



# Processed Meat, Seafood and Alternatives To Meat in India

January 2026

## 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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