

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Wine Production and Trade Update

Report Categories:

Wine

Beverages

Promotion Opportunities

Agriculture in the Economy

Food Service - Hotel Restaurant Institutional

Approved By:

Lazaro Sandoval

Prepared By:

Dhruv Sood

Report Highlights:

FAS Mumbai forecasts 2019 wine production to rise by 5 percent to 17.6 million liters as this year's monsoon season is expected to support higher yields. Rising production is fueled by growing wine consumption supported by changing beverage preferences and trends. Despite high tariffs, wine imports registered a 14 percent growth (by value) from last year reflecting evolving Indian consumer pallets over the past decade. The Indian wine sector will continue to expand but its potential is constrained by excise taxes, licensing processes, complex distribution procedures, poor handling and storage options, competition from whiskey and limited advertising options.

General Information:

This report does not include a Production, Supply, and Distribution/Demand table.

Production

In 2019, Indian wine production is forecast to rise to 17.6 million liters (1.96 million cases at 12 bottles per case of 750 milliliters each) on area of approximately 6,000 acres (2,428 hectares). This represents a five percent increase in production over 2018 which also experienced a good harvest. Although wine production in the country is booming, Indian output represents less than a percent of global wine production.

Area is expected to expand in 2019 as one of the larger wine producers plans to plant 355 hectares of vineyards in response to greater domestic wine demand. Smaller wineries and farmers are supplying wine and grapes to larger wineries through long-term contracts (5-10 years) as it assures them payment at end of every season in contrast to other horticultural crops. The sector has witnessed significant consolidation in last few years where several larger wineries have acquired small ones in other states to overcome the differential taxation policy among states. Small wineries are also choosing to supply grapes to the more commercially viable wineries that can support marketing and branding of their products. The growth potential of smaller wineries is constrained by limited capital availability, tight liquidity, and the lack of national distribution. Wineries of all sizes increasingly look to wine tourism as a new source of income through the set-up of in-house restaurants, lodging, wine tastings and vineyard tours.

Production Regions: Wine production in India is concentrated in the states of Maharashtra (90 percent) and Karnataka (7 percent), while the states Goa and Himachal Pradesh represent less than 3 percent of output combined. Most wineries and production are concentrated in the Nashik region in Maharashtra, which is considered the home of the country's wine sector. Other significant wine regions include Sangli (Maharashtra), Nandi Hills (Karnataka) and Bangalore (Karnataka). The country's diverse mix of climates allow it to grow an array of grape varieties for wine including indigenous varieties such as Anabeshahi, Arkavati and Arkashyam in addition to imported varieties such as Syrah, Cabernet Sauvignon, Merlot, Chardonnay, Sauvignon Blanc, Zinfandel, Shiraz, Chenin Blanc, and Clairette Blanche.

The Nasik region has a shorter ripening season due to the hilly terrain and colder climate, which keeps alcohol levels lower and results in easier growing conditions for white varieties. The average grape yields can range from 3-4 tons per acre for red varieties, and 4-5 tons per acre for white varieties. Harvest usually is done during the winter months and usually starts from December and continues until to March. Post-harvest, the wineries use the pre-monsoon (Apr-June) period for early pruning, while monsoon (June-September) period typically involves pruning, canopy management and mulching.

The state of Karnataka is the second largest producer of wine grapes in India. The state has recognized four regional appellations in the state namely Nandi Valley, Krishna Valley, Cauvery Valley and Hampi Hills. The harvest is usually occurs from March to May in Southern Karnataka, and February-March in Northern Karnataka. To promote wine cultivation in the state of Karnataka, the state government had announced a Karnataka grape processing and wine policy in 2007, which included the creation of the Karnataka Wine Board (KWB), the only wine board in the country to date. According to KWB, there are currently 17 wineries in the state with wine production of approximately 9 million liters.

Government Support: Production is expected to continue to grow in the coming years and as such the state

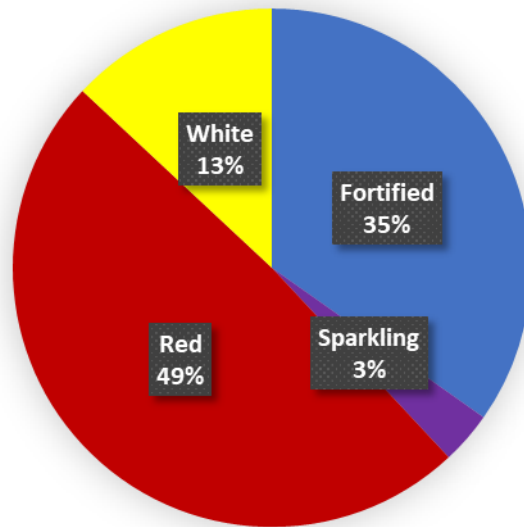
governments of Maharashtra and Karnataka have taken steps to support the wine industry through various supports. These supports include the reduction or elimination excise taxes on wines produced in state, easing distribution restrictions, and providing fiscal incentives to establish wineries and vineyards. These states have also imposed stiff excise taxes on imported wines and wines from other states. In the case of Maharashtra, the state government has eased licensing requirements and regulations for establishing wineries and wine retail outlets. In addition, the state government established wine industrial parks to facilitate investment in the industry. Wineries in Maharashtra that produce and sell wines made from grapes grown in the state have been exempted from paying excise duty since 2001, however the exemption is set to expire in December 2021. The local industry is hopeful that an extension will be granted to support the industry. Wineries in Maharashtra currently pay twenty percent value added tax (VAT) to the state government, out of which almost 16 percent is refunded. Similar to incentives provided by the state of Maharashtra, the state of Karnataka provides a grape subsidy of Rs. 50,000 per hectare for new plantations. The Karnataka Wine Board also separately conducts various market promotion activities including wine festivals, appreciation/tasting courses in smaller towns in the state. KWB has also initiated a certification course recognized by the Government of Karnataka.

Consumption

Based on trade sources and available sales data, national wine consumption is over 30 million liters per year. Historically, alcoholic beverages such as whisky, rum and beer dominated alcohol consumption in India, however, the rise in disposable incomes, rapid urbanization, access to reasonably priced domestic wines, the perceived health benefits of consuming low alcohol beverages and changing consumer attitudes have led to a significant increase in wine consumption. Local sources indicate that the Indian wine sector has become the fastest growing alcoholic beverage category in the past decade, thanks in particular to the rise of upper-middle class urban consumers.

An estimated 485 million consumers are above the drinking age (over a third of the country's total population). According to Wine Intelligence, most of India's wine consumption takes place in urban centers, including Mumbai (32%), Delhi (25%) Bangalore (20%), Pune (5%) and Hyderabad (3%). At present, consumers have a strong preference for red wines followed by fortified, white and sparkling wines. Despite the sector's accelerated growth over the past few years, wine penetration is low with an estimated 2-3 million consumers consuming 24 million liters. Domestic wines dominate the Indian wine market due their lower price and higher availability. Imported wines face an import tariff of 150 percent which severely limits the availability of foreign wines in the market. As such, international wines are viewed as more expensive and superior to domestic wine but are limited to select occasions or gifting.

Chart 1 – Wine Consumption by Category



Source: Based on category sales data from Euromonitor.

Price remains the primary driver of wine choice for consumers followed by brand familiarity and country of origin. Although consumers are price sensitive, they are willing to spend more on wine, especially for professional and family events to impress guests.

Growth in consumption is driven by the wine's fastest growing consumer segment young adults (20-35). Recognizing this opportunity, the sector is widening its range of products to meet the varied tastes and needs of this demographic. Young adults are driving demand for alcoholic drinks as socializing over drinks is becoming the norm. Wine consumption is also being driven by perceived health benefits including the reduction of the risk of heart disease and stroke, managing cholesterol levels, promoting longevity, and boosting the immune system.

Although wine consumption in India has traditionally been skewed towards women, the growing urban population and the increasing availability of wine has made it a drink that is appreciated by everyone. In addition, wine has been traditionally associated with class and education, but younger consumers have come to appreciate wine without those associations. In the past, women were often reluctant to drink in public due to apprehensions regarding etiquette. But now, full tasting sessions with friends and family are increasingly organized by this consumer group. Moreover, status-conscious consumers are increasingly viewing wines as a viable gifting option for birthdays, anniversaries, and the holiday season.

Economy wines (around USD \$7-\$10) are preferred by most consumers, with these being generally produced domestically and thus more widely available. Although mid-income groups are increasingly developing a more sophisticated taste for wine, they would rather opt for a domestically produced wine than an international brand due to a lack of knowledge about wine in general. Access to reasonably priced quality wines (around USD \$10-\$15) is considered by some to be the key to speeding the development of India's wine sector. Some wineries, instead of producing dry European-style wines that sell for eight to ten dollars per bottle, are working to produce sweeter wines that sell for two to three dollars per bottle with higher alcohol content, screw tops, smaller bottles and convenient packaging. The intent is to better meet the expectations of the Indian palate and broaden the appeal of wine to more moderate-income consumers. Due to the increasing availability and affordability of wine, lower-middle-income households are becoming more

familiar with the product and increasing their purchases.

Better access to affordable imported wines will also help increase consumer demand for both imported and domestic wines as well. Increasing consumer knowledge will be a key task of the sector moving forward in order to ensure demand continues to increase, specifically towards higher quality and premium wines (over USD \$20).

In recent years, there has been increased public and political attention directed at alcoholic beverages, as well as at the food and soft drinks industries, because of concerns related to the health effects of alcohol consumption and overconsumption of foods and drinks containing high levels of sugar. Certain local governments have proposed or adopted taxes on sugary foods and beverages to influence consumers purchasing behaviors. These policies may be adversely affecting their sale and consumption of those products.

According to Euromonitor International data, over 2015-2030, the median income per Indian household is expected to rise by nearly 90 percent. States such as West Bengal are witnessing strong demand for alcoholic drinks, driven mainly by middle-income consumers. Additionally, rapid urbanization is further resulting in the strong growth of the pub culture. Earlier adoption of wine, along with the wider availability of both domestic and international wines, will spur consumer interest and will likely drive the category's growth over the forecast period.

Marketing

Traditionally, wine has been sold through thousands of small "wine shops" which are liquor stores carrying a range of alcoholic beverages. These stores rarely have air conditioning and do not market wine or other beverages beyond carrying signs or other promotional materials. Additionally, acquiring a retail license can be difficult and expensive, which limits the opportunity to open new stores thereby restricting growth in the retail sales channel. Some states and cities (Maharashtra, Goa, Haryana, Karnataka, Telangana and Delhi) have allowed the sale of wine in supermarkets and malls but this is only present in tier I and tier II cities. India's modern retail food industry is developing rapidly and could serve as a new outlet for exposing consumers to wine. Most modern retailers rely on subcontractors who hold liquor licenses to operate their wine shops. The highest revenue is generally achieved during the second quarter of a calendar year (April to June), as this quarter coincides with the summer holiday season in India, and during the fourth quarter of a calendar year (October to December), as this quarter coincides with Christmas and the festival season in India as well as the Indian winter holiday season.

- **Advertising:** Advertising for all alcoholic drinks has been banned in India since 2000. However, companies are finding creative ways to market their products in India through sports tournaments, events, music festivals, and surrogate brands in mineral water or club soda being offered under alcoholic drinks' brand names. Alcohol companies are now venturing into digital advertising through online videos and social media which is unregulated so far.
- **Tradeshows and Tastings:** The number of trade shows for the alcoholic beverage sector are very limited. However, several brands are increasingly participating in food shows to showcase and market wines as an agricultural product and increase consumer education. In some shows, the sampling of wines is permitted as well. Another popular option being adopted by wineries is to conduct tastings and wine dinners for select groups of influencers and industry contacts to introduce new products.

- **Duty Free Segment:** In India, the difference in prices between imported wines at duty-free stores and traditional retail locations is significant due to high duties. Any decrease in the taxes paid on goods purchased at traditional locations may reduce the incentive for customers to purchase at duty free stores. Given that no significant reduction in the tariffs on wine are currently expected, duty free stores are expected to continue to generate high sales volume and remain a strong channel for purchase of imported wines. The majority of these stores are located in the international terminals of airports and seaports.
- **Wine Tourism:** A few wineries and importers have developed programs to sell directly to consumers at the wineries. These marketing approaches enable smaller wineries and importers to bypass traditional distribution systems and better target consumers based on their wine interests. Other small to medium wineries are adopting the wine tourism model by setting up in-house restaurants, in addition to wine tasting and vineyard tours to increase revenue. Some wineries are also investing in product innovation through the production of wine coolers to capture younger consumers, whom have not developed a palate for traditional wines but are willing to experiment with new products.

Distribution and Storage

Each of India's 29 states and seven union territories wields considerable control over the taxation, marketing, storage, and distribution of alcoholic beverages including wines. Five states (Bihar, Gujarat, Manipur, Mizoram and Nagaland) ban the sale of alcoholic beverages completely. Excise revenue from sales of alcohol is an important source of revenue (in some states it is the primary source) for funding state-level projects and services. Revenue from hard liquor sales is the primary target of state tax regulators, but wine is often subject to the same requirements as other alcoholic beverages.

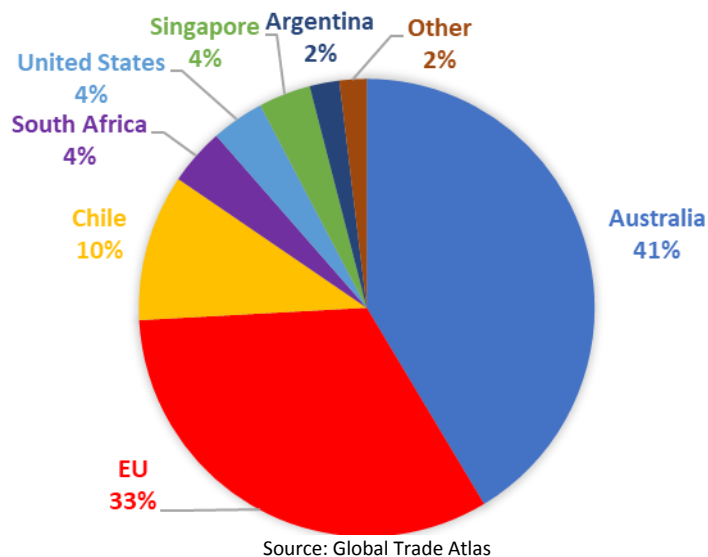
Imported wines and all other alcoholic beverages including domestic products must be stored in a government-approved bonded warehouse or excise department bonded warehouse. Importers can keep the imported wine in an excise approved warehouse after paying the import duty. Wines can be released from the bonded warehouse for distribution only after the distributor meets all the mandatory requirements of the state where they plan to market the product. Trade sources indicate that government-controlled storage warehouses don't invest in cold chain facilities (due to low sales volume of wine as compared to whiskey and beer) and lack the proper storage conditions for wines. Consequently, the product that is sold to the end consumer may not be in the optimum condition.

Trade

In 2018, India imported 5.2 million liters of wine at a value of USD \$27.4 million. The largest suppliers to India are Australia and the European Union, who combined supply almost 75 percent of the country's wine

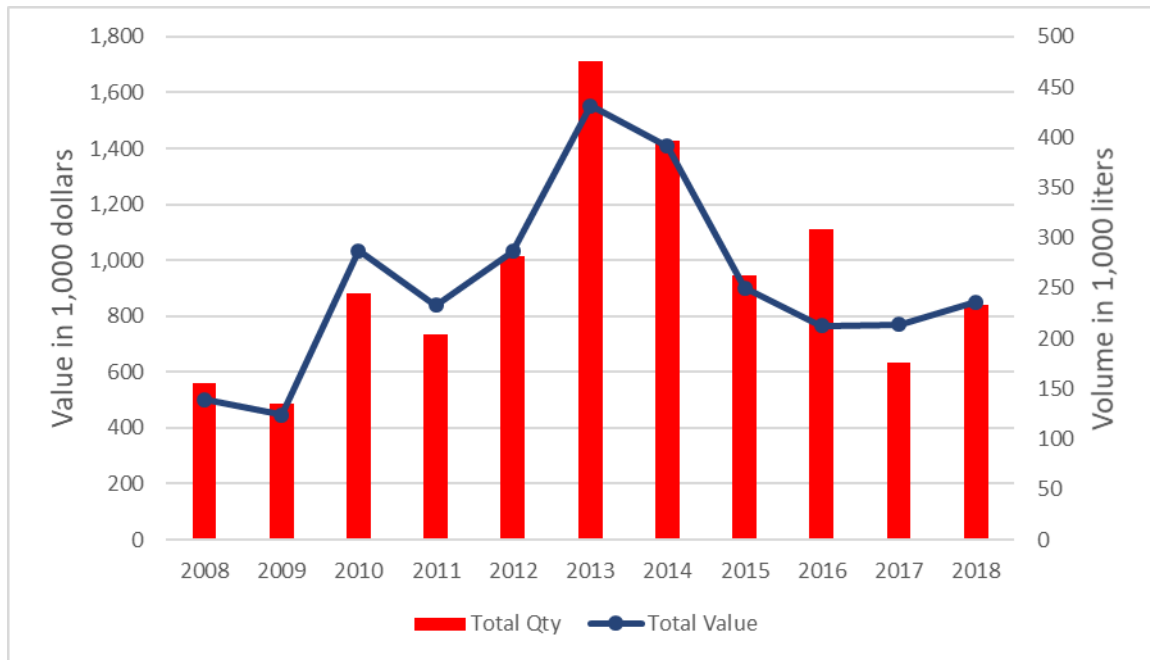
imports. Secondary suppliers include Chile, South Africa, the United States, Singapore, and Argentina. The European Union previously supplied over half of India’s wine imports yet over the past two years Australia has surpassed the EU through more competitive prices and lower logistical costs.

Chart 2 – Indian Wine Imports by Destination 2018 (By Volume)



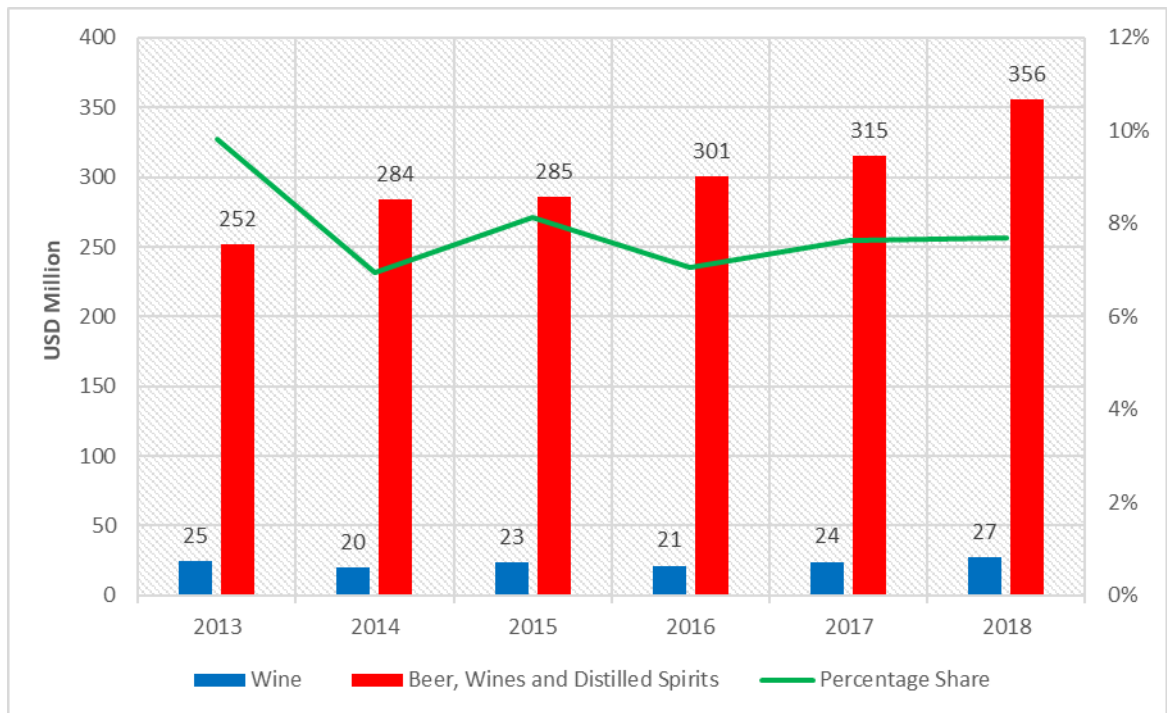
According to U.S. trade statistics, in calendar year 2018, U.S. exports of wine (HTS Code 2204) to India were valued at close to \$1 million. The percentage share of U.S wines in exports of total alcoholic beverages to India was four percent in 2018. Ongoing problems with tariffs, issues with local authorities regarding excise taxes, labeling requirements, and product registration continue to be an impediment to exports of premium U.S. wines. Australia continues to be the leading supplier of wines to India by value and by volume. The unit price of Australian wines is 76 percent lower than the American wines (refer table 3). While imports contribute 15-25 percent of the total wine availability (depending upon the year), wine importers are playing an important role in terms of introducing Indian consumers to new varietals and new origins through the low-end segments of their portfolio. Due to high tariffs and other prohibitive costs, the wine imports have been generally restricted to lower-end wines due to prohibitive costs that make higher-end wines unaffordable. According to private sources, most importers are only willing to import wine at a low FOB price around USD \$1.5-\$3 per bottle.

Chart 3 - U.S. Wine Exports to India (Value and Volume)



Source: U.S. Census Bureau Trade Data

Chart 4 - India: Imports of Wine as a Percentage of Imports of Alcoholic Beverages



Source: Directorate General of Foreign Trade, Ministry of Commerce

India is often touted as an important emerging market for wine, and while sales have lagged below expectations for the past several years, consumption in the last three years has remained sound due to

constant efforts to increase brand awareness and consumer education. Sources report that nearly half of all imported wine is for the hotel sector (hotel restaurants, catered events and receptions). Retail sources have reported that grocery-store sales are an emerging area as high-end chains are dedicating spaces to wines. However, sales are largely of domestic wines as imported products sell very infrequently due consumers’ unfamiliarity with imported brands, the wine growing regions and characteristics in addition to higher retail prices due to import tariffs.

Policy

Federal and State Regulations

Alcoholic beverages taxation and legislation is controlled by state governments in India, resulting in wide variations in trading conditions across the country. Many states are heavily reliant on alcoholic beverage taxes for their annual budgets, creating the temptation to hike taxes in times of economic difficulty. Other states are meanwhile increasingly influenced to shift towards prohibition due to social pressure for various reasons. State government decisions are often difficult to predict and continue to pose heavy constraints to sector participants.

The taxation structure for alcoholic drinks is furthermore highly complex in many states, with some states taxing products differently according to price band. For example, excise duty and value added tax (VAT) are set by states with levels varying widely and some states opting for more complex VAT structures. The federal government meanwhile issues licenses for alcoholic beverage manufacturing facilities and imposes a central import tax on alcoholic drinks in addition to state excise and sales taxes in their own states. This complex system meanwhile encourages inter-state smuggling and contraband, creating heavy burdens for alcohol firms seeking a national presence in India. Trade sources indicate the possibility of the inclusion of alcoholic beverages including wine under the ambit of Goods and Services Tax (GST), which would significantly help streamline taxation and create a larger unified consumption market in the country. However, state governments have been reluctant to give up a large portion of their tax revenue which they would be required to share with the federal government.

Licenses

Licensing procedures vary by state; some states prohibit the sale of alcohol, others permit it, while some have state-run monopolies that control the distribution of alcohol. In general, importers, distributors, retailers, restaurants and hotels must have a license to handle alcoholic beverages. In some states, licenses are further delineated to allow for services such as room service sales of alcohol. Licenses are typically subject to annual renewal fees. State licensing and distribution structures are outlined in Table 1.

Table 1: State Licensing and Distribution Structures

Structure	Description	States
Open Markets	A business may apply for a license at a set fee, if	Maharashtra, West Bengal,

	licenses are available. In some states new licenses have not been available for many years.	Goa, Assam, Meghalaya, Arunachal and Tripura
Auction Markets	Licenses are auctioned to the highest bidder.	Uttar Pradesh, Rajasthan, Madhya Pradesh, Punjab, Haryana and Chandigarh.
Government Controlled	The government-controlled markets have different models. Karnataka is the most open state, with the lowest trade margins. Whereas retail shops in Delhi, Kerala and Tamil Nadu are run by the state government.	Tamil Nadu, Delhi, Kerala, Andhra Pradesh, Telangana and Karnataka.
Prohibition States	Sales of alcohol are prohibited	Bihar, Gujarat, Manipur, Mizoram and Nagaland.

Tariffs

In July 2007, the Government of India imposed a basic customs duty on all wine products (HS code 2204) at 150 percent, equivalent to the bound level established during the Uruguay Round of the World Trade Organization. The import tariffs remain prohibitory for all imported wines i.e. basic customs duty at 150 percent plus an 18 percent Integrated Goods and Services Tax (IGST). For additional details on customs duty structure, please refer [Custom Duty Calculator](#).

Market Entry Strategy

Given the complexity of the domestic excise, licensing and distribution policies, the key to accessing the Indian market is identifying an experienced importer and distributor. There are only a few people in India who understand the complexities of wine distribution and a prospective importer should have staff with experience in this area. A key consideration for an exporter is understanding how their wines will eventually be priced for sale after all taxes and fees have been incurred and through what channel whether retail or the hospitality sector.

Estimates of the number of wine importers have varied from 50 to 100 over the past few years. Several wine enthusiasts reportedly jumped into the business as imports were rising a few years ago, but some did not have distribution experience and transactions ultimately failed with volumes of unsold wine stranded in warehouses in some cases. The five largest importers account for an estimated 60-70 percent of imports, with the balance of active importers, perhaps 30 firms, each handling less than 10,000 cases per year. Several importers began as distributors of alcoholic beverages other than wine and have added wine to their portfolios. Additionally, some Indian wine producers, who seek to offer their customers the full range of wine options, are importing wines that complement their domestic wine production.

The Indian wine market has garnered considerable attention over the past decade with many touting the rapid growth and imminent expansion of the market. Indian importers indicate that they receive a steady stream of inquiries from foreign exporters with interest in the Indian market. Many of the established importers already carry U.S. wines within their portfolios and prefer not to carry similar varietals of wine from the same country or state. Wineries from new regions or with new varieties may find greater interest among importers. Indian importers are appreciative of the superior quality and range of U.S. wines and spirits and

are keen to explore opportunities to source them at reasonable prices.

FSSAI labeling requirements

The Government of India's (GOI) Food Safety and Standards Authority of India (FSSAI) recently published a notification to announce the implementation of new alcoholic beverages standards of April 1, 2019. These standards include specified requirements for the labeling of wine and other alcoholic beverages. This section provides an overview of the labeling and food safety requirements for wine but should not be viewed as a definitive listing of requirements.

Non-Rectifiable labeling requirements should be printed on the product label and cannot be affixed.

1. Name of Product (Red/White Wine)
2. Ingredient List
3. Manufacturer Name and Complete Address (*Produced and Bottled By*)
4. Date of Bottling/Vintage
5. Country of Origin
6. Net Weight/ Volume

Rectifiable labeling requirements signify that a label can be rectified by affixing a single non-detachable sticker next to the principal display panel without altering or masking the original label information in any manner. The rectification will be carried out at custom bond warehouses.

1. Name and address of importer
1. FSSAI logo and license number
2. Statutory warning - "*consumption of alcohol is injurious to health*" and "*be safe-don't drive and drive*"

While there is no official process of approving labels prior to shipment, an importer may be able to work with a local FSSAI office to obtain feedback concerning a proposed label.

Please see the following USDA GAIN reports relating to FSSAI labeling requirements for alcoholic beverages.

[IN9035 - FSSAI Publishes FAQs on Alcoholic Beverages Regulation](#)

[IN9032 – Implementation of Alcoholic Beverage Regulations 2018](#)

[IN9002 – Rectifiable Labeling for Alcoholic Beverages](#)

Trade Data

Table 1. India: CY wine imports by Origin (value in USD)

Trade Partner	2013	2014	2015	2016	2017	2018
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Australia	2,756,256	3,321,824	3,314,667	3,370,064	3,897,768	6,573,371
France	10,352,773	7,970,166	9,187,044	8,949,766	9,259,471	5,621,096
Singapore**	498,640	97,132	69,829	130,609	1,086,859	5,537,835
Italy	2,520,224	1,980,165	2,941,555	2,181,346	2,855,388	3,035,108
Chile	1,049,180	590,239	1,227,134	1,100,586	1,381,565	1,493,336
United States	1,405,307	1,436,556	1,095,009	868,570	920,728	1,046,517
United Kingdom	1,798,452	1,861,771	2,305,631	1,930,139	1,916,701	998,603
Spain	328,601	281,554	574,183	462,629	657,059	740,660
South Africa	492,643	442,272	878,432	665,560	550,630	718,875
New Zealand	380,991	309,320	452,665	338,807	384,543	356,942
Others	3,142,039	1,462,785	1,195,412	1,218,854	1,161,492	1,301,011
Total	24,725,106	19,753,784	23,241,561	21,216,930	24,072,204	27,423,354

** Major transshipment hub for Indian subcontinent

Source: Directorate General of Foreign Trade, Ministry of Commerce

Table 2. India: CY wine imports by Origin (volume in liters)

Trade Partner	2013	2014	2015	2016	2017	2018
Australia	415,384	792,753	818,176	1,017,506	1,209,958	2,148,906
France	1,296,426	644,581	711,408	956,234	928,049	616,740
Chile	298,825	212,901	428,342	420,434	528,773	538,918
Italy	491,541	423,158	655,259	478,370	569,431	525,680
Spain	79,349	65,878	202,945	143,580	206,473	252,641
South Africa	123,346	111,972	220,681	171,346	152,654	208,707
United States	204,229	334,669	245,844	245,298	173,616	194,136
Singapore**	96,912	19,256	8,949	28,826	117,944	191,950
United Kingdom	304,792	383,673	324,132	240,033	223,142	139,770
Argentina	53,799	54,030	97,133	124,371	99,888	109,379
Others	581,295	291,840	238,352	258,410	232,798	265,637
Total	3,945,898	3,334,711	3,951,221	4,084,408	4,442,726	5,192,464

** Major transshipment hub for Indian subcontinent

Source: Directorate General of Foreign Trade, Ministry of Commerce

Table 3. India: Average Unit Import Price of Wine by major suppliers (CIF Value)

Trade Partner	2013	2014	2015	2016	2017	2018
Chile	3.51	2.77	2.86	2.62	2.61	2.77

Argentina	5.28	4.67	3.58	3.41	3.65	2.83
Spain	4.14	4.27	2.83	3.22	3.18	2.93
Belgium	6.87	6.40	7.80	8.09	41.73	3.01
Australia	6.64	4.19	4.05	3.31	3.22	3.06
South Africa	3.99	3.95	3.98	3.88	3.61	3.44
Greece	3.10	3.79	3.74	-	2.25	3.59
Germany	2.90	4.78	3.08	2.71	3.41	3.64
Portugal	4.88	2.99	3.30	3.21	3.78	3.85
United States	6.88	4.29	4.45	3.54	5.30	5.39
Netherlands	5.52	4.66	5.14	3.25	6.01	5.51
Canada	18.61	4.53	7.87	10.30	30.03	5.67
Italy	5.13	4.68	4.49	4.56	5.01	5.77
Austria	3.89	19.54	6.44	7.16	8.04	6.29
United Kingdom	5.90	4.85	7.11	8.04	8.59	7.14

Source: Directorate General of Foreign Trade, Ministry of Commerce

Table 4. India: CY imports of Alcoholic Beverages* by Origin (value in USD)

*includes Harmonized Tariff Schedule (HTS) code – 2203, 2204 and 2208

Trade Partner	2013	2014	2015	2016	2017	2018
United Kingdom	173,203,388	208,064,309	203,260,117	212,491,419	217,216,501	195,706,516
Singapore**	10,672,777	16,560,951	14,343,880	14,681,496	23,310,016	69,866,748
France	28,532,470	19,503,645	26,212,278	29,639,359	28,691,045	22,641,190
Belgium	1,111,332	1,259,407	2,929,082	4,551,758	1,809,922	10,505,318
United States	5,967,689	6,350,008	7,722,814	7,529,075	9,636,637	9,337,768
Netherlands	738,239	570,003	1,037,954	773,787	2,888,558	9,254,230
Australia	2,913,688	3,660,956	3,504,900	3,413,074	3,988,143	6,660,497
Mexico	2,957,636	3,029,396	5,029,831	5,016,576	3,600,119	4,893,322
Sweden	2,086,861	4,366,368	3,134,924	4,673,610	3,580,887	4,031,234
United Arab Emirates**	5,809,232	5,502,732	3,361,630	4,648,536	5,588,090	3,916,928
Others	17,880,161	15,015,143	14,868,058	13,227,937	14,846,278	19,054,675
Total	251,873,473	283,882,918	285,405,468	300,646,627	315,156,196	355,868,426

** Major transshipment hub for Indian subcontinent

Source: Directorate General of Foreign Trade, Ministry of Commerce

Table 5. India: CY wine exports to India from major suppliers (value in USD)

Trade Partner	2013	2014	2015	2016	2017	2018
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Australia	2,879,968	3,333,753	2,875,375	3,304,365	4,253,980	7,162,324
Singapore	6,971,441	6,528,525	7,781,591	6,356,000	6,137,980	6,284,236
France	4,686,975	4,305,066	3,557,989	3,046,949	3,598,325	4,002,272
Italy	2,379,608	2,096,595	2,675,094	1,884,507	2,655,294	2,738,860
Chile	965,393	787,690	1,184,393	1,151,397	941,236	1,214,099
United States	1,564,560	1,408,153	899,443	826,731	768,960	850,841
Spain	406,006	351,907	653,082	420,262	782,463	758,733
South Africa	350,533	373,061	477,002	361,217	602,972	554,118
United Kingdom	206,416	272,104	138,581	92,388	43,313	318,692
New Zealand	349,340	333,951	368,180	265,186	339,780	265,362

Source: Official country export statistics as reported in Global Trade Atlas

Table 6. India: CY wine exports to India from major suppliers (volume in liters)

Trade Partner	2013	2014	2015	2016	2017	2018
Australia	787,257	1,003,739	1,000,611	1,158,496	1,487,995	2,479,793
France	524,345	453,067	534,044	447,832	500,497	519,919
Italy	412,997	399,961	595,000	456,135	536,824	511,094
Chile	324,388	263,835	417,024	436,788	343,367	441,190
Singapore	296,618	222,714	271,249	263,404	270,943	288,044
South Africa	110,354	104,323	136,133	121,036	195,427	281,076
Spain	119,244	141,796	284,885	161,403	290,510	279,472
United States	477,291	396,608	263,092	315,591	175,396	233,029
United Kingdom	42,344	63,241	31,964	16,207	5,769	54,086
New Zealand	32,367	42,109	44,323	39,905	45,479	38,731

Source: Official country export statistics as reported in Global Trade Atlas

Table 7. India: CY wine exports from India (volume in liters)

Trade Partner	2013	2014	2015	2016	2017	2018
Netherlands	149,975	41,576	66,968	286,446	199,483	126,173
Australia	230	12,233	8,919	1,065	8,866	125,526
United Kingdom	78,779	141,295	127,859	94,738	92,166	108,935
Singapore	40,066	10,410	28,568	12,853	57,186	105,100
Japan	106,293	85,063	75,937	93,970	61,322	80,531
France	89,907	86,602	99,935	80,835	106,880	74,954
United Arab Emirates	183,837	185,359	51,009	197,295	48,883	74,665
Sri Lanka	60,466	50,433	106,789	89,261	28,097	57,494
Hong Kong	26,033	21,442	36,235	6,004	31,240	53,163
Spain	13,840	20,132	44,600	59,000	11,350	39,400
Others	1,026,557	813,742	428,616	382,652	357,648	153,116
Total	1,775,983	1,468,287	1,075,435	1,304,119	1,003,121	999,057

Source: Directorate General of Foreign Trade, Ministry of Commerce

Table 8: India CY wine exports from India (value in USD)

Trade Partner	2013	2014	2015	2016	2017	2018
Netherlands	1,100,445	497,446	702,904	4,017,183	4,867,408	1,939,519
Hong Kong	235,452	120,486	201,622	27,642	205,906	1,691,334
Singapore	241,681	52,631	210,019	149,617	541,999	1,152,322
Australia	2,473	16,508	60,752	4,226	186,077	986,718
United Arab Emirates	900,104	1,274,325	617,974	689,378	564,352	701,292
Sri Lanka	319,464	659,284	482,582	663,298	374,989	634,734
France	412,917	447,869	474,609	347,088	477,944	395,698
Japan	390,636	401,322	425,852	445,657	287,771	315,964
United Kingdom	216,495	507,544	400,000	255,218	387,929	260,540
Spain	100,291	173,969	152,612	145,330	88,921	182,138
Others	3,003,982	3,812,888	926,388	832,659	1,359,534	647,652
Total	6,923,940	7,964,272	4,655,314	7,577,296	9,342,830	8,907,911

Source: Directorate General of Foreign Trade, Ministry of Commerce