

# Market Analysis: “Compass Eye” Automated Commodity Sorter

**Target Industries & Buyer Segments:** Large foodservice and processing organizations with strict safety demands are the primary customers. For example, corporate/institutional caterers (e.g. Compass Group’s kitchens at Google/Microsoft campuses) and major contract operators (Sodexo, Aramark) enforce HACCP-based quality controls <sup>1</sup> <sup>2</sup>. These kitchens serve thousands daily and need to eliminate foreign objects in pulses/grains, so an automated sorter can be appealing. Similarly, **hospitality** (hotels and restaurants) chains – from luxury hotels (Taj, Marriott, etc.) to large QSR or cruise-line caterers – emphasize consistent ingredient quality. High-end food brands (e.g. Tata Sampann pulses) use multi-step cleaning for uniform quality <sup>3</sup>; hotel kitchens buying such branded ingredients signal demand for cleanliness. **Food manufacturers and packers** are another segment – companies that grind, bag or package commodities (pulses, rice, spices, nuts) need to remove contaminants to protect equipment and brand reputation. Leading pulses/food processors like ASOP Foods (Ajit Singh Om Parkash Pvt Ltd) already collect raw produce from farmers, clean it and supply to retailers (e.g. Amazon) <sup>4</sup>. Such processors could either buy sorters or offer pre-sorted products to caterers. **Institutional food service** (hospital kitchens, eldercare, schools, prisons, military) also values “absolutely safe” food <sup>2</sup>; these clients may invest in sorting tech or in vetted suppliers to avoid any foreign material in patient and student meals. In short, Compass Eye’s **B2B** market spans global foodservice (catering chains, healthcare, hospitality) and food processing/manufacturing sectors.

- *Example – Healthcare:* Hospital kitchen studies emphasize “foreign objects should never find a place” in patient meals <sup>2</sup>. Automated vision sorting has been shown effective in HACCP food safety programs <sup>1</sup>. This underscores that medical and elder-care cafeterias are a target segment.
- *Example – Packaged Foods:* Tata’s branded pulses use a 5-step cleaning process to ensure premium uniformity <sup>3</sup>; similarly, packers of organic/health foods (like Tata Sampann or other organic/health brands) will demand sorting to meet their quality claims. Buying cleaned pulses from suppliers (or installing on-site sorters) is a competitive necessity.

**Commodity Compatibility & Throughput:** Compass Eye targets dry bulk food materials. Current demonstration units process ~30–40 kg per batch, suitable for large kitchen or mid-size processing use. Its existing portfolio covers ~15–16 commodities: all major *pulses* (lentils, beans, peas etc.), *rice* (paddy, parboiled, white rice), common *cereals/grains* (wheat, maize, sorghum), *spices* and *nuts* <sup>5</sup> <sup>6</sup>. For example, Bühler Sortex optical sorters handle “all types of pulses (beans, lentils, peas)” to remove tiny defects <sup>5</sup> and “all types of rice” removing stones and color faults <sup>7</sup>. Similarly, spice sorters remove foreign materials in whole/seed spices <sup>8</sup>. Compass Eye could extend to other crops (millets, coffee, etc.) since camera-based sorters generally work on any singulated bulk commodity <sup>9</sup>. In contrast, industrial-scale optical sorters handle much higher volumes – e.g. Premier Tech’s OS T sorter processes “up to 30 tons per hour” of maize, rice, pulses, wheat, soybeans, etc. <sup>10</sup>. Thus, *buying capacity* aligns with mid-level volume: large kitchens or small millers might run dozens of kilos per day, whereas large processors use multi-TPH machines. (Compass Eye’s 30–40 kg per run is ideal for on-site cleaning; very large processors would use traditional sorters.)

**Competitor Landscape:** Compass Eye competes with both **other sorting machines** and **alternative supply approaches**. Globally, major optical sorter manufacturers sell high-end systems: Bühler (Sortex), TOMRA, Satake, Cimbria, Key Technology, etc. <sup>11</sup>. These vendors offer machines for all grains/pulses (e.g. TOMRA sorters “detect and reject stones, glass and plastics” from beans, lentils, peas <sup>12</sup>). In India and Asia, companies like Spectrum (India), North India Compressors, Kinetic Group, etc. also build color sorters for pulses and rice <sup>13</sup>. Such machines are powerful (capacities from ~1 to 30+ tons/hour <sup>14</sup> <sup>10</sup>) but expensive. By contrast, Compass Eye’s value proposition is a more compact, turnkey conveyor sorter with magnet & vacuum integration for kitchen use.

- *Optical Sorters vs Magnets:* Traditional separators use magnets or sieves for ferrous/large impurities. For example, magnetic separators remove even tiny ferrous particles (as small as dust) but only capture ferrous metal <sup>15</sup>. Metal detectors similarly find metals in a production line. These are common in food plants, but they cannot detect stones, plastics or discolored grains. Optical/laser sorters (camera-based systems) automate removal of any foreign object that differs in color/shape <sup>15</sup> <sup>16</sup>. (The trade-off is cost and space – optical sorters require air ejectors and electronics.) Compass Eye bundles a camera plus magnetic and suction removal on a conveyor, competing with a combination of those traditional controls.
- *Service/Procurement Competitors:* Some companies bypass on-site sorting by **buying pre-cleaned commodities**. Large foodservice operators often source from branded or specialty suppliers who guarantee purity. For example, pulses are available in bulk from aggregators like ASOP Foods, which “collect produce from farmers, clean them and provide it to market” <sup>4</sup>. Likewise, branded pulses (Tata Sampann, other organic/natural brands) are marketed as free of adulterants. In effect, these suppliers are indirect competitors: a corporate kitchen could choose to *buy* sorted ingredients instead of installing new equipment. (The mention of “Foodbuy” suggests such a procurement organization – effectively group purchasing of assured-quality foods.)

**Market Drivers and Constraints:** Automation in food processing is growing worldwide. Industry reports note “rapid growth in the food industry” with optical sorters becoming ubiquitous to improve safety <sup>9</sup>. Globally, the optical-sorting market is expanding (~10% CAGR) as manufacturers seek to reduce contamination and labor <sup>9</sup> <sup>1</sup>. Key drivers include strict food-safety regulations (especially in developed markets) and demand for premium “blemish-free” products. On the other hand, high equipment cost is a barrier: even analysts note that “optical sorting equipment is expensive... [which] may prevent some end users with tight budgets”. Compass Eye, positioned for mid-size kitchens, must show ROI in time saved and waste avoided to justify purchase.

**Summary:** In summary, Compass Eye targets the B2B foodservice and processing market worldwide. Its **ideal buyers** are large-scale kitchens (corporate, hospitality, institutional) and smaller food processors who need visual impurity removal but not full industrial lines. The machine’s commodity range (pulses, rice, grains, spices, etc.) aligns with typical food staples that restaurants, hospitals and mills handle. Main **competitors** are advanced optical sorting systems (global OEMs) and alternative supply methods (buying pre-cleaned goods from packers). Compass Eye’s niche is providing automated visual sorting (with magnet/vacuum) at kitchen scale – filling a gap between expensive factory sorters and purely manual cleaning.

**Key References:** Technologies and market trends cited above are drawn from food-sorting industry sources <sup>9</sup> <sup>16</sup> <sup>5</sup> <sup>12</sup>, company case examples <sup>3</sup> <sup>4</sup>, and food safety analyses <sup>2</sup> <sup>16</sup>. These illustrate how

optical sorting is applied and valued across food industries, and the competitive landscape of players in this space.

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