



**Euromonitor  
International**

# Processed Meat, Seafood and Alternatives To Meat in India

January 2026

## 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

Table 3 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 4 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 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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Summary 1 - Research Sources

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