

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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India

Exporter Guide

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Report Highlights:

India is a small and growing market for imported consumer food products. India's modern retail sector is expanding and young and higher income consumers are trying global cuisines. Importers attend major international food shows in search of new products. Exporters should determine if a product has market access and be willing to start small and comply with specific labeling and packaging requirements.

Post:

New Delhi

Executive Summary:**Section 1: Market Overview:**

India has one of the world's fastest growing large economies and, by some estimates, is projected to become the world's third largest economy by 2025. In 2010, annual gross domestic product (GDP) growth reached 8.9 percent but slipped to 6.9 percent in 2013. However, in 2014, the GDP rose to 7.4 percent (based on a revised base year). The governments "Make in India" program encourages the development of the manufacturing sector as a major goal. The International Monetary Fund and World Bank, each, have projected India's growth to remain around 7.5 percent to 8 percent in the medium term.

The Reserve Bank of India has taken measures to control inflation and has benefited by the persistent decline in global oil and agricultural commodity prices. The depreciation of the rupee remains a concern for the economy as during the period from November 2014 to November 2015 the exchange rate went from INR 61 to the U.S. dollar to over INR 66 to the U.S. dollar.

The Government of India has not lowered tariffs or noticeably improved access for imported food and agricultural products over the past several years. Nevertheless, led by commodities such as vegetable oils and pulses for which tariffs are low, India's bulk, intermediate, consumer-oriented, fishery and forestry imports grew from \$13.2 billion in 2009 to \$24.5 billion in 2014 (Note: Exports jumped from \$16.8 billion in 2009 to \$43.0 billion in 2014, as well). Imports of consumer-oriented foods, led by tree nuts and fresh and dried fruits essentially have doubled since 2009 to \$3.89 billion.

Table 1. India: Imports of Ag., Fish, and Forestry Products from the World (U.S. Billion \$)

Category	2009	2014	2015 (YTD) Jan- Sep'15
Bulk	3.871	5.403	4.076
Intermediate	6.152	12.417	8.849
Consumer- Oriented	1.723	3.890	3.419
Fishery and Seafood	0.040	0.059	0.045
Forestry	1.446	2.772	1.844
Total	13.232	24.541	18.233

Source: India's Ministry of Commerce

Table 2. India: Exports of Ag., Fish, and Forestry to the World (U.S. Billion \$)

Category	2009	2014	2015 (YTD) Jan- Sep'15
Bulk	6.570	17.631	9.530
Intermediate	3.364	7.566	4.501
Consumer- Oriented	4.825	11.870	7.923
Fishery and Seafood	1.875	5.505	3.376
Forestry	0.153	0.404	0.386
Total	16.787	42.976	25.716

Source: India's Ministry of Commerce

A. Food Purchasing Behavior

Traditionally, the Indian food consumer was someone who shopped regularly at small neighborhood stores for fresh ingredients to prepare Indian foods at home. Consumers rarely ate out and rarely consumed or prepared foods from other countries or cultures. Consumers adjusted their consumption to the seasonal or regional availability of food and it was common for the type of food consumed to change significantly between regions, within a state, or from rural to urban areas. While many of these patterns still hold true for the vast majority of Indians, food purchasing behaviors, particularly for upper income consumers, are changing with the emergence of cafes, fast food restaurants, supermarkets, processed foods, larger refrigerators, 24-hour television food channels, easier access to imported foods, women working outside the home, rising numbers of nuclear families and the introduction of foreign cuisines. In nominal terms, total expenditures on food increased 64 percent between 2009 and 2014 to an estimated \$365 billion.

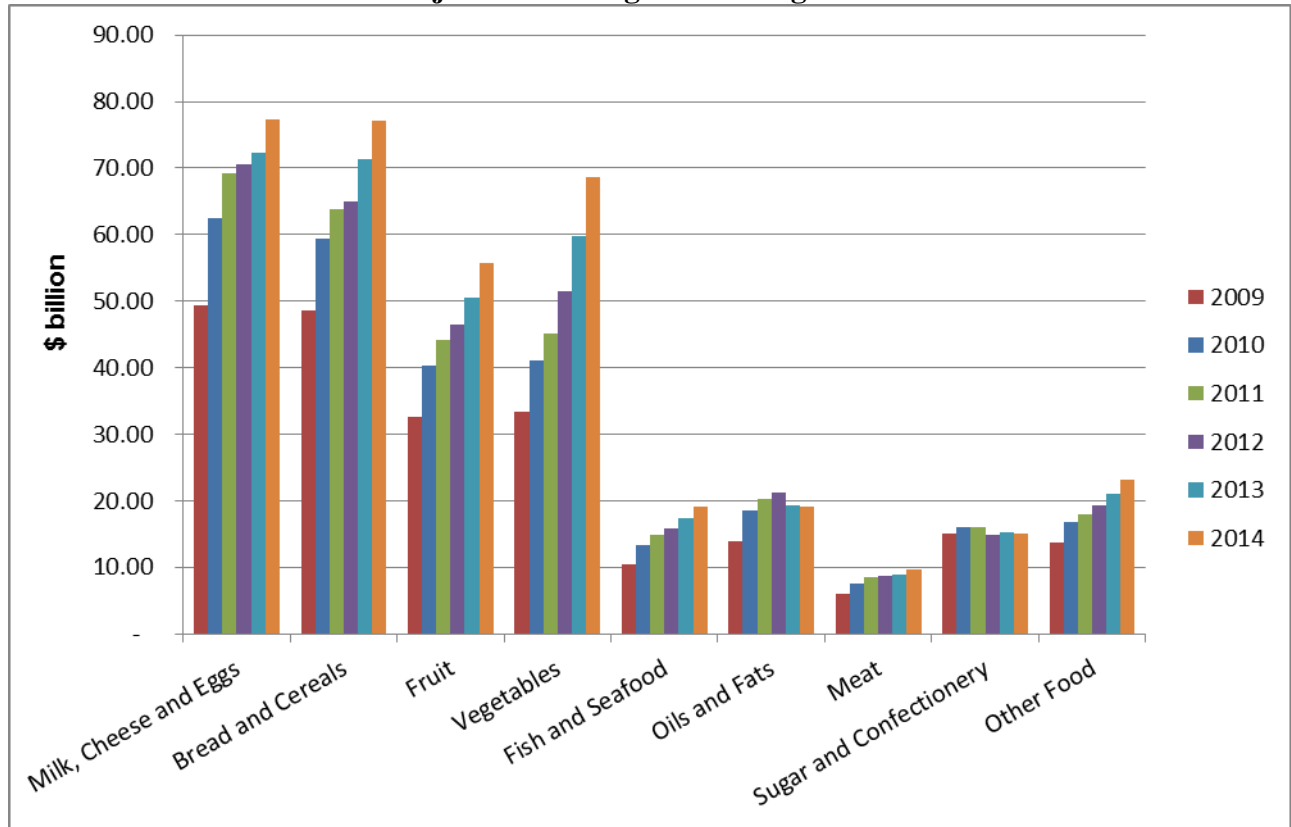
Table 3. India: Consumer Expenditures on Major Food Categories During 2014

Categories	2014	2009 – 2014
	(\$ billions)	Growth Percentage
Milk, Cheese and Eggs	77.30	56%
Bread and Cereals	77.20	59%
Fruit	55.70	71%
Vegetables	68.70	106%
Fish and Seafood	19.10	82%
Oils and Fats	19.10	38%
Meat	9.60	60%
Sugar and Confectionery	15.00	-1%
Other Food	23.10	70%
Total	364.80	64%

Source: Euromonitor

Demand for specialty and high value foods such as chocolates, nuts and dried fruits, cakes, fresh fruits, confectionary items, and fruit juices peaks during the fall festive season, especially at Diwali - the Hindu festival of lights which occurs during October or November depending on the lunar calendar. This is also the best time to introduce new-to-market food products in India.

Figure 1. India: Growth in Consumer Expenditures on Major Food Categories during 2009-2014



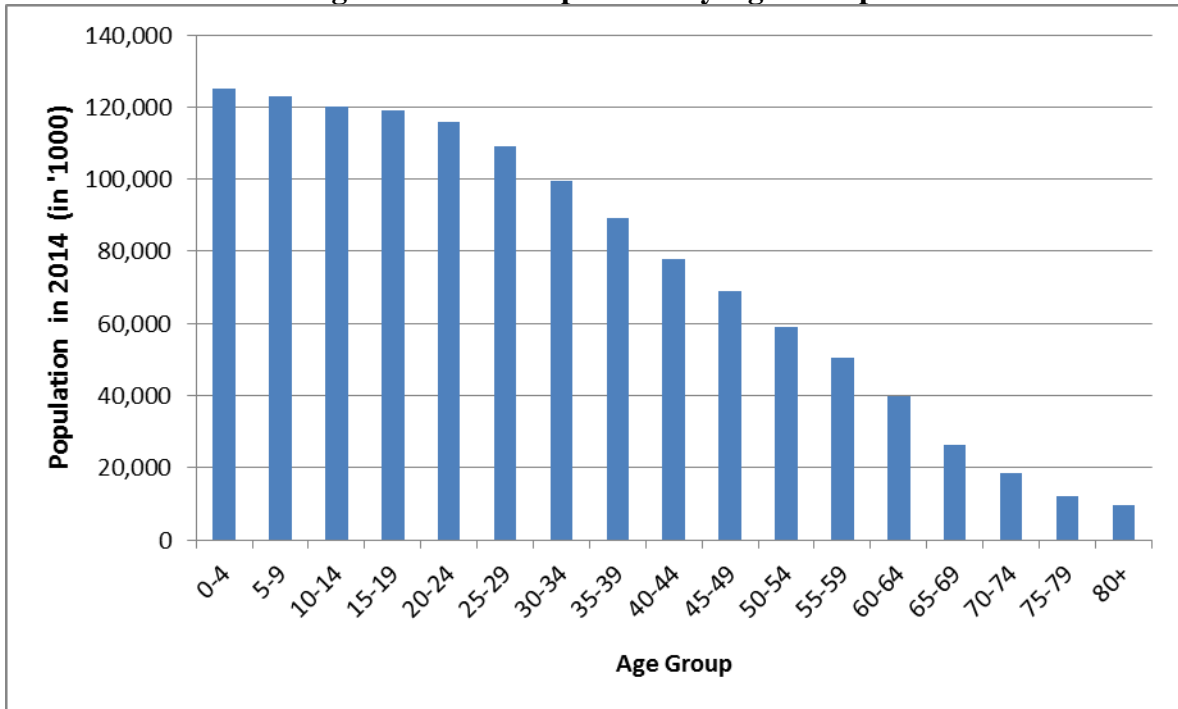
Source: Euromonitor

B. Consumer Demographics

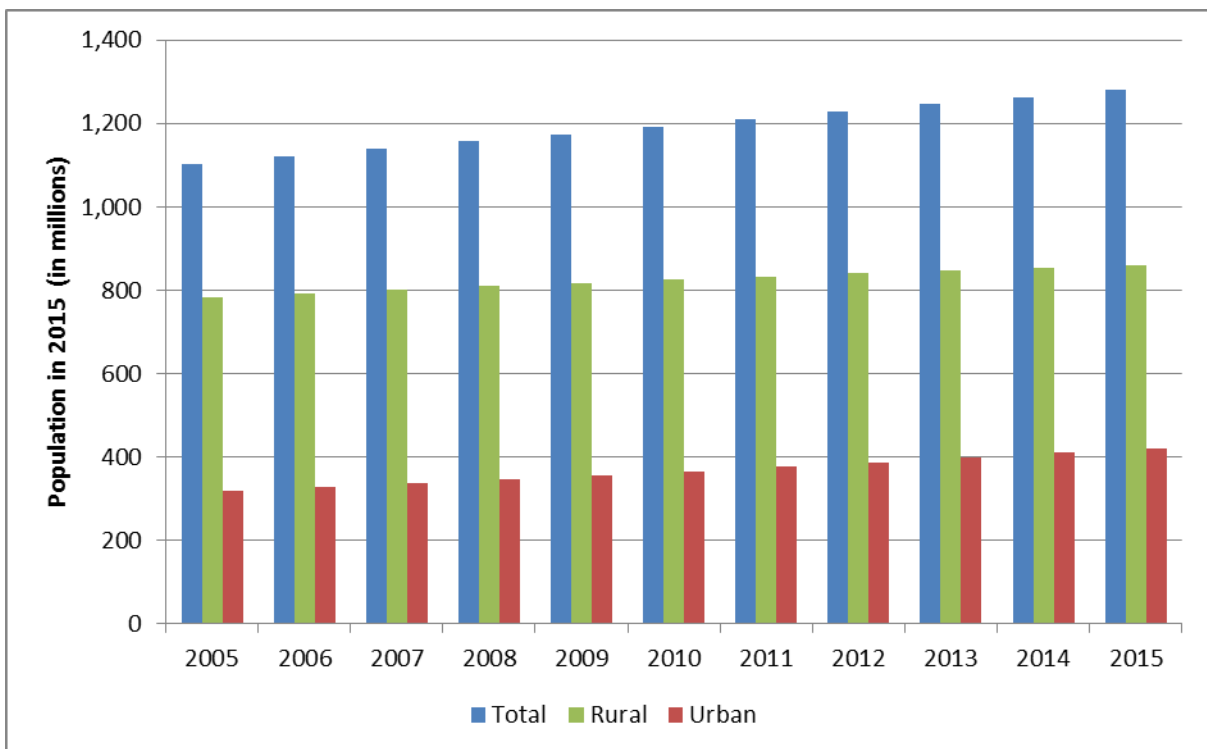
With a population of 1.25 billion, India is the world's second most populous country after China. India is also one of the youngest countries in the world with a median age of 25. Nearly 60 percent of Indians are under the age of 30. However, declining birth rates suggest that the Indian population will age over the next 10 years with the fastest growth occurring among those aged 30 and above - a group that comprises the highest earners.

Nearly half of all Indians are married and families traditionally live in joint or extended families resulting in an average household size of 4.8 people in 2014. In urban areas, smaller nuclear families are becoming more common as mobility and employment opportunities increase.

Figure 2. India: Population by Age Group



Source: Euromonitor



Source: Euromonitor

Over 850 million Indians live in rural areas compared to 400 million who live in urban areas. While the urban population is growing at more than double the rate of rural areas as migrants move to cities in search of opportunity, it will likely be several decades before India's population will become majority urban. Agriculture accounts for an estimated 14 percent of Indian GDP, but over half of Indians are employed in agriculture, suggesting that urban areas will continue to gain population as surplus labor moves to cities. Nevertheless, rural areas are emerging as important markets for fast moving consumer goods. Aside from vegetable oil and pulses, opportunities for imported value-added or consumer-ready foods are likely limited in rural areas while showing promise in Tier 1, Tier 2, and some Tier 3 cities.

While media reports touting the rise of the Indian middle class abound, incomes in India continue to be relatively low. The World Bank classifies India as a "low income" country. The annual per capita gross income was \$1,570 during 2014 according to data compiled by World Bank. The Government of India recently published a similar estimate indicating that real per capita annual disposable income grew 10.1 percent from 2013 to 2014 to Rs.88,538 (\$1,341).

Persistent low incomes and rising food prices present nutritional challenges for many Indian consumers. As per [UNICEF the State of the World's Children 2015](#) report, more than 43 percent of Indian children under the age of five years are underweight. According to India's National Sample Survey Office, Indians continue to spend a large percentage of their incomes on food with rural Indians spending 57 percent and urban residents spending 44 percent. To some degree, the large number of lower income earners may reflect the large numbers of younger Indians who have not yet moved into their prime working years. In addition, the practice of living in extended families also helps to stretch incomes in India. Indians continue to be excellent savers saving nearly 30 percent of their incomes on average.

Table 4. India: Population and Income Categories 2009-2014

2014 Per Capita Income Band	2014 (Million People)	Annualized Percent Growth in People per Category from 2009-2014
Population with Income of US\$0-500 (Current)	163.1	-5
Population with Income of US\$501-1,000 (Current)	229.4	-1
Population with Income of US\$1,001-1,500 (Current)	159.4	3
Population with Income of US\$1,501-2,500 (Current)	164.1	6
Population with Income of US\$2,501-3,500 (Current)	71.0	9
Population with Income of US\$3,501-15,000 (Current)	97.7	12
Population with Income of US\$15,000+ (Current)	10.2	10

Source: Euromonitor

While consumption of processed foods such as domestically-produced chips, biscuits and vegetable oils penetrates the lower income categories, current opportunities for value-added imported foods are generally thought to be limited to higher income consumers. According to data provided by Euromonitor, average consumer expenditure (for all products) per household by the top 10 percent of Indian households rose to \$9,429 in 2014 from \$6,457 in 2009. Trade sources frequently estimate India's market for luxury goods at 10 million people and data from Euromonitor indicates that during 2007-2012, the luxury goods markets in India recorded real growth of 270 percent. There are

nearly 616,000 households with annual incomes in excess of \$150,000, up from 359,000 in 2009.

Regionally, the union territories of Delhi (\$3,308), Chandigarh (\$2,360), and the small state of Sikkim (\$2,654) have the highest per capita incomes. Among states, Gujarat (\$1,606), Maharashtra (\$1,720, home to Mumbai), Tamil Nadu (\$1,694, home to Chennai), Karnataka (\$1,274 home to Bengaluru, formerly known as Bangalore), along with Haryana (\$2,006) have the highest per capita incomes. The states of Bihar (\$544), Uttar Pradesh (\$607, India's most populous state), and Jharkand (\$694) have the lowest per capita incomes.

Advantages	Challenges
<ul style="list-style-type: none"> Expanding number of middle and upper income consumers willing to diversify diets. 	<ul style="list-style-type: none"> High income consumers are spread throughout the country.
<ul style="list-style-type: none"> Increasing urbanization and growing number of working women that has led to rise of dual-income households. 	<ul style="list-style-type: none"> Diverse agro-industrial base offering many products at competitive prices and preference for fresh traditional foods.
<ul style="list-style-type: none"> Increasing exposure to international products and western lifestyle. 	<ul style="list-style-type: none"> Indian food companies (including many multinational companies) produce western-style food products at competitive prices.
<ul style="list-style-type: none"> Opportunities for bulk, intermediate, and consumer ready products that can be used by growing food processing sector under Make in India campaign run by Government of India 	<ul style="list-style-type: none"> Stringent food regulations regarding biotech foods and certain food additives.
<ul style="list-style-type: none"> A slow but, gradual transformation of the retail food sector in urban and rural areas. 	<ul style="list-style-type: none"> Difficulties in accessing vast semi-urban and rural markets due to infrastructure limitations.
<ul style="list-style-type: none"> U.S. food products are considered safe and of high quality. 	<ul style="list-style-type: none"> High tariffs, persistent sanitary and phyto-sanitary requirements that effectively prohibit or restrict imports and competition from other countries.
<ul style="list-style-type: none"> Strong U.S.-India ties and political stability in India. 	<ul style="list-style-type: none"> Unwillingness of U.S. exporters to meet Indian importers' requirements (mixed shipments, changing product specifications to conform to Indian food laws, etc.).
<ul style="list-style-type: none"> Growing domestic and international tourism and rise in food/lifestyle media creating opportunities for niche products. 	<ul style="list-style-type: none"> Competition from countries having geographical proximity and freight advantage.

SECTION II: EXPORTER BUSINESS TIPS

A. Food Preferences

An estimated 20-30 percent of the Indian population is strictly vegetarian in accordance with the tenets of Hinduism. Those Hindus who eat meat tend to do so sparingly and beef (cow meat) consumption is taboo among Hindus, Jains and Sikhs who comprise over 80 percent of India's population. Furthermore, non-vegetarian food is not consumed during special days or religious observances. India's large Muslim population (estimated at 160 million) does not consume pork and eats Halal animal products that are sourced from livestock that were slaughtered according to the tenets of Islam. Many non-vegetarian members of the Indian population, too, may not eat meat or poultry at home and may only consume it at restaurants or food service establishments.

Indians take pride in the many regional and varied foods that comprise Indian cuisine. In general, Indians have a strong preference for fresh products, traditional spices and ingredients, which has generally slowed the penetration of American and other foreign foods. However, the acceptance of packaged, convenience and ready-to-eat food products is increasing, especially among younger consumers and the urban middle and upper middle class. Many Indians are quite willing to try new foods while eating out, but often return to traditional fare at home. Italian, Chinese, Thai and Mexican foods are reportedly the fastest growing new cuisines in India and consumers are slowly diversifying their consumption patterns.

Imported food items often spotted in retail stores include dry fruits and nuts, cakes and cake mixes, chocolates and chocolate syrups, seasonings, biscuits/cookies, canned/package fruit juices, canned soups, pastas/noodles, popcorn, potato chips, canned fish and vegetables, ketchup and other sauces, breakfast cereals, and fresh fruits such as apples, pears, grapes and kiwis.

B. Shopping Habits

Indian consumers traditionally purchase daily food needs from small neighborhood stores and vendors because of convenience, perceived freshness, and limited refrigeration and storage space at home. Quality is considered important, but there is a reluctance to pay a premium for such. With the penetration of modern retail outlets in larger cities, suburbs, and semi-urban areas, more Indians are gaining exposure to organized retail. A growing number of people in urban areas are widely travelled and have experienced international cuisines and branded food products. These consumer groups (mostly young professionals) have higher levels of disposable income and generally prefer making weekly/monthly purchases of processed foods and branded products. In general, most of the shopping and food purchasing decisions are made by women. In households that can afford hired help, servants often do much of the shopping. Availability of many fresh foods, particularly fruits and vegetables, is seasonal, and people are accustomed to adjusting their diet to the season.

A typical Indian household will make regular purchases of wheat flours, pulses, edible oils, ghee (clarified butter), dairy items (milk, butter, yogurt, paneer (cottage cheese)), spices and condiments, pickles, noodles, snack foods, jams and sauces. Most packaged food items are sold in small containers to keep pricing low and to accommodate limited storage space.

C. Distribution Systems

Marketing channels for imported foods often involve several intermediaries. Indian firms typically import, with the help of a clearing and forwarding agent, and distribute food products to retailers. While a number of importers have their own warehouses, others may utilize clearing and forwarding agents to facilitate the storage, movement and distribution of goods given the high cost of building and maintaining warehouses and maintaining truck fleets. Importers/distributors with national distribution typically have sub-offices in regional cities or appoint other distributors to market their products in specific regions.

For domestically produced foods, clearing and forwarding agents transport merchandise from the factory or warehouse to “stockists” or distributors. While the agents do not take title to the product, they receive 2 to 4 percent margins, then invoice the stockist, and receive payment on behalf of the manufacturer. The stockists have exclusive geographical territories and a sales force that calls on both the wholesalers and on large retailers in urban areas. They usually offer credit to their customers and receive margins in the range of three to nine percent. The wholesalers provide the final link to those rural and smaller retailers who cannot purchase directly from the distributors.

Sales to these retailers are typically in cash only and the wholesalers receive a margin of two to three percent. Margins for retailers vary from 10 to 35 percent, and the total cost of the distribution network represents between 10 and 20 percent of the final retail price. As a rule of thumb, retail prices of imported foods are typically two to three times higher than FOB export prices after tariffs, excise, margins and transportation costs added on. Added costs for products requiring refrigeration or special handling are even higher.

Table 5. India: Imported Food Product Pricing (Margins at Various Channels)

Distribution Channel	Margins
Clearing and forwarding agents	3-5 percent
Wholesalers	4-6 percent
Super Stockists	5-7 percent
Distributor	8-12 percent
Retailer	10- 35 percent

Source: USDA/FAS Analysis

With the rise of chain restaurants, modern companies specializing in the handling of food have emerged. These firms can comply with rigorous temperature and quality specifications on behalf of their clients and offer modern warehousing and transportation facilities.

Retailers rarely import directly, relying on importers and distributors to handle the clearing and storage of products. However, a few of the larger modern retail chains have started to import certain products directly. Imported packaged foods enter India from regional trading hubs such as Dubai, Singapore and Hong Kong as well directly from supplying countries. Major importers are located in Mumbai, Delhi, Bengaluru, Kolkata, and Chennai. Successful U.S. exporters have worked, generally, through reliable regional distributors to reach target markets.

D. Infrastructure

Refrigerated warehousing and transportation facilities are limited and costly, but facilities are reported to be improving. In some cases, high electricity costs and/or erratic power supplies have constrained cold chain development.

India has 3.34 million kilometers (2 million miles) of roads and roads in some areas have improved considerably over the past 10 years. Nevertheless, road travel can be slow and difficult. India also has over 65,000 km (40,389 miles) of railroads that carry over 30 million passengers and 2.8 million tons of freight per day.

India has a coastline of 7,600 kilometers and is serviced by 13 major ports in Kandla, Mumbai, Mundra, Cochin, Mormugoa, and New Mangalore on the west coast, and Chennai, Tuticorin, Vishakhapatnam, Paradeep, Ennore and Kolkata on the east coast. Container handling facilities are available at most major ports and in several major cities. Mumbai, followed by Chennai, is India's largest container port and the port where most containerized food enters India. Air shipments typically land at the Mumbai or Delhi airports. Freezer and refrigeration facilities at the Mumbai and Delhi airport are limited and present a challenge for importers seeking to clear high value food products with a short shelf life.

E. Finding a Business Partner

“Does my product have market access?” is the most important question exporters can ask as they research the Indian market. See the trade policy section of this report for more details. If yes, then the next thing to consider is pricing relative to Indian incomes. As a rule of thumb, a product is likely to be two to three times more costly than the U.S. FOB price once it reaches the retail shelf. Consequently, determining whether a product should target the small number of high-income consumers or larger numbers of middle income consumers is the key in assessing market potential in India. Exporters should then consider whether they are willing to start small, meet special labeling requirements, ship mixed or partial containers and be both persistent and patient.

If an exporter is still interested in the Indian market, the next step is to locate a reliable importer/distributor.

A visit to India to gain a first-hand feel of the Indian market, preferably coinciding with a major food show, such as Annapoorna (USDA-endorsed show), AAHAR (March 2016 outside New Delhi), or Food and Grocery Forum (in January in Mumbai) (see Appendix B for more details) offers a good opportunity to learn more about the Indian market and meet prospective importers. Similarly, increasing numbers of Indian importers are visiting international food shows such as ANUGA, SIAL and Gulfood.

Restaurant franchises are another way of introducing new products. An increasing number of chains are opening in India including casual dining, fast food, and cafes. While many of these companies source foods that are produced in India, some require specialized ingredients or imports of certain items that are not readily available. Additionally, India's hotel sector has traditionally represented a small but consistent market for certain high-value food products that cannot be readily sourced in

India.

Consider the following before selecting a distributor:

- Do they have a national or regional distribution network?
- How is their distribution network structured?
- Who are their customers? Do they sell to retailers, hotels or restaurants?
- What are their capabilities? Do they have experience handling perishable or value added foods?
- Are they interested in marketing your products? If so, how will marketing costs be handled?
- Are they managing similar brands or products from other suppliers? If yes, then can this lead to conflict of interest or can be beneficial in having someone with experience in similar like of business.
- What are the margins and costs charged by the distributor?
- Recognize that agents with fewer principals and smaller set-ups may be more adaptable and committed than those with a large infrastructure and established reputations.
- Be prepared to start small by shipping a few pallets or cases of a product and recognize that it could take several months or years before an importer is ready to order full containers.
- Be willing to meet country specific labeling requirements and consider working through a consolidator or participating in mixed containers.

Ensuring payment is another important consideration when establishing a relationship with an importer. Until a successful working relationship is established, exporters may wish to consider vehicles such as an irrevocable letter of credit. Alternatively, Indian importers are accustomed to operating without credit and may be willing to pay cash prior to shipment. While FAS India receives few queries concerning delinquent Indian importers, our offices do not have the authority or expertise to mediate contractual disputes or serve as a collection agent when differences over payment arise. FAS India can recommend local legal services (refer [IN5099](#)), but these situations can be avoided with proper preparation and sale terms. For firms that qualify, the Export Import Bank of the United States provides exporter insurance. USDA's Export Credit Guarantee Program (GSM-102) is not operational in India.

A number of regional trade associations and chambers of industry are active in India. These associations work on behalf of local and multinational food and food ingredient manufacturers, processors, importers, farmers, retailers, cooperatives etc. Please see Appendix E for details on such trade associations operating in India. Exporters are advised to identify appropriate associations and work closely with these associations to explore opportunities in the Indian market. There are several U.S.-based trade groups that are active in India. For more information please refer to Appendix C.

F. Trade Policy

There are several key trade restrictions that limit market access for U.S. food products. Imports of most animal and livestock-derived food products are effectively banned due to established Indian import requirements. This includes certain sub-categories in the Harmonized Tariff Schedule under Chapters 2, 3, 4, 5, 16 and 21 (e.g., milk and dairy products, poultry meat, certain seafood, ovine and caprine products, as well as pork products and pet food). Furthermore, imports of beef are banned due to religious concerns.”

Effective July 8, 2006, the Government of India's (GOI) Foreign Trade Policy (2004-2009) specified that all imports containing products of modern biotechnology must have prior approval from the Genetic Engineering Approval Committee (GEAC), Ministry of Environment and Forests. The policy also made a biotech declaration mandatory. Soybean oil derived from GE soybeans (select events) remains the only biotech food/agricultural product currently approved for import. For more information on India's biotech import policy, please see [IN5088](#) – 'Agricultural Biotechnology Annual 2015'.

G. Advertising and Sales Promotion

Advertising and trade promotion in India is creative and well developed. Most major U.S. advertising firms choose local partners as they know India and Indians best. Advertising through television is especially popular in India. Increasing numbers of Indian consumers have access to a number of national and international channels through satellite television. India also has a number of national and local newspapers in a variety of languages. The number of radio stations is also increasing, especially in larger cities.

While mass advertising through television, radio or newspapers is relatively expensive, U.S. trade associations, cooperators or companies that have an established or growing presence in the market may find that a broader advertising strategy could help increase awareness and sales of their products. In addition to this social media platforms are becoming popular platform for advertising especially among tech savvy audience

For smaller and new-to-market exporters, targeted promotions are likely a more appropriate and cost-effective approach to marketing. Indian importers and distributors are generally eager to support marketing campaigns (e.g., tastings, demonstrations, and point-of-sale information), but often note that foreign suppliers are unwilling to provide adequate marketing support.

There are a large number of annual trade shows focusing on various aspects of the food sector. These shows cater to Indian exporters and the domestic food industry, but a few shows are starting to become viable options for foreign food exporters. This report lists shows in Appendix B, one of which, Annapoorna, is currently endorsed by USDA.

H. Business Etiquette

India offers one of the largest English-speaking workforces in the world. Although Hindi is India's leading national language, most Indian officials and business people have an excellent command of English. Most Indian businessmen have traveled abroad and are familiar with western culture.

Business is not conducted during religious holidays that are observed throughout the many regions and states of India. Verify holiday information with the Consulate or Embassy before scheduling a visit. Indian executives prefer late morning or afternoon appointments between 11:00 a.m. and 5:00 p.m.

The climate in India can be hot for most of the year; it is advisable to wear lightweight clothing to avoid discomfort. Men should wear a jacket and tie (and women should wear corresponding attire)

when making official calls or attending formal occasions. Always present a business card when introducing yourself and refer to business contacts by their surname, rather than by their given name. Use courtesy titles such as “Mr.,” “Mrs.,” or “Ms.” Talking about your family and friends is an important part of establishing a relationship with those involved in the business process. Hospitality is a key part of doing business in India; most business discussions will not begin until “chai” (tea), coffee, or a soft drink is served and there has been some preliminary “small talk.” To refuse any beverage outright will likely be perceived as an insult. While an exchange of gifts is not necessary, most businessmen appreciate token mementos, particularly if they reflect the subject under discussion. Business lunches are preferred to dinners. Try to avoid business breakfasts, especially in Mumbai.

The best time of year to visit India is between October and March, so that the seasons of extreme heat and rains can be avoided. Although Delhi (the capital) has a cool, pleasant winter (November - February), summers (April -July) are fierce with temperatures of up to 120 degrees Fahrenheit. Mumbai (the business hub) and most other major cities have a subtropical climate – hot and humid year around. Most Indian cities have good hotels and are well connected by domestic airlines.

I. Import Duties

High tariffs on the majority of food items along with prohibitory requirements on certain products continue to hinder the growth of food imports from the United States (see Section F. Trade Policy). Import tariffs on consumer food products range from zero to 150 percent, but most products face tariffs in the range of 30 to 40 percent. India’s tariff structure is such that there is considerable flexibility to raise or lower tariffs. Consequently, tariffs are subject to review and change, especially at the start of the Indian fiscal year on April 1. The computation of the effective import tariff is often complex and can involve an array of additional duties. Given the complexity of India’s tariff structure, U.S. exporters should discuss tariff levels and additional charges that will affect the landed cost of their products with prospective importers and ensure all the details are in line with the specific Harmonized Tariff System code.

J. Food Laws

On August 5, 2011, the Food Safety and Standards Authority of India (FSSAI) formally implemented its Food Safety and Standards Rules, 2011 as published in the Indian Official Gazette Notification No. G.S.R. 362 (E). The Food Safety and Standards Rules, 2011 contain the provisions for establishing enforcement mechanisms, sampling techniques, and other legal aspects instituted under Section 91 of the Food Safety and Standards Act 2006. The full text of the final Food Safety and Standard Rules, 2011, as well as the later amendments can be accessed on the FSSAI website: [Food Safety and Standard Rules, 2011](#).

For more information on food laws related to food products imported into India please refer to Food and Agricultural Import Regulations and Standards (FAIRS) - Narrative report (available from the “Exporter Assistance” category of the FAS [GAIN](#) website).

The system of product approval for proprietary food or “novel” foods (i.e., food products not classified by a “standard” in Indian regulation) continues to be a challenge. As per the [Food Safety](#)

[and Standards Act, 2006](#), any proprietary food requires product approval under Section 22 of the FSS Act, 2006. However, this existing process of product approval for such food products has been discontinued by FSSAI as of August 26, 2015. FSSAI published an official notice on its website on August 26, 2015, stating that it would no longer “continue with the process of Product Approvals”. Products designated under Section 22 of the FSS Act 2006 include foods derived from genetically engineered sources, nutritional supplements, special foods for medical or dietary requirements, traditional Indian *ayurvedic*, *sidha* and *unani* foods, organic and “novel foods”.

FSSAI is in the process of framing regulations specific to proprietary foods to ease the difficulties faced by domestic and international food manufactures to launch new products in the market.

SECTION III: MARKET SECTORS: STRUCTURE AND TRENDS

A. Food Retail

Food retailing in India is typically described as being part of the “unorganized” sector, which means that it is dominated by millions of small shops that rely on traditional wholesaling and distribution methods. These are small neighborhood stores that often provide free delivery and credit to regular customers. The “organized” or modern food retail sector in India has begun to emerge over the past five years. The number of “modern” retail outlets has increased from an estimated 200 outlets in 2005 to over 3,000 outlets in 2015). For more information see the [IN5164 - Retail Foods Annual 2015](#).

The modern retail sector, which includes a mix of supermarkets, hypermarkets, specialty and gourmet stores, and convenience stores, is dominated by large Indian companies. Several foreign retailers have established operations in India, but have been limited to wholesale operations known “cash and carry” stores because of India’s foreign direct investment laws.

Supermarkets are typically 3,000 to 6,000 square feet as high real estate costs continue to present a challenge to retailers seeking store locations. Some are located in or near shopping malls. These are self-service stores stocked with a wide range of Indian and, more recently, imported groceries, snacks, processed food, confectionary, personal hygiene and cosmetic products. Imported items in the supermarkets consist mainly of almonds and other dry fruits, fresh fruit, fruit juices, ketchup, chocolates, sauces, specialty cheese, potato chips, canned fruits/vegetables, cookies, and cake mixes. They stock most national brands, regional and specialty brands, and sometimes their own brand of packaged dry products, and some international brands. Many have a small bakery/confectionary section, and some have fresh produce, meat and dairy products. A few sell small quantities of frozen foods. A typical supermarket carries about 6,000 stock-keeping units (SKUs).

A few retailers are establishing large hypermarkets with an area of 25,000 to 100,000 square feet in an effort to take advantage of scale and create a unique one-stop shopping experience in India that differentiates them from smaller supermarkets and traditional small retailers. These stores are catering to consumers who seek wider selection and have the means to have storage space (including refrigerators) and their own transportation.

Until modern food retail began to develop a few years ago, smaller “Mom and Pop” stores were the primary purveyors of imported foods. There are thousands of these stores around India and some are the only source of imported foods in their cities. These small stores continue to be an important sales platform for imported foods.

B. Food Service – Hotels, Restaurants and Institutional sector

According to Euromonitor, the estimated size of India’s foodservice industry is around \$95 billion, of which the “organized” or modern sector contributes about 20-25 percent. The sector is forecast to grow to \$110 billion by 2018. India has strong domestic hotel chains, including Indian Hotels Ltd. (Taj Group), East India Hotels Company Ltd. (Oberoi Group), ITC Ltd. (Welcome Group), Asian

Hotel and Leela Venture. Several international chains such as Starwood Group, Radisson, Four Seasons, Best Western, Hilton, Marriott, Country Inn and Suites by Carlson, and Quality Inn have also established a presence through franchising.

The premium segment (including 5-star deluxe and 5-star hotels) dominates the hotel business in India and accounts for roughly 65 percent of total revenues in the industry. Hotels in this segment are concentrated in major metropolitan cities such as New Delhi, Mumbai, Chennai, Bengaluru, Pune, Hyderabad, and Kolkata, and are now spreading to middle-tier cities and along major tourist circuits. Most of the 5-star business is generated from business travelers, and most of those are international. The mid-market segment (comprised of 3 and 4 star hotels) caters to a mix of business and leisure travelers and is concentrated in second-tier cities and in major tourist locations. The budget segment (2 star ratings or below) is present in most towns and cities and places of tourist interest and does not present an opportunity for food exporters.

Premium and mid-market hotels source most of their food needs from local distributors who present the best opportunity for accessing the hotel sector. Hotels typically contract with local distributors on centralized annual supply contracts. Some hotels import directly through consolidators in Europe, the Middle East or Asia. Hotels have the option of obtaining products duty-free against their foreign exchange earnings and typically do so via distributors who have bonded warehouses that can supply duty-free goods. When sourcing imported goods from local distributors, hotels tend to focus on branded specialty products that are not available in the local market and may often choose to make some goods in house from both imported and local ingredients.

India has witnessed a sizeable shift in its casual dining restaurant (CDR) and quick service restaurant (QSR) sector. CDRs and QSRs have gone from largely serving Indian snacks to now serving western foods with an Indian flavor. Chains and franchises, both international and local, are doing well in major urban areas and are spreading into smaller cities. To gain favor with Indian diners fast food restaurants have developed a range of “Indianized” products to suit the local palate. Some outlets serve exclusively vegetarian food, catering to the country’s large vegetarian population.

Although fast food chains source most of their raw materials locally, some ingredients that are not available in India are imported. In the past few years, the “coffee shop” culture has spread throughout major cities and seems poised for further growth. While coffee import tariffs are high, suppliers of specialty ingredients and syrups may find opportunities in this sector. For a detailed report on hotel, restaurant and institutional food service sector please refer [IN5163 - Food Service – Hotel, Restaurant, Institutional Annual 2015](#).

C. Food Processing

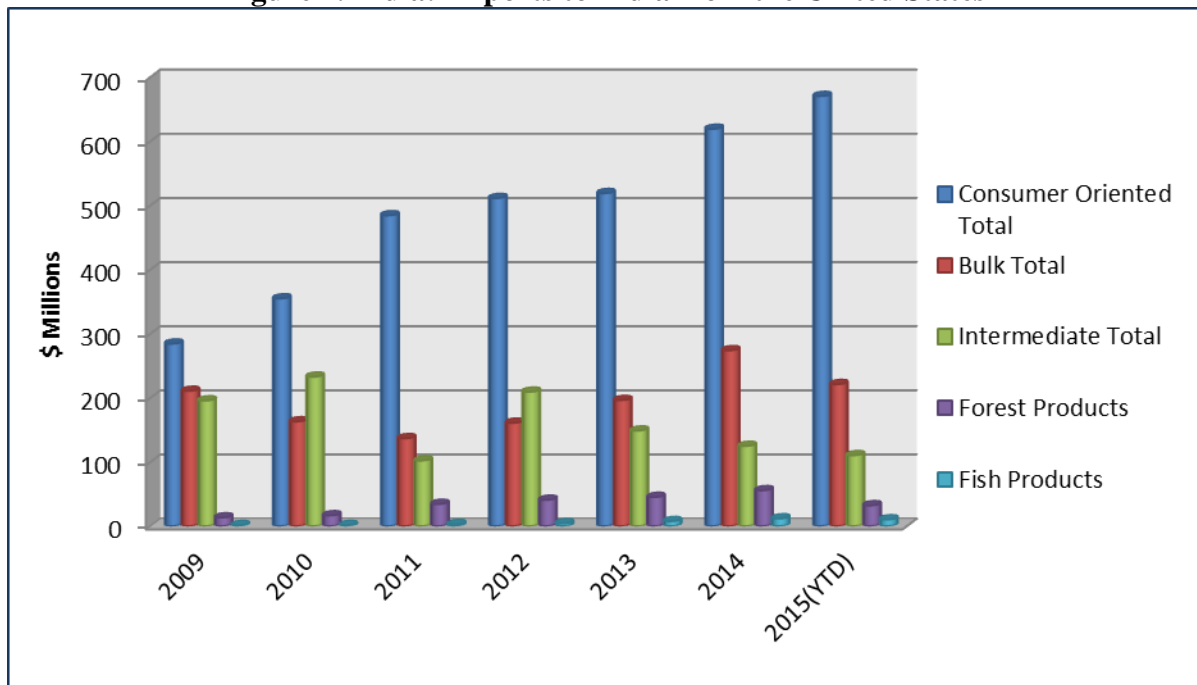
According to the Ministry of Food Processing, the food processing sector accounts for 1.6 percent of gross domestic product and is valued at \$25 billion (based on revised series). According to the latest Annual Survey of Industries, there are 37,175 registered food processing units in the country with 1.7 million people employed in the sector. As foreign multinational corporations have entered Indian, the food processing industry (FPI) has attracted \$6.5 billion in foreign direct investment (FDI) since April 2000 accounting for two percent of total FDI inflows. A large segment of the Indian FPI still operates in the “unorganized” sector or informal sector.

The almost year-round availability of fresh products across the country, combined with consumers' preference for fresh products and freshly cooked foods, has tempered the demand for processed food products in the past. However, with changing lifestyle and consumption patterns cited in this report, the demand for convenient and hygienic foods is on the rise. Industry sources estimate that over 400 million consumers consume some type of processed food regularly.

Food processors are introducing new products and traditional recipes using improved technology, innovative packaging, and aggressive marketing. For ingredients that are not available in India, processors turn to imports and typically source through importers specializing in food ingredients. Food ingredients sourced by Indian food processing companies from the U.S. include dried fruits and nuts, essential oils, protein isolates, starch, vegetable saps, thickeners, lactose, sugar and sugar syrups, mixed seasonings, sauces and preparations, yeast, baking powders, sweeteners and other preparations for beverages, vinegar, oleoresins, and gelatin and gelatin derivatives.

Domestic food laws restrict the use of a number of ingredients, flavors, colors, and additives. Exporters should work with potential importers to ensure that their ingredients have market access. For details about India's Food Processing Industry, please see IN5165 Food Processing Ingredients Annual 2015.

Figure 4. India: Imports to India from the United States



Source: USDA/FAS Global Trade Database

SECTION IV. BEST PRODUCT PROSPECTS:

Category 1: Products Present in the Market that Have Good Sales Potential

Description	Total Imports CY 2014 - Value (\$ millions)	Total Imports CY 2014 - Quantity (metric tons)	5-yr. Import growth by value (in %)	Base tariff	Key Constraints Over Market Development	Market Attractiveness for US
Almonds	627	98,374	18	Rs. 35/ kg (in- Shelled)	Competition from Afghanistan and Australia	High seasonal demand, health consciousness
Pistachios	75	10,297	8	10%	Competition from Iran and Afghanistan	High seasonal demand, health consciousness
Grapes Fresh or dried	52	18,792	19	30%	Competition from domestic and foreign suppliers	Seasonal shortages and high prices, diverse fruits among India's middle income population and growing retail industry
Apples Fresh, Pears And Quinces, Fresh	252	220,878	18	Apples 50% Pears 30%	Competition from domestic and foreign suppliers like China, Chile, and New Zealand.	Seasonal shortages and high prices, increasing interest in quality fruits and growth of organized retail.
Cocoa and Cocoa Preparations	264	69,754	26	up to 30%	Competition from domestic and other foreign suppliers	Consumer preference for imported products and brands
Fruit Juices	30	16,051 Liters	5	up to 30%	Competition from domestic brands and neighboring countries	Increasing health awareness and shortage of domestic products
Sauces, Preparations Mixes, Condiments, and Seasonings	12	5,989	5	30%	Competition from domestic brands	Consumer preference for imported products and brands and growing fast food culture
Beverages, Spirits, and Vinegar	511	290,425, 827 Liters	10	up to 150%	High import duty, complex state laws, and competition from other suppliers	Increasing consumption and growing middle income population

SECTION V. POST CONTACT AND FURTHER INFORMATION

The following reports may be of interest to U.S. exporters interested in India. These, and related reports, can be accessed via the FAS Home Page: www.fas.usda.gov by clicking on “Data & Analysis” and then selecting GAIN reports and choosing the “search reports” function to refine the desired criteria (e.g., category and date range)

Report Number	Subject
IN5163	Food Service- HRI 2015
IN5165	Food Processing Ingredients 2015
IN5164	Retail Foods 2015
IN5167	Food and Agricultural Import Regulations and Standards – Narrative
IN4045	Update on India’s Quick Service Restaurant Sector
IN4085	Agricultural and Agribusiness Consultants 2014
IN4095	Wine Production and Trade Update 2014
IN5088	Agricultural Biotechnology Annual 2015
IN5089	Casual Dining and QSR Sector See Fast Track Growth in India
IN5106	Livestock and Products Annual 2015
IN5131	Dairy and Products Annual 2015
IN5155	Mobile and E-Commerce Grocery Retail and Food Service Bloom

For additional information please contact:

Foreign Agricultural Service

Embassy of the United States of America

Chanakyapuri, New Delhi - 110 021

Phone: 91-11-2419-8000, Fax: 91-11-2419-8530

E-Mail: agnewdelhi@fas.usda.gov

Web: http://newdelhi.usembassy.gov/foreign_agricultural_service.html

Office of Agricultural Affairs

American Consulate General

C-49, G-Block, Bandra Kurla Complex, Bandra (E)

Mumbai - 400 051

Phone: 91-22-2672-4863

E-mail: agmumbai@fas.usda.gov

Twitter: @USDAIndia

Web: <http://mumbai.usconsulate.gov/business/agriculture-related-business.html>

APPENDIX A – STATISTICS

TABLE A: Key Trade and Demographic Information

Agricultural imports from all countries (USD billion) ¹ / U.S. market share	21.7/ 4.91%
Consumer Food Imports from all countries (USD billion) ² / U.S. market share	3.9/ 17%
Edible fishery imports from all countries ³ (USD million) / U.S. market share	59/ 19%
Total Population ⁴	1.25 billion
Urban population ⁵	400 million
Rural population	850 million
Number of major metropolitan areas ⁶ (with a population of a million or more)	53
Population Density ⁷ (People per square kilometer)	382
Proportion of population below 6 years ⁸ / percentage	150 million/13%
Proportion of population above 7 years ⁹	1.05 billion
Per capita Gross Domestic Product in CY 11 (USD) ¹⁰	1,581
Unemployment Rate 2014/15 ¹¹ (%)	3.6
Female Work participation Rate ¹² (%)	25.51
Exchange Rate Rs. Per USD (as of December 21, 2015)	66.29

Source: ^{1,2,3} USDA/FAS Global Trade Database; ^{4,5,6,7,8,9,11} Census of India 2011

10: World Bank; ^{11,12:} Ministry of Labor and Employment Government of India

Executive Summary:

Section 1: Market Overview:

India has one of the world's fastest growing large economies and, by some estimates, is projected to become the world's third largest economy by 2025. In 2010, annual gross domestic product (GDP) growth reached 8.9 percent but slipped to 6.9 percent in 2013. However, in 2014, the GDP rose to 7.4 percent (based on a revised base year). The governments "Make in India" program encourages the development of the manufacturing sector as a major goal. The International Monetary Fund and World Bank, each, have projected India's growth to remain around 7.5 percent to 8 percent in the medium term.

The Reserve Bank of India has taken measures to control inflation and has benefited by the persistent decline in global oil and agricultural commodity prices. The depreciation of the rupee remains a concern for the economy as during the period from November 2014 to November 2015 the exchange rate went from INR 61 to the U.S. dollar to over INR 66 to the U.S. dollar.

The Government of India has not lowered tariffs or noticeably improved access for imported food and agricultural products over the past several years. Nevertheless, led by commodities such as vegetable oils and pulses for which tariffs are low, India's bulk, intermediate, consumer-oriented, fishery and forestry imports grew from \$13.2 billion in 2009 to \$24.5 billion in 2014 (Note: Exports jumped from \$16.8 billion in 2009 to \$43.0 billion in 2014, as well). Imports of consumer-oriented foods, led by tree nuts and fresh and dried fruits essentially have doubled since 2009 to \$3.89 billion.

Table 1. India: Imports of Ag., Fish, and Forestry Products from the World (U.S. Billion \$)

Category	2009	2014	2015 (YTD) Jan- Sep'15
Bulk	3.871	5.403	4.076
Intermediate	6.152	12.417	8.849
Consumer- Oriented	1.723	3.890	3.419
Fishery and Seafood	0.040	0.059	0.045
Forestry	1.446	2.772	1.844
Total	13.232	24.541	18.233

Source: India's Ministry of Commerce

Table 2. India: Exports of Ag., Fish, and Forestry to the World (U.S. Billion \$)

Category	2009	2014	2015 (YTD) Jan- Sep'15
Bulk	6.570	17.631	9.530

Intermediate	3.364	7.566	4.501
Consumer- Oriented	4.825	11.870	7.923
Fishery and Seafood	1.875	5.505	3.376
Forestry	0.153	0.404	0.386
Total	16.787	42.976	25.716

Source: India's Ministry of Commerce

A. Food Purchasing Behavior

Traditionally, the Indian food consumer was someone who shopped regularly at small neighborhood stores for fresh ingredients to prepare Indian foods at home. Consumers rarely ate out and rarely consumed or prepared foods from other countries or cultures. Consumers adjusted their consumption to the seasonal or regional availability of food and it was common for the type of food consumed to change significantly between regions, within a state, or from rural to urban areas. While many of these patterns still hold true for the vast majority of Indians, food purchasing behaviors, particularly for upper income consumers, are changing with the emergence of cafes, fast food restaurants, supermarkets, processed foods, larger refrigerators, 24-hour television food channels, easier access to imported foods, women working outside the home, rising numbers of nuclear families and the introduction of foreign cuisines.

In nominal terms, total expenditures on food increased 64 percent between 2009 and 2014 to an estimated \$365 billion.

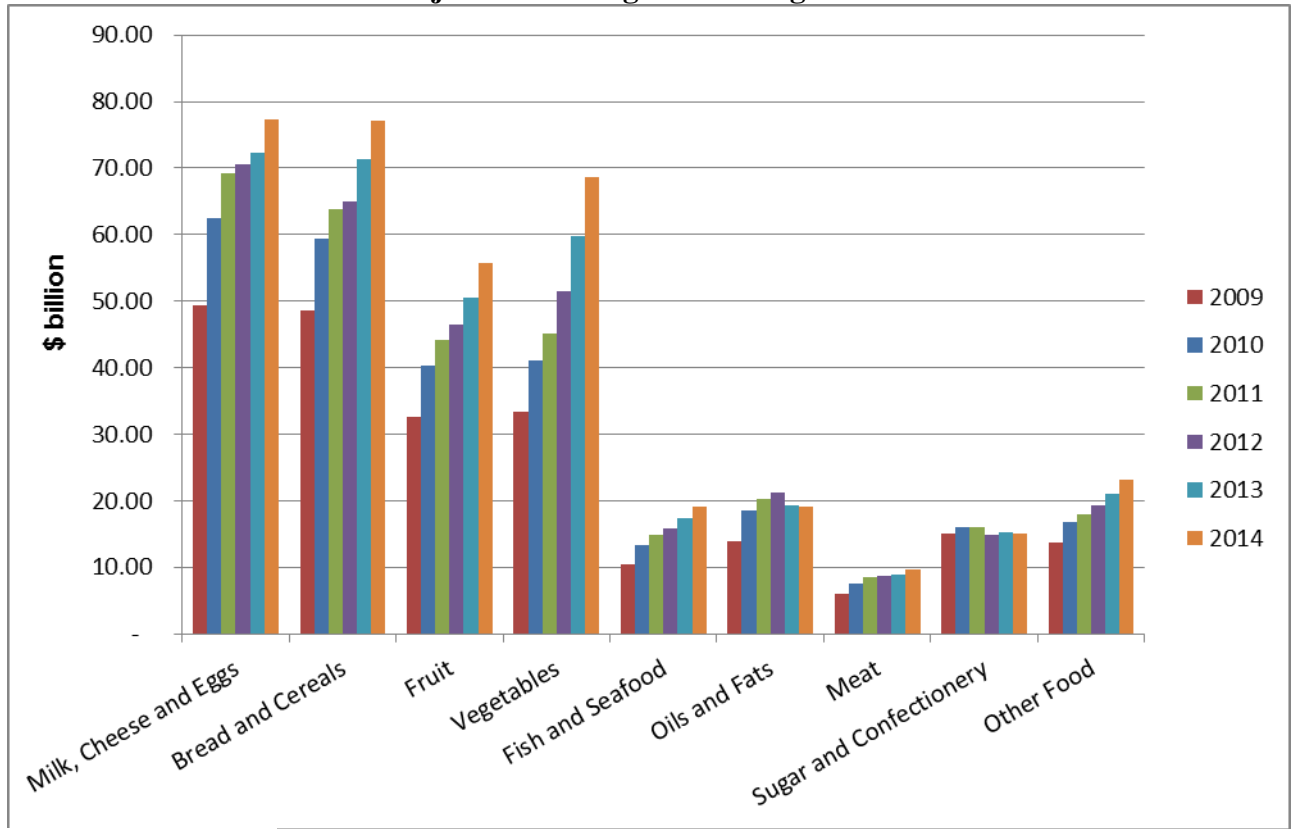
Table 3. India: Consumer Expenditures on Major Food Categories During 2014

Categories	2014	2009 – 2014
	(\$ billions)	Growth Percentage
Milk, Cheese and Eggs	77.30	56%
Bread and Cereals	77.20	59%
Fruit	55.70	71%
Vegetables	68.70	106%
Fish and Seafood	19.10	82%
Oils and Fats	19.10	38%
Meat	9.60	60%
Sugar and Confectionery	15.00	-1%
Other Food	23.10	70%
Total	364.80	64%

Source: Euromonitor

Demand for specialty and high value foods such as chocolates, nuts and dried fruits, cakes, fresh fruits, confectionary items, and fruit juices peaks during the fall festive season, especially at Diwali - the Hindu festival of lights which occurs during October or November depending on the lunar calendar. This is also the best time to introduce new-to-market food products in India.

Figure 1. India: Growth in Consumer Expenditures on Major Food Categories during 2009-2014



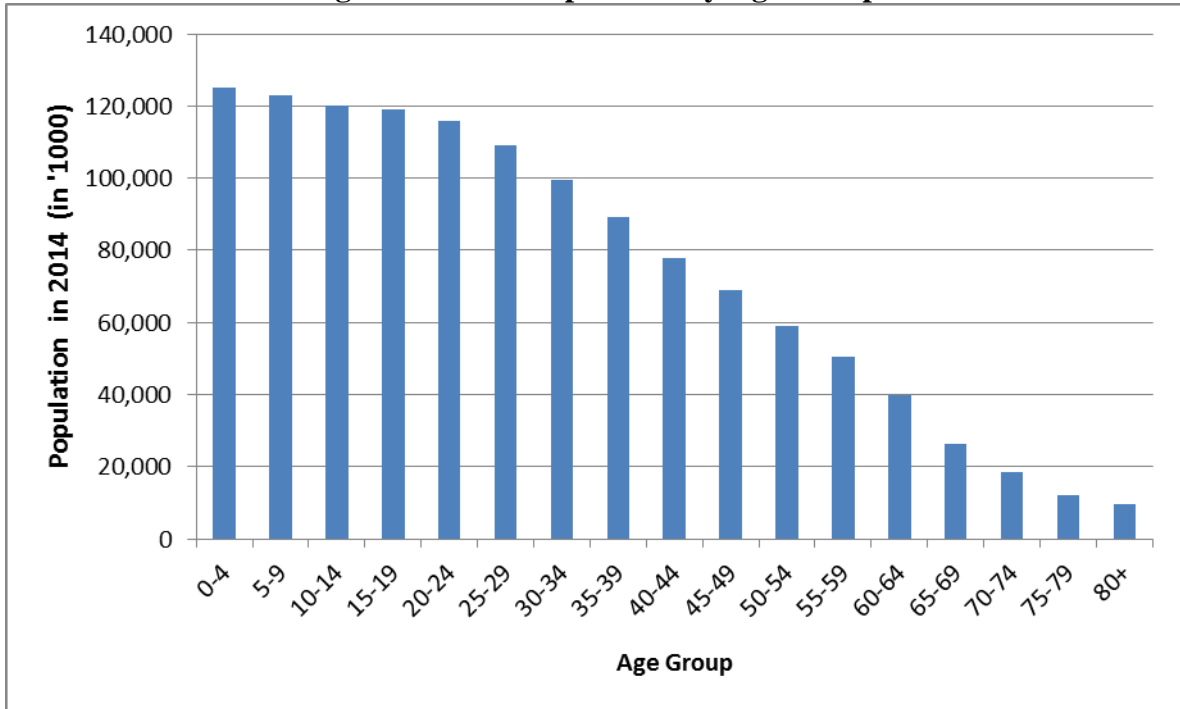
Source: Euromonitor

B. Consumer Demographics

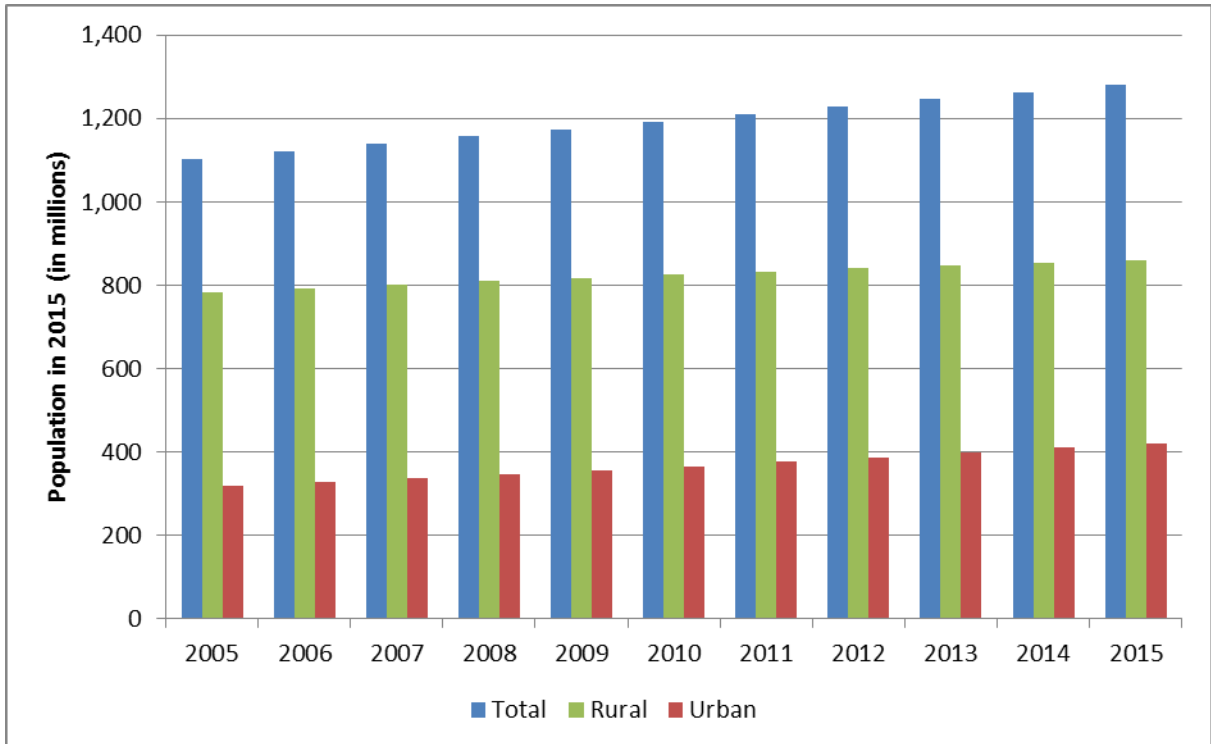
With a population of 1.25 billion, India is the world's second most populous country after China. India is also one of the youngest countries in the world with a median age of 25. Nearly 60 percent of Indians are under the age of 30. However, declining birth rates suggest that the Indian population will age over the next 10 years with the fastest growth occurring among those aged 30 and above - a group that comprises the highest earners.

Nearly half of all Indians are married and families traditionally live in joint or extended families resulting in an average household size of 4.8 people in 2014. In urban areas, smaller nuclear families are becoming more common as mobility and employment opportunities increase.

Figure 2. India: Population by Age Group



Source: Euromonitor



Source: Euromonitor

Over 850 million Indians live in rural areas compared to 400 million who live in urban areas. While the urban population is growing at more than double the rate of rural areas as migrants move to cities in search of opportunity, it will likely be several decades before India's population will become majority urban. Agriculture accounts for an estimated 14 percent of Indian GDP, but over half of Indians are employed in agriculture, suggesting that urban areas will continue to gain population as surplus labor moves to cities. Nevertheless, rural areas are emerging as important markets for fast moving consumer goods. Aside from vegetable oil and pulses, opportunities for imported value-added or consumer-ready foods are likely limited in rural areas while showing promise in Tier 1, Tier 2, and some Tier 3 cities.

While media reports touting the rise of the Indian middle class abound, incomes in India continue to be relatively low. The World Bank classifies India as a "low income" country. The annual per capita gross income was \$1,570 during 2014 according to data compiled by World Bank. The Government of India recently published a similar estimate indicating that real per capita annual disposable income grew 10.1 percent from 2013 to 2014 to Rs.88,538 (\$1,341).

Persistent low incomes and rising food prices present nutritional challenges for many Indian consumers. As per [UNICEF the State of the World's Children 2015](#) report, more than 43 percent of Indian children under the age of five years are underweight. According to India's National Sample Survey Office, Indians continue to spend a large percentage of their incomes on food with rural Indians spending 57 percent and urban residents spending 44 percent. To some degree, the large number of lower income earners may reflect the large numbers of younger Indians who have not yet moved into their prime working years. In addition, the practice of living in extended families also helps to stretch incomes in India. Indians continue to be excellent savers saving nearly 30 percent of their incomes on average.

Table 4. India: Population and Income Categories 2009-2014

2014 Per Capita Income Band	2014 (Million People)	Annualized Percent Growth in People per Category from 2009-2014
Population with Income of US\$0-500 (Current)	163.1	-5
Population with Income of US\$501-1,000 (Current)	229.4	-1
Population with Income of US\$1,001-1,500 (Current)	159.4	3
Population with Income of US\$1,501-2,500 (Current)	164.1	6
Population with Income of US\$2,501-3,500 (Current)	71.0	9
Population with Income of US\$3,501-15,000 (Current)	97.7	12
Population with Income of US\$15,000+ (Current)	10.2	10

Source: Euromonitor

While consumption of processed foods such as domestically-produced chips, biscuits and vegetable oils penetrates the lower income categories, current opportunities for value-added imported foods are generally thought to be limited to higher income consumers. According to data provided by Euromonitor, average consumer expenditure (for all products) per household by the top 10 percent of Indian households rose to \$9,429 in 2014 from \$6,457 in 2009. Trade sources frequently estimate India's market for luxury goods at 10 million people and data from Euromonitor indicates that during 2007-2012, the luxury goods markets in India recorded real growth of 270 percent. There are

nearly 616,000 households with annual incomes in excess of \$150,000, up from 359,000 in 2009.

Regionally, the union territories of Delhi (\$3,308), Chandigarh (\$2,360), and the small state of Sikkim (\$2,654) have the highest per capita incomes. Among states, Gujarat (\$1,606), Maharashtra (\$1,720, home to Mumbai), Tamil Nadu (\$1,694, home to Chennai), Karnataka (\$1,274 home to Bengaluru, formerly known as Bangalore), along with Haryana (\$2,006) have the highest per capita incomes. The states of Bihar (\$544), Uttar Pradesh (\$607, India's most populous state), and Jharkand (\$694) have the lowest per capita incomes.

Advantages	Challenges
<ul style="list-style-type: none"> Expanding number of middle and upper income consumers willing to diversify diets. 	<ul style="list-style-type: none"> High income consumers are spread throughout the country.
<ul style="list-style-type: none"> Increasing urbanization and growing number of working women that has led to rise of dual-income households. 	<ul style="list-style-type: none"> Diverse agro-industrial base offering many products at competitive prices and preference for fresh traditional foods.
<ul style="list-style-type: none"> Increasing exposure to international products and western lifestyle. 	<ul style="list-style-type: none"> Indian food companies (including many multinational companies) produce western-style food products at competitive prices.
<ul style="list-style-type: none"> Opportunities for bulk, intermediate, and consumer ready products that can be used by growing food processing sector under Make in India campaign run by Government of India 	<ul style="list-style-type: none"> Stringent food regulations regarding biotech foods and certain food additives.
<ul style="list-style-type: none"> A slow but, gradual transformation of the retail food sector in urban and rural areas. 	<ul style="list-style-type: none"> Difficulties in accessing vast semi-urban and rural markets due to infrastructure limitations.
<ul style="list-style-type: none"> U.S. food products are considered safe and of high quality. 	<ul style="list-style-type: none"> High tariffs, persistent sanitary and phyto-sanitary requirements that effectively prohibit or restrict imports and competition from other countries.
<ul style="list-style-type: none"> Strong U.S.-India ties and political stability in India. 	<ul style="list-style-type: none"> Unwillingness of U.S. exporters to meet Indian importers' requirements (mixed shipments, changing product specifications to conform to Indian food laws, etc.).
<ul style="list-style-type: none"> Growing domestic and international tourism and rise in food/lifestyle media creating opportunities for niche products. 	<ul style="list-style-type: none"> Competition from countries having geographical proximity and freight advantage.

SECTION II: EXPORTER BUSINESS TIPS

A. Food Preferences

An estimated 20-30 percent of the Indian population is strictly vegetarian in accordance with the tenets of Hinduism. Those Hindus who eat meat tend to do so sparingly and beef (cow meat) consumption is taboo among Hindus, Jains and Sikhs who comprise over 80 percent of India's population. Furthermore, non-vegetarian food is not consumed during special days or religious observances. India's large Muslim population (estimated at 160 million) does not consume pork and eats Halal animal products that are sourced from livestock that were slaughtered according to the tenets of Islam. Many non-vegetarian members of the Indian population, too, may not eat meat or poultry at home and may only consume it at restaurants or food service establishments.

Indians take pride in the many regional and varied foods that comprise Indian cuisine. In general, Indians have a strong preference for fresh products, traditional spices and ingredients, which has generally slowed the penetration of American and other foreign foods. However, the acceptance of packaged, convenience and ready-to-eat food products is increasing, especially among younger consumers and the urban middle and upper middle class. Many Indians are quite willing to try new foods while eating out, but often return to traditional fare at home. Italian, Chinese, Thai and Mexican foods are reportedly the fastest growing new cuisines in India and consumers are slowly diversifying their consumption patterns.

Imported food items often spotted in retail stores include dry fruits and nuts, cakes and cake mixes, chocolates and chocolate syrups, seasonings, biscuits/cookies, canned/packaged fruit juices, canned soups, pastas/noodles, popcorn, potato chips, canned fish and vegetables, ketchup and other sauces, breakfast cereals, and fresh fruits such as apples, pears, grapes and kiwis.

B. Shopping Habits

Indian consumers traditionally purchase daily food needs from small neighborhood stores and vendors because of convenience, perceived freshness, and limited refrigeration and storage space at home. Quality is considered important, but there is a reluctance to pay a premium for such. With the penetration of modern retail outlets in larger cities, suburbs, and semi-urban areas, more Indians are gaining exposure to organized retail. A growing number of people in urban areas are widely travelled and have experienced international cuisines and branded food products. These consumer groups (mostly young professionals) have higher levels of disposable income and generally prefer making weekly/monthly purchases of processed foods and branded products. In general, most of the shopping and food purchasing decisions are made by women. In households that can afford hired help, servants often do much of the shopping. Availability of many fresh foods, particularly fruits and vegetables, is seasonal, and people are accustomed to adjusting their diet to the season.

A typical Indian household will make regular purchases of wheat flours, pulses, edible oils, ghee (clarified butter), dairy items (milk, butter, yogurt, paneer (cottage cheese)), spices and condiments, pickles, noodles, snack foods, jams and sauces. Most packaged food items are sold in small containers to keep pricing low and to accommodate limited storage space.

C. Distribution Systems

Marketing channels for imported foods often involve several intermediaries. Indian firms typically import, with the help of a clearing and forwarding agent, and distribute food products to retailers. While a number of importers have their own warehouses, others may utilize clearing and forwarding agents to facilitate the storage, movement and distribution of goods given the high cost of building and maintaining warehouses and maintaining truck fleets. Importers/distributors with national distribution typically have sub-offices in regional cities or appoint other distributors to market their products in specific regions.

For domestically produced foods, clearing and forwarding agents transport merchandise from the factory or warehouse to “stockists” or distributors. While the agents do not take title to the product, they receive 2 to 4 percent margins, then invoice the stockist, and receive payment on behalf of the manufacturer. The stockists have exclusive geographical territories and a sales force that calls on both the wholesalers and on large retailers in urban areas. They usually offer credit to their customers and receive margins in the range of three to nine percent. The wholesalers provide the final link to those rural and smaller retailers who cannot purchase directly from the distributors.

Sales to these retailers are typically in cash only and the wholesalers receive a margin of two to three percent. Margins for retailers vary from 10 to 35 percent, and the total cost of the distribution network represents between 10 and 20 percent of the final retail price. As a rule of thumb, retail prices of imported foods are typically two to three times higher than FOB export prices after tariffs, excise, margins and transportation costs added on. Added costs for products requiring refrigeration or special handling are even higher.

Table 5. India: Imported Food Product Pricing (Margins at Various Channels)

Distribution Channel	Margins
Clearing and forwarding agents	3-5 percent
Wholesalers	4-6 percent
Super Stockists	5-7 percent
Distributor	8-12 percent
Retailer	10- 35 percent

Source: USDA/FAS Analysis

With the rise of chain restaurants, modern companies specializing in the handling of food have emerged. These firms can comply with rigorous temperature and quality specifications on behalf of their clients and offer modern warehousing and transportation facilities.

Retailers rarely import directly, relying on importers and distributors to handle the clearing and storage of products. However, a few of the larger modern retail chains have started to import certain products directly. Imported packaged foods enter India from regional trading hubs such as Dubai, Singapore and Hong Kong as well directly from supplying countries. Major importers are located in Mumbai, Delhi, Bengaluru, Kolkata, and Chennai. Successful U.S. exporters have worked, generally, through reliable regional distributors to reach target markets.

D. Infrastructure

Refrigerated warehousing and transportation facilities are limited and costly, but facilities are reported to be improving. In some cases, high electricity costs and/or erratic power supplies have constrained cold chain development.

India has 3.34 million kilometers (2 million miles) of roads and roads in some areas have improved considerably over the past 10 years. Nevertheless, road travel can be slow and difficult. India also has over 65,000 km (40,389 miles) of railroads that carry over 30 million passengers and 2.8 million tons of freight per day.

India has a coastline of 7,600 kilometers and is serviced by 13 major ports in Kandla, Mumbai, Mundra, Cochin, Murmagoa, and New Mangalore on the west coast, and Chennai, Tuticorin, Vishakhapatnam, Paradeep, Ennore and Kolkata on the east coast. Container handling facilities are available at most major ports and in several major cities. Mumbai, followed by Chennai, is India's largest container port and the port where most containerized food enters India. Air shipments typically land at the Mumbai or Delhi airports. Freezer and refrigeration facilities at the Mumbai and Delhi airport are limited and present a challenge for importers seeking to clear high value food products with a short shelf life.

E. Finding a Business Partner

“Does my product have market access?” is the most important question exporters can ask as they research the Indian market. See the trade policy section of this report for more details. If yes, then the next thing to consider is pricing relative to Indian incomes. As a rule of thumb, a product is likely to be two to three times more costly than the U.S. FOB price once it reaches the retail shelf. Consequently, determining whether a product should target the small number of high-income consumers or larger numbers of middle income consumers is the key in assessing market potential in India. Exporters should then consider whether they are willing to start small, meet special labeling requirements, ship mixed or partial containers and be both persistent and patient.

If an exporter is still interested in the Indian market, the next step is to locate a reliable importer/distributor.

A visit to India to gain a first-hand feel of the Indian market, preferably coinciding with a major food show, such as Annapoorna (USDA-endorsed show), AAHAR (March 2016 outside New Delhi), or Food and Grocery Forum (in January in Mumbai) (see Appendix B for more details) offers a good opportunity to learn more about the Indian market and meet prospective importers. Similarly, increasing numbers of Indian importers are visiting international food shows such as ANUGA, SIAL and Gulfood.

Restaurant franchises are another way of introducing new products. An increasing number of chains are opening in India including casual dining, fast food, and cafes. While many of these companies source foods that are produced in India, some require specialized ingredients or imports of certain items that are not readily available. Additionally, India's hotel sector has traditionally represented a small but consistent market for certain high-value food products that cannot be readily sourced in

India.

Consider the following before selecting a distributor:

- Do they have a national or regional distribution network?
- How is their distribution network structured?
- Who are their customers? Do they sell to retailers, hotels or restaurants?
- What are their capabilities? Do they have experience handling perishable or value added foods?
- Are they interested in marketing your products? If so, how will marketing costs be handled?
- Are they managing similar brands or products from other suppliers? If yes, then can this lead to conflict of interest or can be beneficial in having someone with experience in similar like of business.
- What are the margins and costs charged by the distributor?
- Recognize that agents with fewer principals and smaller set-ups may be more adaptable and committed than those with a large infrastructure and established reputations.
- Be prepared to start small by shipping a few pallets or cases of a product and recognize that it could take several months or years before an importer is ready to order full containers.
- Be willing to meet country specific labeling requirements and consider working through a consolidator or participating in mixed containers.

Ensuring payment is another important consideration when establishing a relationship with an importer. Until a successful working relationship is established, exporters may wish to consider vehicles such as an irrevocable letter of credit. Alternatively, Indian importers are accustomed to operating without credit and may be willing to pay cash prior to shipment. While FAS India receives few queries concerning delinquent Indian importers, our offices do not have the authority or expertise to mediate contractual disputes or serve as a collection agent when differences over payment arise. FAS India can recommend local legal services (refer [IN5099](#)), but these situations can be avoided with proper preparation and sale terms. For firms that qualify, the Export Import Bank of the United States provides exporter insurance. USDA's Export Credit Guarantee Program (GSM-102) is not operational in India.

A number of regional trade associations and chambers of industry are active in India. These associations work on behalf of local and multinational food and food ingredient manufacturers, processors, importers, farmers, retailers, cooperatives etc. Please see Appendix E for details on such trade associations operating in India. Exporters are advised to identify appropriate associations and work closely with these associations to explore opportunities in the Indian market. There are several U.S.-based trade groups that are active in India. For more information please refer to Appendix C.

F. Trade Policy

There are several key trade restrictions that limit market access for U.S. food products. Imports of most animal and livestock-derived food products are effectively banned due to established Indian import requirements. This includes certain sub-categories in the Harmonized Tariff Schedule under Chapters 2, 3, 4, 5, 16 and 21 (e.g., milk and dairy products, poultry meat, certain seafood, ovine and caprine products, as well as pork products and pet food). Furthermore, imports of beef are banned due to religious concerns.”

Effective July 8, 2006, the Government of India's (GOI) Foreign Trade Policy (2004-2009) specified that all imports containing products of modern biotechnology must have prior approval from the Genetic Engineering Approval Committee (GEAC), Ministry of Environment and Forests. The policy also made a biotech declaration mandatory. Soybean oil derived from GE soybeans (select events) remains the only biotech food/agricultural product currently approved for import. For more information on India's biotech import policy, please see [IN5088](#) – 'Agricultural Biotechnology Annual 2015'.

G. Advertising and Sales Promotion

Advertising and trade promotion in India is creative and well developed. Most major U.S. advertising firms choose local partners as they know India and Indians best. Advertising through television is especially popular in India. Increasing numbers of Indian consumers have access to a number of national and international channels through satellite television. India also has a number of national and local newspapers in a variety of languages. The number of radio stations is also increasing, especially in larger cities.

While mass advertising through television, radio or newspapers is relatively expensive, U.S. trade associations, cooperators or companies that have an established or growing presence in the market may find that a broader advertising strategy could help increase awareness and sales of their products. In addition to this social media platforms are becoming popular platform for advertising especially among tech savvy audience

For smaller and new-to-market exporters, targeted promotions are likely a more appropriate and cost-effective approach to marketing. Indian importers and distributors are generally eager to support marketing campaigns (e.g., tastings, demonstrations, and point-of-sale information), but often note that foreign suppliers are unwilling to provide adequate marketing support.

There are a large number of annual trade shows focusing on various aspects of the food sector. These shows cater to Indian exporters and the domestic food industry, but a few shows are starting to become viable options for foreign food exporters. This report lists shows in Appendix B, one of which, Annapoorna, is currently endorsed by USDA.

H. Business Etiquette

India offers one of the largest English-speaking workforces in the world. Although Hindi is India's leading national language, most Indian officials and business people have an excellent command of English. Most Indian businessmen have traveled abroad and are familiar with western culture.

Business is not conducted during religious holidays that are observed throughout the many regions and states of India. Verify holiday information with the Consulate or Embassy before scheduling a visit. Indian executives prefer late morning or afternoon appointments between 11:00 a.m. and 5:00 p.m.

The climate in India can be hot for most of the year; it is advisable to wear lightweight clothing to avoid discomfort. Men should wear a jacket and tie (and women should wear corresponding attire) when making official calls or attending formal occasions. Always present a business card when introducing yourself and refer to business contacts by their surname, rather than by their given

name. Use courtesy titles such as “Mr.,” “Mrs.,” or “Ms.” Talking about your family and friends is an important part of establishing a relationship with those involved in the business process. Hospitality is a key part of doing business in India; most business discussions will not begin until “chai” (tea), coffee, or a soft drink is served and there has been some preliminary “small talk.” To refuse any beverage outright will likely be perceived as an insult. While an exchange of gifts is not necessary, most businessmen appreciate token mementos, particularly if they reflect the subject under discussion. Business lunches are preferred to dinners. Try to avoid business breakfasts, especially in Mumbai.

The best time of year to visit India is between October and March, so that the seasons of extreme heat and rains can be avoided. Although Delhi (the capital) has a cool, pleasant winter (November - February), summers (April -July) are fierce with temperatures of up to 120 degrees Fahrenheit. Mumbai (the business hub) and most other major cities have a subtropical climate – hot and humid year around. Most Indian cities have good hotels and are well connected by domestic airlines.

I. Import Duties

High tariffs on the majority of food items along with prohibitory requirements on certain products continue to hinder the growth of food imports from the United States (see Section F. Trade Policy). Import tariffs on consumer food products range from zero to 150 percent, but most products face tariffs in the range of 30 to 40 percent. India’s tariff structure is such that there is considerable flexibility to raise or lower tariffs. Consequently, tariffs are subject to review and change, especially at the start of the Indian fiscal year on April 1. The computation of the effective import tariff is often complex and can involve an array of additional duties. Given the complexity of India’s tariff structure, U.S. exporters should discuss tariff levels and additional charges that will affect the landed cost of their products with prospective importers and ensure all the details are in line with the specific Harmonized Tariff System code.

J. Food Laws

On August 5, 2011, the Food Safety and Standards Authority of India (FSSAI) formally implemented its Food Safety and Standards Rules, 2011 as published in the Indian Official Gazette Notification No. G.S.R. 362 (E). The Food Safety and Standards Rules, 2011 contain the provisions for establishing enforcement mechanisms, sampling techniques, and other legal aspects instituted under Section 91 of the Food Safety and Standards Act 2006. The full text of the final Food Safety and Standard Rules, 2011, as well as the later amendments can be accessed on the FSSAI website: [Food Safety and Standard Rules, 2011](#).

For more information on food laws related to food products imported into India please refer to Food and Agricultural Import Regulations and Standards (FAIRS) - Narrative report (available from the “Exporter Assistance” category of the FAS [GAIN](#) website).

The system of product approval for proprietary food or “novel” foods (i.e., food products not classified by a “standard” in Indian regulation) continues to be a challenge. As per the [Food Safety and Standards Act, 2006](#), any proprietary food requires product approval under Section 22 of the FSS Act, 2006. However, this existing process of product approval for such food products has been discontinued by FSSAI as of August 26, 2015. FSSAI published an official notice on its website on

August 26, 2015, stating that it would no longer “continue with the process of Product Approvals”. Products designated under Section 22 of the FSS Act 2006 include foods derived from genetically engineered sources, nutritional supplements, special foods for medical or dietary requirements, traditional Indian *ayurvedic*, *sidha* and *unani* foods, organic and “novel foods”.

FSSAI is in the process of framing regulations specific to proprietary foods to ease the difficulties faced by domestic and international food manufactures to launch new products in the market.

SECTION III: MARKET SECTORS: STRUCTURE AND TRENDS

A. Food Retail

Food retailing in India is typically described as being part of the “unorganized” sector, which means that it is dominated by millions of small shops that rely on traditional wholesaling and distribution methods. These are small neighborhood stores that often provide free delivery and credit to regular customers. The “organized” or modern food retail sector in India has begun to emerge over the past five years. The number of “modern” retail outlets has increased from an estimated 200 outlets in 2005 to over 3,000 outlets in 2015). For more information see the IN5164 - Retail Foods Annual 2015.

The modern retail sector, which includes a mix of supermarkets, hypermarkets, specialty and gourmet stores, and convenience stores, is dominated by large Indian companies. Several foreign retailers have established operations in India, but have been limited to wholesale operations known “cash and carry” stores because of India’s foreign direct investment laws.

Supermarkets are typically 3,000 to 6,000 square feet as high real estate costs continue to present a challenge to retailers seeking store locations. Some are located in or near shopping malls. These are self-service stores stocked with a wide range of Indian and, more recently, imported groceries, snacks, processed food, confectionary, personal hygiene and cosmetic products. Imported items in the supermarkets consist mainly of almonds and other dry fruits, fresh fruit, fruit juices, ketchup, chocolates, sauces, specialty cheese, potato chips, canned fruits/vegetables, cookies, and cake mixes. They stock most national brands, regional and specialty brands, and sometimes their own brand of packaged dry products, and some international brands. Many have a small bakery/confectionary section, and some have fresh produce, meat and dairy products. A few sell small quantities of frozen foods. A typical supermarket carries about 6,000 stock-keeping units (SKUs).

A few retailers are establishing large hypermarkets with an area of 25,000 to 100,000 square feet in an effort to take advantage of scale and create a unique one-stop shopping experience in India that differentiates them from smaller supermarkets and traditional small retailers. These stores are catering to consumers who seek wider selection and have the means to have storage space (including refrigerators) and their own transportation.

Until modern food retail began to develop a few years ago, smaller “Mom and Pop” stores were the primary purveyors of imported foods. There are thousands of these stores around India and some are the only source of imported foods in their cities. These small stores continue to be an important sales platform for imported foods.

B. Food Service – Hotels, Restaurants and Institutional sector

According to Euromonitor, the estimated size of India’s foodservice industry is around \$95 billion, of which the “organized” or modern sector contributes about 20-25 percent. The sector is forecast to grow to \$110 billion by 2018. India has strong domestic hotel chains, including Indian Hotels Ltd. (Taj Group), East India Hotels Company Ltd. (Oberoi Group), ITC Ltd. (Welcome Group), Asian Hotel and Leela Venture. Several international chains such as Starwood Group, Radisson, Four

Seasons, Best Western, Hilton, Marriott, Country Inn and Suites by Carlson, and Quality Inn have also established a presence through franchising.

The premium segment (including 5-star deluxe and 5-star hotels) dominates the hotel business in India and accounts for roughly 65 percent of total revenues in the industry. Hotels in this segment are concentrated in major metropolitan cities such as New Delhi, Mumbai, Chennai, Bengaluru, Pune, Hyderabad, and Kolkata, and are now spreading to middle-tier cities and along major tourist circuits. Most of the 5-star business is generated from business travelers, and most of those are international. The mid-market segment (comprised of 3 and 4 star hotels) caters to a mix of business and leisure travelers and is concentrated in second-tier cities and in major tourist locations. The budget segment (2 star ratings or below) is present in most towns and cities and places of tourist interest and does not present an opportunity for food exporters.

Premium and mid-market hotels source most of their food needs from local distributors who present the best opportunity for accessing the hotel sector. Hotels typically contract with local distributors on centralized annual supply contracts. Some hotels import directly through consolidators in Europe, the Middle East or Asia. Hotels have the option of obtaining products duty-free against their foreign exchange earnings and typically do so via distributors who have bonded warehouses that can supply duty-free goods. When sourcing imported goods from local distributors, hotels tend to focus on branded specialty products that are not available in the local market and may often choose to make some goods in house from both imported and local ingredients.

India has witnessed a sizeable shift in its casual dining restaurant (CDR) and quick service restaurant (QSR) sector. CDRs and QSRs have gone from largely serving Indian snacks to now serving western foods with an Indian flavor. Chains and franchises, both international and local, are doing well in major urban areas and are spreading into smaller cities. To gain favor with Indian diners fast food restaurants have developed a range of “Indianized” products to suit the local palate. Some outlets serve exclusively vegetarian food, catering to the country’s large vegetarian population.

Although fast food chains source most of their raw materials locally, some ingredients that are not available in India are imported. In the past few years, the “coffee shop” culture has spread throughout major cities and seems poised for further growth. While coffee import tariffs are high, suppliers of specialty ingredients and syrups may find opportunities in this sector. For a detailed report on hotel, restaurant and institutional food service sector please refer IN5163 -Food Service – Hotel, Restaurant, Institutional Annual for 2015.

C. Food Processing

According to the Ministry of Food Processing, the food processing sector accounts for 1.6 percent of gross domestic product and is valued at \$25 billion (based on revised series). According to the latest Annual Survey of Industries, there are 37,175 registered food processing units in the country with 1.7 million people employed in the sector. As foreign multinational corporations have entered Indian, the food processing industry (FPI) has attracted \$6.5 billion in foreign direct investment (FDI) since April 2000 accounting for two percent of total FDI inflows. A large segment of the Indian FPI still operates in the “unorganized” sector or informal sector.

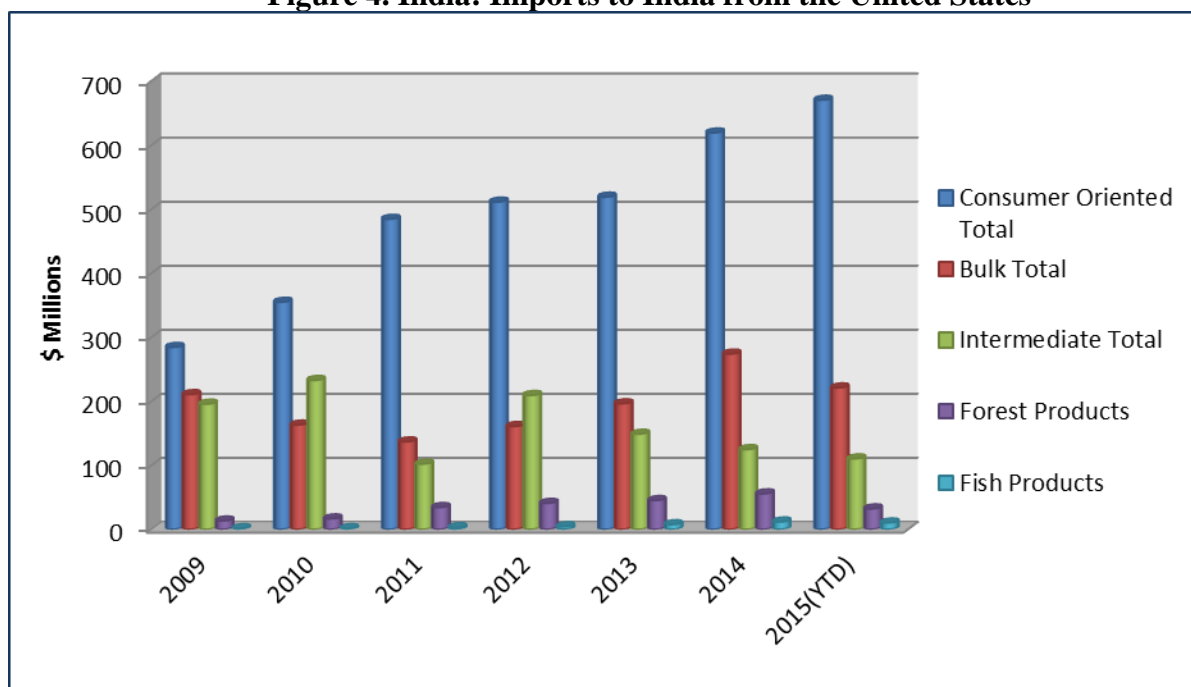
The almost year-round availability of fresh products across the country, combined with consumers’ preference for fresh products and freshly cooked foods, has tempered the demand for processed food

products in the past. However, with changing lifestyle and consumption patterns cited in this report, the demand for convenient and hygienic foods is on the rise. Industry sources estimate that over 400 million consumers consume some type of processed food regularly.

Food processors are introducing new products and traditional recipes using improved technology, innovative packaging, and aggressive marketing. For ingredients that are not available in India, processors turn to imports and typically source through importers specializing in food ingredients. Food ingredients sourced by Indian food processing companies from the U.S. include dried fruits and nuts, essential oils, protein isolates, starch, vegetable saps, thickeners, lactose, sugar and sugar syrups, mixed seasonings, sauces and preparations, yeast, baking powders, sweeteners and other preparations for beverages, vinegar, oleoresins, and gelatin and gelatin derivatives.

Domestic food laws restrict the use of a number of ingredients, flavors, colors, and additives. Exporters should work with potential importers to ensure that their ingredients have market access. For details about India’s Food Processing Industry, please see IN5165 Food Processing Ingredients Annual 2015.

Figure 4. India: Imports to India from the United States



Source: USDA/FAS Global Trade Database

SECTION IV. BEST PRODUCT PROSPECTS:

Category 1: Products Present in the Market that Have Good Sales Potential

Description	Total Imports CY 2014 - Value (\$ millions)	Total Imports CY 2014 - Quantity (metric tons)	5-yr. Import growth by value (in %)	Base tariff	Key Constraints Over Market Development	Market Attractiveness for US
Almonds	627	98,374	18	Rs. 35/ kg (in- Shelled)	Competition from Afghanistan and Australia	High seasonal demand, health consciousness
Pistachios	75	10,297	8	10%	Competition from Iran and Afghanistan	High seasonal demand, health consciousness
Grapes Fresh or dried	52	18,792	19	30%	Competition from domestic and foreign suppliers	Seasonal shortages and high prices, diverse fruits among India's middle income population and growing retail industry
Apples Fresh, Pears And Quinces, Fresh	252	220,878	18	Apples 50% Pears 30%	Competition from domestic and foreign suppliers like China, Chile, and New Zealand.	Seasonal shortages and high prices, increasing interest in quality fruits and growth of organized retail.
Cocoa and Cocoa Preparations	264	69,754	26	up to 30%	Competition from domestic and other foreign suppliers	Consumer preference for imported products and brands
Fruit Juices	30	16,051 Liters	5	up to 30%	Competition from domestic brands and neighboring countries	Increasing health awareness and shortage of domestic products
Sauces, Preparations Mixes, Condiments, and Seasonings	12	5,989	5	30%	Competition from domestic brands	Consumer preference for imported products and brands and growing fast food culture
Beverages, Spirits, and Vinegar	511	290,425, 827 Liters	10	up to 150%	High import duty, complex state laws, and competition from other suppliers	Increasing consumption and growing middle income population

SECTION V. POST CONTACT AND FURTHER INFORMATION

The following reports may be of interest to U.S. exporters interested in India. These, and related reports, can be accessed via the FAS Home Page: www.fas.usda.gov by clicking on “Data & Analysis” and then selecting GAIN reports and choosing the “search reports” function to refine the desired criteria (e.g., category and date range)

Report Number	Subject
IN5163	Food Service- HRI 2015
IN5165	Food Processing Ingredients 2015
IN5164	Retail Foods 2015
IN5167	Food and Agricultural Import Regulations and Standards – Narrative
IN4045	Update on India’s Quick Service Restaurant Sector
IN4085	Agricultural and Agribusiness Consultants 2014
IN4095	Wine Production and Trade Update 2014
IN5088	Agricultural Biotechnology Annual 2015
IN5089	Casual Dining and QSR Sector See Fast Track Growth in India
IN5106	Livestock and Products Annual 2015
IN5131	Dairy and Products Annual 2015
IN5155	Mobile and E-Commerce Grocery Retail and Food Service Bloom

For additional information please contact:

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Web: <http://mumbai.usconsulate.gov/business/agriculture-related-business.html>

APPENDIX A – STATISTICS

TABLE A: Key Trade and Demographic Information

Agricultural imports from all countries (USD billion) ¹ / U.S. market share	21.7/ 4.91%
Consumer Food Imports from all countries (USD billion) ² / U.S. market share	3.9/ 17%
Edible fishery imports from all countries ³ (USD million) / U.S. market share	59/ 19%
Total Population ⁴	1.25 billion
Urban population ⁵	400 million
Rural population	850 million
Number of major metropolitan areas ⁶ (with a population of a million or more)	53
Population Density ⁷ (People per square kilometer)	382
Proportion of population below 6 years ⁸ / percentage	150 million/13%
Proportion of population above 7 years ⁹	1.05 billion
Per capita Gross Domestic Product in CY 11 (USD) ¹⁰	1,581
Unemployment Rate 2014/15 ¹¹ (%)	3.6
Female Work participation Rate ¹² (%)	25.51
Exchange Rate Rs. Per USD (as of December 21, 2015)	66.29

Source: ^{1, 2, 3} USDA/FAS Global Trade Database; ^{4, 5, 6, 7, 8, 9, 11} Census of India 2011

¹⁰: World Bank; ^{11, 12}: Ministry of Labor and Employment Government of India

**TABLE B: Consumer Food and Edible Fishery Product Imports
for Calendar Years 2013 & 2014 (\$1,000)**

Commodity	Description	Imports from the world		Imports from the U.S.		U.S. Market Share (%)	
		2013	2014	2013	2014	2013	2014
Consumer Oriented Agric. Total		3,227,562	3,890,257	586,306	643,495	18	17
40210	Mlk & Crm,Cntd,Swt,Powdr,Gran/Solids,Nov 1.5% Fat	2,153	4,265	0	1	0	0
40229	Mlk & Crm,Cntd,Swtnd,Powdr/Solids, Over 1.5% Fat	1,584	2,128	2	4	0	0.18
40410	Whey & Modfd Whey Whet/Nt Cncntrtd Cntg Add Sweetn	19,599	26,871	5,303	5,252	27	20
40590	Fats And Oils Derived From Milk, N.E.S.O.I.	1,893	2,464	0	6	0	0.24
40630	Cheese, Processed, Not Grated Or Powdered	3,099	3,238	56	5	2	0
40690	Cheese, Nesoi, Including Cheddar And Colby	4,114	4,748	9	5	0	0
60110	Bulbs, Tubers, Corms, Crowns & Rhizoms Etc Dormant	2,373	1,512	0	0	0	0
60120	Bulbs, Etc In Growth Or Flower; Chicory	2,159	2,661	3	0	0	0
60290	Live Plants, Cuttings & Slips,Nesoi;Mushroom Spawn	7,145	7,142	451	244	6	3
60313	Fresh Cut Orchids And Buds	4,398	5,282	3	0	0	0
70310	Onions And Shallots, Fresh Or Chilled	5,300	253	0	0	0	0
71290	Vegetables Nesoi & Mixtures, Dried, No Furth Prep	4,655	4,145	124	261	3	6
80131	Cashew Nuts, Fresh Or Dried, In Shell	807,575	1,033,297	0	0	0	0
80132	Cashew Nuts, Fresh Or Dried, Shelled	22,844	3,915	3	0	0	0
80211	Almonds, Fresh Or Dried, In Shell	498,735	565,984	391,348	457,104	78	81
80212	Almonds, Fresh Or Dried, Shelled	42,335	61,823	8,677	20,224	20	33
80250	Pistachios, Fresh Or Dried, Shelled Or Not	26,297	0	3,015	0	11	0
80251	Pistachios, In Shell, Fresh Or Dried	22,697	33,883	9,742	6,974	43	21
80252	Pistachios, Shelled, Fresh Or Dried	22,054	41,773	1,643	412	7	1
80280	Areca Nuts, Fresh Or Dried	12,453	85,586	0	0	0	0
80290	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	136,304	115,840	0	0	0	0
80410	Dates, Fresh Or Dried	181,289	198,612	0	0	0	0
80420	Figs, Fresh Or Dried	64,175	66,660	0	0	0	0
80510	Oranges, Fresh	18,874	28,223	948	672	5	2
80610	Grapes, Fresh	9,493	9,336	5,631	4,400	59	47
80620	Grapes, Dried (Including Raisins)	31,900	43,385	358	15	1	0.03
80810	Apples, Fresh	218,689	236,847	70,786	68,302	32	29
80820	Pears And Quinces, Fresh	4,566	0	1,582	0	35	0
80830	Pears, Fresh	9,492	15,440	2,444	3,682	26	24
80940	Plums, Prune Plums And Sloes, Fresh	2,067	2,332	499	569	24	24
81050	Kiwi Fruit (Chinese Gooseberries) Fresh	9,240	12,966	0	0	0	0
81090	Fruit Nesoi, Fresh	4,926	6,267	4	54	0	1

81310	Apricots, Dried	13,507	12,609	1	0	0	0
81330	Apples, Dried	1,109	1,158	6	0	1	0
90121	Coffee, Roasted, Not Decaffeinated	1,192	1,050	382	233	32	22
90411	Pepper Of Genus Piper, Neither Crushed Nor Ground	94,710	180,816	86	12	0	0.01
90422	Capsicum/Peppers, Pimenta/Allspice, Crushed/Ground	1,005	1,099	25	93	2	8
90611	Cinnamon, Neither Crushed Nor Ground	2,981	3,316	1	0	0	0
90619	Cinnamon-Tree Flowers, Neither Crushed Nor Ground	24,764	45,807	0	0	0	0
90710	Cloves, Neither Crushed Nor Ground	60,072	104,267	0	0	0	0
90811	Nutmeg, Neither Crushed Nor Ground	7,007	5,803	2	1	0	0.02
90820	Mace	2,132	0	0	0	0	0
90821	Mace, Neither Crushed Nor Ground	5,491	10,108	0	0	0	0
90822	Mace, Crushed Or Ground	1,410	697	1	0	0	0
90830	Cardamoms	5,968	0	0	0	0	0
90831	Cardamoms, Neither Crushed Nor Ground	35,017	38,469	0	0	0	0
90910	Seeds Of Anise Or Badian	5,917	0	0	0	0	0
90920	Seeds Of Coriander	1,253	0	205	0	16	0
90921	Coriander Seeds, Neither Crushed Nor Ground	7,179	16,159	414	1,604	6	10
90931	Cumin Seeds, Neither Crushed Nor Ground	1,603	1,040	0	0	0	0
90940	Seeds Of Caraway	4,140	0	0	0	0	0
90961	Anise Badian Etc Juniper Berries Nt Crushed/Ground	11,791	20,913	0	0	0	0
91010	Ginger	4,970	0	0	0	0	0
91011	Ginger, Neither Crushed Nor Ground	15,749	17,925	10	0	0	0
91020	Saffron	6,984	10,750	0	0	0	0
91030	Tumeric (Curcuma)	9,186	12,639	0	0	0	0
91099	Spices, Nesoi	1,921	3,613	157	73	8	2
110630	Flour, Meal & Powder Of The Products Of Chapter 8	1,689	2,787	51	392	3	14
152110	Vegetable Waxes (Other Than Triglycerides)	2,997	2,959	34	17	1	1
160100	Sausages, Similar Prdt Meat Etc Food Prep Of These	1,110	805	0	0	0	0
170211	Lactose & Lactose Syrup Cont 99% More Lactse By Wt	43,960	46,292	8,325	7,515	19	16
170219	Lactose In Solid Form And Lactose Syrup, Nesoi	11,390	9,602	4,059	4,816	36	50
170490	Sugar Confection (Incl Wh Choc), No Cocoa, Nesoi	13,786	16,786	941	1,213	7	7
180620	Chocolate Prep Nesoi, In Blocks Etc. Over 2 Kg	11,899	20,267	193	157	2	1
180631	Chocolate & Othr Cocoa Preps, Not Bulk, Filled	23,602	24,175	31	0	0	0
180632	Chocolate & Othr Cocoa Preps, Not Bulk, Not Filled	4,946	6,621	0	0	0	0
180690	Cocoa Preparations, Not In Bulk Form, Nesoi	35,047	40,423	485	1,106	1	3

190110	Food Preparations For Infants, Retail Sale Nesoi	2,942	5,826	1	3	0	0
190120	Mixes & Doughs For Prep Of Bakers Wares Hdg 1905	2,682	2,618	233	450	9	17
190190	Malt Extract; Flour, Meal, Milk Etc Prod Etc Nesoi	1,973	2,849	140	40	7	1
190219	Pasta, Uncooked, Not Stuffed Etc., Nesoi	6,455	11,270	0	4	0	0.04
190230	Pasta, Prepared Nesoi	2,596	2,444	12	12	0	0.5
190410	Prep Food, Swelling/Roasting Cereal/Cereal Product	1,220	2,097	378	355	31	17
190531	Cookies (Sweet Biscuits)	3,555	5,473	5	46	0	1
190532	Waffles And Wafers	4,992	5,459	107	172	2	3
190540	Rusks, Toasted Bread And Similar Toasted Products	2,410	3,236	12	23	1	1
190590	Bread, Pastry, Cakes, Etc Nesoi & Puddings	10,798	9,017	469	211	4	3
200290	Tomato Paste Etc, Not Prepared With Vinegar Etc.	8,070	7,969	1,737	772	22	10
200410	Potatoes, Prepared Etc., No Vinegar Etc., Frozen	5,990	751	2,609	330	44	44
200490	Vegetables Nesoi, Prep Etc., No Vinegar Etc, Frozn	2,527	1,669	1,122	425	44	25
200570	Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen	1,351	2,067	1	0	0	0
200799	Jams, Fruit Jellies, Pastes Etc Nesoi, Nut Pastes	3,003	4,480	274	411	9	9
200811	Peanuts, Prepared Or Preserved, Nesoi	1,154	2,080	749	452	65	22
200819	Nuts (Exc Peanuts) And Seeds, Prepared Etc. Nesoi	5,277	11,971	415	414	8	3
200820	Pineapples, Prepared Or Preserved Nesoi	1,099	1,642	1	0	0	0
200860	Cherries, Prepared Or Preserved, Nesoi	1,992	1,935	11	12	1	1
200880	Strawberries, Prepared Or Preserved Nesoi	1,813	1,792	21	0	1	0
200899	Fruit & Edible Plant Parts Nesoi, Prep Etc. Nesoi	2,778	2,404	325	50	12	2
200911	Orange Juice, Frozen, Sweetened Or Not	7,640	5,150	942	195	12	4
200939	Juice Of Other Single Cirtus Fruit,Nt Frot,Nesoi	1,117	3,495	4	5	0	0
200949	Pineapple Juice, Nt Fort., Unfermnt, Nesoi	1,109	1,504	0	0	0	0
200969	Grape Juice, Nesoi,Nt Fortified With Vitamins/Min	1,864	1,398	0	0	0	0
200979	Apple Juice, Nesoi,Nt Fortified W Vitamins, Unferm	8,736	6,937	1	16	0	0.2
200989	Juice Of Single Fruit/Veg, Not Fortified Etc Nesoi	4,639	7,770	22	2,710	0	35
200990	Mixtures Of Fruit And/Or Vegetable Juices	7,911	2,067	5,940	931	75	45
210111	Coffee Extracts, Essences Etc. & Prep	5,209	9,854	501	343	10	3

	Therefrom						
210120	Tea Or Mate Extracts/Essences/Concentrates & Preps	988	1,170	179	284	18	24
210210	Yeasts, Active	8,933	10,424	587	1,013	7	10
210320	Tomato Ketchup And Other Tomato Sauces	2,200	2,596	1,442	1,593	66	61
210390	Sauces Etc. Mixed Condiments And Seasonings Nesoi	8,680	8,885	1,599	1,955	18	22
210500	Ice Cream And Other Edible Ice, With Cocoa Or Not	2,766	3,647	1	0	0	0
210690	Food Preparations Nesoi	70,270	59,820	19,030	13,854	27	23
220210	Waters, Incl Mineral & Aerated, Sweetnd Or Flavord	5,409	8,571	181	158	3	2
220290	Nonalcoholic Beverages, Nesoi	87,208	124,880	1,113	2,392	1	2
220300	Beer Made From Malt	3,939	4,648	0	1	0	0.02
220410	Sparkling Wine Of Fresh Grapes	8,580	6,506	44	34	1	1
220421	Wine, Fr Grape Nesoi & Gr Must W Alc, Nov 2 Liters	6,089	5,819	274	31	5	1
220429	Wine, Fr Grape Nesoi & Gr Must With Alc, Nesoi	10,053	7,348	1,087	1,370	11	19
220900	Vinegar & Substitutes For Vinegar From Acetic Acid	3,244	4,792	140	272	4	6
230910	Dog And Cat Food, Put Up For Retail Sale	15,371	19,509	241	224	2	1
350220	Milk Albumin,Inc Concen Of 2 Or More Whey Proteins	6,686	10,382	5,112	4,993	76	48
350290	Albumin & Albumin Derivatives, Nesoi	2,116	4,345	1,149	940	54	22
350510	Dextrins And Other Modified Starches	38,016	41,928	8,648	7,663	23	18
350790	Enzymes And Prepared Enzymes, Nesoi	71,951	83,560	6,462	6,641	9	8
090700	Cloves (Whole Fruit, Cloves And Stems)	35,455	0	0	0	0	0
	Other Consumer Oriented Foods	44,742	68,370	4,942	6,277	11	9
Fish & Seafood Products		47,821	58,661	5,586	11,025	12	19
30214	Atlantic Salmon And Danube Salmon Fresh Or Chilled	298	663	0	0	0	0
30269	Fish, Nesoi, With Bones, Fresh Or Chilled	11,118	0	0	0	0	0
30279	Nile Perch And Snakeheads, Fresh Or Chilled	950	1,193	0	0	0	0
30289	Fish, Fresh Or Chilled, Nesoi	5,604	16,324	0	0	0	0
30313	Atlantic Salmon And Danube Salmon, Frozen	204	145	0	0	0	0
30322	Atlantic And Danube Salmon, With Bones, Frozen	90	0	0	0	0	0
30349	Tunas Nesoi, With Bones, Frozen	356	156	0	0	0	0
30379	Fish, Nesoi, With Bones, Frozen	297	0	0	0	0	0
30384	Seabass, Frozen	281	352	0	0	0	0
30389	Fish, Frozen, Nesoi	1,739	3,557	0	0	0	0
30459	Fish Meat Fresh/Chilled Exc Fillets & Steaks Nesoi	120	675	0	0	0	0

30462	Catfish Fillets, Frozen	1,355	4,607	0	0	0	0
30469	Carp, Eel And Snakehead Fillets, Frozen	125	205	0	0	0	0
30479	Fish Fillet Fam Bregmaceroditae, Etc. Frozen Nesoi	141	73	0	0	0	0
30499	Fish Meat, Frozen, Except Steaks And Fillets Nesoi	11,963	11,303	664	523	6	5
30549	Fish Including Fillets, Smoked, Nesoi	202	106	0	0	0	0
30559	Fish, Dried, Whether Salted But Not Smoked Nesoi	1,736	3,960	0	0	0	0
30612	Lobsters, Including In Shell, Frozen	232	- 0	0	0	0	0
30613	Shrimps And Prawns, Including In Shell, Frozen	2,467	0	1,307	-	53	0
30615	Norway Lobsters, Frozen	246	383	0	0	0	0
30616	Cold-Water Shrimps And Prawns, Frozen	3,802	10,394	3,497	10,372	92	99.79
30617	Shrimps And Prawns, Frozen, Nesoi	1,002	688	0	0	0	0
30729	Scallops Incl Queen, Frozen/Dried/Salted/In Brine	224	14	0	0	0	0
30741	Cuttle Fish & Squid, Live, Fresh Or Chilled	830	214	0	0	0	0
30749	Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine	1,101	943	102	0	9	0
160414	Tunas/Skipjack/Bonito Prep/Pres Not Minced	118	263	8	17	7	7
160510	Crab, Prepared Or Preserved	86	94	2	2	3	2
160569	Aquatic Invertebrates, Prepared Or Preserved Nesoi	191	281	0	0	0	0
160590	Molluscs, Etc., Prepared Or Preserved	221	- 0	0	0	0	0
	Other Fish & Seafood Products	723	2,068	6	111	1	5
Agricultural Products Total		19,351,896	21,710,340	1,048,814	1,066,974	5	5
Agricultural, Fish and Forestry Products		22,144,498	24,541,295	1,108,216	1,147,063	5	5

* Cashew Nuts, Fresh Or Dried, In Shell are primarily for re-export.
Source: USDA/FAS Global Trade Database

Table C(I): India: Top 15 Suppliers of Consumer Foods

Partner Country	United States Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	3,019,375,990	3,227,562,387	3,890,257,216	100.00	100.00	100.00
United States	498,365,310	586,306,220	643,495,949	16.51	18.17	16.54
Cote d'Ivoire	233,659,339	197,405,756	353,847,593	7.74	6.12	9.10
Tanzania	183,286,409	183,282,887	184,096,095	6.07	5.68	4.73
Nepal	104,846,625	139,507,670	169,978,217	3.47	4.32	4.37
China	143,450,130	164,892,227	167,512,078	4.75	5.11	4.31
Afghanistan	101,577,280	152,675,038	164,492,483	3.36	4.73	4.23
Guinea-Bissau	123,649,292	131,936,321	160,105,837	4.10	4.09	4.12
Vietnam	70,143,989	88,476,082	151,520,568	2.32	2.74	3.89
Sri Lanka	71,033,174	125,350,610	146,790,244	2.35	3.88	3.77
Benin	160,299,297	100,252,031	143,782,978	5.31	3.11	3.70
Australia	63,947,967	112,875,160	118,378,159	2.12	3.50	3.04
Pakistan	94,221,315	102,701,342	112,019,729	3.12	3.18	2.88
Bangladesh	72,127,569	105,261,138	98,442,450	2.39	3.26	2.53
Iran	61,985,631	85,399,255	98,090,620	2.05	2.65	2.52
Indonesia	113,639,586	73,711,295	83,135,321	3.76	2.28	2.14

Source: Global Trade Atlas

Table C (II): India: Top 15 Suppliers of Fish and Seafood Products

Partner Country	United States Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	70,727,000	47,821,995	58,661,853	100.00	100.00	100.00
Bangladesh	38,549,349	18,525,001	20,769,050	54.50	38.74	35.40
Vietnam	11,637,872	11,800,906	14,750,000	16.45	24.68	25.14
United States	3,358,747	5,586,487	11,025,605	4.75	11.68	18.80
Myanmar	460,678	1,254,116	2,052,800	0.65	2.62	3.50
Indonesia	271,651	633,352	1,602,157	0.38	1.32	2.73
United Kingdom	1,822,825	833,924	1,477,029	2.58	1.74	2.52
Japan	1,176,743	939,440	917,070	1.66	1.96	1.56
Thailand	993,120	927,291	894,192	1.40	1.94	1.52
Poland	94,928	592,520	856,702	0.13	1.24	1.46
Denmark	470,506	552,598	754,017	0.67	1.16	1.29
Falkland Islands	0	359,369	624,657	0.00	0.75	1.06
Singapore	886,141	986,596	609,730	1.25	2.06	1.04
China	594,821	357,874	444,020	0.84	0.75	0.76
Unidentified Country	1,218,005	891,277	340,551	1.72	1.86	0.58
Norway	0	4,783	248,863	0.00	0.01	0.42

Source: USDA/FAS Global Trade Database

APPENDIX B: INDIA: MAJOR FOOD AND AGRICULTURAL TRADE SHOWS IN

JANUARY 2015

Food & Grocery Forum India 2016

January 19 - 21, Bombay Exhibition Centre, Mumbai

www.foodforumindia.com

Organized by Images Multimedia Pvt. Ltd, Food & Grocery Forum India combines India's leading food conference with a concurrent trade show. USDA participated in the 2015 show.

Food Hospitality World 2016

January 21- 23, 2016, Bandra Kurla Complex, Mumbai

www.fhwexpo.com

Organized by Global Fairs & Media Pvt Ltd., the show caters to the food, beverage and hospitality industry. USDA participated in the 2014 show.

MARCH 2015

AAHAR International Food Fair 2016

March 15 – 19, 2016, Pragati Maidan, New Delhi

www.aaharinternationalfair.com

Organized by the government-run Indian Trade Promotion Organization, AAHAR caters to the processed food and hospitality sector including machinery & technology. This is India's oldest food show.

SEPTEMBER 2016

Annapoorna, World of Food India

September 22-24, 2016, Bombay Exhibition Center, Mumbai

www.worldoffoodindia.com

A joint-venture of Koelnmesse and the Federation of Indian Chamber of Commerce and Industry (FICCI), Annapoorna - World of Food India is an international exhibition on food & beverage products in India. This is a USDA endorsed show.

APPENDIX C: U.S. BASED STATE REGIONAL TRADE GROUPS / COOPERATORS / STATE OFFICE REPS DEALING IN FOOD OR AGRICULTURE IN INDIA

Almond Board of California

Website: www.almondboard.com

Local Representative Office Address:

India Program Manager

Almond Board of California

M-16, Greater Kailash II

New Delhi 100 048

Tel: 011 2922 4492

Mobile: +91-9810955533

E-mail: sudarshan.mazumdar@gmail.com

American Pistachio Growers

Website: <http://americanpistachios.org/>

Local Representative Office Address:

i2i Consulting

Head Office: 10, Sunder Nagar

New Delhi – 110 003

Phone: 91-11-46590340/41004670

Email: devna@i2iconsulting.biz

Homepage: www.i2iconsulting.biz

California Table Grape Commission

Website: www.tablegrape.com

Local Representative Office Address:

The SCS Group

651, Pace City II, Sector 37

Gurgaon, Haryana 122 004

Ph: +91-124-434 4500

Fax: +91-124-434 4501

E-Mail: ctgc@scs-group.com

Home page: <http://www.scs-group.com>

California Walnut Board & Commission

Website: <http://www.walnuts.org/walnuts/>

Local Representative Office Address:

The SCS Group

651, Pace City II, Sector 37

Gurgaon, Haryana 122 004

Ph: +91-124-434 4500

Fax: +91-124-434 4501

E-Mail: walnuts@scs-group.com

Home page: <http://www.scs-group.com>

Cotton Council International

Website: www.cottonusa.org

Local Representative Office Address:

Antar Advisors

B/91, Vishal Residency

Ramdev Nagar-Anand Nagar Road

Satellite – Ahmedabad – 380015, Gujarat

Tel: +91-79-4030 0131

Fax: +91-79-4032 7897

Email – antaradvisors@gmail.com / peush_narang@yahoo.com

Distilled Spirits Council of the United States

Website: <http://www.discus.org/index.asp>

Local Representative Office Address:

Creative Consultants

8 Joel, 3rd Floor

St. Michael's School Marg, Off L J Cross Road No. 1,

Opp. St. Michael Pre-primary School

Mahim, Mumbai 400 016

Ph: +91-22-2445 1033

Fax: +91-22-2445 2750

Mobile: +91 9820220424

E-Mail: shatbhi@gmail.com

Food Export Association of the Midwest USA

Website: www.foodexport.org

Local Representative Office Address:

The SCS Group

651, Pace City II, Sector 37

Gurgaon, Haryana 122 004

Ph: +91-124-434 4500

Fax: +91-124-434 4501

E-Mail: foodexportusa@scs-group.com

Home page: <http://www.scs-group.com>

Food Export USA-Northeast

Website: www.foodexport.usa.org

Local Representative Office Address:

The SCS Group

651, Pace City II, Sector 37

Gurgaon, Haryana 122 004

Ph: +91-124-434 4500

Fax: +91-124-434 4501

E-Mail: foodexportusa@scs-group.com

Home page: <http://www.scs-group.com>

Global Cold Chain Alliance

Website: <http://www.gcca.org>

Local Representative Office Address:

i2i Consulting

Head Office: 10, Sunder Nagar

New Delhi – 110 003

Phone: 91-11-46590340/41004670

Email: atul@i2iconsulting.biz

Homepage: www.i2iconsulting.biz

Pear Bureau Northwest

Website: www.usapears.org

Local Representative Office Address:

The SCS Group

651, Pace City II, Sector 37

Gurgaon, Haryana 122 004

Ph: +91-124-434 4500

Fax: +91-124-434 4501

E-Mail: usapears@scs-group.com

Home page: <http://www.scs-group.com>

Southern United States Association

Website: www.susta.org

Local Representative Office Address:

Head Office: 10, Sunder Nagar

New Delhi – 110 003

Phone: 91-11-46590340/41004670

Email: devna@i2iconsulting.biz

Homepage: www.i2iconsulting.biz

Sunkist Growers

Website: <http://www.sunkist.com/>

Local Representative Office Address:

The SCS Group

651, Pace City II, Sector 37

Gurgaon, Haryana 122 004

Ph: +91-124-434 4500

Fax: +91-124-434 4501

E-Mail: ksunderlal@scs-group.com

Home page: <http://www.scs-group.com>

US Apple Export Council

Website: <http://www.usaapples.com/en/index.html>

Local Representative Office Address:

The SCS Group,

651, Pace City II, Sector 37

Gurgaon, Haryana 122 004

Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: usa.apples@scs-group.com
Home page: <http://www.scs-group.com>

U.S. Dry Pea and Lentil Council

Website: www.pea-lentil.com
Local Representative Office Address:
C-101, Somvihar Apartments
Sangam Marg, R.K. Puram
New Delhi – 110022
Phone: 91-11-26184324
Fax: +91-11-26177340
Email: Shakundalal@hotmail.com
shakundalal@rediffmail.com

U.S. Highbush Blueberry Council

Website: <http://www.blueberry.us/home.html>
Local Representative Office Address:
30/25, Knowledge Park – III,
Greater Noida 201306, NCR Delhi
Phone: +91 98101 58318
Email: raj Kapoor@aibtm.in

U.S. Grains Council

Website: www.grains.org
Local Representative Office Address:
FF 303 G, Sushant Shopping Arcade
Sushant Lok I
Gurgaon - 122 002
Phone: +91-124-404-5892
Fax: +124-239-6209
E-Mail: usgcindia@gmail.com

U.S. Pecan Council

Website: <http://www.uspecans.org/>
Local Representative Office Address:
i2i Consulting
Head Office : 10, Sunder Nagar
New Delhi – 110 003
Phone: 91-11-46590340/41004670
Email: devna@i2iconsulting.biz
Homepage: www.i2iconsulting.biz

Virginia Department of Agriculture and Consumer Services

Website: <http://www.vdacs.virginia.gov/>
Local Representative Office Address:

i2i Consulting
Head Office: 10, Sunder Nagar
New Delhi – 110 003
Phone: 91-11-46590340/41004670
Email: devna@i2iconsulting.biz
Homepage: www.i2iconsulting.biz

Washington State Apple Commission

Website: www.bestapples.com
Local Representative Office Address:
The SCS Group
651, Pace City II, Sector 37
Gurgaon, Haryana 122 004
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: apples@scs-group.com
Home page: <http://www.scs-group.com>

APPENDIX D: USEFUL INDIAN AGENCIES OF CENTRAL GOVERNMENT

Department of Animal Husbandry, Dairying and Fisheries (DADF)

Ministry of Agriculture,
Krishi Bhawan
New Delhi.
Website: <http://www.dahd.nic.in/>
Lead Role: Regulates imports of livestock and livestock products into India.

Ministry of Agriculture and Cooperation (AGRICOOOP)

Ministry of Agriculture
Krishi Bhawan
New Delhi.
Website: <http://agricoop.nic.in/>
Lead Role: Regulates imports of plants and plant products into India.

Plant Quarantine Organization of India (PPQ)

Plant Quarantine Division
Directorate of Plant Protection Quarantine and Storage
Department of Agriculture and Cooperation
Government of India
N.H. IV, Faridabad (Haryana)
Website: <http://www.plantquarantineindia.org/index.htm>
Lead Role: Inspection and regulation of the imports of plants and plant products.

Food Standards and Safety Authority of India (FSSAI)

FDA Bhawan
Kotla Road, New Delhi
Website: <http://www.fssai.gov.in/Default.aspx>

Lead Role: Regulates manufacturing, processing, distribution, sale and import of food with the aim of ensuring safe and wholesome food for human consumption.

Department of Health (DOH)

Ministry of Health and Family Welfare

Website: <http://www.mohfw.nic.in/pfa.htm#Draft%20Notifications>

Lead Role: Regulates standards for various domestic and imported food products.

Ministry of Food Processing Industries, India (MoFPI)

Panchsheel Bhawan, August Kranti Marg

Khelgaon, New Delhi – 110049

Website: <http://mofpi.nic.in>

Lead Role: Regulates and promotes the food processing sector in India.

APPENDIX E: LIST OF INDIAN TRADE ASSOCIATION

[All India Food Processors Association](#) (AIFPA)

[American Chambers of Commerce and Industry](#) (AMCHAM India)

[Associated Chambers of Commerce and Industry](#) (ASSOCHAM)

[Compound Livestock Feed Manufacturers Association](#) (CLFMA)

[Confederation of Indian Trade and Industry](#) (CII)

[Council of Leather Exports](#) (CLE)

[Federation of Indian Chambers of Commerce and Industry](#) (FICCI)

[Federation of Hotels and Restaurants in India](#) (FHRAI)

[Forum of Indian Food Importers](#) (FIFI)

[Indo-American Chambers of Commerce](#) (IACC)

[Indian Dairy Association](#) (IDA)

[Indian Importers Association](#) (IIA)

[Indian Sugar Mills Association](#) (ISMA)

[National Restaurant Association of India](#) (NRAI)

[Retailers Association of India](#) (RAI)

[The Solvent Extractors Association of India](#) (SEA)

[United States India Business Council](#) (USIBC)