, there have been several pockets of excellence. However, apart from government subsidies, entrepreneurs have not received any structured help to scale up their initiatives and make it a viable business. The inherent risks in agriculture have impeded the adoption of newer technology. There is a shortage of agriculture and food technocrats who could shepherd the next wave of growth. This could be met through three interventions:

10. **Scale up agricultural extension services through private participation and new infrastructure creation**—Even though agriculture has done fairly well in terms of food production, adoption of technology is limited. The government could encourage and enable industry, where there is viability, to participate in extension services. Extension services are imperative to introduce and integrate science and technology into the farming system. The government could consider PPP models in extension services (where possible), encourage contributions from farmer training centres at the district level attached to Krishi Vigyan Kendras (KVKs) by defining and monitoring performance standards, and encourage scaling up of farmers
cooperatives which proactively participate in extension services in the region. The government may encourage the private sector to participate in farmer training centres to bring their learnings and practices to KVKs. The government could consider creating dedicated institutes providing vocational training in extension services which will provide facilities to train the last mile farmer, the extension worker and facilitators. Public extension, however, should continue in the remote areas where farmers do not have access to or knowledge of agricultural best practices.

11. Create a network of four to five new world class food and agricultural universities and research laboratories to stimulate agriculture research—India ranks poorly in terms of quality and quantity of research vis-à-vis the rest of the world. Setting up world class universities will enable cutting edge research and ensure commercialisation through private investment and market linkages. These institutes, enabled by more autonomy, should be set up in collaboration with private sector players and foreign universities and classified as universities of national importance. These can be branded as “Indian Institute of Agriculture and Technology” (IIAT). An alternative in the short run would be to set up agriculture colleges in current institutes of national importance like the IITs, or upgrade existing agriculture and biotechnology institutes. Further, strong lab–farm links must be established so that innovative products developed by these universities are used in the agriculture and food processing sectors. The government has already taken the first steps by proposing the National Agricultural Education Project and the National Agriculture Entrepreneurship Project in the 12th Five Year Plan.

12. Set up agri-business focussed angel and venture capital funds as a PPP initiative between central and state governments and private capital providers—With the reduction in agricultural workforce due to rapid urbanisation and migration to cities, there is a need to create a generation of agri-entrepreneurs who will lead the next wave of growth. The central and state governments and private players could contribute to a professionally managed fund that finances innovative entrepreneurship ideas in agriculture. In addition, it is important to set up “business incubation centres” in regionally contiguous zones (potentially the demand servicing and export hubs, the mega food parks) that will help farmers shape their business ideas and train them on aspects like financial management, marketing and commercialisation and establishing networks with industries.

The 12-point programme could meaningfully transform India’s food and agriculture sector and improve the welfare of all stakeholders. However, current governance and implementation mechanisms need to be strengthened and new ones introduced to drive implementation. The report suggests five actions that could accelerate implementation—formation of enabler mechanisms, creation of enhanced governance for missions, an empowered group of stakeholders to oversee a national agriculture and food forum, an empowered industrial food and agriculture council, and food and agriculture action committees in states. The central government could consider budgetary support to these action committees, linking fund committed to tangible outcomes or enabling viability gap funding. This is just the beginning of the journey. These recommendations and their on-ground implementation will have to be revisited periodically to keep track of the progress and to make timely course corrections, if the need arises.

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This study of the food and agriculture sector reveals India’s immense potential in the global agriculture and food space. Equally notable is the resilience of the Indian farmer, who has constantly responded to changing demand patterns. The challenge to feed India’s population has moved from making enough, to creating an inclusive ecosystem where the populace has access to quality food, farmer welfare is ensured, and the country’s economy grows. With the concerted, consistent and focussed efforts of the government, supported by the private sector and research and dissemination organisations, India is on the brink of becoming an agriculture and food powerhouse.
## Summary of recommendations

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| **Accelerate sustainable yield improvement** | ▪ Limited deployment of quality seeds  
▪ Limited deployment of technology particularly in cutting edge yield improvement techniques  
▪ Unscientific usage of fertilisers and pesticides  
▪ Absence of farm mechanisation technology which can adapt to small Indian farm sizes  
▪ Degradation of soil and sharp depletion of water table | 1. Launch a “National Agricultural Technology Mission” (12th FYP) with the following mandate:  
▪ Develop and disseminate high yielding, disease resistant varieties of seeds  
▪ Set up a targeted, well marketed “farmer education” programme  
▪ Stimulate adequate and judicious use of inputs  
▪ Promote mechanisation and modern irrigation practices for smallholdings in particular  
▪ Catalyse deployment of modern technology in the fields of inputs, irrigation technology  
▪ Encourage private participation in ensuring world-class farming practices  
2. Create a “National Agricultural Sustainability Mission” (12th FYP) with the following mandate:  
▪ Create a national map of soil type and water  
▪ Establish soil and water testing facilities across states with soil health cards to farmers  
▪ Encourage nutrient management  
▪ Incentivise reclamation of problem soil  
▪ Promote integrated micro-irrigation and fertigation  
▪ Encourage cropping practices promoting sustainability  
▪ Train extension engine to focus on sustainability  
▪ Provide budgetary support to successful state pilots to ensure national scale-up  |
| **Promote win-win farmer–industry interaction** | ▪ Lack of linkages create an ineffective and economically inefficient supply chain  
▪ Overcoming trust barriers between farmers and industry | 3. Encourage scalable farmer–industry partnerships through various models:  
▪ Fund growth of Farmer Producer Organisations and Farmer Producer Companies (through NABARD or other government institutions)  
▪ Promote local aggregators, who are in direct contact with the farmers, and are linked to marketers |
### Recommendations

**Scale food processing and exports**
- Insufficient aggregation of farmers and avenues to market produce
- Limited penetration of farming techniques and technology

**Issues**
- Rising food demand with greater emphasis on higher quality food and greater hygiene
- Sub-scale processing industry
- Limited exports today
- Limited investments and expertise transfer in processing and branding

**Recommendations**
- Encourage technology investment by permitting long-term leases while guaranteeing ownership rights to farmers
- Promote an open PPP model which incentivises the private sector players to participate actively
- Promote organised agri-input retail
- Encourage corporate farming in select high value agriculture areas

### 4. Develop a favourable policy regime, which improves agricultural marketing mechanisms:

- Revisit APMC Act across states
- Review caps on subsidies for essential agricultural investments
- Review taxation and stock limits for agriculture and food processing
- Consider delisting perishables from scope of APMC Act and give farmers freedom to sell outside the mandi
- Promote and fund the scaling up of technology solutions for price transparency
- Promote land aggregation through long tenure leases while protecting ownership rights
- Consider unified regulatory regime for organised input retail
- Consider amendments to the Land Ceiling Act

### 5. Stimulate food processing through emphasis on quality and branding:

- Enable a scalable business model by (a) implementing back-end procurement mechanisms, (b) setting up post-harvest infrastructure, (c) working with the evolving modern retail formats
- Develop a branded food movement with focus on customer proposition and norms on quality and traceability
- Ensure a conducive policy environment for growth and investment (including taxes, capped subsidies and FSSAI)
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Recommendations

6. Launch a “National Agriculture and Food Export Mission” in select categories:
   - Identify the right agri-products for exports
   - Invest in market creation
   - Update evacuation and access infrastructure, e.g., cold chain, ports, particularly in export hubs
   - Adhere to internationally acclaimed benchmarks for quality and traceability

7. Attract and develop private investments and world class expertise:
   - Conduct road shows to attract global food and agriculture majors to India
   - Create a conducive investment environment to enable investment in latest technologies for processing, branding and guaranteeing quality

8. Create a “National Farm Gate to Market Infrastructure Authority” (NFMIA):
   - Create an independent body with authority to be accountable for the development of such pan-India farm gate to market infrastructure
   - Mandate NFMIA to create a national blueprint for viable agricultural infrastructure focussed on reducing operating costs and providing the backbone infrastructure
   - Build the infrastructure or oversee the creation of this infrastructure through the appropriate contracting and Special Purpose Vehicles (SPVs)

9. Create mega demand servicing and export hubs:
   - Create mega hubs with the necessary forward and backward linkages (similar to mega food parks)
   - Ensure presence of anchor tenants for guaranteed demand offtake
   - Scale up funding support by Ministry of Food Processing Industries (align to mega food park scheme)
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| Nurture the next generation of agri-business technocrats, entrepreneurs, researchers and workers | ▪ Lack of professional training and education of on-ground extension workers  
▪ Lack of facilities for research and development of new technologies and innovation in agriculture  
▪ Lack of commercialisation of existing research due to limited linkages between institutes and industry  
▪ Limited encouragement for investments in agri-businesses | 10. Scale up agricultural extension services through private participation and new infrastructure creation:  
▪ Encourage private sector participation in extension services so as to ensure efficient incentive-led performance on the field  
▪ Build extension bodies that could set up farmer training centres at the district level attached to KVKs and encourage scaling up of farmers cooperatives  
▪ Enforce performance standards on KVKs and farmer training centres  
▪ Create dedicated institutes to provide training in extension services |
| | 11. Create a network of four to five new world class food and agricultural universities and research laboratories to stimulate agriculture research (12th FYP):  
▪ Set up world class universities – Indian Institutes of Agriculture & Technology (IIAT) – with more autonomy to enable cutting edge research, and ensure commercialisation (new institutes or upgrade existing institutes)  
▪ Encourage private sector players and foreign universities to partner with universities through grants and tie-ups  
▪ Establish strong lab–industry–farm links so that innovative products developed by these universities are used in the agro and food processing sectors | |
| | 12. Set up agri-business focussed angel and venture capital funds as a PPP initiative between central and state governments and private capital providers (12th FYP):  
▪ Create a professionally managed fund financing innovative agri-entrepreneurship ideas  
▪ Build business incubation centres in regionally contiguous zones (in the mega demand servicing zones or export hubs) | |