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GAIN Report

Global Agricultural Information Network

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Exporter Guide

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Report Highlights:

India is a small but growing market for imported consumer food products. Food exporters face high tariffs, effective bans on some products and strong competition from domestic producers, but opportunities are emerging for certain products. Young and higher income consumers are becoming increasingly open to consuming processed food products, eating out and trying foreign cuisines. In addition, India's small modern retail sector is expanding. A core of professional importers who seek to manage brands rather than trade in food has developed and Indian importers often attend major international food shows in search of new products. In addition, USDA has endorsed two annual food shows in India. Exporters seeking to establish a presence in the Indian market should first seek to determine if a product has market access and then be prepared to be patient, start small and comply with special labeling requirements. A recent near 20 percent devaluation of the rupee against the dollar could affect the importer and consumer appetites for imported foods during 2012.

Post:

New Delhi

Author Defined:**SECTION 1: MARKET OVERVIEW**

With a population of almost 1.2 billion, India is the world's largest democracy. Structural reforms and stabilization programs during the 1990s have contributed to India's sustained economic growth, averaging more than six percent over the past two decades. India's 2010/11 (April/March fiscal year) gross domestic product (GDP) grew at an impressive 8.5 percent, but recent quarterly growth rates suggest that 2011/12 growth will be somewhat lower as GDP growth during the first six months of the fiscal year was 7.3 percent. The rupee has depreciated nearly 20 percent against the dollar over the past few months and is raising concerns about how the cost of key imports such as oil will affect inflation.

Persistently high food inflation continues to be a concern and the Government of India is keen to attract investment in food value chains, processing and logistics in an effort to reduce food waste that results from poor handling and infrastructure. Despite high levels of food inflation, tariffs on most imported food products remain high and a number of U.S. food products do not have access to the Indian market. India's modern retail sector is developing, albeit from a very small base, and accounts for less than five percent of all retail food sales. Over the past five years, firms have introduced a variety of formats from gourmet stores to hypermarkets.

India effectively prohibited imports of most food products up until 10 years ago. Consequently, the business of importing food is relatively new and consumer awareness of imported foods is limited, but growing. In 2010, India's market for consumer food products was valued at \$2.1 billion, up from \$1.7 billion in 2009. These figures include large imports of cashews, much of which are processed and re-exported. Adjusting for cashew imports, the market for consumer food products was valued at a smaller \$1.6 billion in 2010, up from \$1.1 billion in 2009. With consumer food exports of \$350 million in 2010, the United States was the largest supplier followed by Cote d'Ivoire (\$163 million—principally cashews), New Zealand (\$134 million), Tanzania (\$132 million—principally cashews) and China (\$120 million).

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 beginning to change 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. Over the past five years, small but growing numbers of Indians have started to eat out more, try new cuisines and ingredients, buy more convenience and processed foods, focus more on health and nutrition and shop at supermarkets and other "modern" food retail platforms.

In nominal terms, total expenditures on food and non-alcoholic beverages increased 70 percent between 2005 and 2010 to an estimated \$250 billion. Despite persistently high food inflation in recent years, spending on food and non-alcoholic

beverages accounted for 27 percent of total expenditures in 2010, down from 34 percent in 2005 according to data provided by Euromonitor. Lower income consumers spend a significantly higher portion of their income on food. Of total households, those accounting for the lowest 10 percent of incomes (annual incomes of less than \$800) spent 57 percent of their income on food, while the 10 percent of households with highest incomes (annual incomes of \$12,500 or more) spent 17 percent of their incomes on food in 2010.

An estimated 20 to 30 percent of Indians are strict vegetarians and the bulk of household expenditures go to vegetables and cereals. Between 2005 and 2010, household spending on every food category except meat and oils increased in real terms.

Table 1: Indian Consumer Expenditures on Major Food Categories During 2009

| Category | 2009 \$Billion | 2005-2009 Percent Growth* |
|-------------------------|-------------------|------------------------------|
| Vegetables | 59.5 | 30.4 |
| Bread and Cereals | 55.8 | 11.9 |
| Milk, Cheese, and Eggs | 43.4 | 7.1 |
| Fruit | 20.8 | 28.5 |
| Sugar and Confectionary | 16.9 | 31.3 |
| Fish and Seafood | 13.0 | 33.0 |
| Other Food | 11.3 | 36.3 |
| Oils and Fats | 10.7 | -8.0 |
| Meat | 10.6 | -0.8 |
| TOTAL | 242.0 | 17.8 |

*Growth rates are based on inflation-adjusted real values

Source: Euromonitor, One dollar equals Rs. 50

Demand for specialty and high value foods such as chocolates, nuts and dried fruits, cakes, fresh fruits 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.

Consumer Demographics:

With a population of nearly 1.2 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 5.3 people in 2009. In urban areas, smaller nuclear families are becoming more common as mobility and employment opportunities increase. In 2009, 115 million women were in the workforce, accounting for 27 percent of workers and a 9.4 percent increase from 2005 according to Euromonitor estimates.

Over 800 million Indians live in rural areas compared to 380 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 15 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. A study by the Confederation of Indian Industry and Technopak estimated the total value of the rural market at \$425 billion in 2010. Aside from vegetable oil and pulses, opportunities for imported value-added or consumer-

ready foods are likely limited in rural areas.

While Media reports touting the rise of the Indian middle class abound, incomes in India continue to be relatively low. For those aged 15 and above, per capita gross income was Rs. 78,713 (\$1,574 at Rs. 50/USD) during 2010 according to data compiled by Euromonitor. A 2009 FAO report estimated that one out of every five Indians is undernourished. Nearly 600 million Indians over the age of 15 earned less than the per capita gross income of Rs. 78,713 in 2010. 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.

Data in the following table indicate that the lowest and highest income categories had the highest growth rates between 2005 and 2010. Income growth slowed during 2008 and 2009 as a result of the global recession, but appears to have rebounded in 2010. Indians continue to be excellent savers saving nearly 30 percent of their incomes on average.

Table 2: Growth in People within Per Capita Income Categories 2005-2010
(Income categories defined following the table)

| 2010 Per Capita Income | 2010 Millions of People | 2005-2010 Percent Change in People per Category |
|------------------------|-------------------------|---|
| A: Above \$4,720 | 76 | 10.2 |
| B: \$2,360-\$4,720 | 46 | 4.7 |
| C: \$1,574-\$2,359 | 99 | 3.8 |
| D: \$787-\$1,573 | 244 | 6.9 |
| E: Below \$787 | 352 | 17.6 |

Source: Euromonitor, one dollar equals Rs. 50

- A: Reflects earners with annual incomes that are 200 percent or more of the per capita gross income for earners over the age of 15 which equates to incomes above Rs. 236,000 or \$4,720.
- B: Reflects earners with annual incomes that are 150-200 percent of the per capita gross income for earners over the age of 15 which equates to Rs. 118,000-236,000 or \$2,360-\$4,720.
- C: Reflects earners with annual incomes that are 100-150 percent of the per capita gross income for earners over the age of 15 which equates to Rs. 78,700-118,000 or \$1,574-\$2,360.
- D: Reflects earners with annual incomes that are 50-100 percent of the per capita gross income for earners over the age of 15 which equates to Rs. 39,350-78,700 or \$787-\$1,574.
- E: Reflects earners with annual incomes that are less than 50 percent of the per capita gross income for earners over the age of which equates to incomes below Rs. 39,350 or \$787.

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, the top 10 percent of Indian households (22 million households with 100 million people living in the households) had total household expenditures of \$12,557 in 2010. Trade sources frequently estimate India's market for luxury goods at 10 million people and data from Euromonitor indicate that there are nearly 450,000 people with annual incomes in excess of \$150,000, up from 300,000 in 2005.

Regionally, the union territories of Delhi (Rs. 88,421) and Chandigarh (Rs. 119,240) along with the small state of Goa (Rs. 116,916) have the highest per capita incomes. Among states, Gujarat (Rs. 59,570), Maharashtra (Rs. 54,867, home to Mumbai), Tamil Nadu (Rs. 45,058, home to Chennai) and Karnataka (Rs. 40,998, home to Bengaluru, formerly known as

Bangalore) have the highest per capita incomes. The states of Bihar (Rs. 13,663) Uttar Pradesh (Rs. 18,214, India’s most populous state) and Madhya Pradesh (Rs. 21,648) have the lowest per capita incomes.

| Advantages | Challenges |
|---|---|
| Expanding number of middle and upper income consumers | Incomes are relatively low and high income consumers are spread throughout the country |
| Increasing urbanization and growing number of working women | Diverse agro-industrial base offering many products at competitive prices and preference for fresh traditional foods |
| Increasing exposure to international products and western lifestyle | Indian food companies (including many multinational companies) produce western style food products at competitive prices |
| A gradual transformation of the retail food sector in urban and rural areas | Difficulties in accessing vast semi-urban and rural markets due to infrastructure limitations |
| U.S. food products are considered safe and of high quality | High tariffs, persistent sanitary and phyto-sanitary requirements that effectively prohibit or restrict imports and competition from other countries. |
| Strong U.S.-India political relations | Inability of U.S. exporters to meet Indian importers’ requirements (mixed shipments, changing product specifications to conform to Indian food laws, etc) and 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 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.

Indians tend to 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 the urban middle class. Many Indians are quite willing to try new foods while eating out, but often return to traditional fare at home. Italian, Thai and Mexican foods are reportedly the fastest growing new cuisines in India.

Typical imported food items that can be spotted in retail stores in cities include dry fruits and nuts, cakes and cake mixes, pastries, chocolates and chocolate syrups, seasonings, biscuits, canned fruit juices, canned soups, pastas, noodles, popcorn, potato chips, canned fish and vegetables, ketchup, breakfast cereals, and fresh fruits such as apples, pears, grapes and kiwis.

B. Shopping Habits

Indian consumers traditionally purchase their 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. With the penetration of modern retail outlets in larger cities, suburbs, and semi-urban areas, more and 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 (a local cheese), spices and condiments, pickles, noodles, snack foods, jams and jellies, ketchup and sauces, and health drinks. Most packaged food items are sold in small containers to keep pricing low.

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. Importer/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 2.5 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 five to 30 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 100 percent 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.

With the rise of chain restaurants, modern companies specializing in the handling of food have also emerged. These firms are equipped to 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 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.

D. Infrastructure

Refrigerated warehousing and transportation facilities are limited and costly, but facilities are improving. In some cases, high electricity costs and/or erratic power supplies have constrained cold chain development. Whereas infrastructure projects were previously reserved for the public sector, private investors are now being encouraged to participate in developing roads, warehouses markets and transportation links.

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 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 airport are limited and present a challenge for importers seeking to clear high value food products with short shelf life.

E. Finding a Business Partner

The most important question exporters can ask as they research the Indian market is “does my product have market access?” 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 100 percent more costly than the U.S. FOB price once it reaches retail. Consequently, determining whether a product should target the small number of high-income consumers or larger numbers of middle income consumers is 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 group of professional importers who are keen to manage brands is developing in India and many are interested in expanding their product lines. These importers typically seek exclusive rights to market a particular product or brand. Generally speaking, U.S. companies should avoid the temptation to establish a relationship with an importer/distributor merely because they are the most persistent suitor. India effectively prohibited imports of most food products until 10 years ago. Hence, the food import business is relatively new and exporters would be wise to meet potential importers and research their business profile carefully through banks and trade associations.

A visit to India to gain a first-hand feel of the Indian market, preferably coinciding with a major food show, such as AAHAR or Annapoorna (See Appendix B for more details, both shows are endorsed by USDA) offers an excellent 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. Exporters should check with importers to see if they are approved suppliers for franchises. 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 paying listing fees to retailers?
- Are they managing similar brands or products from other suppliers?
- 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.

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, 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.

A number of regional trade associations, or 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 state regional trade groups and industry 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 because of established Indian import requirements. This includes dairy products classified in Chapter 4 of the Harmonized Tariff Schedule, poultry meat, lamb and mutton, seafood, goat and pork products including pet foods. Imports of beef are banned due to religious concerns.

Imports of alcoholic beverages are constrained by high import tariffs, local taxes and a complex licensing system for distribution and sales. Exporters should work closely with local Indian importers of alcoholic beverages. 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. No biotech food product or ingredient is officially permitted for commercial importation. The only exception is soybean oil derived from Roundup Ready Soybeans, which was approved for importation on June 22, 2007, by the GEAC. For more information on India's biotech import policy, please see IN1187.

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, but costly. Increasing numbers of Indian consumers have access to a number of national and international channels through satellite television. Hindi channels are popular among the majority of the middle-income population. In addition to government-run television in various regional languages, there are several popular national, international, and regional privately-owned channels. Most urban households have televisions, and televisions are also increasingly present in rural India. Mass advertising is expensive and exporters may want to consider smaller, more targeted promotional options that get information

more directly to their intended audience.

There are over 20 annual trade shows focusing on various aspects of the food sector. These shows tend to 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 three shows in Appendix B, two of which, AAHAR and Annapoorna, are endorsed by USDA. AAHAR is the longest running food, beverage, and food processing equipment show and is held during the first half of March every year. The AAHAR show will be held from March 10-14 in 2012. Mumbai-based Annapoorna is also emerging as a major show in western India. Additional information on other Indian trade shows can be accessed from the following website: <http://www.indiatradefair.com>

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 4:00 p.m.

The climate in India can be hot for most part of the year, so 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. Refer to business contacts by their surname, rather than by their given name. Use courtesy titles such as "Mr.," "Mrs.," or "Miss." 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 effective bans 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 30-40 percent range. India's tariff structure is such that it has considerable flexibility in raising or lowering tariffs. Consequently, tariffs are subject to review and change, especially at the start of the fiscal year on April 1. The computation of the effective import tariff is often complex and can involve an array of additional duties including a Countervailing Duty, an Education Cess (a special surcharge on all direct and indirect taxes of three percent introduced in the February 2007 budget), a Special Countervailing Duty (SCVD) and a one percent Customs fee which can increase the effective or actual tariff by an additional 5-10 percentage points. 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.

J. Food Laws

On August 5, 2011, the Food Safety and Standards Authority of India (FSSAI) formally implemented 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 can be accessed on the FSSAI website: [Food Safety and Standard Rules, 2011](http://www.fssai.gov.in/). The objective of the FSSAI is to consolidate various food laws and establish a single regulatory agency in place of the current multiple regulatory agencies (See: <http://www.fssai.gov.in/>).

The standards are essentially a consolidation of previous food laws that were administered by a number of government agencies. Key conditions for food exporters include maximum retail pricing, labeling requirements for dates of production, import and expiration along with a requirement that all imported products must have at 60 percent of their shelf life remaining at the time of import. Exporters should work closely with their importers to ensure that their products comply with local ingredient and labeling regulations.

SECTION III: MARKET SECTORS: STRUCTURE AND TRENDS

A. Food Retail

In India, 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. According to industry experts, food, grocery and beverage (FGB) retailing in India is valued at \$220-\$250 billion and is growing at 8-10 percent annually. Modern food retailing accounts for an estimated two percent of retail sales, but is growing by as much as 20 percent annually. 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 are currently 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 and dairy products. A few sell small quantities of frozen foods. A typical supermarket carries about 6,000 stock-keeping units. 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. These small stores continue to be an important sales platform for imported foods.

B. Food Service

A 2008 report by Technopak, estimated the size of India’s hospitality industry at \$23 billion, of which the “organized” or modern sector contributes about 30 percent. The sector is forecast to grow to \$42 billion by 2018. India has some 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 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 mostly 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 work on annual centralized supply contracts and rarely import directly given storage costs and the complications of clearing shipments. 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 products or products that cannot be sourced locally in India.

After a slow start, the fast food industry has shown impressive growth in recent years. 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; pizza, burger, and other fast food makers 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 see GAIN report IN1186 at www.fas.usda.gov.

C. Food Processing

The food processing sector contributes over 14 percent of manufacturing GDP and is valued at \$58 billion. As multinational corporations have entered India over the past decade, the food processing industry has attracted \$1.3 billion in foreign direct investment (FDI) accounting for one percent of total FDI inflows. A large segment of the Indian food processing industry still operates in the "unorganized" sector, which consists of small enterprises often operating outside of India's legal, tax, and regulatory systems. These enterprises are pervasive in agricultural processing and marketing as well as other sectors of the economy.

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 300 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, mayonnaise, 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, see Post’s GAIN report IN1214.

SECTION IV: BEST HIGH-VALUE PRODUCT PROSPECTS

| Product Types | Import Value (\$Million) CY 2010 | Import Volume (Metric Tons) CY 2010 | 5 -yr Import growth | Basic Import Tariff | Key Constraints | Market Attractiveness For USA |
|------------------------------|----------------------------------|-------------------------------------|---------------------|--|--|---|
| Nuts (mainly Almonds) | 392 | 144,663 | 95 | In shell Almonds (Rs. 35/Kg) Pistachios (10%) | Competition from other suppliers exists but is not substantial | High demand and growing retail industry |
| Cocoa and cocoa preparations | 115 | 31,454 | 420 | 30% | Strong competition from domestic and international suppliers | Strong quality and brand preference |
| Products of the | 28 | 43,336 | 250 | 30% | Competition from | Growing bakery and |

| | | | | | | |
|---|-------|-------------------|-----|----------------------|---|--|
| milling industry, Malt, starches, insulin, wheat gluten | | | | | domestic suppliers | retail industry and increased popularity for processed foods |
| Pulses | 1,865 | 2,999,907 | 220 | Zero | Price Competitiveness, freight advantage (for countries like Myanmar) and the ability to produce specific kind of pulses demanded in India. | Local production is inadequate and more than 20% of total demand for pulses is met through imports. |
| Apples, Pears and Quinces Fresh | 134 | 140,537 | 480 | 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 |
| Grapes Fresh | 21 | 12,843 | 110 | 30% | Competition from domestic and foreign suppliers | Seasonal shortages and high prices, increasing interest in quality fruits and growth of organized retail |
| Pasta | 11 | 8,867 | 120 | 30% | Competition from domestic manufacturers and foreign suppliers | Increasing popularity |
| Fruit Juices | 27 | 18,999 Liters | 237 | 30% | Competition from domestic manufactures and foreign suppliers from neighboring countries | Increasing health awareness and shortage of quality products |
| Sauces, preparations, mixed condiments & seasonings | 9 | 5,256 | 200 | 30% | Competition from domestic organized and unorganized manufactures | Preference for imported brands and growing food processing sector |
| Beverages, Spirits and Vinegar | 235 | 19,245,019 Liters | 2 | Up to 150% | High import duty and competition from domestic suppliers | Growing consumption and lack of domestic production |

Note: Post analysis based on trade data and information from market sources.

SECTION V: KEY CONTACTS AND FURTHER INFORMATION

The following reports may be of interest to U.S. exporters interested in India. These, and related reports prepared by this office, can be accessed via the FAS Home Page: www.fas.usda.gov by clicking on “Attaché Reports” and searching by the report number. Reports given below will provide additional information to exporters interested in the Indian market.

| Report Number | Subject |
|---------------|--|
| IN1104 | FSSAI: Towards Implementing Food Safety Standards in India |
| IN1005 | India: The Retail Food Sector |
| IN9127 | Export Certificate FAIRS Report |
| IN9113 | Food and Agricultural Import Regulations and Standards Report |
| IN1172 | FSSAI publishes the Final Food Safety and Standards Rules 2011 |

| | |
|---------|---------------------------------------|
| IN1186 | HRI Food Service Sector |
| IN 1214 | Food Processing Ingredients Sector |
| IN1189 | Tree nuts Annual |
| IN1184 | Livestock and Products Annual |
| IN 1134 | Product Brief: The Indian Wine Market |

Please also see our Home Page (<http://www.fas.usda.gov/>) for accessing additional reports (FAIRS Subject Reports) related to the import regulations and related publications released by the GOI from time to time. The Country Commercial Guide (<http://www.buyusa.gov/india/en/ccg.html>) prepared by the Commercial Section of the US Embassy may also be of interest to exporters.

For additional information and guidance please contact:

Agricultural Counselor
Foreign Agricultural Service
Embassy of the United States of America
Chanakyapuri, New Delhi - 110 021
Ph: (91-11) 2419-8000, Fax: (91-11) 2419-8530
E-Mail: agnewdelhi@fas.usda.gov

APPENDIX A – STATISTICS

TABLE A. KEY TRADE AND DEMOGRAPHIC INFORMATION

| | |
|---|-----------------|
| Agricultural imports from all countries (USD million) ¹ / U.S. market share (percent) | 14,105/ 5.78% |
| Consumer Food Imports from all countries (USD million) ² / U.S. market share (percent) | 2146/ 14% |
| Edible fishery imports from all countries ³ (USD million)/ U.S. market share (percent) | 58 / 0.87% |
| Total Population ⁴ | 1.2 billion |
| Urban population ⁵ (millions) | 377 million |
| Number of major metropolitan areas ⁶ (with a population of a million or more) | 53 |
| Population Density ⁷ (Persons / Sq.Km.) | 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 10 (USD) ¹⁰ | 1,371 |
| Unemployment Rate 2009/10 ¹¹ (%) | 9.4 |
| Female population employed ¹² (per 1,000 employed males) | 259 |
| Exchange Rate Rs. Per USD (as on November 25, 2011) | 52.25 |

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

^{10:} International Monetary Fund; ^{11, 12:} Ministry of Labor and Employment Government of India

TABLE B. CONSUMER FOOD AND EDIBLE FISHERY PRODUCT IMPORTS FROM CALENDAR YEAR 2008 THROUGH 2010

| India Imports (in \$1000) | | Imports from the World | | Imports from the U.S. | | U.S. Market share (%) | |
|-------------------------------------|---|------------------------|-----------|-----------------------|---------|-----------------------|------|
| Commodity | Description | 2,010 | 2009 | 2,010 | 2009 | 2010 | 2009 |
| Consumer Oriented Agri-Total | | 2,146,919 | 1,723,015 | 350,765 | 254,583 | 16 | 15 |
| 080131 | Cashew Nuts, Fresh Or Dried, In Shell* | 570,769 | 594,406 | 0 | 80 | 0 | 0 |
| 080211 | Almonds, Fresh Or Dried, In Shell | 246,135 | 188,642 | 215,360 | 141,997 | 87 | 75 |
| 080410 | Dates, Fresh Or Dried | 119,542 | 96,770 | 14,496 | 0 | 12 | 0 |
| 080810 | Apples, Fresh | 121,780 | 82,762 | 34,533 | 36,838 | 28 | 45 |
| 080250 | Pistachios, Fresh Or Dried, Shelled Or Not | 52,572 | 48,847 | 11,399 | 12,510 | 22 | 26 |
| 350790 | Enzymes And Prepared Enzymes, Nesoi | 54,001 | 46,565 | 3,167 | 2,468 | 6 | 5 |
| 040590 | Fats And Oils Derived From Milk, Nesoi | 73,734 | 43,863 | 0 | 0 | 0 | 0 |
| 090411 | Pepper Of Genus Piper, Neither Crushed Nor Ground | 45,000 | 41,979 | 0 | 228 | 0 | 1 |

| | | | | | | | |
|---|---|-------------------|-------------------|------------------|----------------|----------|----------|
| 080212 | Almonds, Fresh Or Dried, Shelled | 46,887 | 40,727 | 18,178 | 11,646 | 39 | 29 |
| 210690 | Food Preparations Nesoi | 51,171 | 32,465 | 15,717 | 10,555 | 31 | 33 |
| 220290 | Nonalcoholic Beverages, Nesoi | 36,203 | 31,132 | 728 | 434 | 2 | 1 |
| 080290 | Nuts Nesoi, Fresh Or Dried, Shelled Or Not | 47,030 | 20,194 | 0 | 0 | 0 | 0 |
| 180690 | Cocoa Preparations, Not In Bulk Form, Nesoi | 33,266 | 19,454 | 516 | 445 | 2 | 2 |
| 350510 | Dextrins And Other Modified Starches | 26,403 | 18,875 | 5,076 | 5,072 | 19 | 27 |
| 170211 | Lactose & Lactose Syrup Cont 99% More Lactose By Wt | 24,094 | 17,191 | 5,391 | 4,173 | 22 | 24 |
| 080620 | Grapes, Dried (Including Raisins) | 14,371 | 13,514 | 33 | 57 | 0 | 0 |
| 170490 | Sugar Confection (Incl Wh Choc), No Cocoa, Nesoi | 12,980 | 8,943 | 311 | 383 | 2 | 4 |
| 080820 | Pears And Quinces, Fresh | 12,492 | 8,785 | 2,969 | 1,986 | 24 | 23 |
| 200980 | Juice Of Any Single Fruit/Vegtbl Unfermentd Nesoi | 9,300 | 8,767 | 1,621 | 1,874 | 17 | 21 |
| 190219 | Pasta, Uncooked, Not Stuffed Etc., Nesoi | 7,816 | 7,923 | 2 | 1 | 0 | 0 |
| 080510 | Oranges, Fresh | 8,234 | 6,552 | 3,208 | 710 | 39 | 11 |
| 210390 | Sauces Etc Mixed Condiments And Seasonings Nesoi | 3,534 | 6,108 | 509 | 1,332 | 14 | 22 |
| 091030 | Tumeric (Curcuma) | 8,400 | 5,734 | 240 | 9 | 3 | 0 |
| | Other Consumer Oriented Foods | 521,205 | 332,817 | 17,311 | 21,785 | 3 | 7 |
| Fish & Seafood Products Total | | 58,424 | 39,919 | 513 | 310 | 1 | 1 |
| 030269 | Fish, Nesoi, With Bones, Fresh Or Chilled | 38,452 | 23,768 | 0 | 0 | 0 | 0 |
| 030613 | Shrimps And Prawns, Including In Shell, Frozen | 4,131 | 5,470 | 162 | 82 | 4 | 2 |
| 030749 | Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine | 699 | 652 | 0 | 106 | 0 | 16 |
| 160414 | Tunas/Skipjack/Bonito Prep/Pres Not Minced | 138 | 235 | 0 | 9 | 0 | 4 |
| 160590 | Molluscs, Etc., Prepared Or Preserved | 322 | 192 | 0 | 3 | 0 | 1 |
| 160510 | Crab, Prepared Or Preserved | 125 | 120 | 0 | 2 | 0 | 2 |
| 030623 | Shrimps/Prawns Inc Live, Fr/Ch/Drd/Salted/In Brine | 394 | 104 | 350 | 62 | 89 | 59 |
| 160520 | Shrimps And Prawns, Prepared Or Preserved | 550 | 91 | 0 | 1 | 0 | 1 |
| 030799 | Molluscs Etc Nesoi, Frozen, Dri, Salted Or In Brin | 29 | 64 | 0 | 0 | 0 | 0 |
| 160420 | Fish, Prepared Or Preserved, Nesoi | 107 | 50 | 0 | 2 | 0 | 4 |
| 160413 | Sardines/Sardinella/Brisling Prep/Pres, Not Minced | 13 | 33 | 0 | 0 | 0 | 0 |
| 030729 | Scallops Incl Queen, Frozen/Dried/Salted/In Brine | 33 | 24 | 0 | 0 | 0 | 0 |
| 160411 | Salmon, Prepared Or Preserved, Whole Or Pieces | 22 | 17 | 0 | 3 | 0 | 15 |
| 160530 | Lobster, Prepared Or Preserved | - | 7 | 0 | 6 | 0 | 82 |
| 030721 | Scallops Incl Queen Scallops, Live, Fresh, Chilled | 16 | 3 | 0 | 0 | 0 | 0 |
| 030530 | Fish Fillets, Dried, Salted Or In Brine, Nt Smoked | - | 2 | 0 | 0 | 0 | 0 |
| 160419 | Fish, Prepared Or Preserved, Whole Or Pieces Nesoi | 5 | 0 | 0 | 0 | 0 | 0 |
| Other fish and Seafood Products | | 13,388 | 9,087 | 1 | 33 | 0 | 0.4 |
| Agricultural Products Total | | 14,105,703 | 11,746,509 | 819,870 | 627,517 | 6 | 5 |
| Agriculture, Fish and Forestry Total | | 22,040,971 | 17,158,674 | 1,171,094 | 841,916 | 5 | 5 |

* Cashew Nuts, Fresh Or Dried, In Shell are primarily for re-export.

Source: USDA/FAS Global Trade Database

TABLE C (I): TOP 15 SUPPLIERS OF CONSUMER FOODS

| Year To Date: January - December | | | | | | |
|---|----------------|---------------|---------------|----------------|-------------|-------------|
| Partner Country | Dollars | | | % Share | | |
| | 2008 | 2009 | 2010 | 2008 | 2009 | 2010 |
| World | 1,694,311,616 | 1,723,014,993 | 2,146,918,744 | 100 | 100 | 100 |
| United States | 236,880,650 | 254,583,094 | 350,764,669 | 14 | 15 | 16 |
| Cote d'Ivoire | 197,079,859 | 155,425,449 | 163,311,531 | 12 | 9 | 8 |
| New Zealand | 12,404,065 | 47,289,633 | 133,975,177 | 1 | 3 | 6 |
| Tanzania | 79,706,086 | 82,585,691 | 132,617,736 | 5 | 5 | 6 |
| China | 72,726,081 | 88,028,386 | 120,476,966 | 4 | 5 | 6 |
| Afghanistan | 103,663,826 | 93,977,689 | 93,543,987 | 6 | 5 | 4 |
| Benin | 79,875,332 | 92,980,897 | 78,428,658 | 5 | 5 | 4 |
| Australia | 37,452,483 | 57,228,840 | 76,931,795 | 2 | 3 | 4 |
| Sri Lanka | 65,694,605 | 37,091,652 | 75,573,330 | 4 | 2 | 4 |
| Nepal | 69,595,060 | 56,320,635 | 70,901,627 | 4 | 3 | 3 |
| Indonesia | 110,475,061 | 77,325,482 | 70,486,326 | 7 | 4 | 3 |
| Pakistan | 35,813,165 | 49,323,613 | 64,031,765 | 2 | 3 | 3 |
| Guinea-Bissau | 98,727,849 | 116,467,048 | 58,863,936 | 6 | 7 | 3 |
| Iran | 56,509,893 | 33,024,660 | 49,338,173 | 3 | 2 | 2 |
| Ghana | 37,201,127 | 35,871,917 | 46,036,640 | 2 | 2 | 2 |

Source: USDA/FAS Global Trade Database

TABLE C (II): TOP 15 SUPPLIERS OF FISH & SEAFOOD PRODUCTS

| |
|---|
| Year To Date: January - December |
|---|

| Partner Country | Dollars | | | % Share | | |
|----------------------|------------|------------|------------|---------|------|------|
| | 2008 | 2009 | 2010 | 2008 | 2009 | 2010 |
| World | 58,490,802 | 39,919,158 | 58,424,470 | 100 | 100 | 100 |
| Bangladesh | 43,442,492 | 23,772,812 | 38,936,345 | 74 | 60 | 67 |
| Vietnam | 30,407 | 908,652 | 3,399,304 | 0 | 2 | 6 |
| Yemen | 1,036,191 | 1,889,277 | 2,598,328 | 2 | 5 | 4 |
| Thailand | 849,927 | 769,815 | 2,072,736 | 2 | 2 | 4 |
| Unidentified Country | 5,988,729 | 5,025,329 | 1,319,042 | 10 | 13 | 2 |
| United Kingdom | 297,355 | 438,690 | 856,434 | 1 | 1 | 1 |
| China | 429,691 | 305,972 | 846,513 | 1 | 1 | 1 |
| Pakistan | 706,514 | 728,611 | 763,601 | 1 | 2 | 1 |
| Norway | 1,157,817 | 361,971 | 732,313 | 2 | 1 | 1 |
| Singapore | 536,105 | 449,553 | 728,381 | 1 | 1 | 1 |
| United Arab Emirates | 423,056 | 598,926 | 697,307 | 1 | 2 | 1 |
| Japan | 471,896 | 452,595 | 619,119 | 1 | 1 | 1 |
| Spain | 52,978 | 233,264 | 538,380 | 0 | 1 | 1 |
| United States | 249,047 | 310,484 | 513,104 | 0 | 1 | 1 |

Source: USDA/FAS Global Trade Database

APPENDIX B: MAJOR FOOD AND AGRICULTURAL TRADE SHOWS IN INDIA IN 2011/12

AAHAR, THE INTERNATIONAL FOOD FAIR 2012

March 10-14, 2012

Venue: Pragati Maidan

Website: <http://www.aaharinternationalfair.com/about-fair/introduction-aahar-international.html>)

(Annual Event, organized in March. USDA endorsed in 2012.

Fine Food India 2011

December 5-7, 2011

Venue: Pragati Maidan, New Delhi

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

A new show in place of the former International Food and Drink Expo-India. Expected to be an annual show.

ANNAPOORNA- World of Food India

September 26 - 28, 2012 .

Venue: Bombay Exhibition Centre - NSE Exhibition Complex

Goreagon (East), Mumbai

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

APPENDIX C: U.S. BASED STATE REGIONAL TRADE GROUPS / COOPERATORS 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 4491

Mazumdas@rediffmail.com

Cotton Council International

Website: www.cottonusa.org

Local Representative Office Address:

Technopak Advisors

4th Floor, Tower A, DLF Building 8,

DLF Cyber City, Phase II, Gurgaon-122002

Tel: +91-124-4541111

Fax: +91-124-4541198, 4541199

www.technopak.com

Pear Bureau Northwest

Website: www.usapears.org

Local Representative Office Address:
The SCS Group
SCO 29, Sector 15-II
Gurgaon, Haryana 122 001
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: ksunderlal@scs-group.com
Home page: <http://www.scs-group.com>

California Table Grape Commission

Website: www.tablegrape.com
Local Representative Office Address:
The SCS Group
SCO 29, Sector 15-II
Gurgaon, Haryana 122 001
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: ksunderlal@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. 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: usgindia@gmail.com
Washington State Apple Commission

Website: www.bestapples.com

Local Representative Office Address:

The SCS Group

SCO 29, Sector 15-II

Gurgaon, Haryana 122 001

Ph: +91-124-434 4500

Fax: +91-124-434 4501

E-Mail: ksunderlal@scs-group.com

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

Western United States Agriculture Trade Association

Website: www.wusata.org

Local Representative Office Address:

Imports2India Consulting

10, Sunder Nagar

New Delhi – 110 003

Phone: 91-11-24355047/24351798

Fax: 91-11-51507155

Email: devna@i2iconsulting.biz

Homepage: www.i2iconsulting.biz

Southern United States Association

Website: www.susta.org

Local Representative Office Address:

Imports2India Consulting

10, Sunder Nagar

New Delhi – 110 003

Phone: 91-11-24355047/24351798

Fax: 91-11-51507155

Email: devna@i2iconsulting.biz

Homepage: www.i2iconsulting.biz

Food Export Association of the Midwest USA

Website: www.foodexport.org

Local Representative Office Address:

The SCS Group

SCO 29, Sector 15-II

Gurgaon, Haryana 122 001

Ph: +91-124-434 4500

Fax: +91-124-434 4501

E-Mail: ksunderlal@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,
SCO 29, Sector 15-II
Gurgaon, Haryana 122 001
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: ksunderlal@scs-group.com
Home page: <http://www.scs-group.com>

Distilled Spirits Council of the United States

Website: <http://www.discus.org/index.asp>
Local Representative Office Address:
The SCS Group,
SCO 29, Sector 15-II
Gurgaon, Haryana 122 001
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: ksunderlal@scs-group.com
Home page: <http://www.scs-group.com>

California Prune Board

Website: <http://www.californiaprunes.co.uk/>
Local Representative Office Address:
The SCS Group,
SCO 29, Sector 15-II
Gurgaon, Haryana 122 001
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: ksunderlal@scs-group.com
Home page: <http://www.scs-group.com>

California Walnut Commission

Website: <http://www.walnuts.org/walnuts/>
Local Representative Office Address:
The SCS Group,
SCO 29, Sector 15-II
Gurgaon, Haryana 122 001
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,
SCO 29, Sector 15-II
Gurgaon, Haryana 122 001
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: ksunderlal@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:

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

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

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

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

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

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

[Indian Importers Association](#) (IIA)

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

[Indian Dairy Association](#) (IDA)

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

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

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

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

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

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