



Indian Citrus Business & Emerging Opportunities

ICBC | Florida | 2025

Sahyadri Farms Post Harvest Care Limited

Nashik, Maharashtra, India

Mr. Azhar Tambuwala
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- Glance at Sahyadri Farms Post Harvest Care Ltd.
- Indian Citrus Overview
- Challenges faced by India in Citrus Processing
- Sahyadri Farms contribution in Citrus Processing
- Future Outlook - 2035

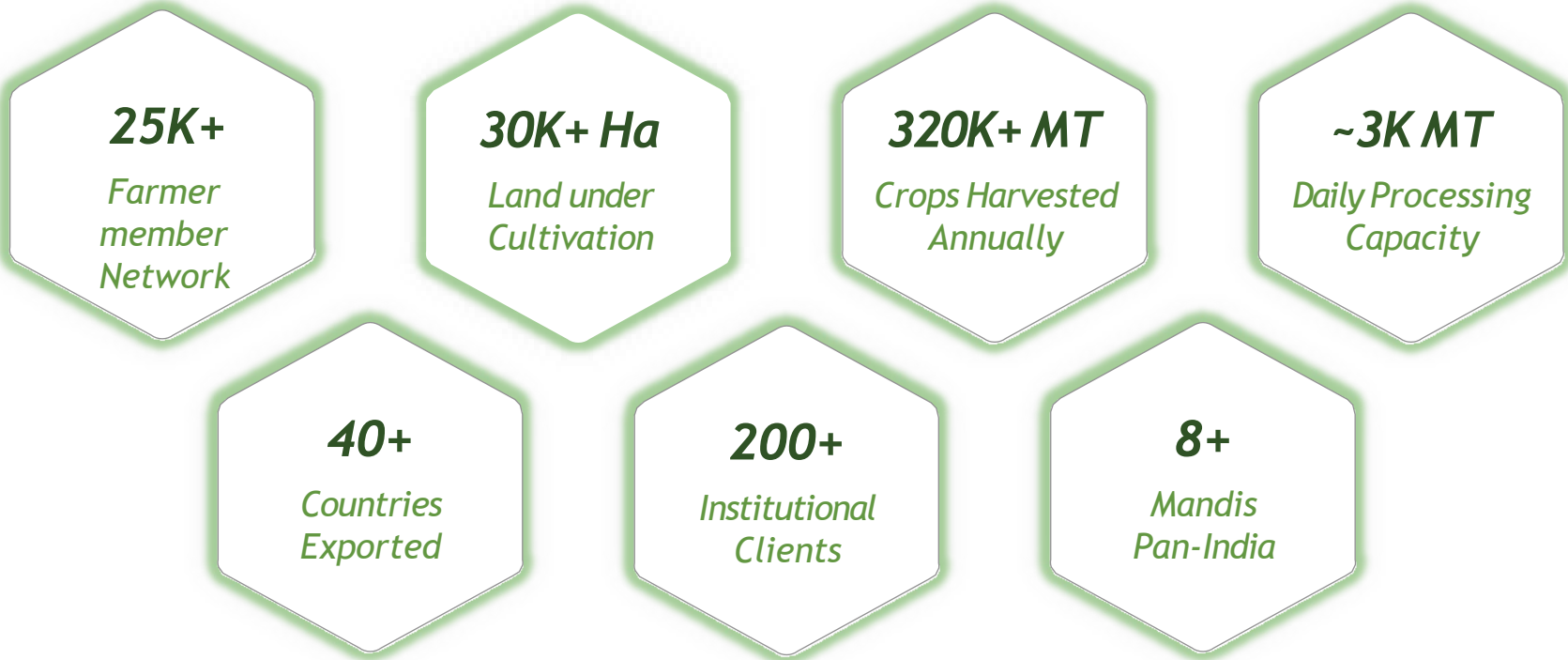


Seeding goodness

India's leading farmer owned integrated, tech-enabled horticulture Value chain ecosystem



Revolutionizing Horticulture Sector With Unparallel Efficiency Through Large Scale Operations...



Product portfolio

Fresh Fruits and Vegetables

Aseptic, Frozen, IQF, Freeze Dried

FMCG products
Ketchup, Jam, Gravies, Juice

Fruit Extraction
Pectin, Punicalagin

Best-in processing capabilities

320K MT+
Annual Farm Procurement

50K MT Grapes
140K MT Tomato
22K MT Mango
50K MT Citrus
...and several others

~3KMT
Daily Processing Capacity

400 MT Fresh Exports
2,000 MT Primary Processing
300 MT FMCG Products
190 MT Bio Active



Fresh F&V Packhouse



Processing capacity



Warehouse & Cold Storage



Establishing market leadership in the segments we operate

INDIA'S LEADING CITRUS PROCESSOR

INDIA'S LEADING GRAPES EXPORTER

INDIA'S LEADING TOMATO PROCESSOR

One-stop platform for buyers to source HIGH QUALITY HORTICULTURE PRODUCTS AT LARGE SCALE

ADVISORY & DECISION SUPPORT SYSTEM

Crop Specific Agronomy

Well-trained agronomy team sharing accurate scientific advisory

Soil & Water Testing

Precision advisory by customized highly effective sensor solutions

Crop Monitoring

Big data analytics, customizable reports and dashboards on crop stage monitoring

Quality Assessment

Quality checks at each stage of crop lifecycle along with corrective actions



Hyperlocal weather stations



International Certifications

EXCLUSIVE VARIETIES



Nursery & Labs

Controlled greenhouse site designed to experiment new variety seedlings



Training and education

Access to unique saplings and knowledge for higher yield & marketability



20

Exclusive patented varieties in grapes & citrus (+29 non-exclusive new varieties)



Nashik Campus, One Of India's Largest Installed Capacity (1/3)

Excellent post-harvest infrastructure with end-to-end integration under one roof

Build on 52 ha. of land in Nashik, Maharashtra



Nashik Campus, One Of India's Largest Installed Capacity (2/3)

Excellent post-harvest infrastructure with end-to-end integration under one roof



350 MT / day Fresh F&V Packhouse



1,800 MT / day Frozen & Aseptic Processing



15,000 MT Warehouse & Cold Storage



300 MT / day FMCG (Ketchup/ Jam/ Squash) Processing unit



180 MT / day Dry Fruits Processing Unit

*State-of-the-art multi-capability facility ensures **BEST QUALITY AT SCALE AND OPTIMUM EFFICIENCY***

Nashik Campus, One Of India's Largest Installed Capacity (3/3)

Excellent post-harvest infrastructure with end-to-end integration under one roof



Corporate Headquarters



Farmer Facilitation Center

One stop hub for farming essentials



Skill Development Center

State-of-the-art Training Facility



R&D Centre



Bio-gas Plant



Microalgae based water treatment plant

*State-of-the-art multi-capability facility ensures **BEST QUALITY AT SCALE AND OPTIMUM EFFICIENCY***

Acquired the largest Citrus Processing plant in India...



20 Hectare
Land



\$5.67Mn
Capex



\$70K MT
Capacity



~50,000Mt
Processed



3,000Mt
Warehouse &
Cold Storage

SAHYADRI FARMS NETWORK CAME INTO PLAY in scaling up Nanded facility and turning it profitable in first year itself



Dedicated in-house R&D lab
equipped with advanced technology



Soil testing solutions for smarter
nutrition and higher yields

Technical Institute
Network



Indian Council Of
Agriculture Research
- CCRI

Associated with
ICAR – CCRI for
Citrus Expertise &
Guidance

Environment-Friendly Solutions (ESG)

Minimizing waste and eco-friendly energy creation

Biogas plant with a capacity to consume 150 MT of fruits and vegetables waste per day



Generate **1.6MW** electricity
Shift from conventional electricity to renewable energy consumption



>
30,000+
kl
Slurry

By-product (Slurry/ waste water) distributed to associated farmers to be used as a bio-fertilizer



4,200+ MT of bio-fertilizers & bio-pesticides produced and sold during the year



5 MW solar energy power plant



In process to **Upgrade the capacity to 6 MW** by end of 2024

Dual positive effect - ZERO WASTE CIRCULAR ECONOMY WITH COST SAVINGS through sustainable energy sources

1. Global Exports

Exporting to **40+ countries** to renowned companies

Germany 	(2011)	(2011)	(2011)	(2011)	(2011)	(2011)	(2014)	(2018)	(2022)
UK 	(2011)	(2022)	(2022)	(2022)					
Netherlands 	(2011)	(2011)	(2011)						
UAE 	(2018)	(2013)							
USA 	(2017)								
Other countries	(2017)	(2013)	(2018)	(2023)	(2023)	(2023)			

...Contributing to **~30%*** of total revenue

2. Domestic Institutional

In high demand, serving **100+** marquee clients...

(2019)	(2018)	(2020)	(2018)	
(2020)	(2016)	(2020)	(2020)	(2023)
(2020)	(2022)	2019	2019	(2020)
(2021)	(2022)	(2023)	(2022)	(2022)

...Contributing to **~50%*** of total revenue

Marquee clientele is a testimony to Sahyadri Farms' ASSURANCE OF QUALITY AND CONSISTENCY



Processed Foods



Pomegranates



Grapes



Bananas

Indian Citrus Overview

In 2022, the world top producers of fresh citrus fruits were **China, Brazil and India**
 India shows the strongest growth rate reinforcing **3rd** largest producer

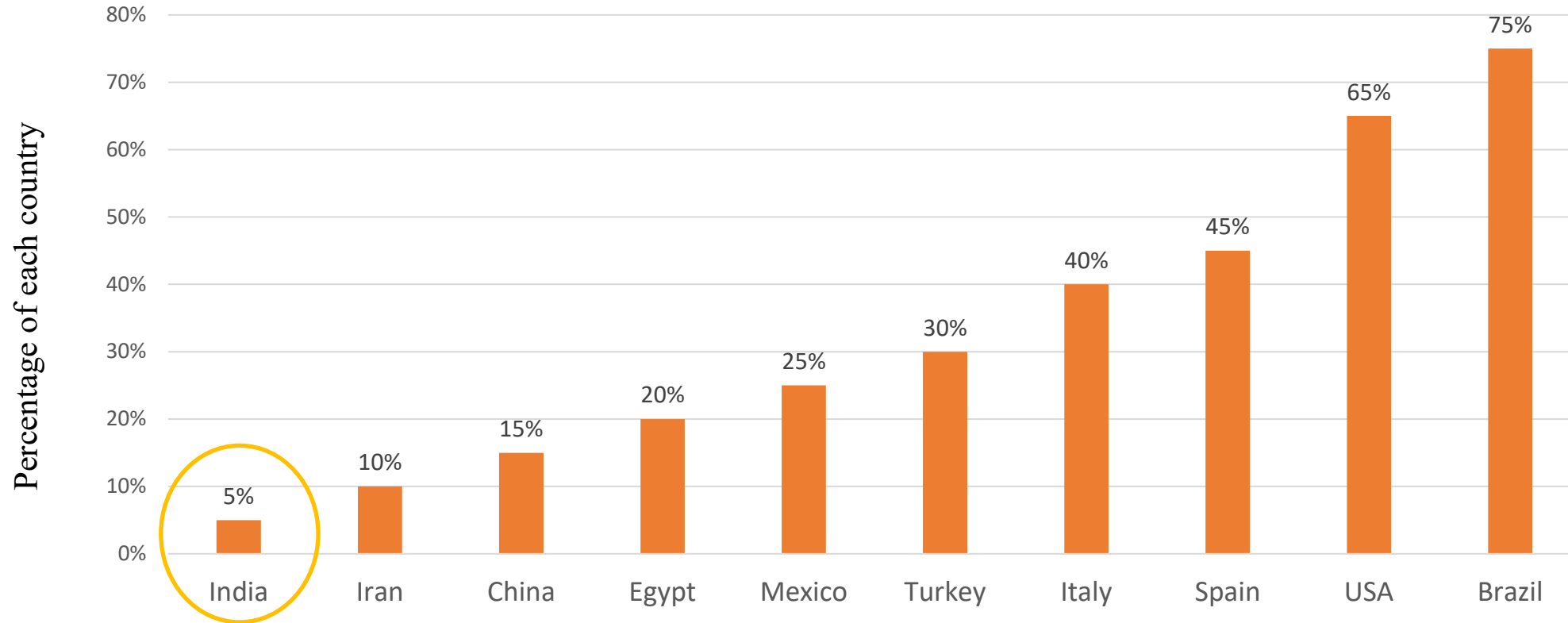
World Top Citrus Producer 2022

Rank	Country	Production (Million MT)	World Share (%)	5-Year Growth Rate
1	China	48.3	29.10%	4.50%
2	Brazil	19.4	11.70%	0.60%
3	India	14.3	8.60%	4.70%
4	Mexico	8.9	5.40%	2.10%
5	United States	7.2	4.30%	-3.30%

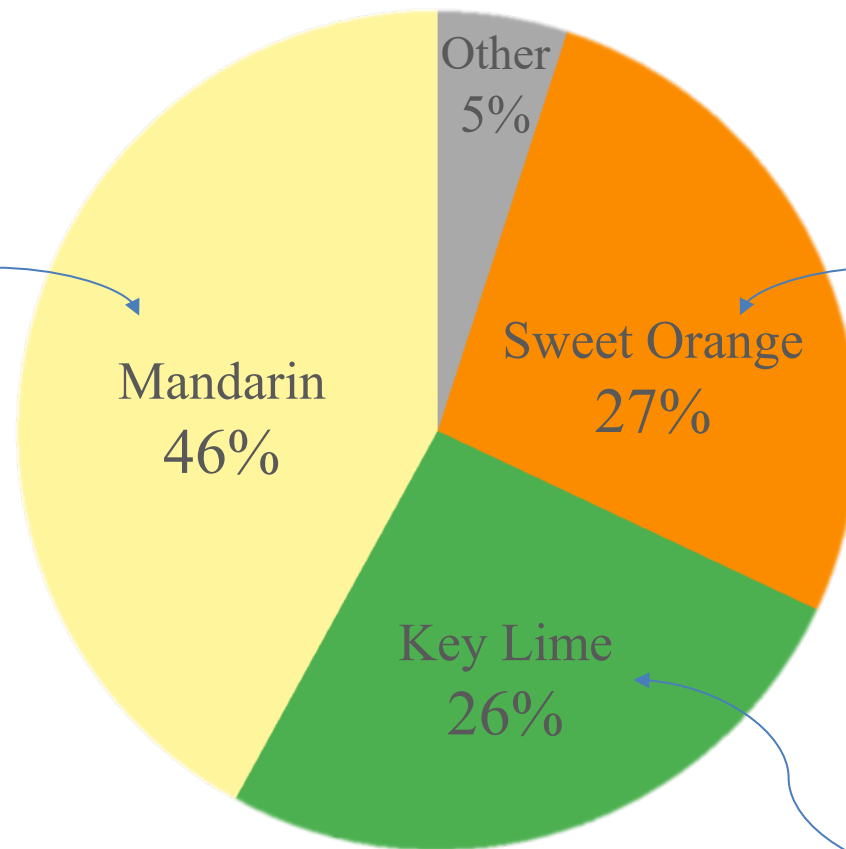


Source: FAOSTAT

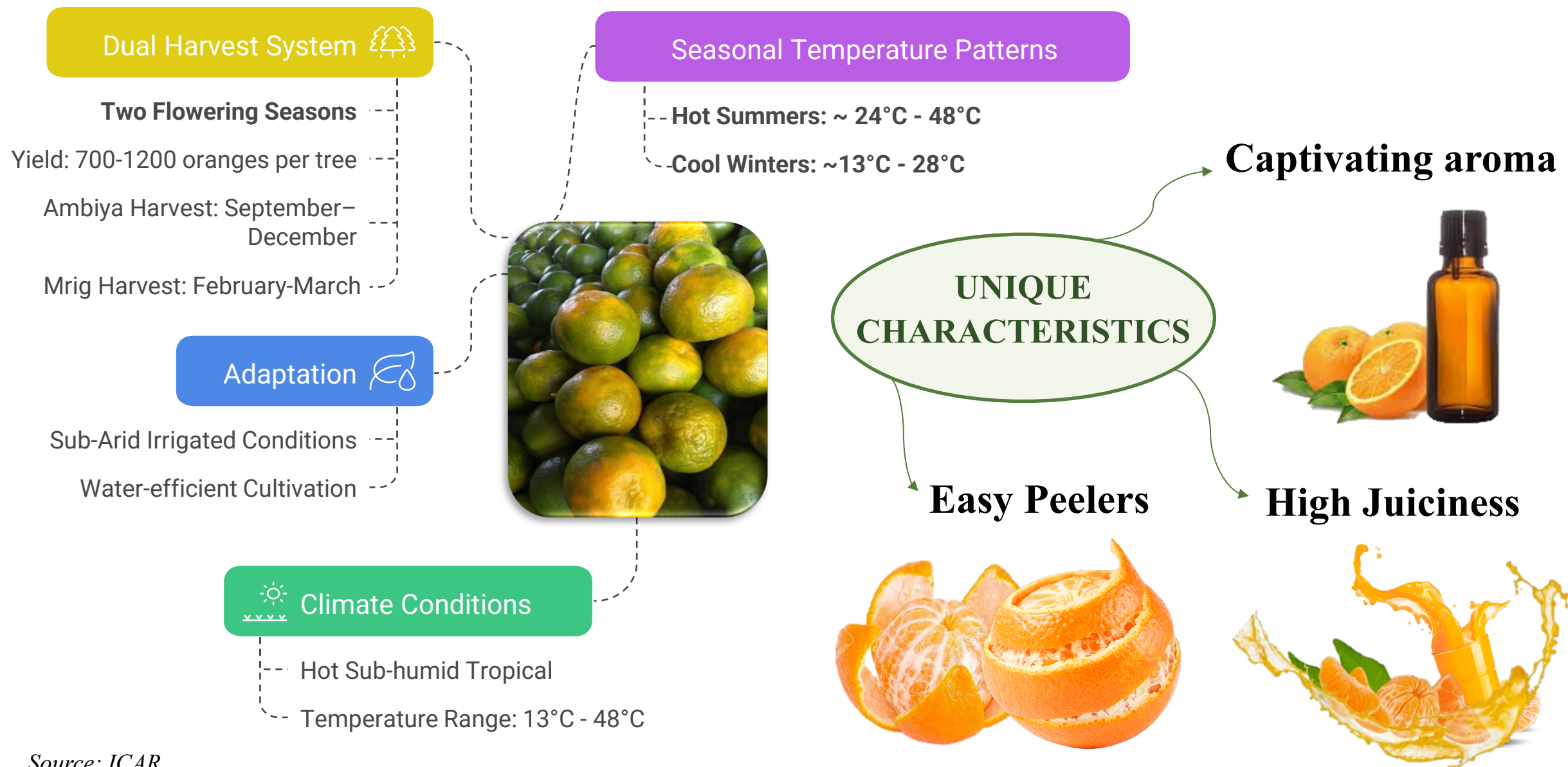
Citrus Production Vs Processing Analysis



India sits on the world's largest untapped citrus processing goldmine - with **95%+ capacity unutilized** despite being the **3rd** largest global producer, positioning it to potentially become a leading citrus processing powerhouse



Sl. No.	G.I. Tagged Variety	Specific G.I. Area	State	Appl. No.	Features of Variety
1	Nagpur Orange	Katol, Nagpur	Maharashtra	385	Fruiting twice a year, unique sweet-sour flavour
2	Coorg Orange	Kodagu, Hassan	Karnataka	33	Sweet taste, greenish color, tight skin
3	Devanahalli Pomello	Devanahalli Taluk	Karnataka	131	Sweet taste and good flavour
4	Arunachal Orange	Wakro, Roing, Dambuk, Mebo etc.	Arunachal Pradesh	375	Loose skin, high juice content, unique taste
5	Khasi Mandarin	Khasi Hills	Meghalaya	465	Sweet, smooth skin, high nutritive value
6	Kachai Lemon	Kachai, Hoomi, Phungthar, Tora, Maichon	Manipur	466	36–56 ml juice/fruit, high ascorbic acid, unique flavour & taste
7	Memong Narang (Citrus indica)	West Garo Hills	Meghalaya	437	Unique taste, colour, pleasant flavour
8	Jalna Sweet Orange	Jalna, Ghansavang, Badnapur, Bhokardan, Jafrabad	Maharashtra	495	Strong correlation between TSS and acidity
9	Assam Lemon (Kaji Nemu)	Tinsukia District	Assam	609	Fruiting year-round, unique flavour, fruits stay longer on tree



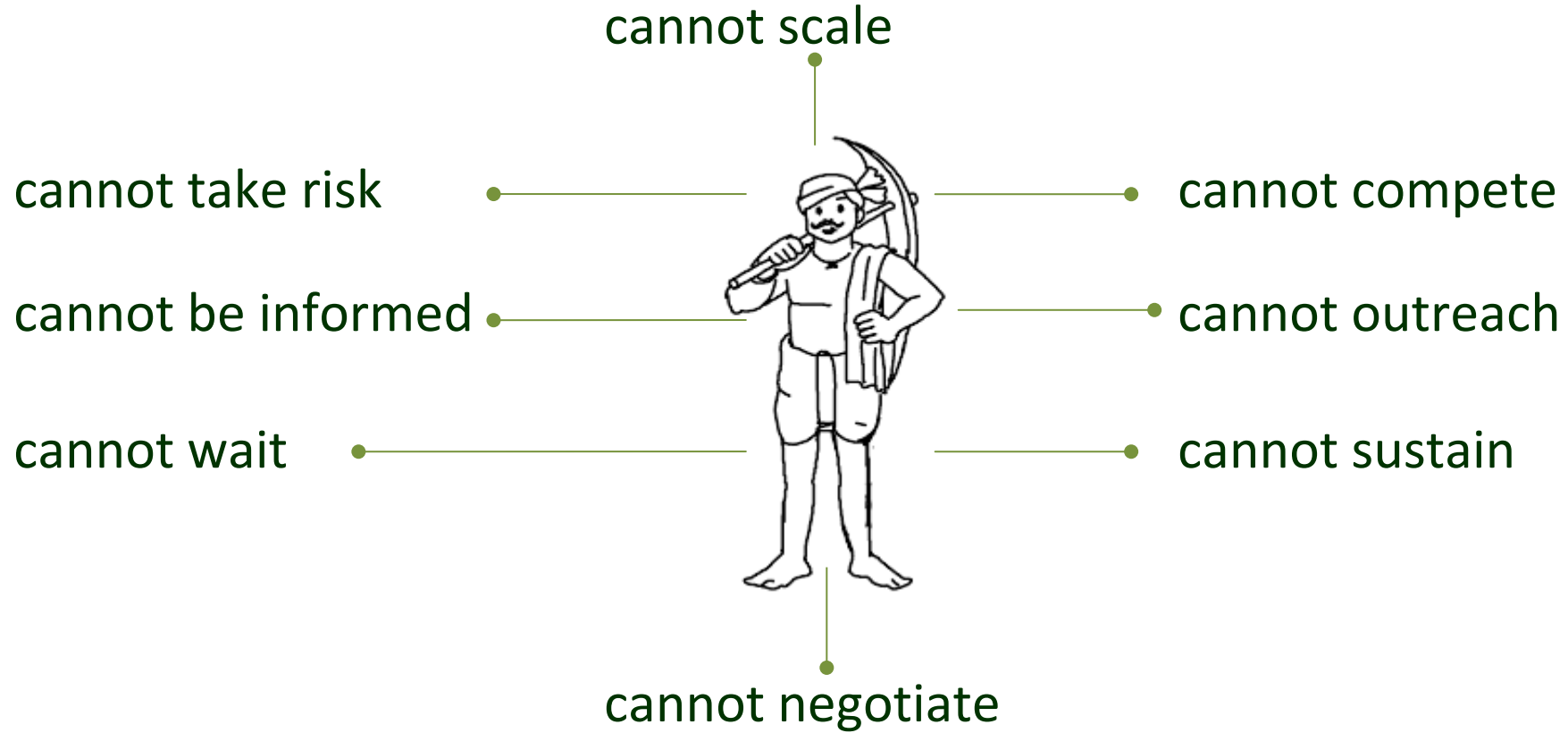


**Values are in MT	Juice Concentrate	Oils	Citrus Pectin	Citrus Fiber
Current Production	8000	400	500	~ 0
Imported	6500	2000	3000	100
Market Growth Rate (next 10 yrs)	6.7% (CAGR)	4.7% (CAGR)	7.6% (CAGR)	6.7% (CAGR)

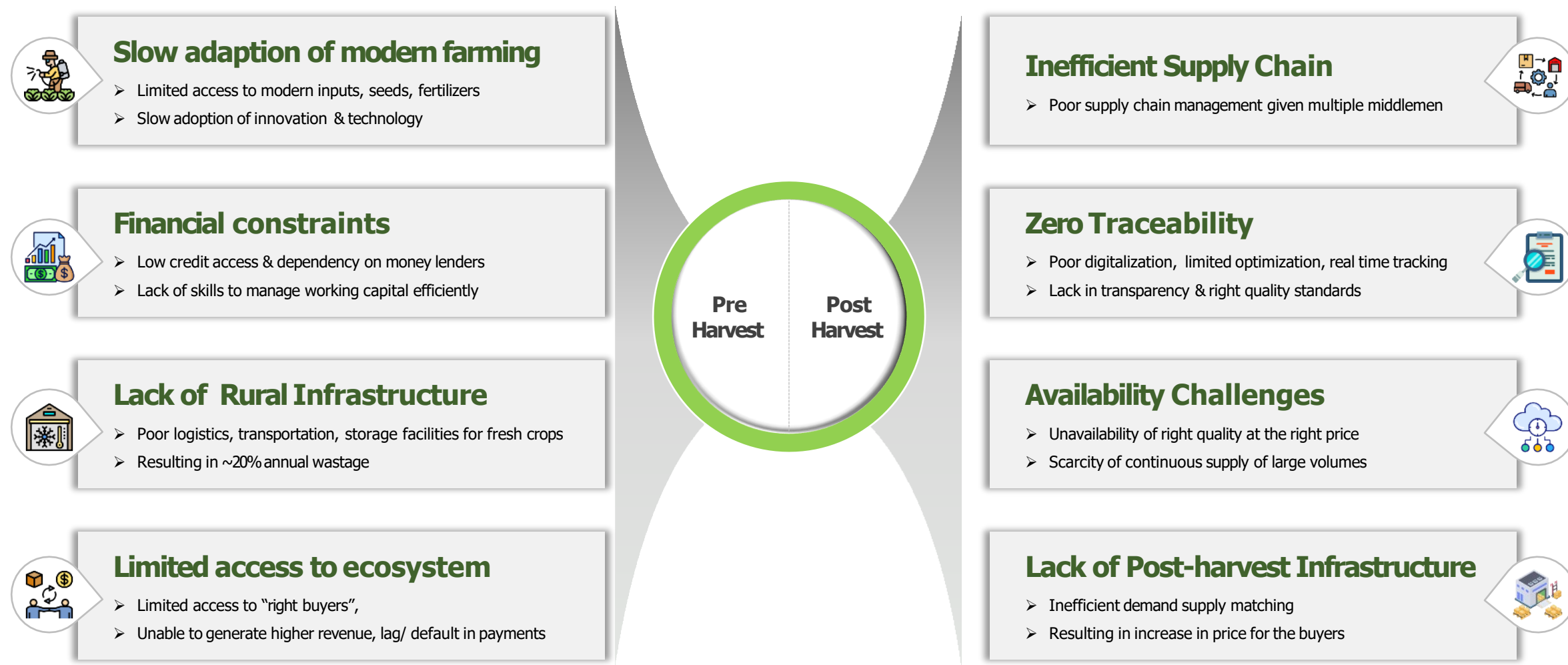
Challenges Faced by the Indian Citrus Industry

Challenges India Has Been Addressing in Citrus Processing

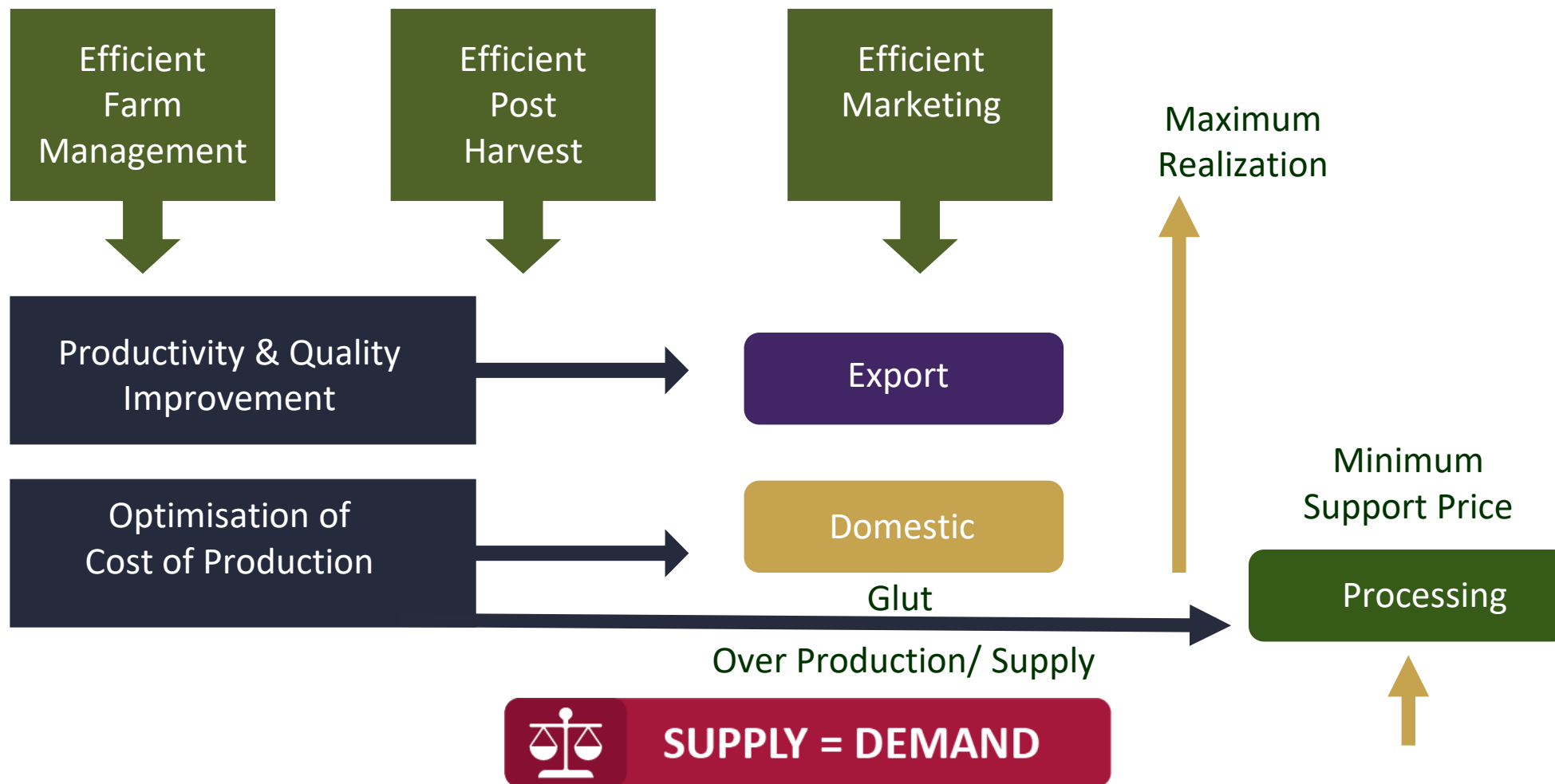
Challenge	2015–18 Baseline	2024–25 Status	Intervention	Outcome
Processing Rate	2–3% processed	5–6% processed	FPO linkages, private units	Large no. of farmers engaged
Post-Harvest Losses	40–45% losses	32–35% losses	Cold storage, better packing	Saving of large amount of produce
Infrastructure	No modern units	Multiple Units	Government & private investment	Multiple integrated hubs operational
Technology	~100% imported tech	Home Grown tech	ICAR-CCRI R&D, tech transfer	Many citrus products developed
Value Addition	Only juice	Oils, pectin, fiber	Circular models, R&D	Significant margin uplift
Market Access	Minimal exports	\$28 Mn exports	Quality certification	Entry into global markets



Hence gets **EXPLOITED**, makes **LOSSES** becomes **DEPRIVED**



Sahyadri Farms' Approach To Addressing These Challenges



SMALL HOLDER FARMERS



Intervention Farm-level

- Efficient resource management
- Productivity improvement at par with global competition
- Quality improvement at par with global standard
- Quality Input/Nursery
- Testing facilities
- Reduction in Cost of Production
- Efficient Finance
- Global Exposure and Skilling

SEED TO PLATE



Intervention Product Value Addition

- State of Art Post Harvest Facilities
- Capable Professionals
- Exhaustive Research & Development
- Skilling

GLOBAL CONSUMER



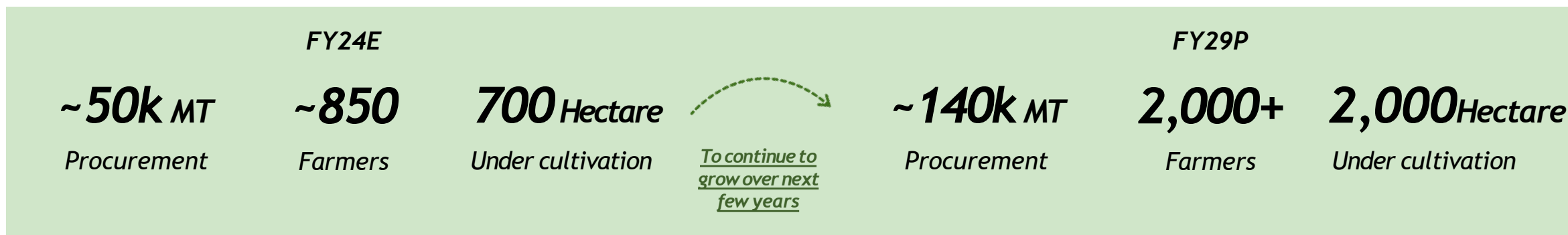
Intervention Sales & Marketing

- Wide Global Networking
- Direct to Consumer Approach
- Established Domestic Wholesale Network
- Developing Domestic Retail Network
- Need Based Processing
- Brand Building
- Skilling

Citrus: Success Story In Making

Started in late 2022, technology and scale are the key drivers

Ventured into Citrus in late 2022 - replicating the success story of Grapes and Tomato



Varietal Mix To Drive Growth

Access to patented varieties

Sr. No.	Type	Varieties
1	Lemon	Eureka
2		Fino
3		Verna
4		Fino
5	Orange	Lane Late
6		Navelina
7		Valencia delta
8		Valencia Midnight
9		Fukomoto
10	Mandarin	Owari
11		Iwasaki
12		Murcott
13		Oronules
14		Nova
15		Tango
16		Sugar Belle



1. Tango

Developed by the **University of California**, having global licencing rights with **Eurosemillas S.A.**

2. Sugar Belle

Developed by the **University of Florida**, having global licencing rights with **EMCO CAL**

Sahyadri Farms acquired India's largest citrus processing plant in Nanded → Improved utilization, enhanced capacity and turned profitable from year 1



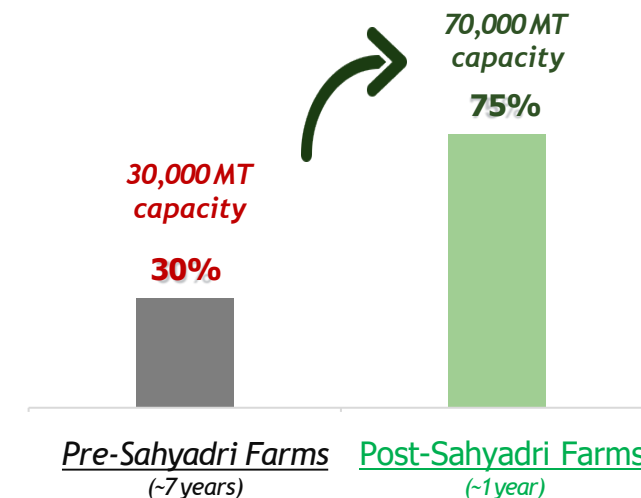
Capex
\$ 5.67Mn



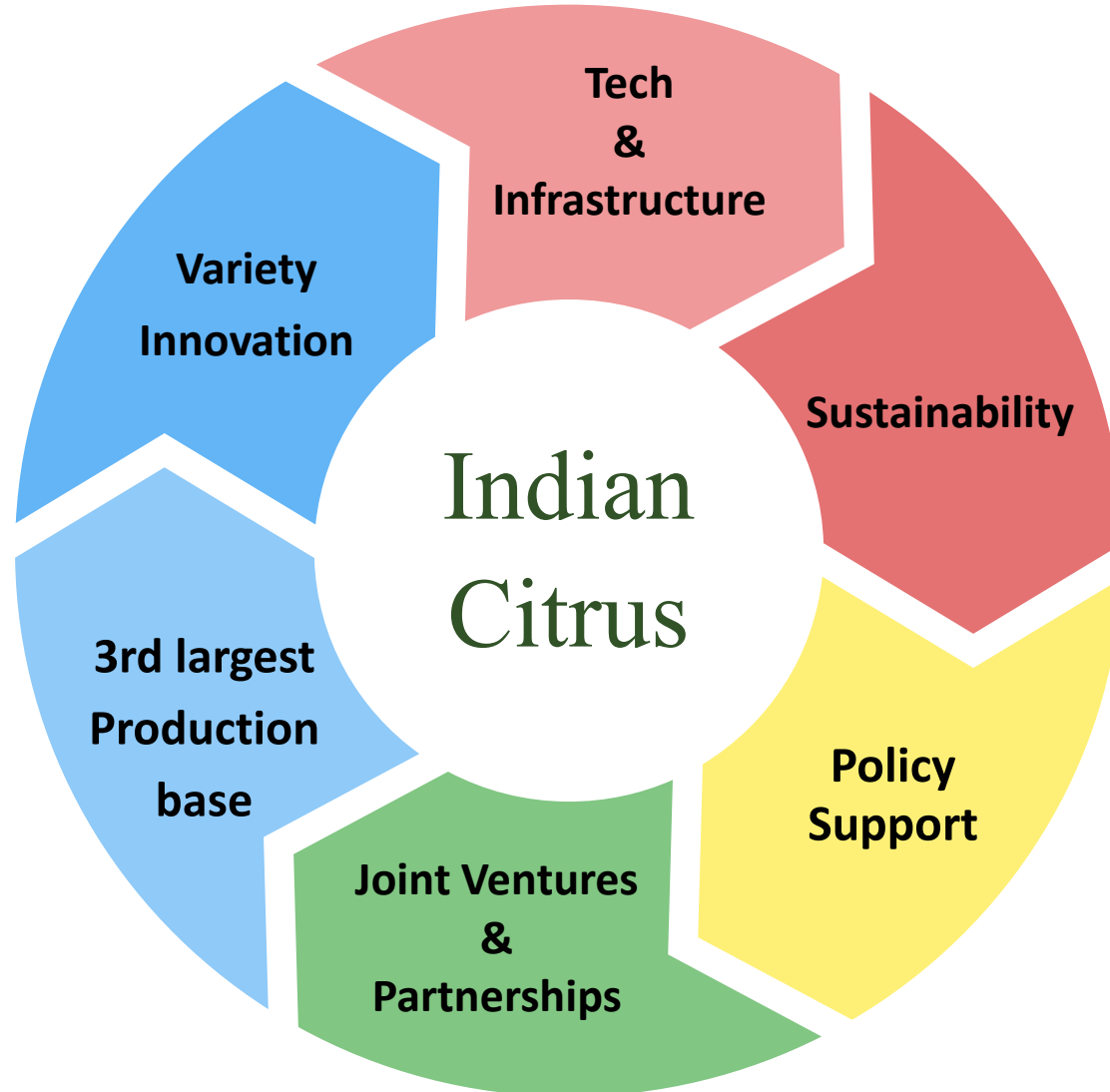
Processing Capacity
600 Mt per day



Cold storage
3,000 Mt



Indian Citrus 2035: From Untapped Potential to Leading Processor

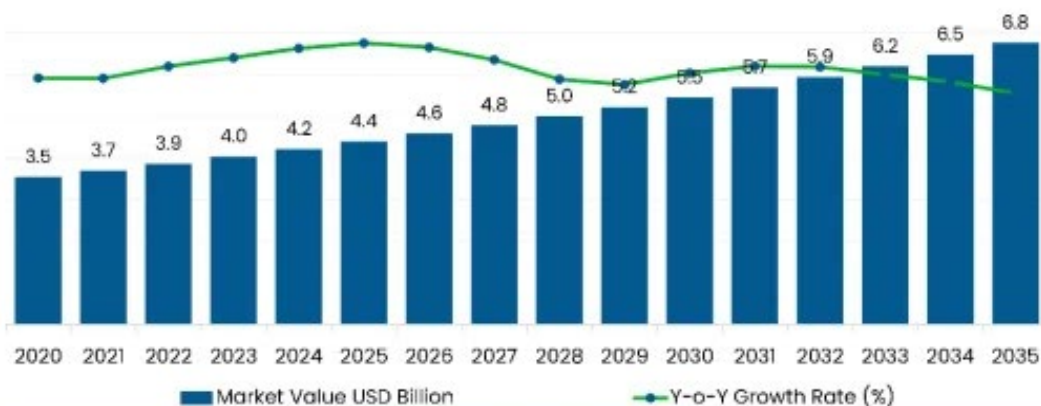


Key Growth Drivers of Indian Citrus

Embracing innovation and sustainability will fuel the future growth of the Indian citrus industry.

Citrus Oil Market

Value (USD Billion) Analysis, 2025-2035



4.4%

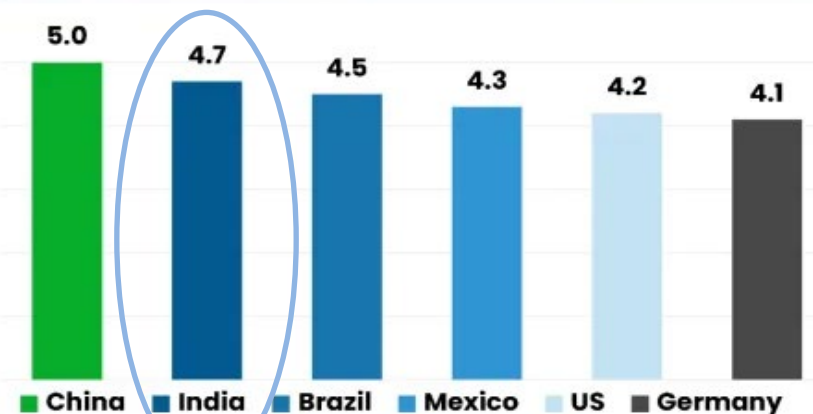
Global Market,
CAGR 2025 - 2035

www.futuremarketinsights.com

Country growth CAGR from 2025 to 2035

Citrus Oil Market

(Example of Country CAGR from 40+ covered in the Report)



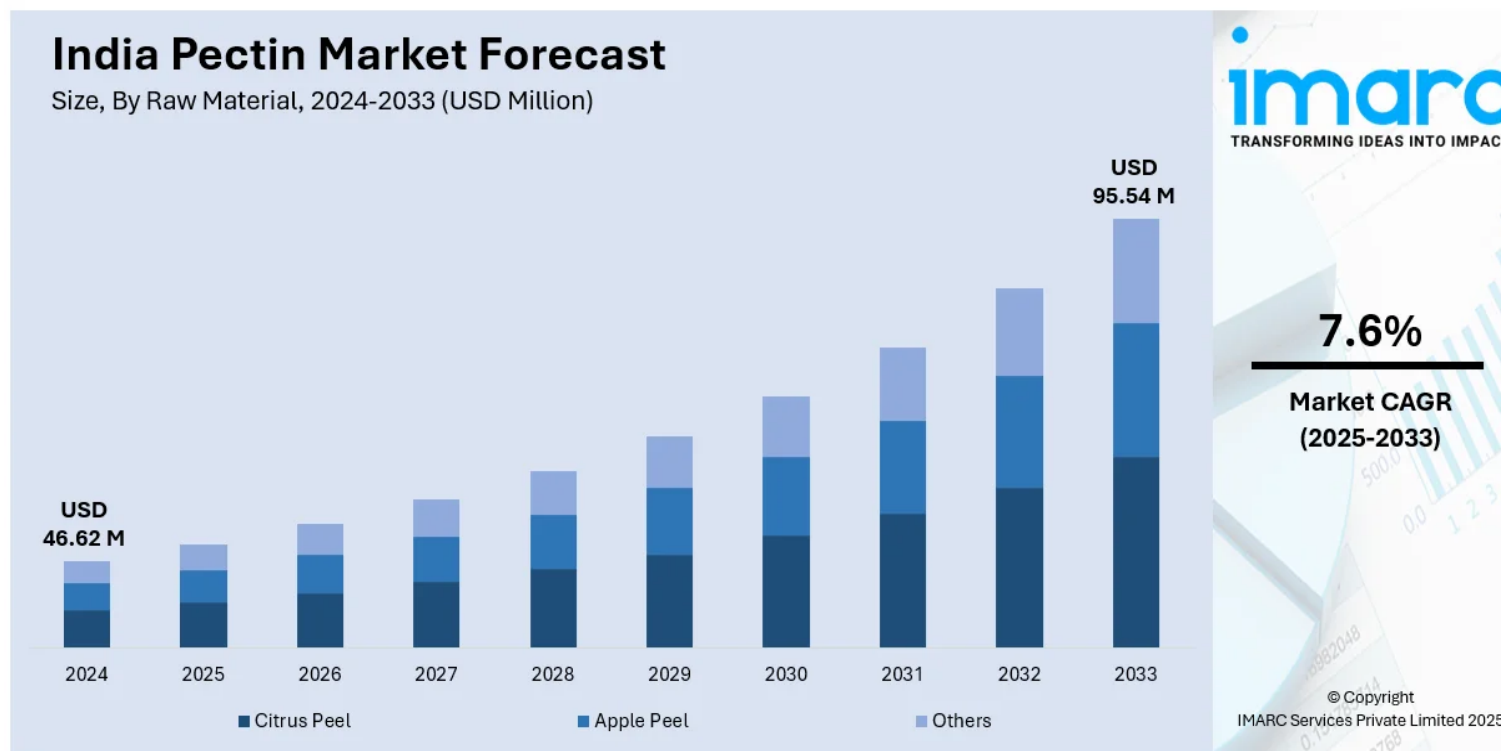
4.4%

Global Market,
CAGR 2025 - 2035

www.futuremarketinsights.com

- **Growth Drivers:** Rising demand for **natural, herbal & Ayurvedic ingredients** in domestic and export markets.
- **Future Outlook:** India positioning as a **global hub for natural wellness ingredients**.

- **Market Growth:** Indian Citrus Oil Industry projected to rise at **4.7% CAGR**.



- **Market Growth (Pectin):** USD 46.6 Mn (2024) → USD 95.5 Mn (2033) at 7.6% CAGR (2025–2033).
- **Market Growth (Citrus Fiber):** Expanding at 6.7% CAGR during 2025 to 2035 period.
- **Food & Beverages:** Rising use as a **natural thickener**; growth in **jams, jellies & confectionery**.
- **Future Outlook:** Strong growth driven by **natural, safe & functional ingredient demand**.

23 Mn MT

*Production
(up 30-50%)*

10-11%

*Processing Share
(vs ~5% today)*

Top 5

*Exporter in Citrus
(Fresh & Processed)*

Thank you !

ICBC 2025 Florida:

A bridge for Innovation, Sustainability & Dependable Supply

Let's Build the Next Leading Citrus Processing Hub – in India