

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## India

**Post:** New Delhi

### Un-Tapped Opportunities for Craft Beer and Beer

#### Ingredients

**Report Categories:**

Market Development Reports

Product Brief

Beverages

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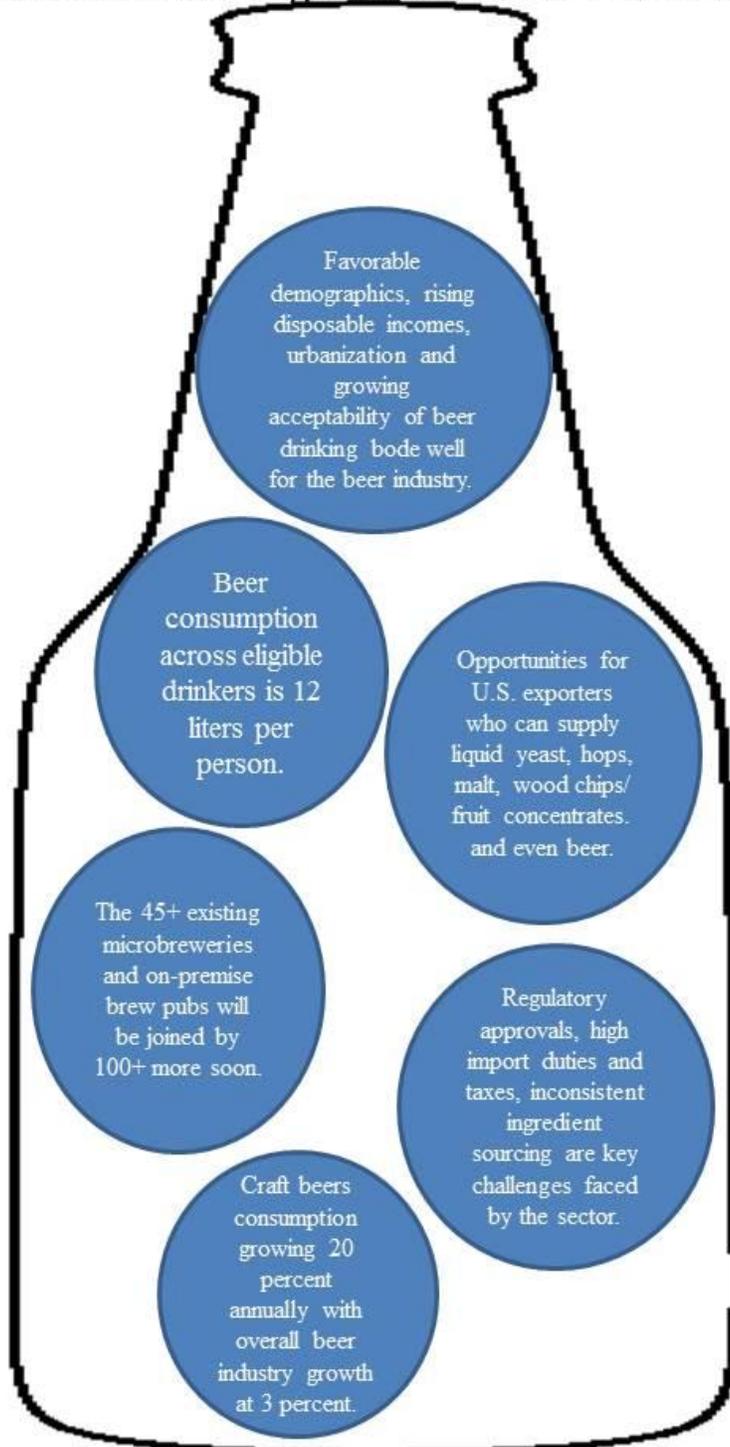
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**Report Highlights:**

The Indian microbrewery sectors consists of ~45 microbreweries and on premise brew pubs with another 100 more opening in the next few years as states issue brewery licenses. Supplying ingredients (malt, hops, yeast) for and supplementing these breweries/pubs with imported beers is an emerging market opportunity as evidenced by growing trade and industry demand. Preferences for and acceptance of craft beers is expanding as the sector sees growth and market penetration across India.

## Beer and Beer Ingredients Sector At A Glance



**Background Information:**

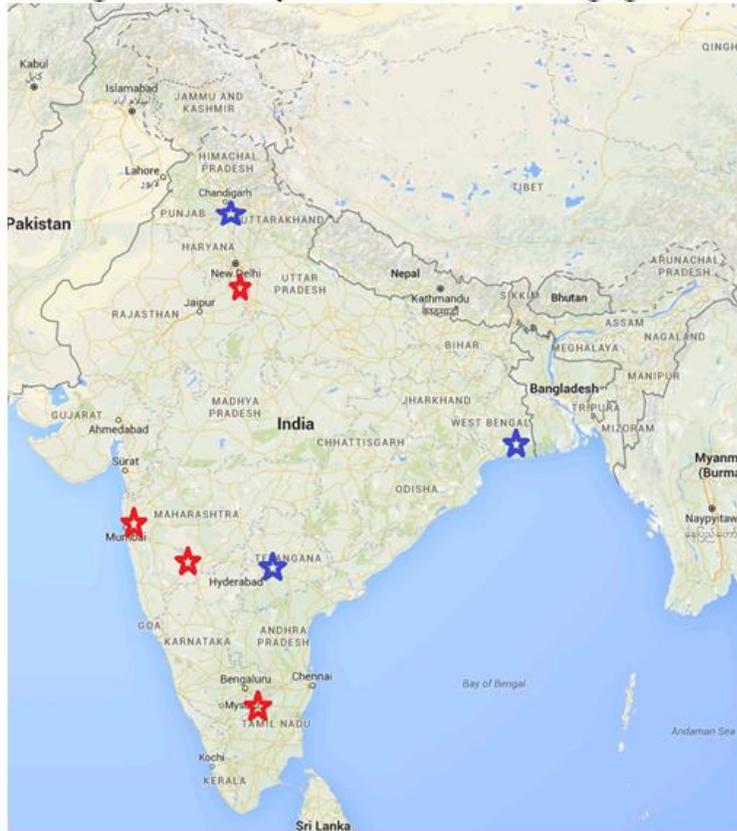
The India microbrewery sector emerged 5 years ago and has grown to include around 45 microbreweries and on-premise brew pubs. Pan-India beer market sales in 2013, from small and large breweries (~85 breweries at that time), was about \$4.1 billion (INR 240 billion). Sales volumes from domestic brewers were about 300 million cases (12 bottles per case at .65 liters per bottle) or 2.34 billion liters of beer. Additionally, India imported just under 4.7 million liters of beer in 2013 valued at \$4 million. By 2015, imported beer volumes and values doubled to \$8.3 million and 9.1 million liters (see trade tables, below). The All India Brewers Association reports that microbreweries account presently for 1 percent of total beer sales and will grow at 20 percent annually. The overall brewery sector is experiencing 3 percent annual growth.

Import volumes of malt; especially roasted malt is on the rise. Likewise, hop imports, in particular, hop pellets is growing fast. Trade data suggests that the industry is evolving in their buying patterns as brewers experiment with different types, different origins, and different product forms. Industry contacts and experienced craft brewers report that demand exists for more ingredients; especially, ingredients from the United States, however, their individual demand levels are not necessarily at volumes that get U.S. businesses and exporters to respond to queries. United States craft suppliers interested in selling into the market can contact the Ag. Affairs Office in Mumbai for additional information and may want to visit the market(s) and/or discuss opportunities with India's local beer associations.

The microbrewery market exists in several tier-1 and tier-2 city markets; including, Gurgaon (state of Haryana which borders New Delhi and Uttar Pradesh in northern India, Mumbai and Pune (state of Maharashtra) in central and western India, and Bangalore (state of Karnataka) in southern India. Microbrewery owners report they are expanding into additional tier-2 cities and new players are entering into tier-1 cities, too.

Industry sources believe there will be increased demand for craft beer in Hyderabad (state of Telangana) in the coming months as the concept is catching hold and the State approved a plan in August 2015 to begin issuing annual microbrewery licenses for about \$4,400 (INR 300,000). The All India Brewers Association further reports that in addition to Hyderabad, Kolkata and Chandigarh would be the next most likely cities where microbreweries develop.

**Image 1. India: Existing Microbrewery Hubs in Red and Emerging Locations in Blue**



Industry contacts report that it costs \$154,000 to \$230,000 (INR 1.0 to 1.5 billion) to establish a craft brewery; excluding, land and labor. Breweries report it is most cost effective to set up and operate in tier-2 cities and provide supplies to their affiliated pubs and customers (i.e., restaurants and bars) in nearby metropolitan cities as metro-area real estate prices are expensive. Bars/Pubs source products in 20-litre and 50-litre kegs as craft breweries have restrictions on bottling. The bars/pubs offer draft beer as part of their menu along with distilled spirits and low-alcohol beverages. Many, too, will offer domestic and imported bottled beer. Most microbreweries purchase their ingredients from importers and distributors rather than importing directly. Sources suggest there are 8 primary importers and distributors of craft beer ingredients across India.

### **Barley, Yeast and Hops Snapshot in India**

Barley, a relatively small winter crop in India, has seen steady production at around 1.8 million metric tons (MMT) over the last few years. Sources report that Indian barley is of six-row varieties and generally unsuitable for malting and traditionally used for food and animal feed. Food use accounts for a major share of barley consumption. Poor quality, rain-damaged grains are fed to livestock. Sources report that around 1/3 of barley production is used for brewing.

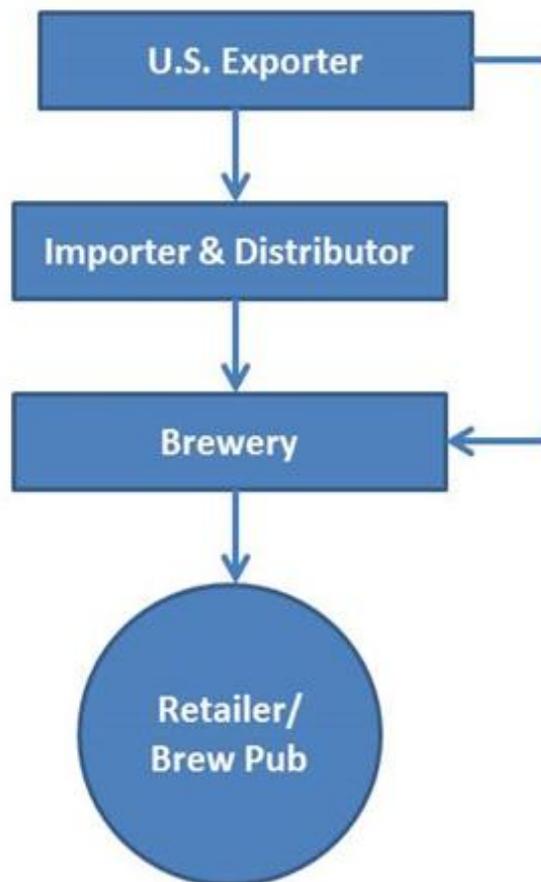
In the last few years, a few new, high-quality malting barley varieties have been developed through public-private breeding programs and are steadily replacing older varieties. Trade sources report that some malting and brewing companies have contract farms that produce malting grade barley in the states of Rajasthan, Punjab, and Haryana. Despite India imposing a zero import duty on barley, imports

volumes are small (just over 2,000 MT in calendar year 2015). Sources suggest that the growth in the brewing industry may fuel demand for malting grade barley in the near future. Relatedly, Indian imports of “malt” (HTS 1107) are rising (see malt trade tables, below).

Key players in the India yeast market are AB Mauri India Pvt. Ltd., AB Vista, Lallemand Inc. and Lesaffre Group. Indications are that AB Mauri India plans to further expand its production capacity and Lallemand and Fermentis are the most popularly imported yeasts used by the beverage sector.

Hops once were grown in Himachal Pradesh, but according to the Himachal Pradesh Department of Horticulture, production has fallen from 130 metric tons in 1994 to an insignificant amount by 2014 as, over time, imported hops (cones, pellets, extracts) were introduced from the European Union, China, and the United States.

### **Image 2. India: Distribution Channel of Craft Beer Ingredients**



### **Consumer Demographics and Preferences**

India’s population was over 1.2 billion in its 2011 census. About 31 percent of India’s population was

“urban” and the share continues growing as rural migrants enter cities and the natural population in urban areas climbs higher, as well. The legal drinking age varies by state and can vary by alcohol-type (e.g., spirits, wine, or beer). In addition, some states (e.g., Gujarat) are “dry” or beginning to restrict alcohol sales (e.g., Bihar) while in many other states there are “dry” days or other types of sales restrictions on quantity, location and alcohol-type.

The country’s per capita income level is steadily growing with its young population actively joining the workforce. Although skewed by a large percentage of low-income earners, India’s per capita annual income across its 1.2 billion plus population was \$1,744 (INR 105,000) in 2014, up 12 percent from 2013.

Indians, predominantly men, have been drinking country liquor, whiskey, and Indian-made “foreign” liquors (IMFLs). In recent years, the Indian alcoholic beverage scene has shifted from drinking at home to drinking at restaurants or pubs. Men are seen to be shifting from spirits to beers and women are seen in bars and pubs with beers, cocktails, and low-alcohol content beverages. Beer is part of most social gatherings and drinking beer at restaurants and pubs is socially acceptable. Over the next five years, Euromonitor International lists alcoholic beverages as one of the five industries with the highest growth prospects in India.

The Indian beer market is largely dominated by local lagers or by foreign brands made in India by international breweries. Some of the top-selling labels include: Kingfisher (United Breweries), Haywards (SAB Miller India), Royal Challenge (SAB Miller India), Kalyani Black Label (United Breweries), and Tuborg (Carlsberg India).

### **Per Capita Consumption in Dispute**

On a per capita basis, using data from 2013, beer consumption in India is small (around 1.92 liters per person). Industry sources argue and Post analysis indicates, however that the per capita beer consumption number is misleading as urban/rural divides (i.e., inadequate geographic beer distribution) and state boundaries (i.e., taxation schemes and political/cultural restrictions) limit access to alcohol and arbitrarily skew the per capita consumption downward. Further, accounting for age/demographics would also provide a more realistic representation of beer and alcoholic beverage consumption. As such, using the 2011 census data as the base and focusing on urban residents aged between 21 and 65 years old and living in non-dry states, the target population moves from 1.2 billion to 194 million people. Using these criteria, average consumption is just over 12 liters per person.

Total India Population	1.211 billion
<u>Less:</u> 69 percent rural population	377 million urban residents
<u>Less:</u> Population < 21 years old	233 million urban residents above the legal drinking age of 21
<u>Less:</u> Population > 65 years old	215 million urban residents aged between 21 and 65 years old
<u>Less:</u> Urban Population in the 21 to 65 year age range from Gujarat, Bihar, and Nagaland where prohibition exists or will soon exist	194 million urban residents with general access to alcoholic beverages; including, beer

*Source: Census India and Industry sources*

### **Location, Location, Location**

Brew pub location is a prime factor for sales. Trade sources report that brew pubs in shopping malls are witnessing low footfall as e-commerce and mobile-commerce allow consumers greater ease of shopping. Standalone restaurants/pubs and/or pubs located in or near hotels and business districts that are close to residential areas are seeing greater footfall. Also, many specialized beer and alcoholic beverage outlets/mom-and-pop shops carry imported and domestic bottled beer. Many will deliver to local residences that are close-by and who phone-in orders for cash on delivery.

### **Taste Preferences, Willingness to Pay, and Seasonality**

The young, working population is slowly being accustomed to new flavors and blends and is willing to pay a higher price for the experience. Though India is generally a price sensitive market, for niche and experiential items like craft beers that appeal to the demographic, the adage may not hold true as exhibited by some of the price and portion points described in each of the “market overview” sections, below.

As there isn’t a homogenous Indian consumer, taste preferences of craft beer in the north, west and south of the country are different from each other. Although, India has favorable climatic conditions throughout the year, months of March to June are peak seasons for beer consumption (generally warm weather and prior to monsoonal summer rains). In the north and west, wheat beers and local flavors (fruits and spice blends) are preferred while “seasonal” varieties are popular in southern India.

### **Market Overviews**

#### **North India Microbreweries Market**

The New Delhi government announced it would grant microbrewery licenses for hotels, restaurants and airports in New Delhi in July 2015. This initiative will grow the craft beer sector and provide opportunities for imported ingredients and equipment. Sources expect to see another 100 microbreweries establishing themselves in the next 3 years in northern India.

Gurgaon, located in the state of Haryana, has 15 microbreweries at present. A microbrewery license in Gurgaon permits the brewer to make 1,000 liters per day. The excise duty on the beer at the point of manufacturing is \$0.62 (INR 40) per liter. Most breweries have Chinese or German brewing equipment. Sources report that hops and yeast ingredients are imported from Germany and malt is

imported from both Germany and Belgium. Presently, many brewers use fermented yeast. Sources suggest there is demand for liquid yeast, wheat flakes, and oat flakes from the United States.

More information on the individual state governments excise policies can be found, below.

[New Delhi State Excise Policy for microbreweries](#)

[Haryana State Excise Policy](#)

[Chandigarh State Excise Policy](#)

Most breweries have 4 or 5 tanks of 1,000 liters each and 2 or 3 tanks of 500 liters each (including fermentation and storage tanks). On average, most breweries have 5 to 15 taps. Though permitted more, most brewers report that about 500 liters of beer is brewed every 2 to 3 days per establishment and is aged for 18 to 20 days before transfer to serving tanks. According to industry sources, sales/consumption of craft beers in Gurgaon is around 200 to 300 liters per establishment per day (about 5,000 to 6,000 liters a month).

The legal drinking age in New Delhi is 25 years old while in Haryana the legal beer drinking age is 18 years old. People in Gurgaon seem to enjoy wheat beers followed by lagers. Prices of craft beers average \$3 (INR 200) for a 500 ml glass and can climb to \$23 (INR 1,500) for a 1,500 ml pitcher of a specialty beer.

### **West India Microbreweries Market**

The legal beer drinking age set by the Maharashtra government is 21 years old. The microbreweries market in Maharashtra is centered in the two cities of Mumbai and Pune. The Maharashtra government has set the annual craft brewing production license to 200,000 liters per establishment but there is some industry speculation that the limit could be increased to 500,000 liters per establishment. Most pubs in Mumbai sell craft beers sourced from Pune but there are some breweries in Mumbai, too. Often, craft beer is transported by road (~3 hours or several hundred kilometers) in kegs. Craft brewery licenses do not allow for bottling operations.

- **Pune**

Most microbreweries in Pune are equipped with Indian made tanks of 8,000 to 12,000 liters. Malt and yeast are sourced frequently from an importer who then acts as a distributor. Supplies originate from Germany, Canada and the United Kingdom. One brewery in Pune has tanks from the United States and uses yeast from California and hops from the Pacific Northwest.

Sales/consumption is between 3,000 to 7,000 liters a month per establishment. Many of the breweries have an ageing cycle of 4-10 days based on the popularity and location of the brewery. Women are increasingly seen in brew pubs and sales figures suggest that they enjoy lighter and “refreshing” beers.

**Image 3. India: Brews in Pune; From (L) to (R) Dark Lager, Oktoberfest, Wheat Beer, Apple Cider**



For more information on the city of Pune, read our FAS India report on [Pune...Fastest Growing City of India](#). Pune is home to a diverse, affluent and young population. Due to its emerging automotive industry, there is an increasingly growing number of foreign expats as well as local residents receiving high-paying jobs with discretionary disposable income. The culture of drinking beer in Pune has evolved from the city of Bangalore. Among craft beer drinkers in Pune, about 70 percent of Pune-ites prefer wheat beers and cider because of their sweet taste while the remaining 30 percent prefer bitter-tasting beers. Prices of craft beers vary from \$3 (INR 195) to \$4.60 (INR 300) for a 330 ml glass and can increase up to \$10.15 (INR 660) for a 1,500 ml pitcher.

Industry sources report that they would like to source fruit concentrates to brew different beer variants. Sources also indicate that most breweries plan to set up a “tap room” or beer cafe as part of their expansion plans in Maharashtra.

- **Mumbai**

Mumbai has 6 microbreweries. Beer is brewed in equipment from Canada, China, and India. Depending on the size of the microbrewery, most have an installed production capacity varying from 10,000 to 60,000 liters. Only one microbrewery reports that it is operating at the full capacity allowed by its license of 200,000 liters.

More information on the [Maharashtra Manufacture of Beer and Wine Rules](#) can be found on page 653 of the hyperlinked manual.

With a population of 11.24 million (as of 2011 census) in urban Mumbai (i.e., excluding the suburban and outlying areas) and annual per capita income of \$1,774 (INR 117,091), Mumbai-kars spend a major portion of their income on beverages, refreshments and processed foods. According to industry sources, Mumbai consumers are open to experiencing new flavors and blends. Reportedly, Mumbai beer connoisseurs enjoy English and American ales, stouts and apple ciders.

The average price for a 330 ml glass starts at \$3 (INR 200) and goes up to \$5 (INR 325). Many locations sell 1,500 ml pitchers at prices ranging from \$4.60 (INR 300) to \$18.40 (INR 1,200) depending on brewery location and popularity.

**Image 4. India: Brews in Mumbai; From (L) to (R) Belgian Ale, Golden Ale, British IPA, Stout, Chocolate Stout and Porter**



### **South India Microbreweries Market**

Currently, Bangalore has 19 microbreweries/brew pubs and industry sources report the city will add 10 more locations every year for the immediate future. The drinking age set by the Karnataka Government is 21 years old. Brew pubs are generally visited by younger members of the workforce and by families on weekends. Industry sources report that consumers place greater emphasis on craft beer quality over price. Trends are seen drifting from sweet to bitter tastes.

The Government license permits a microbrewery to produce 200,000 liters of beer annually. The annual license fee is \$385 (INR 25,000) and an additional \$0.31 (INR 20) excise duty is assessed per liter at the point of manufacturing. Industry sources report it is comparatively easier to get a microbrewery license in Karnataka than in Maharashtra.

For more information on [Karnataka State Excise Department's](#) policy refer to the [Karnataka Excise \(Brewery\) Rules](#).

One of the breweries in Bangalore has American equipment while many others have equipment from Hungary and Canada. Most breweries are installed with 4-5 tanks of 1,000 liters and 2-3 tanks of 200 liters (including fermentation and storage tanks). The breweries report that they brew every day.

**Image 5. India: Brewing Ingredients**



Yeast and malt is imported from European countries (Germany, France and United Kingdom) and hops are sourced from the United States through importers and distributors. Microbreweries/brew-pubs can sell their craft beer on premise. If they choose to distribute their beer in kegs to other bars/restaurants, they must do so through the Karnataka State Beverages Corporation Limited (KSBCL) which is a government-owned distribution company. The microbreweries and brew-pubs that choose to also offer bottled beers, wine and spirits must also purchase this additional alcohol through the KSBCL.

IPAs, stouts, blonde ales, Irish ales and golden ales are the most popular varieties along with seasonal varieties of mango, peach, vanilla, chilli beer and the like. Prices range from \$2.82 (INR 183) to \$4.62 (INR 300) for 330 ml draught. Wheat and stout beers in Bangalore are more expensive than IPAs and other American and Belgian style ales. Industry sources report consumption of craft beers in Bangalore is around 300 to 600 liters per day per establishment (about 9,000 to 15,000 liters a month). For more information on the city of Bangalore, read our report on [Emerging Growth Market...Bangalore](#).

Industry sources believe there will be increased demand for craft beer in Hyderabad (state of Telangana) in the coming months as the concept is catching hold and the State approved a plan in August 2015 to begin issuing annual microbrewery licenses for about \$4,400 (INR 300,000). For more information on the policy, refer to the [Telangana Micro Brewery Rules](#).

### **Challenges for the Small Brewing Sector**

Sales and promotion of alcoholic beverages requires a special license. Moreover, in some states,

consumers are required to have a license that permits them to drink alcohol. Currently the market for craft and craft-style bottled beers is at a nascent stage and brewers report they are waiting for the market to mature before seeking licenses to bottle. Some brew pubs report, too, that imported craft beers tend to compete with draught offerings and cannibalized sales. Furthermore, most craft breweries face major challenges due to continuous ingredient availability.

Economic and political stability is required for growth within the brewing industry. The Government of India controls 60 percent of the alcohol beverage market. Additionally, depending on the state, anywhere between 10 to 30 percent of a state’s revenue is generated from the alcoholic beverage industry.

Presently there are limited educational universities in India that provide a degree or diploma in brewing. Professional development for brewers is only from the education they receive from the owners of the breweries who return from abroad after learning best practices of the international microbrewery market.

**Bottled Beer and Cider Brands and Imports**

There are a few bottled beer and cider brands already being imported into India. Most of them are produced in volumes that are beyond the scale of craft beer producers. Many of these labels are regularly seen in retail and food service establishments. In addition, some of the larger breweries are making beer; including some of those listed below, in India. For example, some of the imported labels that can be seen in Mumbai retail outlets include:

**Table 1. India: Selected List of Imported Bottled Beers Present in Retail Stores**

Italian	Japanese	American	German	Mexico	Netherlands	Belgium	Australian
Peroni	Asahi	Budweiser	Erdinger	Corona	Christoffel	Geist	Foster's
					Heineken	Bira 91	
<b>China</b>	<b>S. Africa</b>					Leffe Blond	
Tsingtao	Savanna					Stella Artois	
	Dry Cider						
						Hoegaarden	

Hotels can obtain a special license to purchase food and beverage items duty-free subject to their foreign exchange earnings. Most of the hotels tend to use their duty-free licenses to purchase items that have the highest import tariffs (i.e., alcoholic beverages).

Trade sources indicate that import duties and taxes account for 80 percent of the price of the product at retail and restaurant outlets. Costs attributed to storage and waste pile up as conditioning and turnover can be issues as vendors cannot sell beer past an expiry date. State-excise taxes are another obstacle as well. Both beer and liquor are taxed on volume and the rates vary marginally based on alcohol content. As such, price sensitive consumers looking for an alcoholic beverage may opt for distilled spirits.

**Table 2. India: Tariffs on Imported Products**

HS Code	Product	Unit	Basic Customs Duty
1107	Malt, whether or not roasted	Kg	30%
2102	Yeasts, active	kg	30%
1210	Hop cones	Kg	30%
130213	Hop extracts	Kg	30%
2203	Beer made from malt	Liter	100%

Source: Indian Customs Data

**Table 3. India: Example of Maharashtra Import Duties and Tax:**

Customs Duty	111.2%	
Value Added Tax (State)	25%	VAT is state specific
<u>Octroi</u> (Mumbai)	7.14%	<u>Octroi</u> is levied when entering Mumbai city
Excise Duty	150% if <u>abv</u> less than 5 percent 175% if <u>abv</u> is more than 5 percent	

Source: Trade Sources

The most frequent path to begin exporting beers to India is to identify a firm that imports and distributes an array of alcoholic beverages. The Government of India recently consolidated its food laws under a single regulatory authority, the Food Safety and Standard Authority of India (FSSAI). For more information on recent amendments/notifications by FSSAI on food laws related to alcoholic beverages imported into India, please refer to our report “Draft Alcoholic Beverage Standards” ([IN5140](#)) and for regulations relating to food additives; including beer and other alcoholic beverages, please refer to our report “Draft Regulations on Food Additives” ([IN5096](#)).

### Beer Associations in India

Currently there are two associations representing the beer sector, namely the [All India Beer Association \(AIBA\)](#) and the newly formed [Craft Brewers Association of India](#). AIBA reports it has over 50 members; including brewers, malt companies, as well as equipment and technology service providers as members. The Craft Brewers Association website lists 7 members all with locations in Bangalore and has a stated purpose of working with government to help develop a conducive regulatory environment that can support business growth and beer culture.

## Trade Tables



<b>Import Volume and Value of Malt, Not Roasted, (HTS 110710) by Country in U.S. Dollar and Metric Ton</b>						
<b>Partner Country</b>	<b>2013</b>		<b>2014</b>		<b>2015</b>	
	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>
Canada	402,121	549	674,704	995	1,165,327	1,550
China	4,495,814	6,385	929,274	1,434	501,193	840
Germany	157,577	192	146,603	199	268,790	464
Russia	17,825	12	-	-	85,698	56
France	-	-	63,960	118	77,946	144
Belgium	-	-	2,802	2	70,476	120
United Kingdom	-	-	47,882	34	63,988	58
Australia	5,516	5	127,639	221	14,723	86
<b>Total</b>	<b>5,078,853</b>	<b>7,143</b>	<b>1,992,864</b>	<b>3,003</b>	<b>2,248,141</b>	<b>3,318</b>

*Source of Data: Ministry of Commerce/Global Trade Atlas Navigator*

<b>Import Volume and Value of Malt, Roasted (HTS 110720) by Country in Metric Ton and U.S. Dollar</b>						
<b>Partner Country</b>	<b>2013</b>		<b>2014</b>		<b>2015</b>	
	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>
China	261,153	420	3,491,916	5,300	6,495,707	9,500
Australia	704,739	1,139	744,140	1,224	1,063,885	1,870
France	370,477	563	613,968	1,039	407,771	765
Germany	95,978	101	94,987	109	50,806	74
United Kingdom	70,288	56	85,999	61	22,747	24
Belgium	35,090	51	146	-	620	1
<b>Total</b>	<b>1,537,725</b>	<b>2,330</b>	<b>5,031,156</b>	<b>7,733</b>	<b>8,041,536</b>	<b>12,234</b>

*Source of Data: Ministry of Commerce/Global Trade Atlas Navigator*

<b>Import Volume and Value of Vegetable Saps And Extracts Of Hops (HTS 130213) by Country in U.S. Dollar and Metric Ton</b>						
<b>Partner Country</b>	<b>2013</b>		<b>2014</b>		<b>2015</b>	
	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>
Germany	2,289,051	86	2,178,983	60	1,569,439	61
United States	379,502	12	740,838	26	323,577	6
United Kingdom	15,234	1	35,005	2	57,782	3
Belgium	11,400	-	-	-	14,275	-
Hong Kong	-	-	-	-	3,595	-
Netherlands	-	-	-	-	49	-
Slovenia	23,860	11	6,238	2	-	-
Czech Republic	-	-	4,160	-	-	-
<b>Total</b>	<b>2,719,047</b>	<b>110</b>	<b>2,965,224</b>	<b>90</b>	<b>1,968,717</b>	<b>70</b>

*Source of Data: Ministry of Commerce/Global Trade Atlas Navigator*

<b>Import Volume and Value of Hop Cones, Neither Ground Nor Powdered Nor In The Form Of Pellets, Fresh Or Dried (HTS 121010) by Country in U.S. Dollar and Metric Ton</b>						
<b>Partner Country</b>	<b>2013</b>		<b>2014</b>		<b>2015</b>	
	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>
Germany	785,789	85	211,135	34	361,668	169
Czech Republic	-	-	-	-	20	-
Australia	93,719	1	91,717	1	-	-
United Kingdom	-	-	8,275	-	-	-
<b>Total</b>	<b>879,508</b>	<b>86</b>	<b>311,127</b>	<b>35</b>	<b>361,688</b>	<b>169</b>

*Source of Data: Ministry of Commerce/Global Trade Atlas Navigator*

<b>Import Volume and Value of Hop Cones, Ground, Powdered Or In The Form Of Pellets; Lupulin (HTS 121020) by Country in U.S. Dollar and Metric Ton</b>						
<b>Partner Country</b>	<b>2013</b>		<b>2014</b>		<b>2015</b>	
	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>
Germany	1,779,554	193	1,763,515	199	2,537,764	305
United States	886,611	39	472,797	67	259,101	25
Czech Republic	467,789	38	125,004	9	229,624	21
Australia	97,639	1	98,769	1	63,313	8
Slovenia	-	-	27,912	18	24,252	7
Canada	-	-	-	-	13,843	1
Netherlands	1,794	-	5,374	-	8,866	1
United Kingdom	4,987	-	2,159	-	62	-
Belgium	8,983	1	-	-	-	-
<b>Total</b>	<b>3,247,357</b>	<b>272</b>	<b>2,495,530</b>	<b>294</b>	<b>3,136,825</b>	<b>368</b>

*Source of Data: Ministry of Commerce/Global Trade Atlas Navigator*

<b>Import Volume and Value of Beer Made From Malt (HTS 2203) by Country in U.S. Dollar and Liters</b>						
<b>Partner Country</b>	<b>2013</b>		<b>2014</b>		<b>2015</b>	
	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>	<b>USD</b>	<b>Quantity</b>
<b>World</b>	<b>3,939,220</b>	<b>4,665,471</b>	<b>4,648,019</b>	<b>5,340,293</b>	<b>8,250,723</b>	<b>9,059,290</b>
Mexico	1,353,475	1,939,000	1,371,766	1,937,055	3,209,832	3,452,182
Belgium	919,328	954,381	974,304	1,034,954	2,701,300	3,101,192
Germany	205,397	309,262	427,472	539,444	581,725	879,336
Singapore	436,900	443,929	772,568	686,886	477,594	375,916
United Kingdom	92,135	45,796	235,033	158,034	395,828	376,449
Netherlands	272,423	247,552	357,099	362,256	390,029	304,933
China	92,881	85,294	60,567	51,065	146,132	148,744
United Arab Emirates	119,094	132,351	66,142	71,467	64,492	61,925
United States	46	50	966	1,000	49,578	49,300
Unidentified Country	80,564	79,719	34,317	28,794	43,983	73,785
Spain	22,308	25,864	46,441	59,958	34,426	59,832
Netherlands Antilles	-	-	-	-	29,047	25,139
Russia	9,131	8,500	57,011	137,320	21,433	43,012
Italy	26,492	30,865	18,622	14,400	15,763	11,444
Denmark	-	-	2,016	1,200	12,698	10,180
Czech Republic	-	-	-	-	12,399	23,680
Vietnam	6,389	7,000	13,178	10,320	11,376	9,380
Korea South	-	-	8,555	9,996	11,084	12,052
France	155,779	202,816	106,160	98,030	8,139	7,714
Lebanon	8,304	3,342	-	-	8,106	10,890
Portugal	17,484	20,000	5,227	5,300	7,008	6,000
Thailand	-	-	-	-	5,548	4,000
Pakistan	-	-	13,123	14,619	3,638	2,334
Japan	14,045	14,150	30	25	3,127	3,565
Estonia	1,163	1,000	2,345	2,500	2,481	1,848
Finland	-	-	-	-	2,244	2,852
Australia	195	200	9,649	10,070	1,182	550
Switzerland	-	-	-	-	531	1,056
South Africa	2,952	3,000	-	-	-	-
Indonesia	-	-	6,637	3,000	-	-
Malaysia	102,734	111,400	58,690	102,500	-	-
Namibia	-	-	102	100	-	-

*Source of Data: Ministry of Commerce/Global Trade Atlas Navigator*

## **POST CONTACT AND FURTHER INFORMATION**

For further information about the craft beer sector and other markets, please contact the following USDA offices in India.

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