



GREENASIA
IMPEX LTD

Investor Presentation

September 2026

Agenda

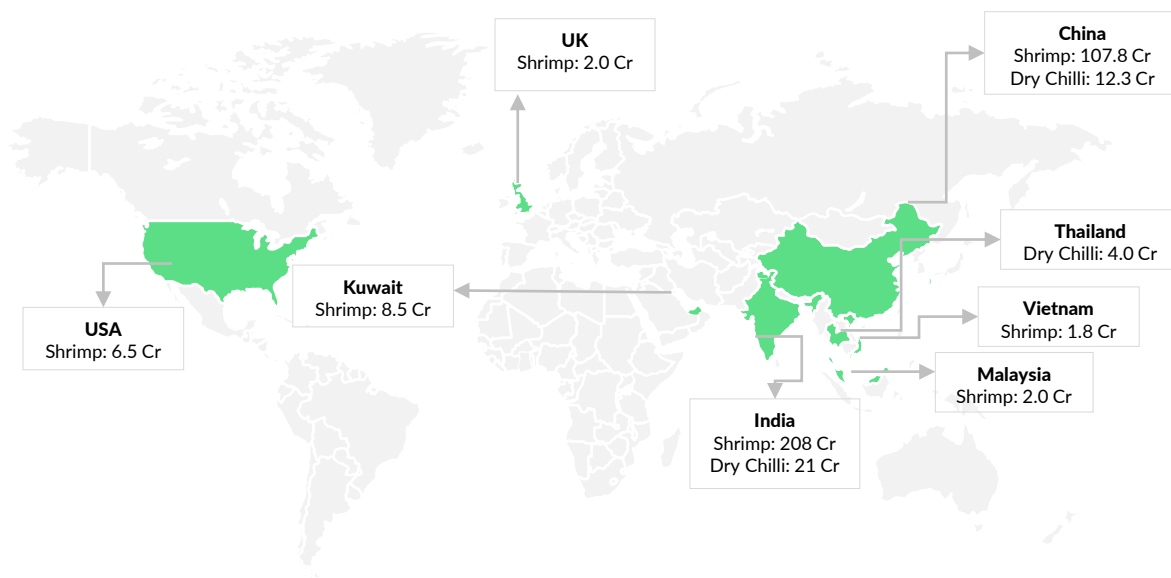
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Green Asia - From Andhra Pradesh Roots to a INR 380+ Cr Shrimps and Dried Chillies Business with Global Reach

Certified Global Exporter of Shrimps and Dry Chillies

- Incorporated in 2014, Green Asia Impex Ltd is an agri-processing and export company based in Andhra Pradesh – India's shrimps and dry chillies hub
- The company generated a revenue of INR 384 Cr in Fiscal 2026, with 21% growth in the last two years
- Certified for domestic & global markets with certifications like FSSAI, ISO 22000, EIC, HACCP, FDA and GACC
- Established global presence across China, USA, Thailand, Vietnam, Malaysia, UK and Kuwait



Note: Revenue from operations for Fiscal 2026 excludes other operational revenue

Fiscal'2026 Revenue Highlights

~INR 384 Cr
Revenue from
Operations

▶ **~INR 337 Cr** Revenue from Shrimp Business

▶ **~INR 38 Cr** Revenue from Dry Chilli Business

▶ **~INR 145 Cr** Combined Export Revenue

▶ **~INR 230 Cr** Combined Domestic Revenue

Operational Highlights

19k+ Sq ft
Shrimps Processing
Facility

3.6k MTPA
Shrimps IQF
Processing Capacity

7.2k MTPA
Shrimp Block Freeze
Processing Capacity

4k+ MT
Shrimps Produced
(Block Freeze & IQF)

1.5k MT
Dry Chillies
Processing Capacity

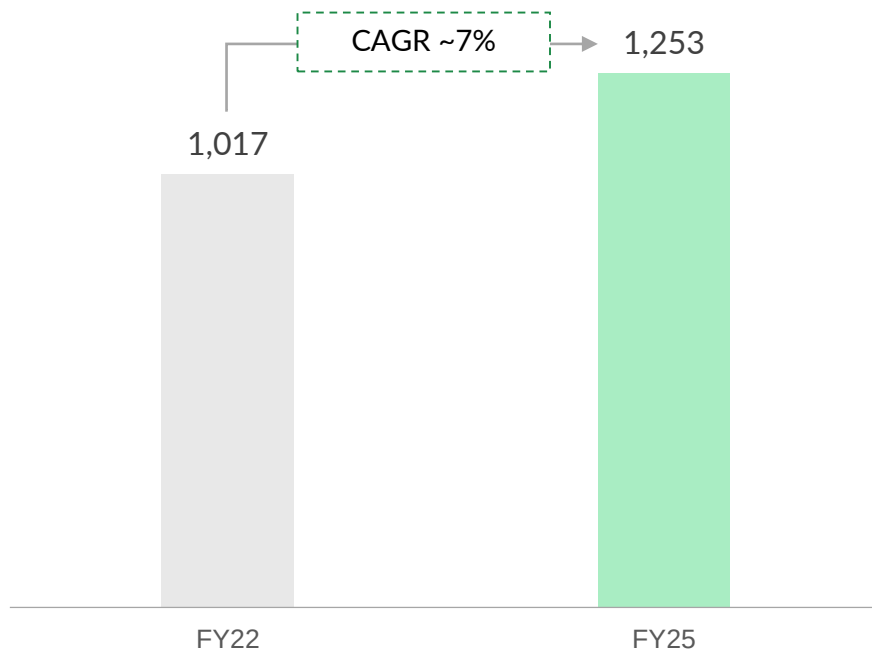
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Countries of Export

Note: Figures are as of Fiscal 2026

India: #2 Shrimps Producer & #1 Dry Chillies Producer, Creating a Global Export Base

India: The Global Leader in Shrimps Production with 1,253 Thousand Tons in FY25

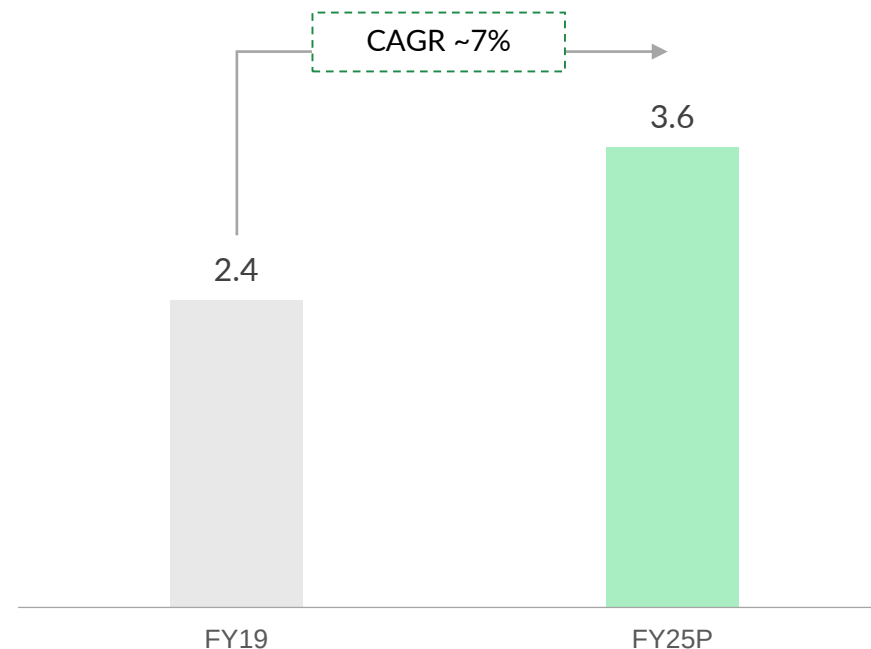
Production Volume
in Thousand Tons



- India's shrimp production showed a strong overall growth trend during FY22–FY25, with total production increasing from 1,016.7 thousand tons in FY22 to 1,253.3 thousand tons in FY25, representing a 7.2% CAGR
- Vannamei shrimp remained the dominant species, while Black Tiger shrimp production fluctuated, peaking at 85.8 thousand tons in FY24 before declining to 67.0 thousand tons in FY25

India: The Global Leader in Red Chilli Production with 3.6 Mn Tons in FY25

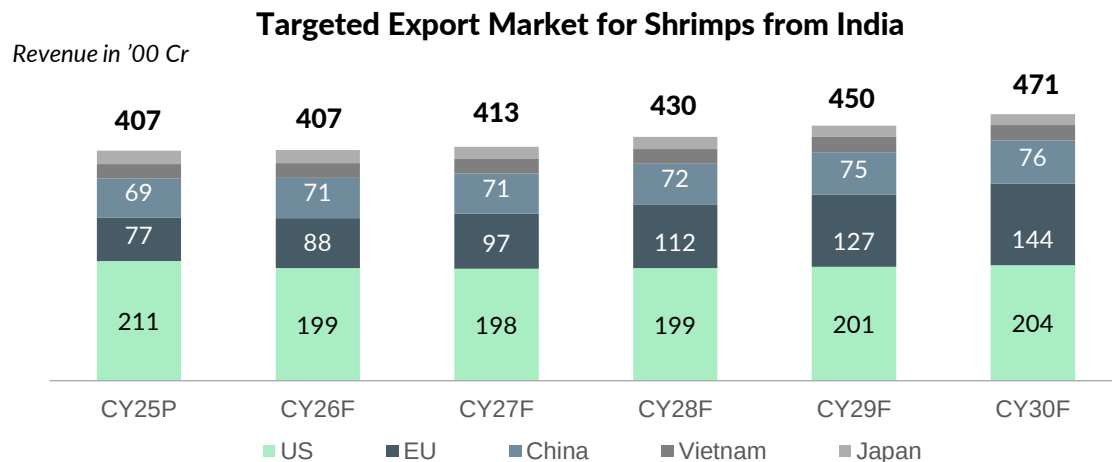
Production Volume in
Mn Tons



- India continues to be global leader in red dry chilli market with 3.6 Mn MT production volume in FY25, from 2.4 Mn MT in FY19
- India's major red dry chilli supply comes from Andhra Pradesh, Telangana, Karnataka and Madhya Pradesh. **Andhra Pradesh alone accounts for >44% of total national production, making it the dry chilli capital of India**

Global Export Opportunity of INR 56k+ Cr – Asia & EU Driving Growth

Indian Shrimp Export Market Exhibits INR 47,100 Cr Opportunity by CY2030P

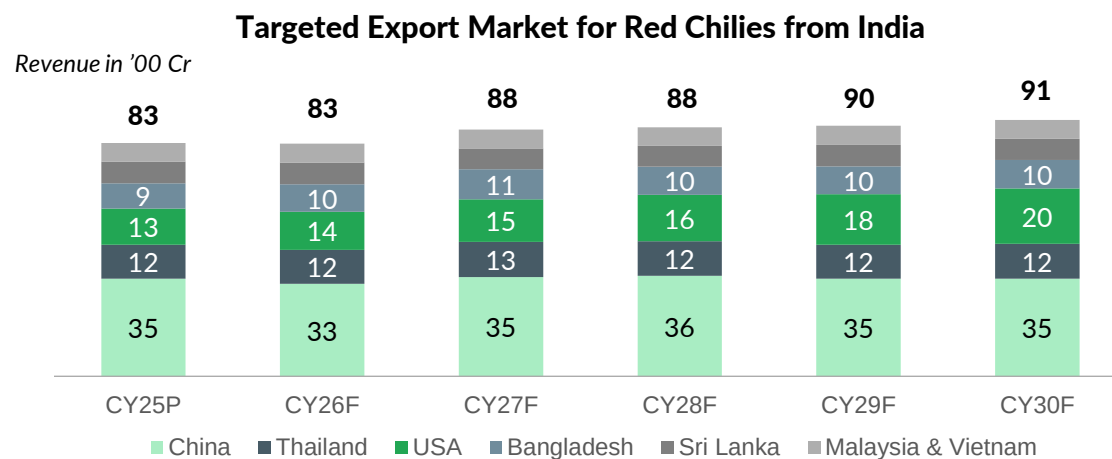


India's Total Shrimp Export and Import Value and Volume

Trade Flow	Value (INR Cr)	Volume ('000 Tons)
Exports	42,500	825
Imports	168	3

- The **China, EU and the USA** together contributes **INR 35,760 Cr in value** and **5,61,200 tons in volume**, making them the top export destinations for Indian shrimps
- **Japan, Vietnam, UAE, Russia, Canada, UK & Kuwait** contributes a combined value of **INR 13,278 Cr** and **2,31,400 tons** in volume

Indian Red Dry Chilli Export Market Exhibits INR 9,100 Cr Opportunity by CY 2030P



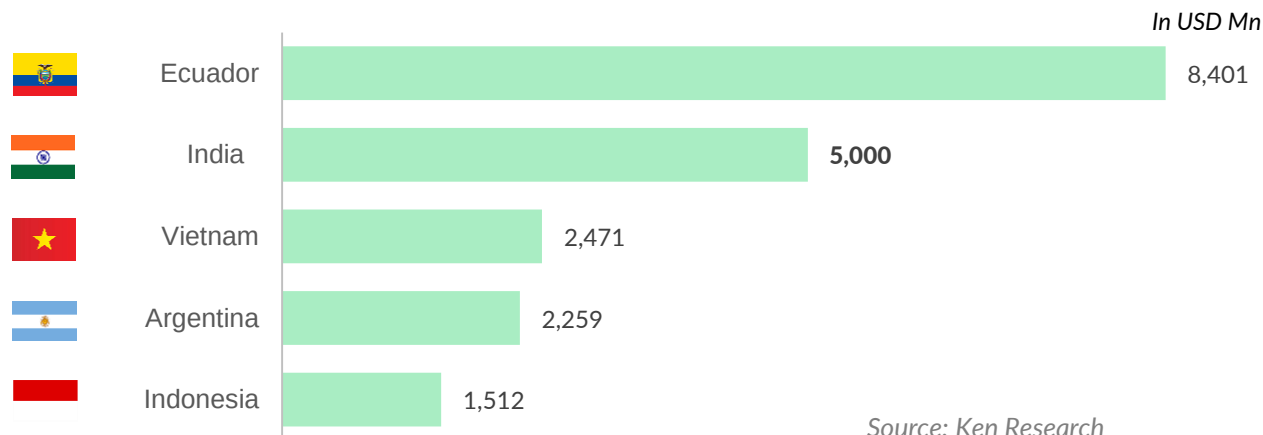
India's Total Chili Export and Import Value and Volume

Trade Flow	Value (INR Cr)	Volume ('000 Tons)
Exports	11,170	536
Imports	120	24

- **China, Thailand, and USA** together contributes **INR 5,820 Cr in value** and **2,80,300 tons in volume**, making them the export destinations for Indian red dry chilli
- **Bangladesh, Sri Lanka, Indonesia, Malaysia, UAE, Vietnam, Canada** contributes a combined value of **INR 3,330 Cr in value** and **1,86,500 tons** in volume

Indian Shrimps & Dry Chillies Exports Trusted Across Global Markets

India Ranks 2nd Worldwide with competitive pricing and cost advantage over Ecuador



- **India ranks 2nd in global shrimp exports** in CY'25 at USD 5,000 Mn, capturing **~17.6% of the global shrimp market**
- This position is supported by competitive pricing, strong processing capacity and value-addition, scaled aquaculture, and favorable labor economics, with sustained demand from the USA, EU, and China

Source: Ken Research

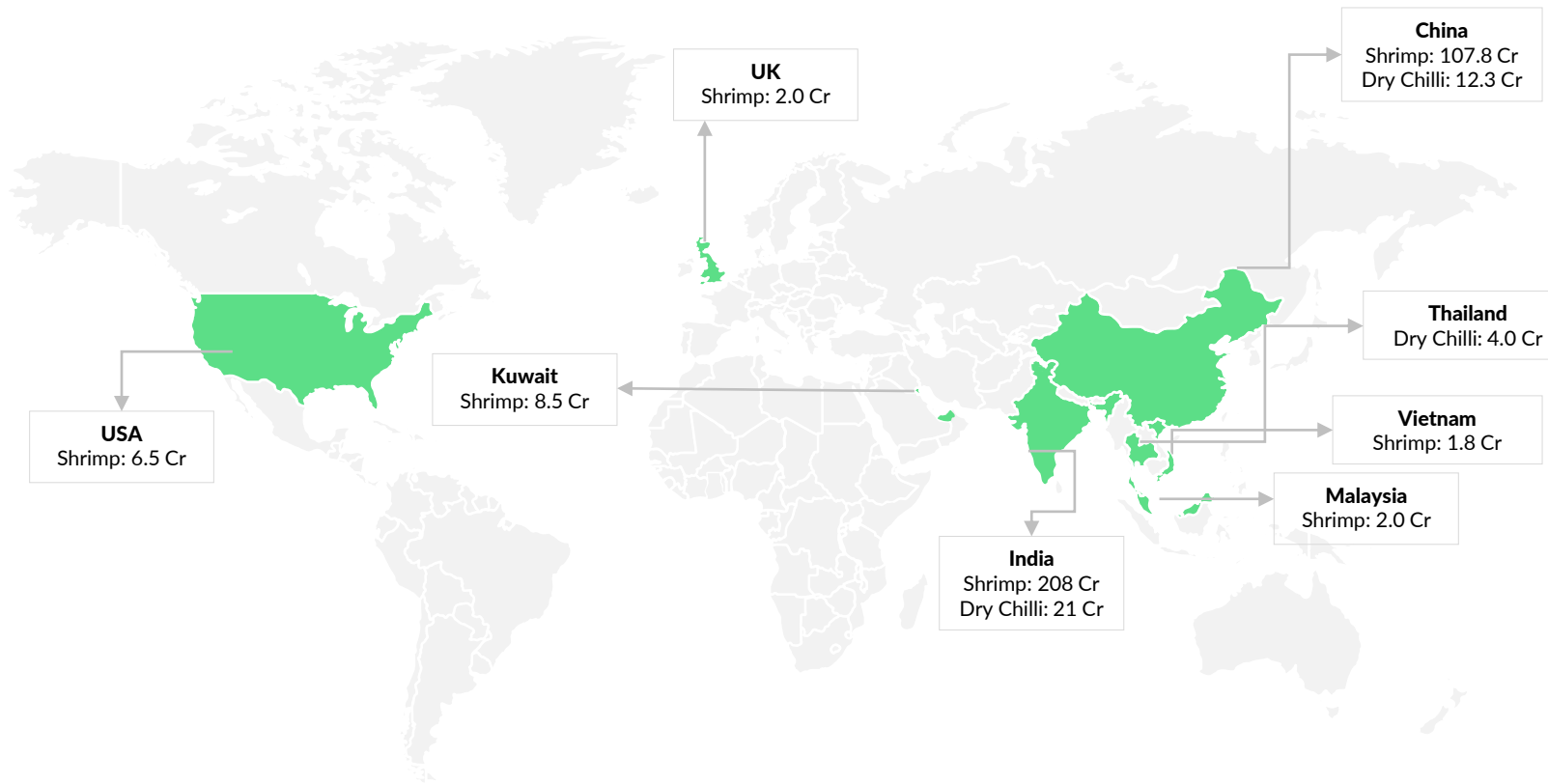
Global Certifications – Trusted Access For Green Asia



- ✓ **Global-ready safety:** Robust compliance with HACCP, and ISO 22000; backed by FSSAI licensing to meet the highest regulatory benchmarks
- ✓ **Borderless market access:** Fully FDA-ready, EIC-approved, and GACC-registered opening seamless access to US, EU, and China markets

Source: Ken Research

80%+ of Green Asia's Exports Are Driven by China, With Diversification Across Asia, Middle East and USA



Revenue	Fiscal 2024	Fiscal 2026	Absolute Growth
Shrimps	97	129	~ 32%
Dry Chillies	25	16	~ (34.1%)
Total	122	145	~ 19%

Shrimp & Dry Chilli Export Revenue (INR Cr)

Countries	Revenue (Fiscal 2026)	Shrimps	Dry Chilli
China	120.0	107.8	12.3
Kuwait	8.5	8.5	NA
USA	6.5	6.5	NA
Thailand	4.0	NA	4.0
Malaysia	2.0	2.0	NA
UK	2.0	2.0	NA
Vietnam	1.8	1.8	NA

Best Positioned to Ride India's Shrimp & Dry Chilli Export Wave: Green Asia's export footprint spans China, Asia & the Middle East – anchored in India's global leadership in shrimp & dry chilli exports

Experienced Promoters Best Positioned to Ride India's Export Tailwinds in Shrimps & Dry Chillies



Mr. Pasupuleti Venkata Rama Rao
Managing Director

- 13 years of experience in the export of seafood and dry chillies industry
- He has been associated with the company since incorporation
- His role and responsibilities include strategic planning and decision making, operational oversight, leadership, team management, financial management, compliance and governance
- He has completed his degree in Bachelor of Science from the Andhra University

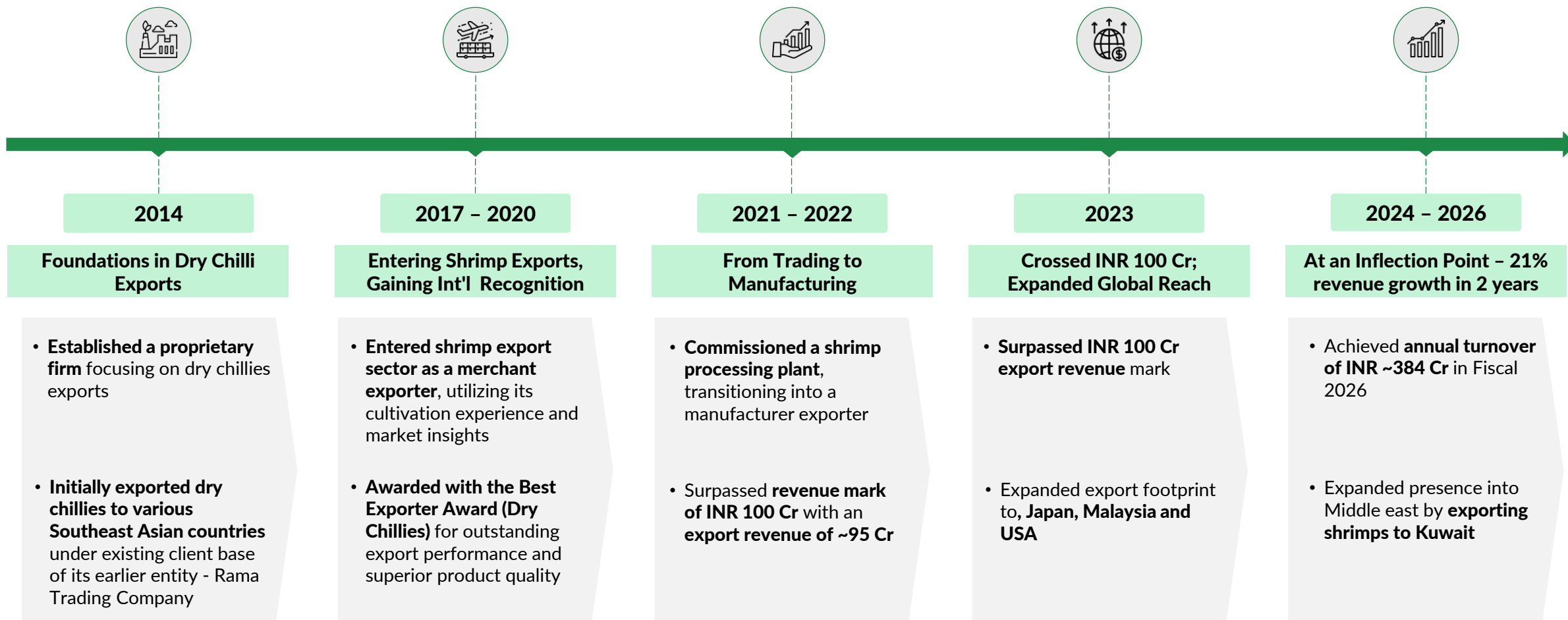


Mrs. Pasupuleti Meenakshi
Executive Director

- 6 years of experience in the export of seafood and dry chillies industry
- She has been associated with the company since September 07, 2020
- She contributes to business planning and operational decision-making, provides inputs on matters relating to the Company's export business, and works with the executive team to achieve the Company's business objectives.
- She has completed Higher Secondary Education from the Board of Intermediate Education

A Decade of Building Capabilities in Shrimps & Dry Chillies Exports

Creating a Platform to Capture India's Export Boom

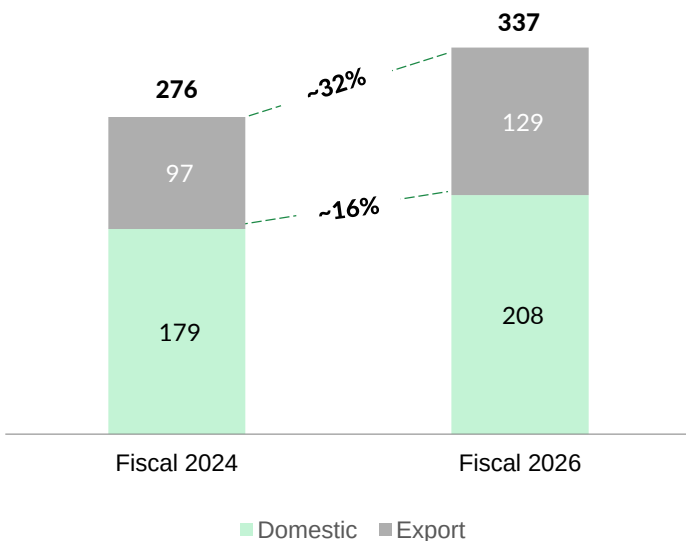


Deep Dive - Shrimps: Green Asia's Core Growth Engine

~87.8% of Revenue Driven by Diversified Species and Formats

~22% Absolute Growth in Shrimp Revenue

(INR Crore)



- Revenue from **shrimp export** has increased from INR 97 Cr in Fiscal 2024 to INR 129 Cr in Fiscal 2026 resulting in an **absolute growth of ~32%**
- Revenue from **domestic sale of shrimp** increased from INR 179 Cr in Fiscal 2024 to INR 208 Cr in Fiscal 2026 resulting in an **absolute growth of ~16%**

Premium-quality Shrimps, carefully sourced, processed & exported to meet global seafood standards



Vannamei Shrimps

High-quality, farm-raised shrimps known for their mild flavor, firm texture and adaptability in global cuisines



Black Tiger Shrimps

Bold taste, large size and rich meat, ideal for grilling, frying and gourmet dishes



Freshwater Shrimps

Naturally cultivated for their delicate sweetness and tender bite, preferred in Asian and European cuisine



Head-On Shell-On (HOSO) Shrimps

Freshly harvested and frozen with heads intact, preserving maximum flavor and texture



Headless Shell-On (HLSO) Shrimps

Carefully processed to remove heads while retaining shell for convenient cooking & storage



Peeled & Deveined (PD) Shrimps

Fully cleaned and deveined for ready-to-cook ease, ensuring high-quality seafood with zero hassle

- ✓ Exporting in bulk to B2B clients across the China, USA, Middle East and Southeast Asia

- ✓ Frozen using Block and Individually Quick Frozen (IQF) to maintain texture and extend shelf life during shipment

- ✓ Multi-step processing includes washing, beheading, grading, metal detection and hygienic packing ensuring stringent quality control

- ✓ Offers Head-on, Headless, Peeled, Deveined variants for reprocessing or direct use in HORECA and seafood value chains

- ✓ Supported by in-house cold storage for year-round supply and minimal spoilage

- ✓ End-to-end temperature-controlled logistics ensures product freshness from plant to port

Near zero defect rate achieved through stringent inspections, advanced freezing and hygienic packaging

Proven Track Record: ~22% Revenue Growth in Shrimps Revenue and Volumes

	Fiscal 2024		Fiscal 2026	Absolute Growth	Impact over the last 2 years
Total Shrimp Revenue (INR Cr)	276	▶	337	↑ ~ 22%	In Fiscal 2026, ~INR 208 Cr revenue generated from domestic sale showcasing strong domestic demand, whereas ~INR 129 Cr revenue generated from export of shrimps
Export Revenue (INR Cr)	97	▶	129	↑ ~ 32%	Export revenue increased from ~INR 97 Cr in Fiscal 2024 to ~INR 129 Cr in Fiscal 2026, marking a growth of 32%, driven by rising demand from Southeast Asia and China
Domestic Revenue (INR Cr)	179	▶	208	↑ ~ 16%	Strong growth in domestic sales, contributing ~INR 208 Cr in Fiscal 2026, highlighting robust demand from Indian consumers for shrimp products
Net Production (MT)	2,679	▶	4,680	↑ ~ 21%	Net Shrimp production increased from 2,679 MT in Fiscal 2024 to 4,680 MT in Fiscal 2026, with an absolute growth of ~21%
Export Countries	6	▶	7	↑ ~ 17%	Global reach in the shrimp segment remained at 7 export countries between Fiscal 2024 and Fiscal 2026.

Trusted by Global B2B Clients: Diversified Customer Base

Top 10 Clients from Shrimps Segment Contribute ~78% of Shrimps Revenues in Fiscal 2026

Client Group	Fiscal 2026 Revenue (INR Lakhs)	% of Total Revenue from Shrimp	% of Total Revenue from Operations
Top 1 customer	5,871	17.4%	15.3%
Top 3 customers	14,112	41.9%	36.8%
Top 5 customers	19,568	58.1%	51.0%
Top 10 customers	26,307	78.1%	68.5%

Shrimps - Customer Retention	Fiscal 2024	Fiscal 2025	Fiscal 2026
Total clients (no.)	46	53	59
Repeat customers (% of clients)	48%	51%	36%
Revenue from repeat customers (INR Lakhs)	25,289	24,668	22,078
Repeat customers (% of revenue)	75%	91%	80%

Revenue of ~INR 263 crore has been generated from the top 10 clients in the shrimp segment, accounting for ~78% of the company's total revenue from the shrimp business

World-Class Processing Facilities Ensuring Scale, Quality & Global Compliance

Shrimp Processing Unit having Global Compliance



- The shrimp processing plant is located at Tadepalligudem, Andhra Pradesh, which is a hub for Vannamei shrimps
- The processing unit spans an **area of approximately 19,793 sq ft**

Facility / Line	Product Type	Installed Capacity Fiscal 2026	Utilization Fiscal 2026 (%)
Main Processing Plant	Shrimp (Block Frozen)	7,200	38.38%
IQF Line	Shrimp (IQF Frozen)	3,600	13.00%

Key Machinery & Equipment for Shrimp Processing



IQF Machine

Rapidly freezes individual shrimp pieces at ultra-low temperatures, preserving their freshness, texture and nutritional quality thus preventing clumping



Grading Machine

Sorts shrimps by size and quality with high precision, ensuring uniform grading for consistent product quality and meeting market specifications efficiently



Plate Freezers

Freezes shrimp rapidly through direct contact with chilled metal plates, ensuring uniform freezing and preserving freshness, texture and quality efficiently



IQF Hardener

Stabilizes the surface of individually frozen shrimp post-IQF, improving texture, preventing damage, and enhancing appearance for better handling and longer shelf life



Cold Storage Unit

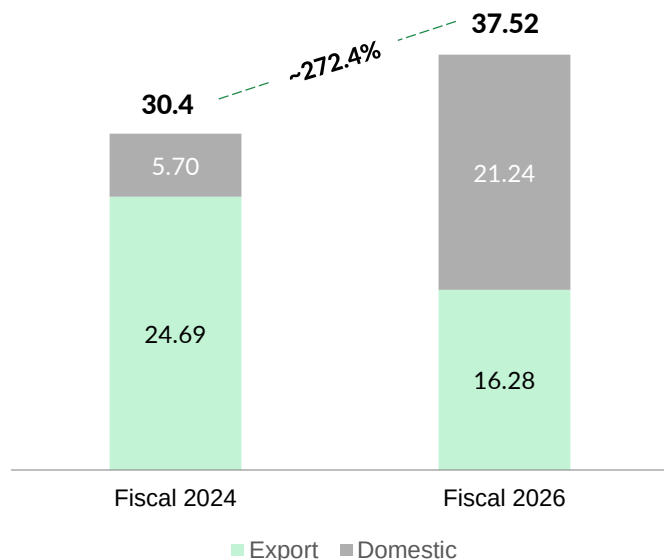
A dedicated cold storage facility preserves shrimp quality and freshness, enabling longer shelf life and supporting reliable export operations

Deep Dive – Dry Chillies: Diversified Export Leg for Green Asia

~10% of Total Revenue

~23.4% Absolute Growth in Chilli Revenue

(INR Crore)



- Revenue from **Dry Chilli Export** has decreased from **INR 24.69 Cr in Fiscal 2024 to INR 16.28 Cr in Fiscal 2026** primarily driven by a shift in the sales mix towards the domestic market
- Revenue from **domestic sale of Dry Chilli** increased from **INR 5.70 Cr in Fiscal 2024 to INR 21.24 Cr in Fiscal 2026** resulting in an **absolute growth of 272.4%**

Premium-quality Dry Chillies, carefully sourced, processed and exported to meet global standards



Whole Dry Chillies

Sun-dried to retain their inherent color, pungency & aroma, suitable for wide industrial applications



Stemless Dry Chillies

Manually sorted and cleaned to offer convenience in processing and cooking, ensuring a hassle-free experience



Teja: Vibrant color and moderate heat, suitable for a variety of culinary uses

Byadgi: Long, slender shape & mild spiciness, preferred for powders & sauces

Guntur Sannam: High pungency and rich flavor, often used in international markets for hot sauces and spice blends

- ✓ Sourced from India's leading dry chilli-growing belt near Guntur, Khammam and other prominent regions within Andhra Pradesh

- ✓ Stored in a cold storage facility to help preserve key quality parameters

- ✓ Complies with FSSAI, and pesticide residue standards for global spice markets; registered with the Spice Board for traceability

- ✓ Offers stemmed, stemless, and machine-cleaned grades, tailored for bulk reprocessing into powders, extracts and spice blends

- ✓ Primarily supplied to international spice companies and ingredient manufacturers across China and Bangladesh

- ✓ Received "Best Dry Chillies Exporter" award from Spice Board & Indian Customs

Certified & traceable chili products tailored for the international market with consistent quality & safety

Domestic Dry Chillies Sales Growing Rapidly: 3.72x in Value

	Fiscal 2024		Fiscal 2026	Absolute Growth	Impact over the last 2 years
Total Chili Revenue (INR Cr)	30.40	▶	37.52	↑ ~ 23.4%	In Fiscal 2026, ~INR 16.28 Cr revenue is generated from the export of dry chili, with China being the largest export destination, ~75% of chilli export revenue
Export Revenue (INR Cr)	24.69	▶	16.28	↓ ~ (34.1%)	Export revenue declined from INR 24.69 Cr in Fiscal 2024 to INR 16.28 Cr in Fiscal 2026, primarily driven by a shift in the sales mix towards the domestic market
Domestic Revenue (INR Cr)	5.70	▶	21.24	↑ ~ 272.4%	Strong growth in domestic sales, contributing ~INR 21.24 Cr in Fiscal 2026, highlighting rising Indian consumer preference for dry chillies

Trusted by Leading Buyers

Top 10 Clients from Dry Chillies Segment Contributed ~95% of Dried Chillies Revenue in Fiscal 2026

Client Group	Fiscal 2026 Revenue (INR Lakhs)	% of Total Revenue from Dry Chillies	% of Total Revenue from Operations
Top 1 customer	1,623	43.3%	4.2%
Top 3 customers	2,525	67.4%	6.6%
Top 5 customers	3,024	80.7%	7.9%
Top 10 customers	3,575	95.3%	9.3%

Dry Chillies - Customer Retention	Fiscal 2024	Fiscal 2025	Fiscal 2026
Total clients (no.)	16	43	35
Repeat customers (% of clients)	63%	37%	29%
Revenue from repeat customers (INR Lakhs)	3,094	3,449	1,629
Repeat customers (% of revenue)	82%	61%	54%

Revenue of ~INR 36 crore has been generated from the top 10 clients in the dried chillies segment, accounting for ~95% of the company's total revenue from the dried chillies business

Certified Dry Chillies Processing Facilities with Global Standards

Dry Chilli Processing Unit with Global Compliance



- The dry chilli processing plant is located at **Guntur: The Chilli Capital of India** (150 KM from Tadepalligudem)
- The facility is held on lease and has a built-up area of approximately 10,619 sq ft
- Processing activities such as cleaning, grading, sorting and stem removal are predominantly carried out manually, supported by stem-cutting and sorting machines which are used selectively based on customer specifications.
- **Cold storage facility** serviced from Green Asia Cold Storage Pvt Ltd, and third party facilitators ensures year-round preservation of dry chilli quality, colour, heat and aroma to maintain export readiness and consistent supply

Key Machinery & Equipment for Dry Chilli Processing



Stem Cut Machinery

The machine where chillies are being processed and stems are removed

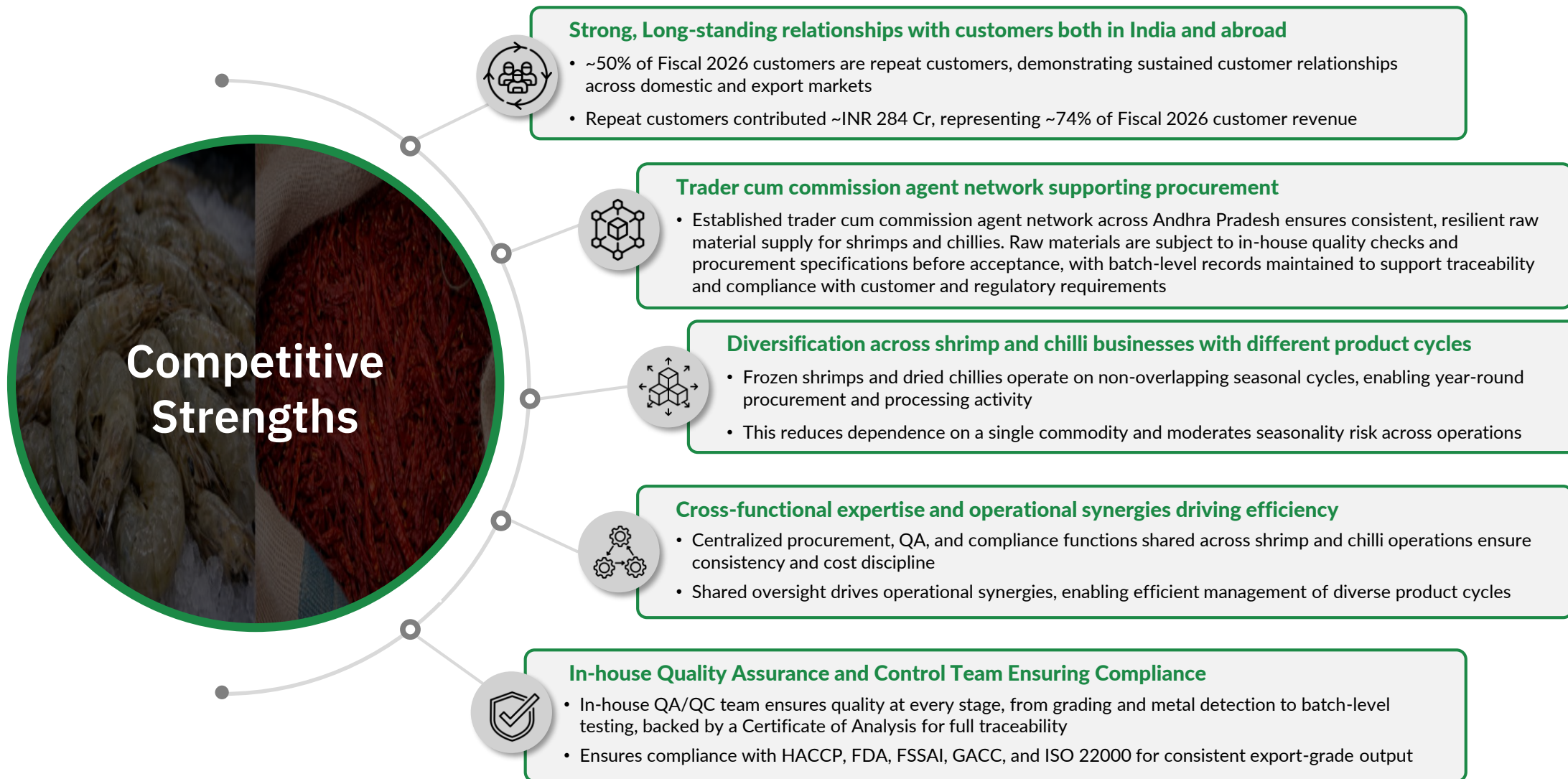


Sortex Machine

The workers manually inspect and remove defects while chillies move on the belt

- The dried chillies segment relies mainly on manual processing (cleaning, grading, sorting) with minimal mechanization.
- As a result, capacity utilisation is non-standardized and cannot be compared to fully mechanized facilities

Competitive Strengths



The Competitive Landscape

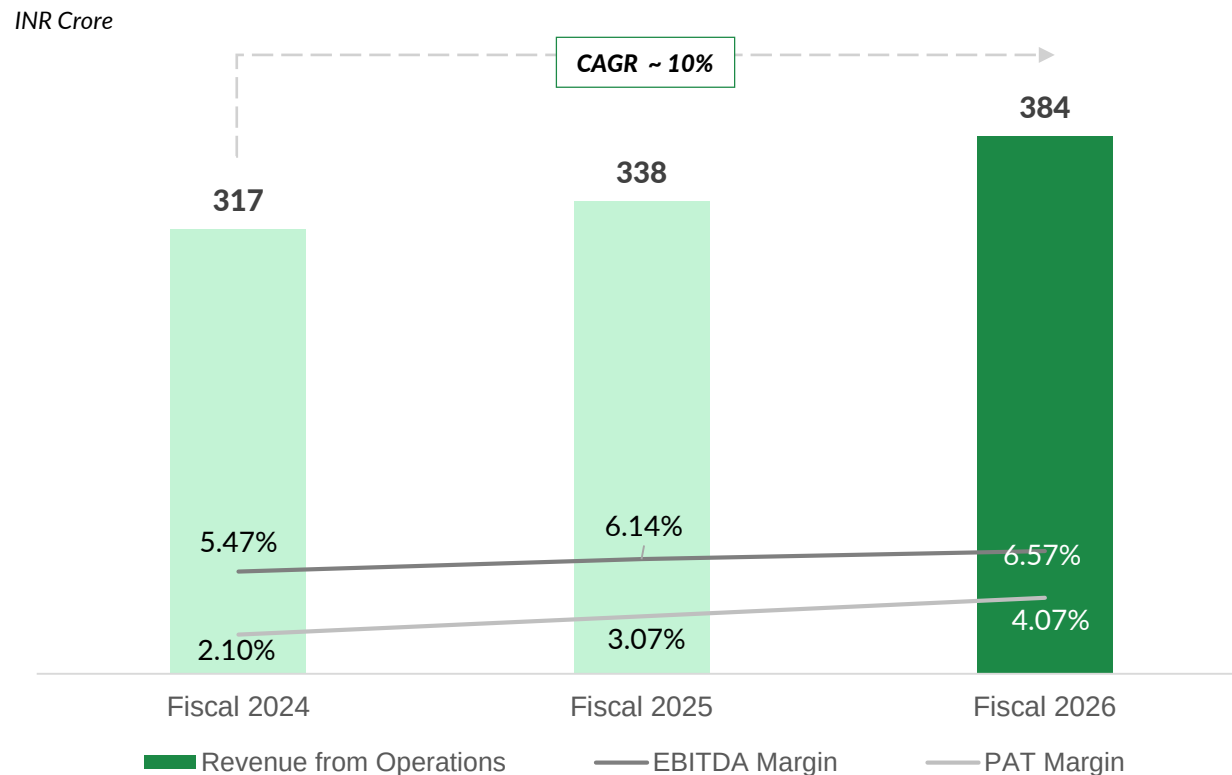
	 Green Asia Impex 2014 Tadepalligudem, Andhra Pradesh	Shrimps					Dry Chillies		
		 Devi Seafoods 1992 Vishakhapatnam, Andhra Pradesh	 Apex Frozen Food Ltd 1995 Kakinada, Andhra Pradesh	 Jagadeesh Marine Exports 1998 Bhimavaram, Andhra Pradesh	 Kings Infra Ventures Ltd. 1958 Kochi, Kerala	 Essex Marine Limited 2009 Kolkata, West Bengal	 NK Agro Exports 2010 Tadepalligudem, Andhra Pradesh	 Vijaya Krishna Spices 2014 Ballari, Karnataka	 Siddhartha Corporation 1990 Thane, Maharashtra
Inception	2014	1992	1995	1998	1958	2009	2010	2014	1990
Headquarters	Tadepalligudem, Andhra Pradesh	Vishakhapatnam, Andhra Pradesh	Kakinada, Andhra Pradesh	Bhimavaram, Andhra Pradesh	Kochi, Kerala	Kolkata, West Bengal	Tadepalligudem, Andhra Pradesh	Ballari, Karnataka	Thane, Maharashtra
Product Portfolio									
Shrimps	✓	✓	✓	✓	✓	✓	✗	✗	✗
Red Chillies	✓	✗	✗	✗	✗	✗	✓	✓	✓
Certifications	HACCP, FDA, FSSAI, GACC, ISO 22000	IFS, BRCGS, BAP & ASC	SA 8000, NSF, BAP	ASC, BAP, BRC, IFS, HACCP	GMP, FSSAI, CAA	HACCP, BRCGS, FSSC V5.1	ISO 9001:2008, GAP, FSSAI	BRC, DNV GL	N/A
Fiscal 26 Shrimps Revenue (INR Cr)	337	3,240*	931	433*	161	61	N/A	N/A	N/A
Fiscal 26 Red Chillies Revenue (INR Cr)	38	N/A	N/A	N/A	N/A	N/A	798*	1064*	1142*
Fiscal 26 EBITDA %	6.57%	16%*	6%	5%*	18%	12%	2%*	5%*	2%*
Fiscal 26 PAT %	4.07%	11%*	4%	2%*	10%	10%	0.5%*	3%*	(1%)*

*Note: Financial metrics for Devi Sea Foods pertain to Fiscal 2024 and that of Jagadeesh Marine Exports, NK Agro, Vijaya Krishna Spices and Siddhartha Corporation pertain to FY25

Source: Ken Research

Crossed the INR 380+ Cr Revenue Mark in Fiscal 2026 with Improving Profitability

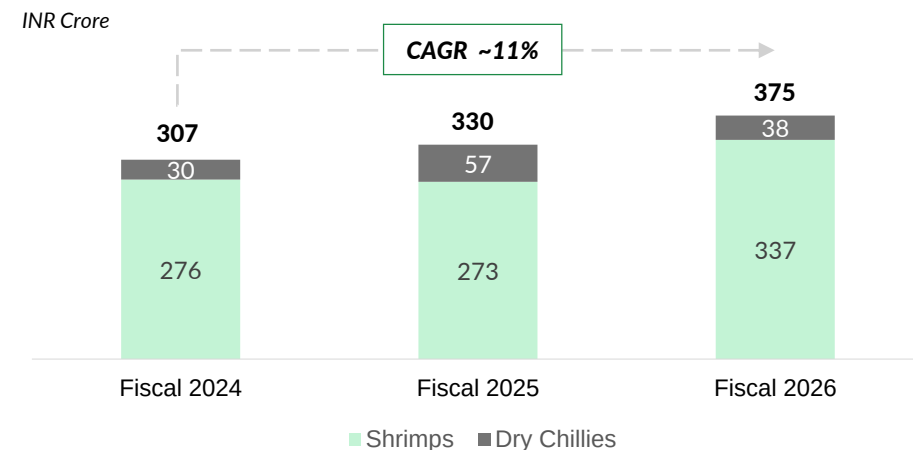
Financial Highlights



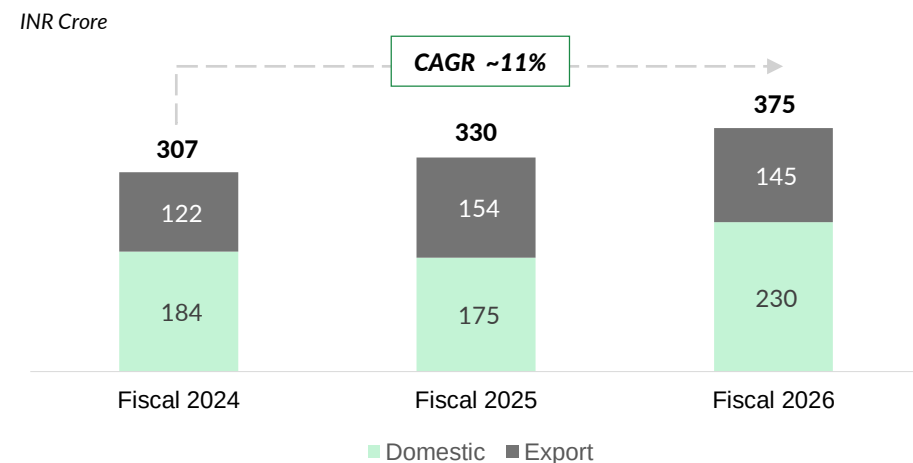
- **Strong Revenue Trajectory:** Revenue grew at a ~10% CAGR from INR 317 Cr (Fiscal 2024) to INR 384 Cr (Fiscal 2026), signaling strong business momentum
- **Improving Profitability:** EBITDA margins expanded from 5.47% (Fiscal 2024) to 6.57% (Fiscal 2026), while PAT margins improved from 2.10% in Fiscal 2024 to 4.07% in Fiscal 2026, reflecting better operational efficiency

Note: Revenue from operations includes other operating revenue

Revenue Breakup: Shrimp vs Dry Chilli

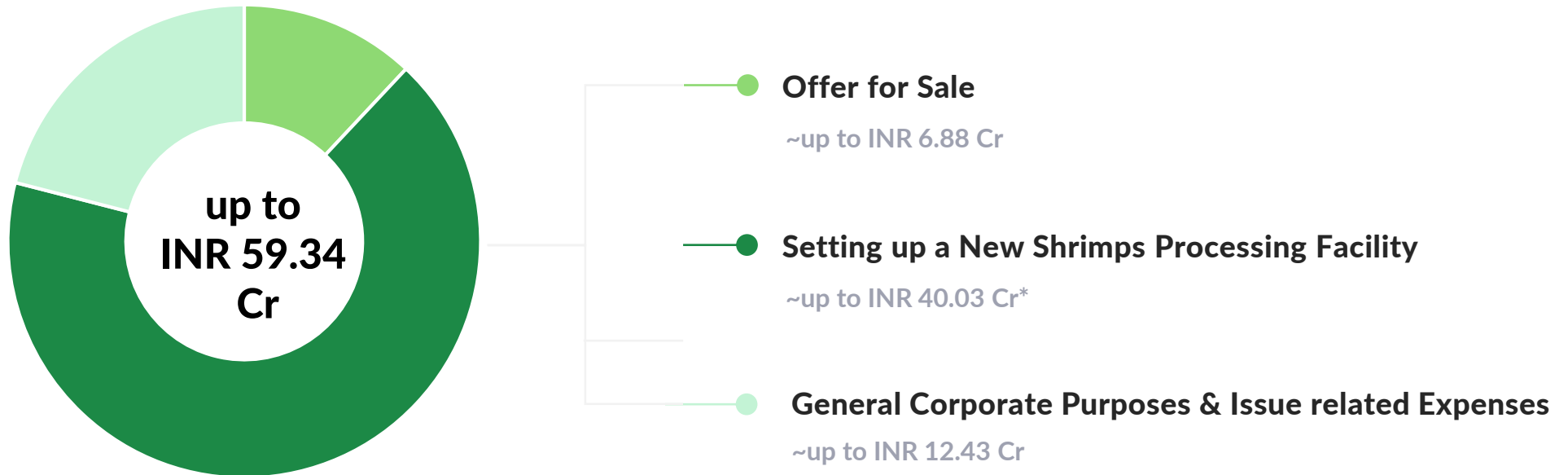


Revenue Breakup: Domestic vs Export



Seeking up to INR 59.34 Cr...

Utilization of Funds

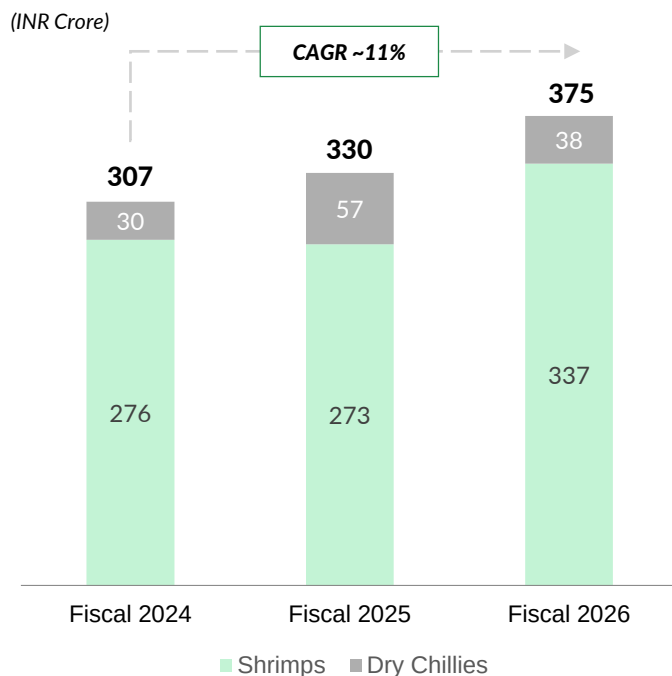


**Note: The proposed seafood processing facility has an estimated project cost of ₹51.27 cr. Of this, ₹1.24 cr towards acquisition of land has been funded through internal accruals. Approximately ₹40.03 cr is proposed to be funded from the IPO proceeds, with the balance project cost to be funded through internal accruals. The funds are proposed to be deployed over the specified implementation period.*

ANNEXURES

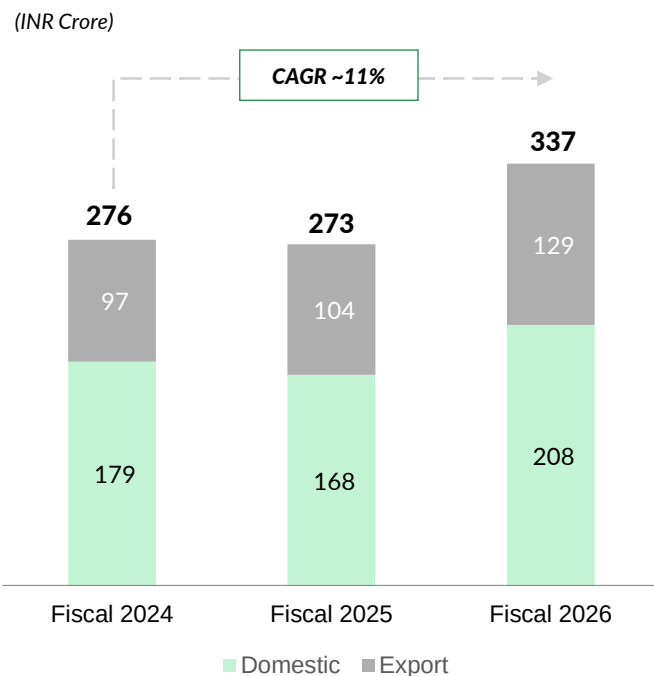
Broad-Based Revenue Growth Across Shrimps and Dry Chillies, Led by Domestic Demand

Revenue Breakup by Product



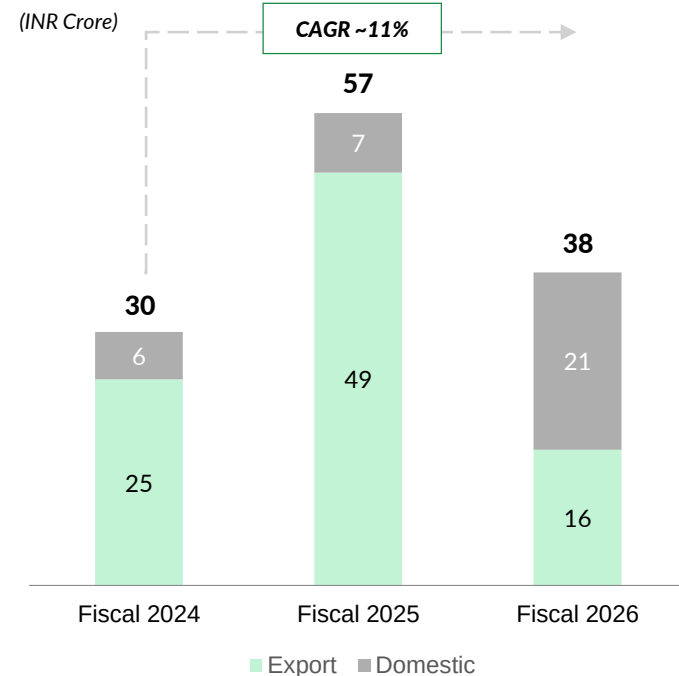
- Revenue from Shrimp segment has increased from INR 276 Cr in Fiscal 2024 to INR 337 Cr in Fiscal 2026 resulting in an absolute growth of ~22%
- Revenue from Dry Red Chilli Segment has increased from INR 30 Cr in Fiscal 2024 to INR 38 Cr in Fiscal 2026 resulting in an absolute growth of ~23.4%

Shrimp Export vs Domestic Revenue



- Revenue from shrimp export has increased from INR 97 Cr in Fiscal 2024 to INR 129 Cr in Fiscal 2026 resulting in an absolute growth of ~32%
- Revenue from domestic sale of shrimp increased from INR 179 Cr in Fiscal 2024 to INR 208 Cr in Fiscal 2026 resulting in an absolute growth of ~16%

Dry Chilli Export vs Domestic Revenue

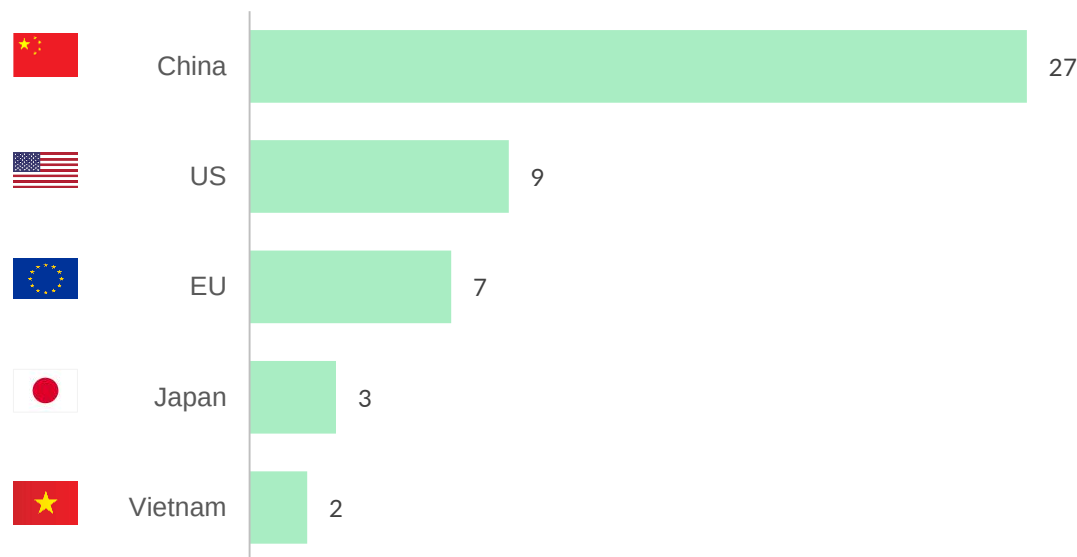


- Revenue from Dry Chilli Export has declined from INR 25 Cr in Fiscal 2024 to INR 16 Cr in Fiscal 2026
- Revenue from domestic sale of Dry Chilli increased from INR 6 Cr in Fiscal 2024 to INR 21 Cr in Fiscal 2026 resulting in an absolute growth of ~272.4%

India Shrimp Market Growing at CAGR of ~9% to Reach INR 1.3 Lakh Cr by FY2030

Shrimps Consumption: China leading with >27 Lakh Tons Annual Consumption

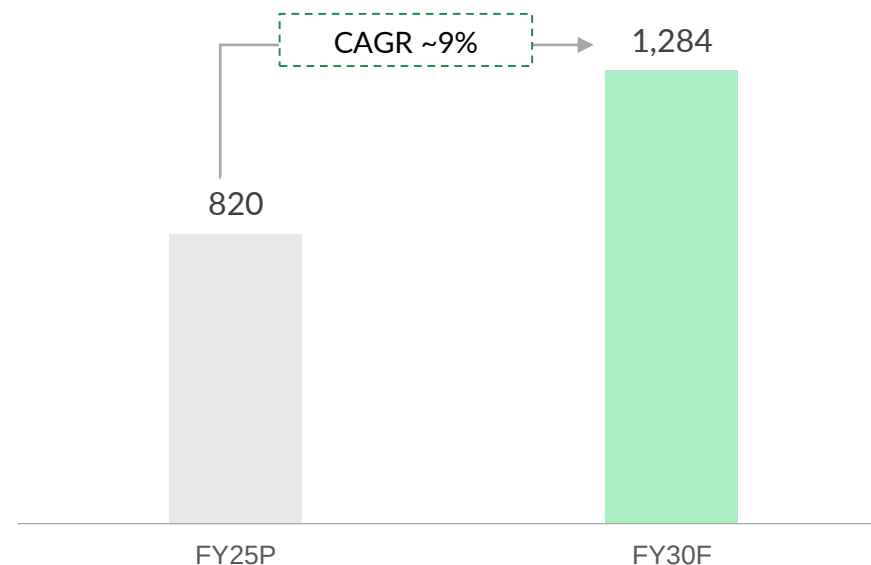
Lakhs Tons



- **China has emerged as the largest consumer of shrimps with >27 Lakh tons annually** due to its massive population & cultural preference for sea-food
- **US and EU have shown strong demand for shrimps with an annual consumption of ~9 Lakh tons & ~7 Lakh tons respectively**, through retail & food service sectors, especially for frozen & processed shrimp
- Global shrimp consumption is expected to grow, supported by rising health consciousness & growing demand for sustainable & traceable seafood

India Shrimp market revenue growing to reach INR 1.3 Lakh Cr in FY30

In INR 00' Crore



- **India's shrimp market is currently valued at 0.8 Lakh Cr, which is projected to reach ~INR 1.3 Lakh Cr by FY30**, growing at a **CAGR of ~9%** (2025-2030)
- India is the 2nd largest producer of farmed shrimps with **~9.3 Lakh MT** production in 2023, of which **90% is exported mainly to the USA, China, Japan, Vietnam, EU**
- **Andhra Pradesh is the leading shrimp-producing state, contributing ~70%** of national output making it the shrimp hub of India

Strong Global Demand for Indian Shrimps with an Export Market of ~INR 43k Cr in FY25

India's Total Export and Import Value and Volume

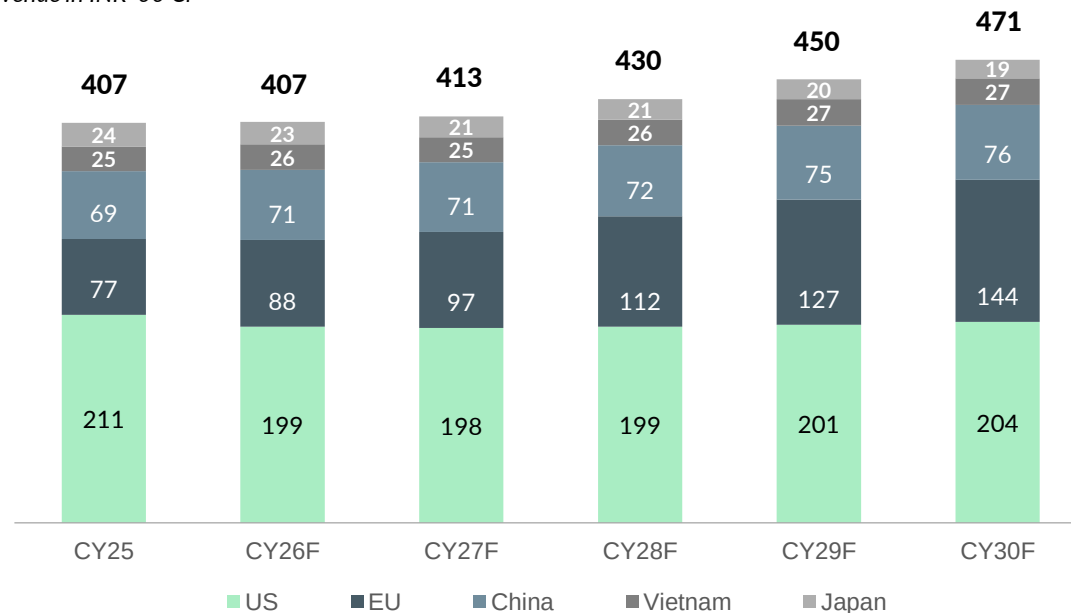
Trade Flow	Value (INR Cr)	Volume ('000 Tons)
Exports	42,500	825
Imports	168	3

Top 10 Export Destinations: Countries Importing Indian Shrimps

Countries	Value (INR Crores)	Volume ('000 Tons)
USA	21,100	309
China	6,930	146
Japan	2,380	38
Vietnam	2,540	43
EU	7,730	112
UAE	1,160	27
Russia	1,200	23
Canada	1,340	22
UK	840	15
Kuwait	250	6
World	42,500	825

Targeted Export Market for Shrimps from India

Revenue in INR '00 Cr

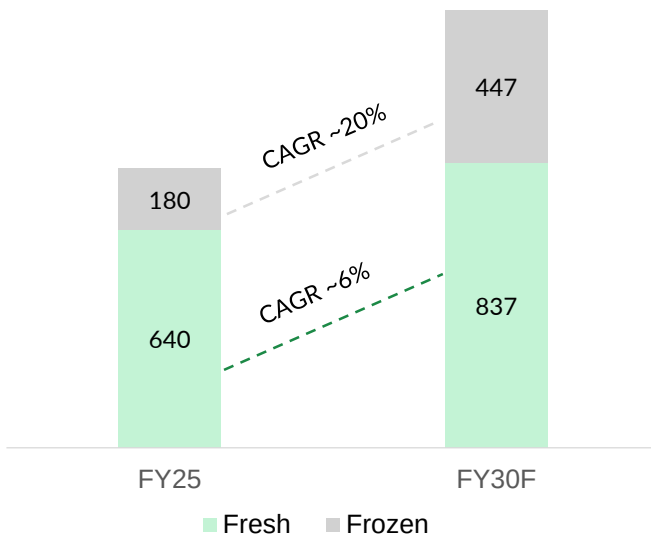


- Indian shrimp export market is **currently pegged at INR 42,500 Cr in FY25** which is projected **to reach INR 47,100 Cr by FY30**, exhibiting a **modest CAGR of ~3%**, indicating a stable and consistent demand
- China, the EU, Japan, Vietnam, and other Southeast Asian countries** together accounted for roughly **48% of India's shrimp exports in FY25**. The **US** remained the **largest importer**, with imports worth **INR 21,100 crore**, and is expected to **maintain its lead through FY30**

Shrimps Market Segmentation in India: A Strategic Breakdown

India Shrimps Market Segmentation by Form

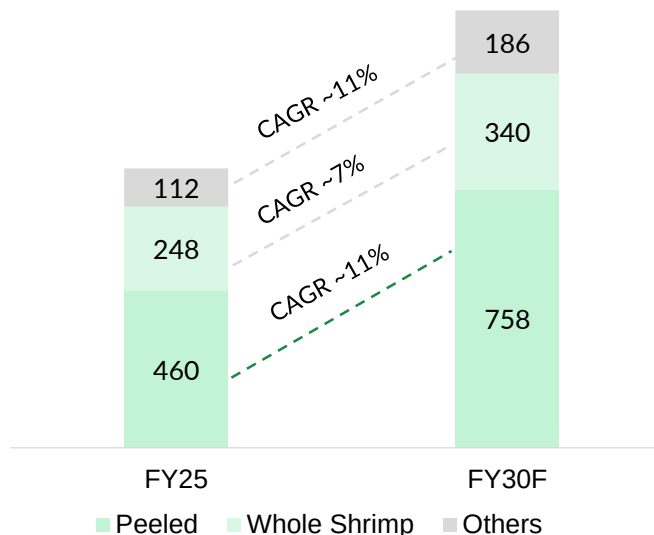
Revenue in INR '00 Cr



- Indian Shrimps market is witnessing a **sharp shift in consumer & export demand toward frozen shrimp**, which is **projected to grow at ~20%** (2025-2030)
- Domestic demand for frozen shrimp is driven by increasing penetration of cold chain logistics** in Tier 2 & Tier 3 cities and **expansion of modern retail formats**
- Frozen Shrimps **align well with both B2B and B2C export requirements** due to their higher shelf life

India Shrimps Market Segmentation by Processed

Revenue in INR '00 Cr



- Peeled shrimp market value is projected to rise significantly from **INR 46,000 Cr in FY25 to INR 75,800 Cr in FY30**
- Peeled shrimp has emerged as the dominant category, holding the **largest share of 56% in FY25** driven by **growing international demand from US, Japan and EU**
- Whole shrimp market is currently valued at **INR 24,800 Cr**, **growing at a CAGR of ~7%** to reach INR 34,000 Cr by FY30

India Shrimps Market Segmentation by Variety

Revenue in INR '00 Cr

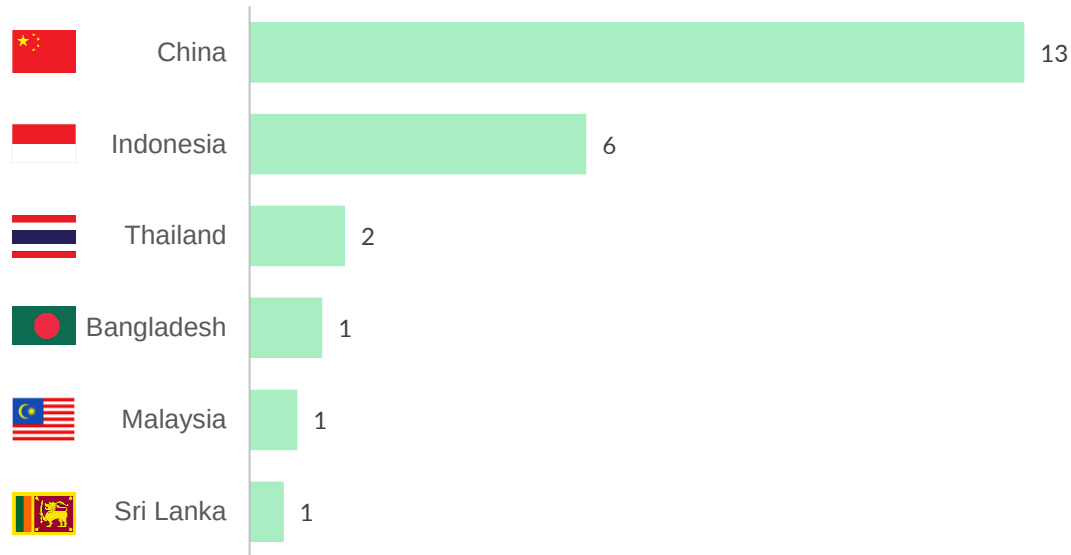


- India's shrimp industry is **dominated by Vannamei shrimp**, which accounts for INR 65,600 Cr, **being ~80% of total market value in FY25**
- Vannamei remains the dominating variety, growing at a CAGR of ~8% to reach a **projected sales value of INR 97,600 Cr by FY30**
- The Black Tiger shrimp market, **pegged at INR 11,500 Cr in FY25**, is **expected to reach INR 22,000 Cr** at ~14% CAGR

India Leads the Global Red Dry Chillies Market with a Production Volume of 32 Lakh Tons in FY24

Dry Chilli Consumption: China leading with >13 Lakh Tons Annual Consumption

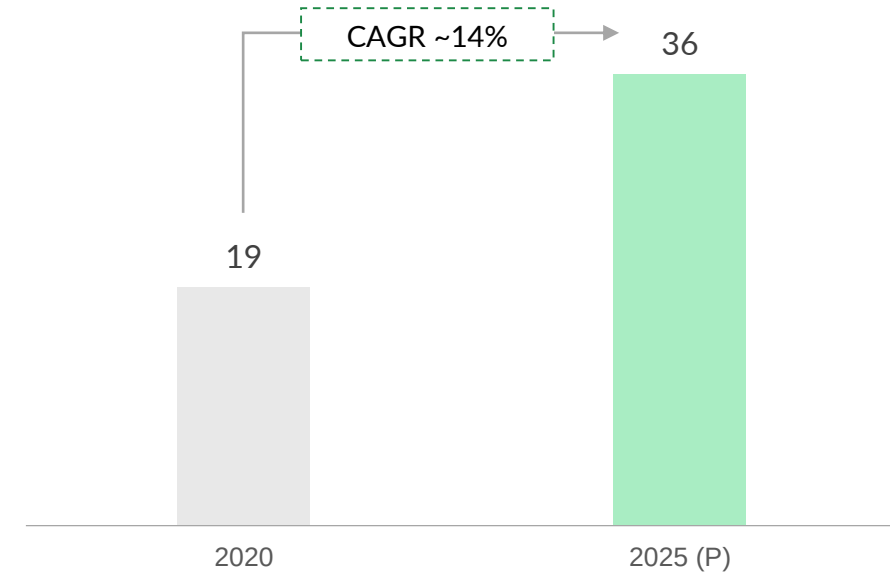
Lakhs Tons



- **Consumption for red dry chillies is majorly concentrated in the Southeast Asian countries** like China, Indonesia & Thailand where spicy food is a cultural staple
- The global red dry chilli **consumption is led by China with >13 lakh tons** followed by Indonesia with ~6 lakh tons and Thailand with ~2 lakh tons
- Consumption is expected to rise in Southeast Asia driven by the growth of food services industry, increasing exports of processed food & adoption of high-yield chilli varieties

India: The global Leader in Dry Chilli Production with 36 Lakh Tons in FY24

in Lakh Tons



- **India's Red Dry Chilli production was 19 Lakh tons in FY20**, which is projected to reached **36 lakh tons in FY25**, exhibiting a **CAGR of ~14%** (2020-2025)
- **India continues to be global leader in red dry chilli market** with 36 lakhs tons production volume in FY24
- India's major red chilli supply comes from Andhra Pradesh, Telangana, Karnataka and Madhya Pradesh. **Andhra Pradesh alone accounts for >44% of total national production, making it the chilli capital of India**

Strong Global Demand for Indian Red Dry Chillies with a Export Market of ~INR 11k Cr in FY25

India's Total Export and Import Value and Volume

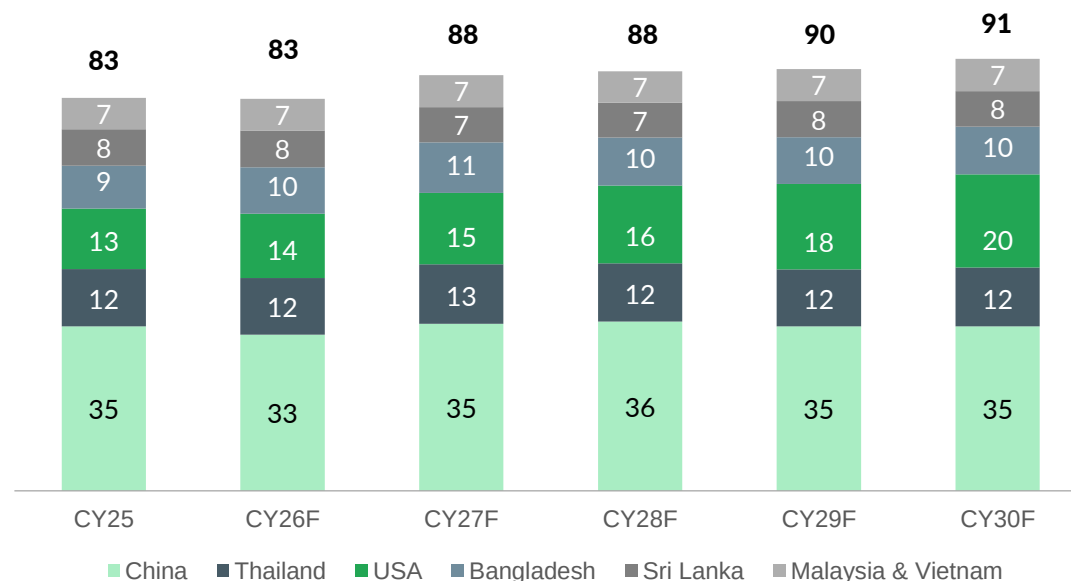
Trade Flow	Value (INR Cr)	Volume ('000 Tons)
Exports	11,170	536
Imports	120	24

Top 10 Export Destinations: Countries Importing Indian Red Dry Chilli

Countries	Value (INR Cr)	Volume ('000 Tons)
China	3,480	187
Thailand	1,210	55
USA	1,130	39
Bangladesh	910	60
Sri Lanka	770	43
Indonesia	640	37
Malaysia	520	23
UAE	260	14
Vietnam	140	8
Canada	90	3
World	11,170	536

Targeted Export Market for Red Chillies from India

Revenue in '00 Cr

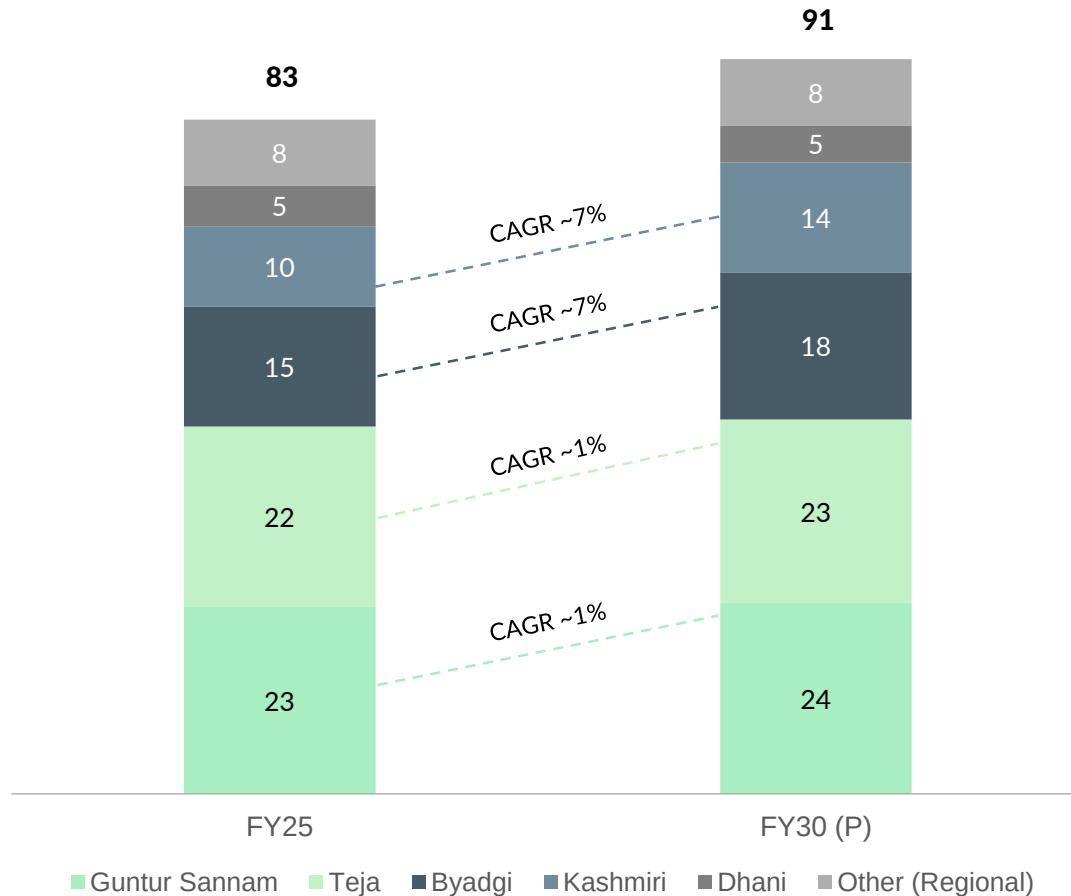


- The Indian red dry chilli export market is **currently valued at INR 8,300 Cr in FY25** which is projected **to reach INR 9,100 Cr by FY30**, exhibiting a **modest CAGR of ~2%**. This indicates consistent export market for red dry chilli
- China remains the largest importer of red dry chillies from India** currently at **INR 3,480 Cr in FY25**, and projected to remain constant till FY30
- Thailand, Bangladesh, Sri Lanka, Malaysia & Vietnam collectively holds 51% of share** for import of red dry chilli from India

INR 4,700 Cr Export Market Opportunity for Guntur Sannam and Teja Chilli Varieties, Cultivated in Andhra Pradesh and Telangana

Indian Red Dry Chilli Varieties: Guntur Sannam and Teja dominate the market

In '00 Crore



- Guntur Sannam continues to hold the largest share, accounting for INR 2,300 Cr in FY25P, and it's projected to maintain a strong market share with a slight increase to INR 2,400 Cr in FY30F. This variety is expected to grow at a steady pace, with a CAGR of ~0.4%
- Teja is the second-largest segment, contributing INR 2,200 cr in FY25P. Its share is expected to remain stable, reaching INR 2,300 crore in FY30F, growing at a CAGR of ~0.3%
- The other varieties such as Byadgi, Kashmiri, Dhani, and Jwala have a comparatively smaller share, but Jwala is poised for a strong growth rate of ~7% CAGR, which reflects increasing demand in niche markets
- Byadgi and Kashmiri varieties are also likely to maintain their positions with slight growth, contributing INR 1,500 cr and INR 1,000 crore, respectively, in FY25P, with minimal change projected by FY30F

Key Growth Drivers & Government Initiatives

Key Growth Drivers of Shrimp Demand

- 1 Rising Global Demand**
Popular for being high in protein and low in fat, it is the most consumed seafood globally
- 2 Competitive Pricing**
Cost-effective compared to competitors like Ecuador
- 3 Aquaculture Advancement**
Biofloc and RAS systems are improving yields and sustainability
- 4 Government Support**
Budget boost of 54%, along with duty reductions, infrastructure development, and financial aid
- 5 Recovery in Demand**
Inventory restocking and increased discretionary spending in key markets are driving demand

Key Government Initiatives for Shrimp Supporting Demand

- 1 PM Matsya Sampada Yojna (PMMSY)**
INR 2,352 Crore (USD 280 Million), up by 56% from FY 23-24
- 2 Budget Allocation For Fisheries (FY 24-25)**
INR 2,616 Crores (USD 311 Million), up by 54% from FY 23-24
- 3 NABARD Support**
Financial assistance for shrimp production, processing, and export
- 4 Duty Reductions**
BCD reduced to 5% on broodstock, polychaetae worms, and feed inputs
- 5 Nucleus Breeding Center**
Financial aid for high-quality broodstock production

Growth Opportunities & Global Demand Trends in the Indian Red Dry Chillies Market



High Global Utilization of Red Chillies Across Industries

- Red chili is used in sauces, spice blends, and ready-to-eat meals
- It is also used in pharmaceutical formulations, cosmetics, and organic pesticides
- These diverse uses maintain steady demand across Asia, North America, and the Middle East



Production Capacity & Regional Output

- Red chillies are grown in Andhra Pradesh, Telangana, Tamil Nadu
- These states have established supply chains that ensure year-round availability and high production volumes



Varietal Range for Different Markets

- Teja and Guntur Sannam varieties are preferred in Southeast Asia
- Bydagi and 334 varieties are used for coloring and masala mixes in the Middle East and North Africa
- Mundu is used in regional cuisines; varieties cater to heat, color, and oil content



Diversified Buyer Base

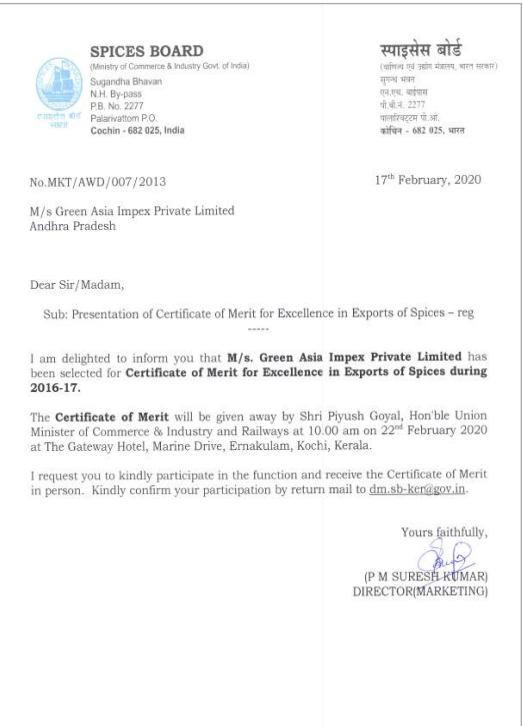
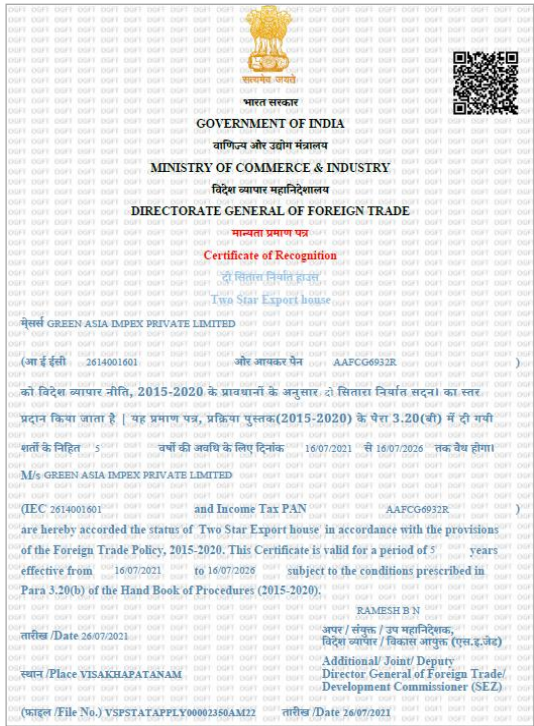
- Indian red chillies are exported to the China, Vietnam, Bangladesh, UAE, Canada and USA
- Some countries like Vietnam and UAE re-export Indian chillies to Southeast Asia, Africa, and Europe



Geographic Diversification Advantage

- This export spread provides resilience against disruptions and slowdowns
- It reflects India's role in global commodity flows and intermediate processing supply chains

Awards and Recognitions



Two Star Export House Award (2015-20)
By the Directorate General of Foreign Trade

Best Chillies Exporter Award (2016-17)
By the Spice Board

Best Chillies Exporter Award (2017)
By the Commissioner of Customs

Licenses and Certifications

Product Certifications



Approval for food products sold in United States

- ✓ Legally allowed to export to US
- ✓ Builds credibility with US buyers
- ✓ Reduces the risk of rejection, detentions or recalls



Preventive food safety system, identifies & control hazards

- ✓ Required by many international buyers
- ✓ Enhances brand credibility and consumer confidence



Ensures compliance with domestic food safety laws

- ✓ Required by many international buyers
- ✓ Enhances brand credibility and consumer confidence

Export Certifications / Permits



Ensures products meet Indian export standards

- ✓ Required for customs clearance in India
- ✓ Enhances regulatory compliance



Compliance with China's import safety & quality standards

- ✓ Mandatory for export to China
- ✓ Helps in avoiding shipment rejections at Chinese ports

Quality Control Certifications



Compliance with China's import safety & quality standards

- ✓ Mandatory for export to China
- ✓ Helps in avoiding shipment rejections at Chinese ports

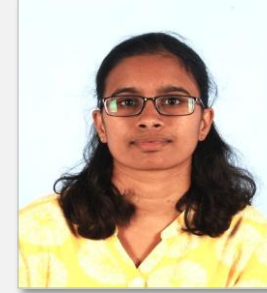
Operations led by Highly Experienced and Passionate, Operational Management Team



Siva Nageswara Rao Gummadilli

Chief Financial Officer

- He is a qualified Chartered Accountant with 15+ years of experience in finance and accounts
- He is responsible for oversees financial strategy, compliance, reporting, risk management, and capital operations
- Previously associated with Bharat Heavy Electricals Limited, Anandam & Co, and ELICO Healthcare Services



Ganta Aswani Raju

Company Secretary

- She is a qualified Company Secretary with 5+ years of experience in secretarial compliance
- She is responsible for ensuring compliance with the Companies Act, maintaining statutory records, and upholding secretarial standards
- Previously associated with Gati Kintetsu Express, Jyotimayee Foods, and other firms



Vishnu Prakash Reddy Karri

General Manager

- He has 20+ years of experience in the field of banking and finance and 3+ years of experience in the field of general administration
- His roles include managing the operations and strategic objective of general administration department



Kranthi Teja Kothapalli

Production Manager

- He has 2+ years of experience in Customer Service and 7+ years of experience in Production Management
- His roles and responsibilities include managing the operations and strategic objectives of production department



Tadi Kalyan Ram

HR Manager

- With 16+ years of experience in human resource management and administration
- His roles and responsibilities include managing operations and strategic objectives of Human Resources Department

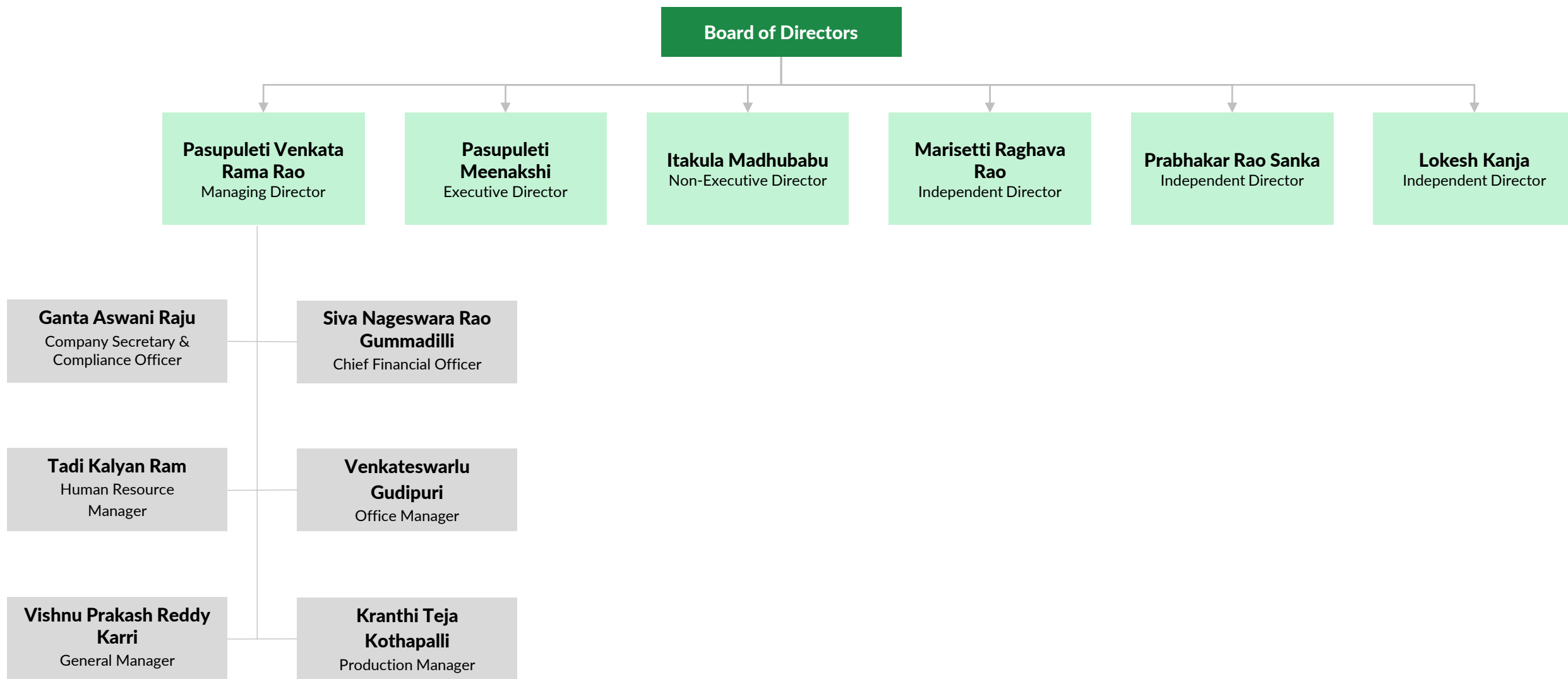


Venkateswarlu Gudipuri

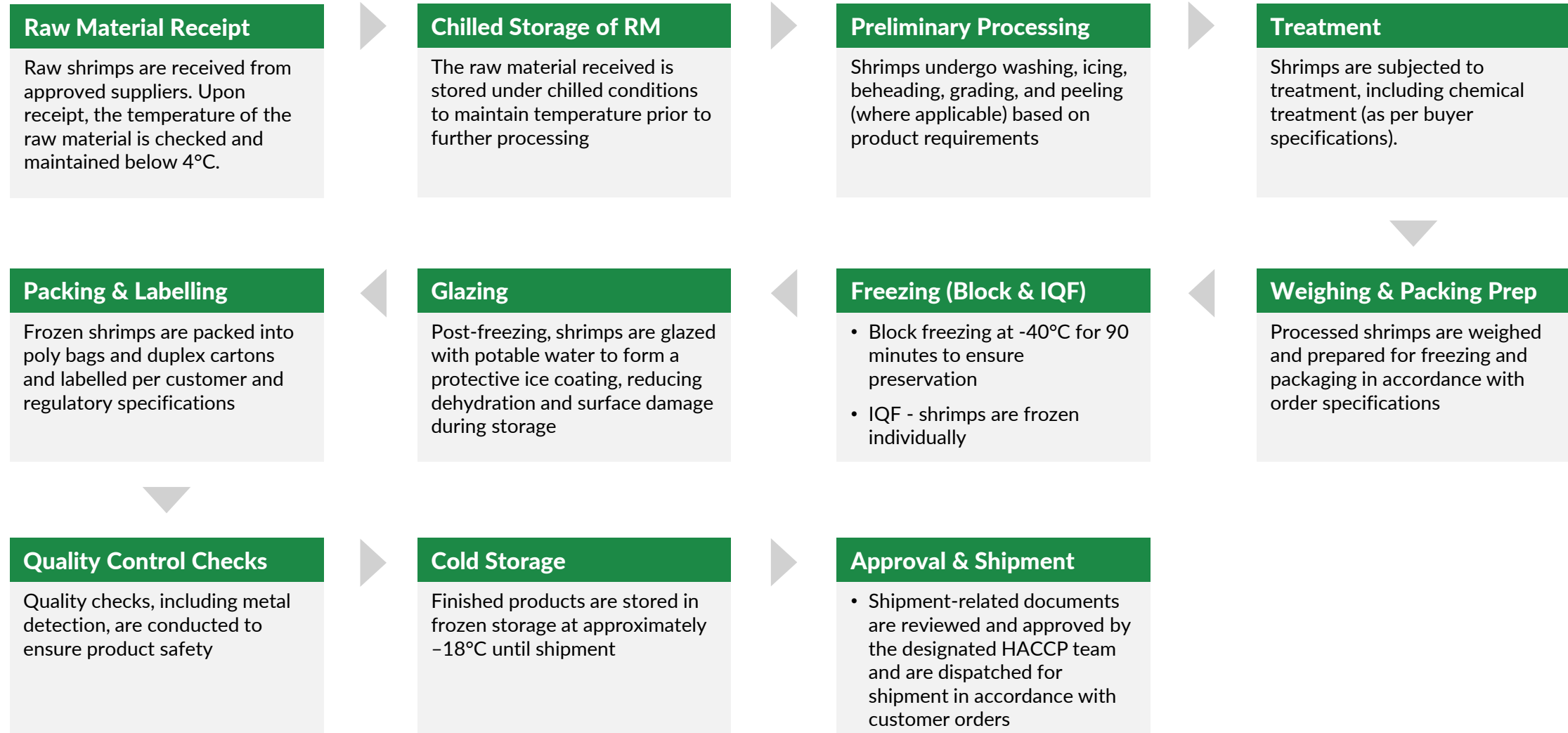
Office Manager

- He has 9+ years of experience in the field of production management and administration department
- His roles and responsibilities includes managing operation and strategic objectives of administration department

Driving Performance Through a Seamless Organizational Structure



End-to-End Process Flow for Shrimps Export and Domestic Distribution



End-to-End Process Flow for Dry Chillies Export and Domestic Distribution



Thank You

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