Upscaling Non Chemical sustainably produced Food

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Consumers - Expanding Middle India

**3X INCREASE IN HIGH & MIDDLE INCOME HOUSEHOLDS IN INDIA**

- **2018**
  - Low: 127M (43%)
  - Lower mid: 97M (33%)
  - Upper mid: 61M (21%)
  - High: 8M (3%)

- **2030 forecast**
  - Low: 57M (15%)
  - Lower mid: 132M (34%)
  - Upper mid: 16M (44%)
  - High: 29M (7%)

24% to 51%
Online Retail Boom

E-retail in India is only expected to increase multifold.

Online retail boom
India is set to become the third-largest online retail market globally, after the US and China, clocking $350 billion in GMV by 2030.

Gross merchandise value (GMV) for e-retail sector (in $ bn)

- 2016: 12.4
- 2017: 16
- 2018: 21.7
- 2019: 27.1
- 2020: 38
- 2021*: 55
- 2025*: 140
- 2030*: 350

- 500,000: Total gig workers expected to be employed (2021)
- $800 bn: Size of India's digital economy (2030)
- $1.5 trillion: Total sales expected to be clocked by kiranas (2030)
- $150 bn: GMV contribution of small-town shoppers on e-commerce (2020-2030)

*forecasts

Source: RedSeer
Market Size

<table>
<thead>
<tr>
<th>Year</th>
<th>Packaged</th>
<th>Health &amp; Wellness</th>
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<tbody>
<tr>
<td>2015</td>
<td>376000</td>
<td>25450</td>
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<tr>
<td>2020</td>
<td>602000</td>
<td>60,980</td>
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<td>2025</td>
<td>1013000</td>
<td>127290</td>
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Health Conscious Individuals

Number of Health Conscious Individuals in India

- 2018: 90
- 2020P: 108
- 2022P: 130
- 2025P: 142
Consumer Behavior

- Primarily driven by Health & safety
- Mostly Middle Class & above
- Adoption seen across the country
Key Issues

• Awareness
• Trust
Way forward

• Invest in Consumer Education
• Invest in Authenticity & Trust
• One standard
• Local markets