# FOOD PROCESSING

**Towards Sustainable Growth Opportunities**

# State Profile

# Goa

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# Abstract

**Growth and Linkages in the Indian Food Processing Sector:**

The Indian food-processing sector has witnessed remarkable growth, during the last 9 years ending 2023-24, Food Processing Industries sector has been growing at an Average Annual Growth Rate (AAGR) of around 6.55% as compared to around 6.06% in manufacturing at 2011-12 prices. The sector constituted as much as 7.93% share of FPI in manufacturing sector in 2023-2024. The sector is one of the largest employment providers in the organised manufacturing sector with 12.91% employment in the total registered/organised sector. This highlights its competitiveness and capacity to cater to global markets.

India is the world's largest producer of milk, pulses and jute and ranks as the second largest producer of rice, wheat, sugarcane, groundnut, vegetables, fruit and cotton. It is also one of the leading producers of spices, fish, poultry, livestock and plantation crops. This abundant raw material base offers immense potential for value addition and export. Notably, India reported the processed food exports amounted to USD 10.09 billion in 2024-2025 with significant shares in processed vegetables and fruits, pulses, cereal preparations etc. Further, the sector has attracted 7.21 billion FDI inflow in the last one-decade ending 2024-25. Recognizing the sector's significance, Ministry of Food Processing Industries has extended support and incentives for creation of modern infrastructure with efficient supply chain management, creation of employment opportunities, reducing post-harvest losses, increasing the processing level and enhancing export of the processed foods.

**Agricultural Strength and Economic Advantages of Goa:**

Goa possesses untapped resources that can enhance agriculture and the processing of agro products. With an efficient logistical network connecting to nearby states, which are major industrial hubs, there is immense potential for growth in this sector. The state has the necessary infrastructure to support agricultural activities and the processing of agricultural products. Goa benefits from the Pradhan Mantri - Kisan Sampada Yojana scheme and various state schemes aimed at promoting fishing and agricultural associated units. Additionally, the state has implemented a robust single window system to facilitate the setup of industries. The government's support and the availability of these schemes create a conducive environment for the development of the food processing sector in Goa.

Goa offers abundant opportunities in the production and processing of cashew nuts, coconuts, and fisheries-based products. As a prominent manufacturer and export house in these sectors, Goa has established a strong market presence. Furthermore, with its status as a major tourist hub, there is a high demand for agricultural and food products in the hospitality industry, particularly for supplies to hotels, restaurants, and catering (HORECA) businesses. This presents additional prospects for growth and expansion in the food processing sector in Goa.

# 1. Overview

Goa is situated on the western coast of India and is bordered by the Arabian Sea to the west, Maharashtra to the north, and Karnataka to the south and east. It is renowned for attracting tourists who are captivated by its breathtaking natural scenery, exquisite beaches, and diverse culture.

The strong expansion of Goa's economy can be credited to the prosperous performance of its various industries, such as fishing, agriculture, tourism, and pharmaceuticals. Agriculture plays a vital role in contributing to Goa's economic well-being.

**Table1: Goa Key Rankings**

| **Particulars** | **Details** |
|---|---|
| State Capital | Panaji |
| Geographic Area[1] | 3,702 sq. km |
| Population (Census 2011)[2] | 1.459 million |
| Total Road Length (March, 2020)[3] | 18,972 km |
| Gross State Domestic Product (GSDP), (Current prices) 2022-23[4] | USD 10.69 billion |
| Airport | International Airports: Dabolim & Mopa |
| Rail Network (2023-24)[5] | 69 km |
| Seaports[6] | 1 Major ( Mormugao), 5 Minor |
| Navigable Internal Waterways[7] | 255 km |
| Industrial Area[8] | No of Industrial Areas: 24 |
| Infrastructure[9] | 2 Air Cargo Terminals<br>1 Inland Container Depots (ICD)<br>1 Container Freight Stations (CFS)<br>4 Railway Goods Sheds<br>7,705 MT Cold Storage Capacity<br>12,902 MT Warehouse Capacity |
| Installed power[10] | 649.11 MW |
| Available land[11] | Mixed Category: 193 ha |

[1] Goa Industrial Development Corporation| General Information
[2] https://rbidocs.rbi.org.in/rdocs/Publications/PDFs/HANDBOOK09122024426229B8B51C4BDE99607F1ADC64154A.PDF
[3] https://morth.nic.in/sites/default/files/Basic%20Road%20Statistics%20of%20India-2019-20.pdf
[4] https://rbidocs.rbi.org.in/rdocs/Publications/PDFs/HANDBOOK09122024426229B8B51C4BDE99607F1ADC64154A.PDF
[5] https://rdso.indianrailways.gov.in/railwayboard/uploads/directorate/stat_econ/2025/IR%20Year%20Book%202023-24-English.pdf
[6] https://www.goa.gov.in/wp-content/uploads/2024/08/Policy-Goa-Logistics-and-Warehousing-Policy-2023.pdf
[7] ibid
[8] https://www.pib.gov.in/PressReleseDetailm.aspx?PRID=1695462
[9] https://warehousingindia.org/wp-content/uploads/2022/10/LEADSReport2022_13October2022.pdf
[10] https://cea.nic.in/wp-content/uploads/installed/2024/03/IC_Mar_2024_allocation_wise.pdf
[11] https://indiaindustriallandbank.gov.in/login1

# 2. Advantage Goa

- Goa, located in western India, borders the Arabian Sea and shares land boundaries with Maharashtra and Karnataka. It has a 104 km coastline, 255 km of inland waterways, and is among the fastest-growing states.
- Goa has a strong presence in fishing, agriculture, tourism, and pharmaceuticals, with key industries like mining, shipbuilding, and iron & steel concentrated in North and South Goa.
- Tourism, the largest segment of Goa's services sector, thrives on its scenic beauty and cultural diversity, attracting over 34 lakh domestic and 32,000 foreign tourists in 2021–22, with 4,245 lodging facilities.
- The Mormugao port handled 17.33 million tonnes of cargo traffic in 2022-23.
- Cashew processing has been a traditional industry in the state.
- 121.46 thousand tonnes of marine fish were harvested in 2021-22. In 2021-22, exports of marine fish and fishery products from Goa stood at USD 13.57 million.
- According to the Department for Promotion of Industry and Internal Trade (DPIIT), Foreign Direct Investment (FDI) inflow in the state stood at USD 165.57 million between October 2019-June 2024.[12]

[12] https://www.ibef.org/states/goa-presentation

# 3. Local Food System

### 3.1 Indigenous Produce

Goa, being in the tropical zone and near the Arabian Sea, has a hot and humid climate for most of the year with moderate temperature variation. Goa receives heavy precipitation (2500-3200 mm). Soils of Goa are mostly laterite with acidic soil reaction. The soil often has poor water holding capacity. Typical agricultural areas in the state are upland and lowland. The coastal saline soil (Khazan) spread over 18000 hectares area. The major food crops grown in the state are paddy, cereals, pulses, oilseeds, sugarcane and vegetables. The important horticultural crops of the state are cashew, coconut, arecanut, mango, banana, pineapple and spices. Fishing is another important activity covering mainly marine fisheries. Major crops, livestock and fisheries of the state of Goa are:

- Field crops: Rice, pulses (cowpea, moong), oilseeds, sugarcane, etc.
- Plantations: Coconut, Cashew, Arecanut, Oil palm, etc .
- Fruit crops: Mango, banana, pineapple, jackfruit, etc.
- Spices: Black pepper, Nutmeg, Kokum, Turmeric, Cinnamon, Ginger, etc.
- Tubers: Colocasia, Elephant foot yam, sweet potato, etc.
- Livestock: Dairy cattle, pig, poultry, buffalo, goat, rabbit etc.
- Fisheries: Pelagic fish, demersal fish, crustacean and molluscan species, etc.[13]

**State has received 10 Geographical Indicator (GI) Tags for[14] -**

- Harmal Chilli
- Myndoli Banana
- Khola Chilli
- Feni
- Goa Cashew (Kaju or Caju)
- Agsechi Vayingim (Agassaim Brinjal)
- Sat Shiro Bheno ( Sat Shirancho Bhendo)
- Goa Mankurad Mango
- Goan Khaje
- Goan Bebinca

### 3.3 Key Production Statistics

**Table 2: Crops ('000 MT)[15], (2023-24)**

| S.No. | Particulars | Production |
|---|---|---|
| 1. | Rice | 95 |
| 2. | Sugarcane | 5.7 |

[13] https://www.agri.goa.gov.in/Upload/SwayampurnaGoa.pdf
[14] https://ipindia.gov.in/writereaddata/Portal/Images/pdf/State_wise_Registered_GI_of_India_15_05_2025.pdf
[15] https://rbidocs.rbi.org.in/rdocs/Publications/PDFs/HANDBOOK09122024426229B8B51C4BDE99607F1ADC64154A.PDF

| S.No. | Particulars | Production |
|---|---|---|
| 3. | Pulses | 3.8 |
| 4. | Cashew Nut[16] | 26.07 |
| 5. | Coconut[17] | 105.01 |

**Table 3: Livestock, 2023-24[18] & Fisheries**

| S.No. | Particulars | Production |
|---|---|---|
| 1. | Milk ('000 MT) | 63.66 |
| 2. | Eggs (lakh nos.) | 424.35 |
| 3. | Meat ('000 MT) | 7.8 |
| 4. | Fish (lakh MT) (2022-23)[19] | 1.40 |

**Table 4: Fruits[20] ('000 MT), 2023-24**

| S.No. | Particulars | Production |
|---|---|---|
| 1. | Mango | 10.08 |
| 2. | Banana | 29.43 |
| 3. | Pineapple | 5.52 |

**Table 5: Spices ('000 MT)[21], 2022-23**

| S.No. | Particulars | Production |
|---|---|---|
| 1. | Black Pepper | 0.35 |
| 2. | Nutmeg | 0.02 |

[16] https://agriwelfare.gov.in/sites/default/files/2023_24_FinalEstimates.xls
[17] ibid
[18] https://dahd.gov.in/sites/default/files/2025-01/FinalBAHS2024Book14012025.pdf
[19] https://dof.gov.in/sites/default/files/2024-06/Handbook.pdf
[20] https://agriwelfare.gov.in/sites/default/files/2023_24_FinalEstimates.xls
[21] ibid

# 4. Production Clusters

Agro Production Clusters (APC) of the State as identified under APC sub-scheme under PMKSY:

**Table 7: Goa Production Cluster[22]**

| S.No. | Product | District |
|---|---|---|
| 1. | Jackfruit based products | North Goa |
| 2. | Coconut based products | South Goa |

Goa has several major clusters and parks for agro and food processing industries including:[23]

1. **Horticulture Estate at Dharbandora:** This estate is a significant cluster for the horticulture industry. It includes facilities like cold storage, primary processing platforms, and other modern facilities to aid farmers.
2. **Industrial Estates:** The Goa Industrial Development Corporation manages a variety of industrial estates across the state, many of which house food processing units. These estates are in regions like Madkaim, Sancoale, Verna, Kundiam, Bethora, and more.
3. **Seafood and Fisheries Cluster:** Given the state's extensive coastline, there are several areas like Cutbona, Malim, and Usgaon where industries related to fisheries and seafood processing have grown.
4. **Cashew Processing Clusters:** Goa has multiple regional clusters known for processing cashew nuts, one of the state's significant agricultural produces.

[22] ONE DISTRICT ONE PRODUCT– MoFPI
[23] https://www.goaipb.goa.gov.in/agro-and-food-processing/

# 5. Agricultural Marketing

The Directorate of Agricultural Marketing and Agricultural Foreign Trade in Goa supervises the marketing of agricultural products. It aims to enhance the marketing system, promote efficiency, foster coordination, support exporters and producers, organize export promotion events, identify surplus for export, and ensure fair prices. These objectives are achieved through the Goa Agricultural Produce Marketing (Regulation) Rules 1969, which align with the Maharashtra Agricultural Produce Marketing (Regulation) Act 1963.[24]

**Table 8: Agricultural Markets in Goa**

| S.No. | Particulars | Details |
|---|---|---|
| 1. | Notified Commodities[25] | 27 |
| 2. | Market Yards[26] | 8 |
| 3. | Food Processing Industries[27] | 96 |

[24] https://gsamb.in/about-gaplmb/
[25] https://gsamb.in/commodities/
[26] https://gsamb.in/market-yards/
[27] Annual Survey of Industries 2022-23

# 6. Potential Opportunities

Goa has established a strong presence in agricultural production, benefitting from its fertile land that facilitates the cultivation of diverse crops. These include paddy, pulses, sugar cane, as well as a variety of garden crops like coconut, cashew, areca nut, mangoes, jackfruits, bananas, and pineapples. Given the abundance of agricultural resources, the realm of food processing holds great potential for growth and advancement in the region.

### 6.1 Fruit processing

In Goa, there are abundant food processing opportunities for mangoes and pineapples. These tropical fruits thrive in the region's favourable climate and are highly sought after for their distinctive flavours. Here are some potential avenues for food processing in Goa:

- **Mango processing:** Goa is renowned for its delicious mango varieties, including Alphonso, Mankurad, and Mallika. Mango processing can involve activities, such as, pulping, juice extraction, canning, and manufacturing mango-based products like jams, chutneys, and beverages.
- **Pineapple processing:** Pineapples are widely cultivated in Goa, particularly the Khaje variety. Setting up pineapple processing facilities can involve activities like slicing, canning, juicing, and production of pineapple-based products such as preserves, candies, and dried pineapple.
- **Other value-added processed products** include - Fruit Pulp and Puree, Fruit Juices and Nectars, Dried Fruits and Snacks, Jams, Jellies, and Preserves, Frozen Desserts (ice creams, sorbets, and frozen yogurts), Fruit-Based Confectionery (candies, chocolates, and fruit-based sweets), etc.

### 6.2 Nut Processing

Cashew nut processing has been a traditional industry in the State.

- Ready-to-consume items such as confectioneries like Kaju Katli, savoury snacks including chilli, paprika, honey, spicy and sweet varieties, as well as crisps and extruded snacks. Additionally, there are food ingredients like breakfast cereals, fruit and nut bars, and chocolate products infused with cashew nuts. Furthermore, roasted, fried, and dried vegan dips and pastes are also available.
- Dairy substitutes - Cashew nuts can serve as a viable alternative to milk and other dairy products. They can be utilized to produce butter, cheese, milk, cream, yoghurt, powdered forms, and oil.

### 6.3 Fisheries

Goa, located on the western coast of India, offers ample opportunities for food processing in the fisheries sector. With its abundant marine resources and vibrant fishing industry, the State provides a conducive environment for fish processing activities. Some potential opportunities in food processing for fisheries in Goa.

- Infrastructure investable opportunities such as Pre-processing units, Packaged food units, Raw Processing, Hatcheries, Freezing Systems, Warehousing, Cold Storage, Fish Filleting and Packaging, Fish Canning, etc. can be focused areas to present.
- Value added products - Fish Pickling and Smoking, Fish-based Ready-to-Eat Products, Fish Sauce and Fish Paste canned fish, frozen fish, fish fillets, Fish Snacks and Fish Jerky, and fish steaks, etc.
- Fish Meal and Fish Oil - Fish oil is an important source of Omega 3 fatty acids and is used in the production of feed, in pharmacological products, and as human food, such as margarine, pastries, or dietary supplements. Utilizing fish waste or low-grade fish, processing units can produce fish meal and fish oil, which are widely used in animal feed and aquaculture industries.

# 7. State Government Initiatives and Schemes

The Goa State Government has implemented numerous reforms to create a conducive and investor-friendly business environment for those interested in establishing their businesses within the State. The table below highlights some of the key initiatives undertaken by the State Government:

- **Goa Online**
  A collaborative initiative by the Department of Information Technology in Goa and the Department of Electronics & Information Technology, Government of India. It aims to offer electronic access to public services at the district and sub-district level. Through a user-friendly portal, 'Goa Online' currently provides over 225 online services. Its primary goal is to support investors by ensuring a transparent, efficient, and streamlined process.[28]
  (goaonline.gov.in)
- **State Industrial Land Bank Portal**
  Industrial parks serving as a one-stop repository of all infrastructure-related information such as connectivity, infra, natural resources and terrain, plot-level information on vacant plots, and contact details.[29]
  (iis.ncog.gov.in)
- **Central Industrial Land Bank Portal**

  A GIS (Geographic Information System) system for displaying the availability of land and infrastructure with details about all State-owned industrial estates along with the prevailing land rates, connectivity, and utility infrastructure. (tsiic.cgg.gov.in)

- **New Goa Industrial Growth and Investment Promotion Policy, 2022[30]**
  The policy aims to offer assistance to local businesses and those already established in the region, while also attracting fresh investments to the State through targeted incentives and the development of enabling infrastructure.
- **Goa Start-up Policy 2021[31]**
  The Government of Goa has implemented the Goa Start-up Policy 2021 with the objective of establishing Goa as a coveted hub for start-ups within India. The vision is to position Goa among the top 25 start-up destinations in Asia by the year 2025. The policy places a strong emphasis on fostering the growth of at least 500 innovative and technology-driven start-ups, while also encouraging the development of sustainable start-ups focused on providing service-oriented solutions in Goa.

The State Government of Goa has introduced significant incentives for food processing and other industrial units through its major policies. A summary of these key incentives is provided in the table below:

[28] Goa Online | Govt. of Goa
[29] Goa Industrial Development Corpora□on | Government of Goa
[30] Goa Industrial Growth and Investment Promo□on Policy, 2022 | Department of Industries | Govt. of Goa
[31] Goa Start-up Policy 2021

**Table 9: Key initiatives for food processing sector**

| Key Initiatives | Goa Investment Policy, 2014[32] |
|---|---|
| Capital subsidy | **Micro units -** Capital subsidy of 30% of the capital cost, up to a maximum of Rs 10 lakh, with the building/office subsidy limited to Rs 5 lakh.<br>**Small units -** Capital subsidy of 30% of the capital cost, up to a maximum of Rs 20 lakh, with the building/office subsidy limited to Rs 10 lakh |
| Interest subsidy | • Interest subsidies capped at Rs 25 lakh for micro, small, and medium manufacturing industries falling under the white, green, and orange categories, and commencing production after 1st October, 2017.<br>• The subsidy for interest on the term loan amounts to 30% of the interest paid, with the maximum limit set by this scheme.<br>• The subsidy for interest on working capital loan is either 1.5% of the total turnover or 30% of the interest paid by the units/enterprise, whichever is lower. |
| Employment Generation | • Enterprises engaging a minimum of 60% of Goan manpower on regular employment are eligible for benefits. Reimbursement shall be restricted to Rs 7,000/- per Goan employee per month. The total subsidy shall not exceed Rs 25.00 lakh per annum, on pro rata basis depending on the date of production. |
| Intellectual Property rights | • Reimbursement of 50% of the professional fees for registration or fees paid to the registry for registration of Intellectual Property Rights (IPR) subject to a limit of Rs 500,000 per unit.<br>• Reimbursement of charges to the extent of 100% of actual expenditure per certification, during the validity period of the Scheme subject to a combined ceiling of Rs 8.00 lakh only for the entire period of the Scheme will be granted to the Unit/Institution. |
| Water & Energy | • Audit: Reimbursement of 25% of the cost of water and energy audit by a recognized institution/consultant.<br>• Water & energy conservation equipment: Reimbursement of 25% of the cost of water and energy conservation equipment, subject to a cap of Rs 100,000 per unit.<br>• Renewable energy: Reduction of 100% in electricity duty for units installing renewable power generation equipment subject to the unit meeting at least 25% of its power requirement from renewable sources. |
| Training linked incentives | • Reimbursement of 75% of the training costs for prospective Goan employees subject to a maximum of Rs 75,000 per prospective employee and Rs 750,000 per unit per year. The reimbursement will be only after the prospective Goan employee is employed by the unit. |
| Financial Assistance for Fishing & Allied Activities | • The Directorate of Fisheries has unrolled numerous schemes for supporting Fisherman which include from developing Inland/Marine aquaculture farms, to purchasing of fishing crafts nets and accessories, fueling the vessels and storage aid for small fishermen. |

[32] Goa Investment Policy 2014

# 8. Regulatory Framework: Registration / NoCs / Licenses

The table below represents the indicative information regarding Regulatory Mechanism available in the State.

### 8.1 For starting operations

**Table 10: Regulatory Mechanism in Goa**

| S.No | Name of Service | Authority/ Agency/ Office/ Department Officer Granting Approval |
|---|---|---|
| 1. | Registration Of Company | Ministry Of Corporate Affairs (MCA) |
| 2. | Registration Under FSSAI Act,2006, Regulation 2011 | FSSAI, Government Of India<br>Health & Family Welfare Department & Food Safety |
| 3. | License Under FSSAI Act,2006, Regulation 2011 | FSSAI, Government of India<br>Health & Family Welfare Department & Food Safety |
| 4. | Intention To Invest Form | Goa Online Portal |
| 5. | Building Plan Approval | Housing & Urban Planning Department |
| 6. | Consent To Establish Under Air And Water Act (NOC) | Goa State Pollution Control Board |
| 7. | License Under Contract Labour Act, (Regulation And Abolition), 1970 | Labour & Employment Department |
| 8. | Registration Under GST (Goods And Services Tax Rules, 2017) | Department Of State Tax Goa |
| 9. | Consolidated Consent & Authorization Under Water Act, 1974, Air Act, 1981 & Authorization Under The Hazardous And Other Wastes (Management And Transboundary Movement) Rules, 2016 | Goa State Pollution Control Board |
| 10. | Application For Pre-Operational Fire NOC (National Building Code, 2005) | Fire & Emergency Department |

### 8.2 For setting up of business

**Table 11: Regulatory Mechanism in Goa**

| S.No | Name Of Service | Authority/ Agency/ Office/ Department Officer Granting Approval |
|---|---|---|
| 11. | Power Connection (Metering & Connection Release, Site Inspection & Estimation) | Goa Electricity Department |
| 12. | Authorization And Registration Under E-Waste (Management) Rules 2016 | Goa State Pollution Control Board |
| 13. | Authorization Under the Hazardous And Other Wastes (Management and Transboundary Movement) Rules 2016 | Goa State Pollution Control Board |
| 14. | Consent To Operate Under the Air (Prevention and Control Of Pollution) Act 1981 | Goa State Pollution Control Board |
| 15. | Registration Under the Building and Other Construction Workers (Regulation of Employment and Conditions of Service) Act 1996 | Labour Department |
| 16. | Registration Of Principal Employers' Establishment Under the Provision of The Contracts Labour (Regulation And Abolition) Act 1970 | Labour Department |
| 17. | License For Contractors Under Provision of The Contracts Labour (Regulation and Abolition) Act 1970 | Labour Department |
| 18. | License Under the Factories Act, 1948 | Labour Department |
| 19. | Application For Water Connection | Public Works Department |
| 20. | Land Allotment in Industrial Estates | Goa Industrial Development Corporation |

# 9. Major Players in Food Processing and Allied Sectors

### 9.1 Beneficiaries under PMKSY Scheme of MoFPI, Government of India[33]

**Table 12: Details of approved projects under Creation / Expansion of Food Processing & Preservation Capacities (CEFPPC)**

| State | Project Name | Sector | District | Status |
|---|---|---|---|---|
| Goa | M/s Goa Bagayatdar Sahakari Kharedi Vikri Sanustha Maryadit | Consumer Products | North Goa | Operational |

### 9.2 Beneficiaries under PMFME Scheme of MoFPI, Government of India

**Table 13: Total assistance approved under PMFME - As on 31.05.2025**

| State/UT | Goa |
|---|---|
| Number of Micro Enterprises | 114 |
| Approved Subsidy (Rs in Crore) | 4.14 |
| Number of SHG Members | 1361 |
| Approved Subsidy (Rs in Crore) | 4.94 |
| Number of Approved Incubation Centre | 1 |
| Approved Subsidy (Rs in Crore) | 2.03 |
| Number of Approved B&M Projects | 1 |
| Approved Subsidy (Rs in Crore) | 1.04 |
| Net Enterprises-PMFME | 1477 |
| Total Subsidy under PMFME (Rs in Crore) | 12.15 |

### 9.3 Beneficiaries under PLI Scheme of MoFPI, Government of India (Operational Units)

**Table 14: Details of operational units under PLI Scheme**

| Name of Scheme | Beneficiary Name | Sector | District | Status |
|---|---|---|---|---|
| PLISFPI | Nestle India Ltd. | Fruits & Vegetables | North Goa | Operational |

[33] https://sampada-mofpi.gov.in/#

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