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STATUS AND TREND OF TOMATO PROCESSING IN INDIA: AN OVERVIEW

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Abstract

India scores second position in the World tomato production. Various Indian food processors processes tomato either into primary or secondary processed products or instant use products. In the present paper, details about the current trend of increased demand for tomato processing in India is highlighted with some details about key tomato product manufacturers.

Introduction

With 10.52% contribution in the World tomato production, India stands at second position globally in 2019. In 2016-17, tomato production in India was about 20,000,000 MT (Fig. 1). Various food processors in India processes tomato either into primary processed products like tomato paste, tomato pulp, tomato juice or into secondary processed products like tomato ketchup, tomato sauce, tomato-based culinary sauce and chutney or instant use tomato soups, dehydrated curries and powders. The major players in tomato processing are Nestle India, Hindustan Unilever, Kraft Heinz, Conagra Brands, Field Fresh Foods, Cremica Food Industries Ltd., Global Green, Reliance retail Limited, Mother Dairy, Godrej Beverages & Foods, NAFED and ITC. On one hand, only 1 % of India's tomato production is reported to be processed into different tomato products in comparison to the global average of 25 % while on other hand, huge losses of about 25-30% are incurred in the supply chain due to lack of proper processing facility at the farmer's end.

Value-added Tomato Products and Applications

According to World Processing Tomato Council (2015), 130,000 tonnes of tomato were processed in India. Value-added products produced from tomatoes include tomato juice, paste, flavoured paste, diced/peeled tomatoes, strained tomato pulp, ketchup, pasta, pickles and pizza sauces, salsa, gravies, ready-to-eat (RTE) curries and tomato-based powder products.

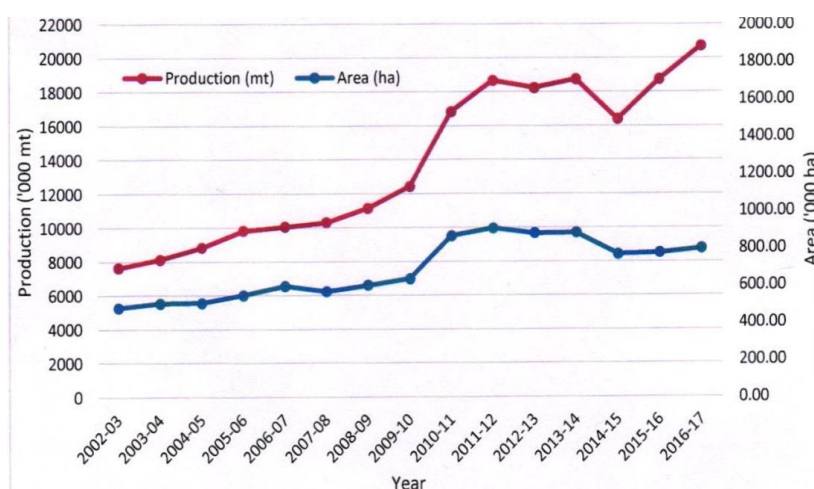


Fig. 1 Year-wise All India Tomato Production (2002-17)
Government of Consumer Affair, GOI (Price Monitoring Cell), 2017-18

Various food processors like GD Foods (Brand name 'Tops'), Future Consumer Enterprises Ltd. (Brand name 'Tasty Treat'), Mother Dairy, NAFED, Griffith Lab, Patanjali Ayurved Limited, GRG Foods and many Farmers Producers Organizations (FPO) are processing tomato into tomato paste/pulp/juice or into various value-added tomato products either at their own processing unit or in Food Parks on payment basis.

Processed tomato products are gaining wide usage not only in snacks food industry/ hotels/quick serving restaurants but also in the individual household kitchen. Over the past few years, more than 12% annual growth rate in India's tomato production has pushed high the interest amongst farmers to grow tomato as a major commercial crop. (National Horticultural Research & Development Foundation, 2017-18). Also, the annual growth rate of tomato-based processed food consumption is over 30% which is creating a massive demand for the processed tomato products. Due to the unexpected rise in the market price of fresh tomato during late-off season in 2014 and 2016, many Indian consumers are buying the affordable and relatively price-stable processed and packaged tomato purees and pastes to prepare curries at home. Further, during the lockdown period imposed due to Covid-19, consumers find it easier to purchase in bulk and use the hygienically packed long shelf-life food products including tomato products over daily buying of fresh tomato. The Indian market for soup has been showing an annual growth rate of 26%. Due to the changing eating habits and lifestyles of younger and wealthier consumers, the demand for processed tomato products like tomato paste and tomato soup is expected to go up in India as well as in abroad.

Leading Indian Tomato Processors

Preservation of tomato by processing it into various high-value products with extended shelf-life can help the country to address the problem of tomato spoilage to a great extent. It can also help address the problem of sudden drop in the tomato price during glut season because of which farmers fail to get the right price for their commodity. Nestle India is the leader in the tomato ketchup manufacturing segment in India with 37% market share. It also produces tomato soup mixes. Both ketchup and soup mixes come in the market under the brand name 'Maggi'. It procures raw tomatoes grown locally in India as well as import from other countries through its global supply chain. Hindustan Unilever (HUL) is the second largest manufacturer of tomato ketchup (with brand name 'Kissan') in India with a market share of 25%. It procures tomatoes locally in India in partnership with Varun Agro and works closely with farmers to help them to adopt sustainable agriculture practices based on improving soil fertility, water management and pest control. Zydus Wellness Kraft Heinz holds about 10% market share in the tomato ketchup manufacturing segment and its brand "Heinz" is gaining popularity among consumers. Field Fresh Foods/Del Monte is another big tomato products manufacturer. It manufactures ketchup, pasta and pizza sauce under the brand 'Del Monte'. Contract farming has been looked up as a solution to reduce the losses of tomato during glut season and to overcome a sharp drop in the prices. Global Green Company is India's largest hybrid tomato contract farming company. Based on high colour value, it processes more than 20,000 tonnes of tomato of UG-37, UG-157, UG-52 varieties into value-added products (ketchup, pasta sauce, tomato blend, pizza sauce etc.) (<https://globalgreengroup.com/tomatoes/>) under the brand 'Tify'. Cremica Group produces tomato ketchup, puree, pasta sauce, dips and Indian gravies. Apart from its retail products, the company caters to various QSR like McDonald's, Barista, Café Coffee Day, Pizza Hut and Domino's and as well as to airlines like Jet Airways and Air India. Dabur India is also a leading producer of tomato puree, tomato juice, soups and chutneys under its retail brand 'Homemade'. Other tomato processors like Conagra Brands, Annie's Homegrown, Bolton Group, Campbell Soup,

General Mills, Kagome, Kensington and Sons, etc. are developing their niche into the budding market for new and innovative tomato products. Tomato has huge export potential in the international market. As per APEDA (Agricultural and Processed Food Products Export Development Authority), beside fresh tomato, India exports many value-added products like tomato ketchup, tomato sauce, tomato juice and preserved/ prepared tomato on large scale (Table 1).

Table 1: Year-wise exported quantities of fresh and value-added products of tomato

Commodity	2014-15		2015-16	2016-17		
	Qty. (MT)	Rs. lakh	Rs. lakh	Qty. (MT)	Rs. lakh	
Fresh tomato	217999.33	44461.34	37772.91	158504.59	267198.49	54806.04
Tomato ketchup & other tomato sauces	2729.05	3320.62	3339.86	2907.46	3576.14	4168.92
Tomatoes, prepared/ preserved	775.02	346.63	101.16	190.14	234.73	136.65
Tomato juice	199.32	95.05	129.3	321.21	255.82	100.46
Total	221702.72	48223.64	41343.23	161923.4	271265.18	59212.07

Conclusion

In India, both tomato production as well as processing is growing with the growth in demand for value-added, affordable tomato products. The new entrants have to create their niche while competing with the well-established and popular brands. There is a scope in the international market for the export of both fresh as well as processed tomato products. There is an increasing acceptability for tomato pastes/purees at home-use level along with flavoured tomato paste and tomato soups.

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