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Report Highlights:

As it assumes the G20 presidency in 2023, India is set to become the second-fastest growing economy in the bloc despite decelerated global economic activity in 2022. Post pandemic, Indian consumer preferences toward premium products and perceived health foods remains high, despite continued high food price inflation and rupee devaluation. The rapid development of India's modern retail sector, including e-retail, presents newfound opportunities for a diverse range of U.S. food product exports. Nevertheless, India persists as a difficult market for U.S. exporters due to supply chain disruptions, high tariffs, a challenging, ever-changing regulatory environment, and competition from domestic and international suppliers.

MARKET FACT SHEET

India is a mixed, middle-income, developing social market economy. It is world’s fifth largest economy by nominal GDP, leapfrogging France and the United Kingdom and third largest by purchasing power parity. India is the second most populated country in the world with a population of 1.4 billion, equivalent to almost 18 percent of total world population. Over half of India’s population is below the age of 25 and more than 65 percent is below 35. According to the International Monetary Fund (IMF) July 2022 report, India’s GDP growth for fiscal year (FY) 2022 is expected to reach 7.4 percent. However, in its latest [World Economic Outlook Growth Projections \(October 2022\)](#), IMF has forecast India’s GDP growth at 6.1 percent for the financial year 2023, a decline from the previous 6.9 percent estimate due to the Russian invasion of Ukraine, persistent food price inflation, a weak Indian rupee (INR) against the U.S. dollar and other global economic conditions.

India’s food processors, importers, wholesalers, retailers, food service operators, hotels, restaurants, and institutions all contribute to its massive, yet developing agribusiness sector. India’s bulk, intermediate, consumer-oriented, and agricultural related imports grew from USD \$23.81 billion in 2020 to \$33.7 billion in 2021, and exports grew from \$39.70 billion to \$51.43 billion in the same period.

Top Agricultural Imports from the U.S.

- **Bulk Agricultural:** Cotton, Pulses, Soybean, Corn, Oilseeds
- **Intermediate Agricultural:** Ethanol (industrial use), Essential Oils, Soybean Meal, Sugars, and Sweeteners
- **Consumer-Oriented Agricultural:** Tree Nuts (Almonds, Walnuts, Pistachios), Fresh Fruits (Apples), Food Preparations, Dairy Products

India Agricultural Imports 2017-2021



Source: Trade Data Monitor

SWOT ANALYSIS:

Strengths	Weaknesses
<ul style="list-style-type: none"> • Consistent supply, scalability of production. • U.S. products perceived as safe and high quality. • Diverse range of food and agricultural products. 	<ul style="list-style-type: none"> • Inability of U.S. exporters to meet Indian importers’ requirements. • Preferential trade agreements with competing countries that supply similar products. • Lack of awareness about the range and value of U.S. agricultural products.
Opportunities	Threats
<ul style="list-style-type: none"> • Growth potential for imported ingredients and intermediate products. • Aspiration of growing middle class and increased exposure to international products and western lifestyles. • Changing buying habits and a preference to purchase for quality over price. • Emerging consumer trends favor healthier, natural, sugar-free, vegan, and organic food options. • Increased tourism and greater arrival of international tourists. • Increased domestic and international business travelers. • More foreign restaurants and brand franchises. 	<ul style="list-style-type: none"> • High tariffs, persistent Phytosanitary requirements prohibit or restrict imports. • Competition from other countries. • Fluctuating Indian Rupee against the U.S. dollar. • Stringent food regulations for biotech foods, ingredients, and certain additives. • Competition from countries with geographical proximity and a freight advantage. • Product substitutes and competition from local and international suppliers. • U.S. exporters not ready for consolidated and small orders. • Onerous labeling requirements.

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SECTION I: MARKET SUMMARY

General Economy and Policy Environment

India is set to be the second-fastest growing economy in the G20 bloc despite a deceleration global economic activity in 2022. Accounting for 17.7 percent of the world's population at 1.4 billion, India is set to overtake China as the most populous country in 2023. India still maintains the largest youth population, with over 800 million persons aged 35 years and below. The demographic consists of the mostly young, aspirational middle and upper middle-class who seek a greater range of premium products.

According to the International Monetary Fund (IMF),¹ India's gross domestic product (GDP) is projected to reach 6.8 percent in Indian fiscal year 2023 (IFY) (April 1-March 31), more than double the world average (2.7 percent). India is also on track to become the world's third largest economy by 2027, surpassing both Japan and Germany. Additionally, India is predicted to be among just three global economies that will reach \$400 billion in annual economic output in 2023 and beyond, which is estimated to rise to more than \$500 billion after 2028.² In addition, India's overall consumer goods spending could double from \$2 trillion in 2022 to \$4.9 trillion by the end of the decade as the population of Indians with large, disposable incomes increases (see: Morgan Stanley Research). Despite its improved business climate—high tariffs, redundant trade policies, and ever-changing import requirements continue to challenge longstanding exporters food and agricultural commodities to India, including the United States.

India's agricultural and related imports increased from \$23.81 billion in calendar year 2020 to \$33 billion 2021. In the same period, total agricultural and related product imports from the United States saw a minimal increase from \$1.81 billion to \$1.87 billion, a modest growth of three percent. However, in 2022 (January-October) total U.S. agricultural and related product exports to India have intensified, reaching \$2.1 billion, a 47 percent year-on-year. This boost in U.S. exports is led by the consumer-oriented product category, which has remained consistent during much of the pandemic. Previously, in 2021, India's tree nut imports from all origins reached \$2.54 billion, with the U.S. market share representing 33 percent, or \$837 million.

The demand demographics for consumer-oriented goods has broadened to include the Indian middle-class. Previously, high-value food product imports such as tree nuts, fresh horticulture or packaged foods were mostly only available for affluent end users. However, in the last decade, this trend has since shifted toward the growing middle-class consumer base, especially youth, who have developed increased awareness on healthy lifestyles. Now, Indian consumers routinely purchase such products throughout the entire year and for personal consumption, as compared to when demand was high only during the festive season, including Diwali (October/November), Christmas, and New Year's Day.

The two pandemic waves from 2020 and 2021 left substantial changes in the customer mindset and a discernable shift in shopping preferences for essential foods. More Indian consumers now desire safe, premium, and readily available food products. Supporting this rise in consumer preference is India's social media and e-retail landscape that has allowed easy access to foods. Improved supply chain

¹ Source: [The Hindu](#); "IMF cuts India's FY 2022-23 growth forecast to 6.8%," published on October 11, 2022.

² See: [Morgan Stanley Research](#); "Why This Is India's Decade," published on October 31, 2022.

infrastructure, especially in smaller cities, has improved access to healthy daily essentials including fresh fruits and vegetables, meats, dairy products, and others.

In Indian fiscal year³ 2022, India's retail sector was worth \$836 billion, with an estimated 82 percent from traditional retail markets, organized brick-and-mortar retail at 12 percent, and online sales channels at 6 percent.⁴ While still small compared to traditional markets, India's online e-retail sector continues to rapidly accelerate and is set to reach \$50 billion in 2022 reach an estimated \$150–\$170 billion by 2027.⁵ Also in 2022, India's online grocery segment totaled estimated 4 billion, but is expected to reach nearly \$50 billion by 2029. Almost 95 percent of India's grocery share is attributed to *kirana* stores (traditional mom and pop stores/neighborhood store), modern supermarkets accounting for four percent, and e-retail online one percent. With its existing 180-190 million online consumer base, India is predicted to rapidly increase its share of online shoppers and reach 400-500 million buyers by 2027, surpassing the United States.

SECTION II: EXPORTER BUSINESS TIPS

India's agricultural imports from the United States are growing at a modest pace, but remain inhibited by high tariffs, longstanding import restrictions, an aggressively shifting regulatory environment, and strong competition from domestic and international suppliers. Still, India remains a potentially advantageous and diverse export market for U.S. food and agricultural goods. India's consumer-oriented food imports reached \$6.1 billion in 2021, a 20 increased from the previous year. In this segment, United States retained the largest market share at 16 percent, or \$956 million. The COVID-19 pandemic shifted many traditionally price-sensitive Indian consumers to higher-value food consumption habits that have been retained post-pandemic. Social media, food influencers, and increased consumer awareness on food and health are the largest contributors to consumer demand toward perceived health foods and high-value products.

Soon to be the largest global population, India's retail market is attempting to keep pace to meet its growing demand. Retail has quickly expanded throughout India, which has also seen an uptick in convenience store businesses, e-retail, and food delivery apps such as Zomato and Swiggy. Indian consumers remain highly interested in new foods and trying traditional cuisines infused with new ingredients and flavors. Domestic food importers are competing to access global supply chains to source high-quality food products and ingredients. The food service sector is also seeing a major demand shift. Indian consumers with international travel exposure are willing to innovate and try new cuisines and culinary practices.

Although most imported foods (tree nuts, fruits, and processed products) are directed toward retail channels, there is high potential in the hotel, restaurant and institutional (HRI) sector, whose menus typically demand the use of high-quality, premium ingredients. The HRI sector procures products through a wide array of wholesale markets, distributors, and importers. Increasing demand for products

³ The Indian fiscal year runs from April 1 to March 31.

⁴ Source: [India Retailer Bureau](https://www.indianretailer.com/article/whats-hot/retail-trends/india-retail-and-e-commerce-trends-2022.a8176); "India Retail and E-Commerce Trends 2022," published on September 14, 2022. <https://www.indianretailer.com/article/whats-hot/retail-trends/india-retail-and-e-commerce-trends-2022.a8176>

⁵ Source: [Bain & Company](https://www.bain.com), "How India Shops Online 2022," published on October 11, 2022.

such as tree nuts, meats, cheese, alcoholic beverages, fresh horticulture, and other consumer-oriented products, provide opportunities for exporters.

More recently, Indian chefs and bar mixologists have increasingly been the drivers in seeking premium imported ingredients to create new recipes and cuisines. With greater international exposure, including global trade shows and a significant foreign clientele base, these HRI stakeholders are critical advocates for the HRI sector that will drive future imported food product sales.

Entry Strategy: Key Factors to Consider Before Entering the Market

- **Can your product come into India and comply with local laws?**
 - ✓ Determine if your product has market access in Indian commerce
 - ✓ Study India’s varied laws/regulations, particularly on foods and beverages
 - ✓ Review FAS policy/market reports; consider a market research firm to assist
- **Find the Right Partner**
 - ✓ Identify a reliable importer/distributor who services in the food retail sector
 - ✓ Avoid conflicts of interest
 - ✓ Consider if participating in an Indian trade show would be effective in identifying a key importer/distributors/partner (See: [USDA-endorsed international trade shows](#))
 - ✓ Consider if collaborating/participating in USDA-endorsed promotional activities would be an effective way to create and/or increase market awareness; and
- **Secure Payment Terms**
 - ✓ Until a successful working relationship is established, exporters may wish to consider vehicles such as an irrevocable Letter of Credit, advance payment, or payment at sight

FAS India does not have the authority to mediate contractual disputes, or to serve as a collection agent when differences over payment or other commercial issues arise. For information about local legal services, please refer to GAIN report [IN 2860](#).

Distribution Channel	Margins
Clearing and Forwarding Agents	2-6 percent
Wholesalers	2-6 percent
Super Stockists	3-7 percent
Distributors	7-12 percent
Importers	5-35 percent
Retailers	15-60 percent

Data Source: USDA India historical data series and estimates.

Local Business Customs and Trends

While Hindi is India’s national language, most Indian officials and businesspeople have an excellent command of English. Further, many Indian businesspeople have traveled internationally and are familiar with western culture. The working cycle for most of the Indian businesses follows the United States with Saturday and Sunday taken off. Traditionally, business is not conducted on any observed religious and national holidays. (See: [U.S. Embassy and Consulates in India Holiday Calendar](#)). Indian executives prefer late morning or afternoon appointments between 11:00 a.m. and 5:00 p.m.

India's climate is often hot for most of the year; it is advisable to wear lightweight clothing to avoid discomfort. Men should wear a jacket and tie (and women should wear corresponding attire) when making official calls or attending formal occasions. Always present a business card when introducing yourself⁶ and refer to business contacts by their surname, rather than by their given name. Use courtesy titles such as "Mr.," "Mrs.," or "Ms." Hospitality is a critical part of conducting business in India. Most business discussions will not begin until chai (tea), coffee, or other drinks are served.

Advertising, sales, and trade promotions in India are creative and well developed. Advertising through online media and television is especially popular, and with the growth of cooking shows, there are often opportunities to co-brand or market products with the celebrity chefs. Digital and social media are preferred for promotions, as online marketing platforms offer cost effective tools to target a growing number of consumers. Among the most effective ways of promoting foods are done through Instagram, Facebook, or Twitter, where social media "influencers" can be employed to build brand awareness, and drive sales for new and existing products.

General Consumer Tastes and Preferences

- The last two years of pandemic has changed attitudes of consumers toward healthy, non-preserved foods, ready-to-eat, and ready-to-cook foods.
- Average Indian's food preference shifted toward proteins, fruits, and vegetables consumption.⁷
- Upper middle-class consumers with disposable income focus on diversified proteins, horticultural products, and processed food consumption.
- The pandemic has renewed interest in home cooked meals. These products, including baked items, draw significant attention on Indian social media.
- Indian consumers are experimenting with the evolving role of healthy snacking, as nearly 81 percent of consumers prefer to have at least one meal of the day with a snack.
- Growing preference toward snacking and smaller sized packaging high in protein, including trail mixes, granola, superfoods, etc., that address specific requirements like gluten-free or vegan.
- The pandemic has also led many Indian consumers to opt for healthier lifestyles and shift their dietary preferences to natural/organic food options and plant-based and vegan foods. Immunity boosting products like fresh and dried fruits are also a top buying priority.
- Indian consumers are becoming more conscious of premium, imported foods, which give an edge to U.S. products, which are traditionally viewed as highly safe and wholesome.
- Rise of plant-based foods and beverages, including ready-to-eat foods, is becoming an established trend due to India's large vegetarian population and demand for healthy foods.⁸
- Traditionally, Indian consumers are accustomed to adjusting their diet based on the time of year based on seasonality for fresh fruits and vegetables.
- Most imported foods are found in retail, such as fresh and processed fruits and nuts, cooking oils, baking mixes, chocolates, condiments and sauces, snacks, soups, pastas, canned vegetables, and breakfast cereals, among others.
- Young, urban consumers are bypassing brick-and-mortar retail and increasingly shopping via e-commerce platforms such as Big-Basket, Nature's Basket, and Amazon India, among others.

⁶ It is a common practice to present the card with two hands as a show of respect to the individual.

⁷ See: [Deloitte](#) and the Confederation of Indian Industries, "Future of food: Innovation in managing demand and supply disruptions," November 2021.

⁸ See: USDA GAIN; "India: Burgeoning Market for Plant-based Meat Substitutes," [IN2021-0064](#).

- An estimated 30-35 percent of Indian consumers are vegetarian who often follow the tenets of Hinduism. Much of the Indian population does not consume non-vegetarian food (i.e., poultry, mutton, etc.) on special days or religious observances. India's large Muslim population (estimated at 201 million) does not consume pork and eats Halal.
- In general, women make most of the shopping and food purchasing decisions. In households that utilize hired labor, domestic employees often do much of the shopping.
- Most packaged food items are sold in small containers to keep pricing low and accommodate limited storage space.

SECTION III: IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

The Food Safety and Standards Authority of India (FSSAI) 2019 edition of the “Manual for Food Imports” details the procedures and requirements to export food products to India. Refer to the [2019 Edition of Food Imports Manual](#) for more information.

General Import and Inspection Procedures

- Imported food products may be subject to multiple regulatory authorities that sometimes have overlapping responsibilities.
- Importers may require an import permit for some consumer-oriented food products that will subject the item to FSSAI and Indian animal or plant health scrutiny.
- Pre-Arrival Document Review (PADR) means the scrutiny of documents submitted by the importer via a Customs House Agent (CHA) to authorized officers in advance of consignment arrival.
- Upon consignment arrival at the port, the CHA will file an integrated declaration form in the Customs Single Window Integration for Facilitating Trade (SWIFT).
- The CHA is required to provide the following documents to authorities for food and beverage products imported into India:
 - Bill of Lading
 - Invoice
 - Packing List
 - Certificate of Origin
 - Health Certificate
 - Permits wherever applicable (Animal and Plant Quarantine)
 - Sanitary certificate
- Every imported food and beverage consignment should carry a label based on the Indian government requirements as specified in [Food Safety and Standards \(Labeling and Display\) Regulations, 2020](#). U.S. exporters should read the latest Labeling and Display Regulations (2020), before designing labels for products for export to India. Section II of the [FAIRS Annual Country Report-2021](#) states India's labeling requirements for food and agricultural products. (Note: The Food Safety and Standards Packaging Regulation (2018), formerly combined with the FSS Labeling Regulation, is now separate, with compliance effective on July 1, 2019. See, [FSS \(Packaging\) Regulation \(2018\)](#) for additional information.
- Upon clearance of the application, the applicant must pay sampling fees for document revision, visual inspection, and product testing.
- The Customs authority, via its single window clearance system, also validates the declared value of articles in the consignment.

Additional information on the import and inspection procedures is available on the [FSSAI's website](#) and Section IX of [FAIRS Annual Country Report-2021](#).

High tariffs on most food items, along with prohibitory requirements on certain products, hinder the growth of U.S. food imports to India. Import tariffs on consumer food products range from zero to 150 percent, but most products maintain tariffs ranging from 30 to 40 percent. India's tariff structure gives the government considerable flexibility to raise or lower tariffs. India routinely uses tariff measures to encourage or limit trade, keep domestic food price inflation in-check, and to guarantee certain commodity prices for local farmers and manufacturers.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

India's domestic food industry remains the primary competitor for U.S. food and beverages. In addition, many third-country competitors enjoy a freight and preferential trade advantage over the United States and can supply goods at lower costs due to geographic proximity to India.

Table 2. India: Top Consumer-Oriented Product Imports					
Table 2A: Top Consumer-Oriented Products Imported from the World			Table 2B: Top Consumer-Oriented Products Imported from the United States		
Description	USD (Millions)		Description	USD (Millions)	
	2021	2022 Jan - Oct		2021	2022 Jan - Oct
Cashew Nuts, Fresh or Dried, In Shell	1,125	1,771	Almonds, Fresh or Dried, In Shell	748	752
Almonds, Fresh or Dried, In Shell	862	800	Apples, Fresh	25	6
Apples, Fresh	378	301	Walnuts, Fresh or Dried, In Shell	30	7
Dates, Fresh or Dried	240	156	Almonds, Fresh or Dried, Shelled	25	12
Pepper of Genus Piper, Neither Crushed nor Ground	171	179	Food Preparations Nesoi	20	12
Other	3,369	3,265	Other	108	139
Total	6,145	6,472	Total	956	928

Sources: Table 2A: Trade Data Monitor; Table 2B: U.S. Census Bureau, Foreign Trade Division.

Table 3. India: Products Present in Market with Good Sales Potential			
Product Types	Import Value (\$ Million) CY 2022 (Jan - Oct)	U.S. Market Share (percent)	Impacting Factors
Almonds (in shell and shelled)	841	90	<ul style="list-style-type: none"> • Strong preference for U.S. almonds • Increased consumption, including for snacking
Chocolate and Cocoa Products	309	0.41	<ul style="list-style-type: none"> • Strong preference for recognized brands • Competition from domestic and international suppliers
Beverages, Spirits	921	25	<ul style="list-style-type: none"> • Increased consumption and lack of domestic

and Vinegar			production
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Source: Trade Data Monitor

Table 4: Products Not Present in Significant Quantities but With Good Sales Potential			
Product Types	Import Value (\$ Million) CY 2021	U.S. Market Share (percent)	Limiting and Impacting Factors
Tree nuts (Except Almonds)	1,558	4.19	India imports a large variety of tree nuts from regions in competition to the United States. Lack of consumer awareness for tree nuts such as pecans, hazelnuts, high tariff rates for walnuts and almonds, and increasing prices for tree nuts are limiting factors.
Leguminous Vegetables, Dried Shelled/Pulses	2,095	0.37	About 20 percent of India's total demand for pulses was previously met through imports. The Indian government imposes quantitative restrictions on imports of peas and other pulses. Retaliatory tariffs remain on U.S. lentils and chickpeas and have limited sales, but opportunities exist for other pulse and legume crops as demand may not be always met by local production. See: GAIN IN2021-0113
Sugars and sugar confectionery	318	4.66	India is a large producer, consumer, and exporter of sugar. Indians prefer sweets, and new and innovative products are always in demand by consumers of all ages and class.
Processed Fruits	568	1.95	Despite a small market share, Afghanistan figs represented 28 percent of India's 2021 processed fruit imports), significant opportunities exist for U.S. processed fruits, including dried cranberries, blueberries, fruit powders, and prunes. Health-conscious Indians are consuming more processed fruits and using them in a variety of traditional Indian cuisines.
Fresh Fruits	617	5	Retaliatory tariffs on U.S. apples, seasonal availability of domestic fresh fruits, and imports from other preferred destinations limit U.S. share. Enhanced access for U.S. cherries, however, offers strong potential for growth.
Poultry Meat and Products. (ex. eggs)	0.5	21.03	India offers a large opportunity for U.S. poultry. However, pricing, high tariffs and the regulatory environment may limit sales.

Source: Trade Data Monitor

Products Not Present Because They Face Significant Barriers

Several trade restrictions imposed by the Indian government limit market access for U.S. food

products. Most animal and livestock-derived food products are effectively banned due to established Indian import requirements, apart from pork and pork products, and poultry and related products. This includes certain sub-categories in the Harmonized Tariff Schedule under Chapters 2, 3, 4, 5, 16 and 21 (e.g., milk and dairy products, certain seafood, sheep, and goat products, and pet food). Furthermore, imports of beef are banned due to religious concerns. If allowed some products (e.g., dairy products including cheeses) may have good sales potential in the food processing, retail, and the HRI sectors.

Effective July 8, 2006, the Government of India’s 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 at the port of entry. Soybean oil and canola oil derived from select events are the only biotech food products currently approved for import. For more information on India’s biotech import policy, see the FAS report on [Agricultural Biotechnology Annual 2022](#).

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Table 5. India: Competition in Major Product Categories in Calendar Year (CY) 2021				
Product Category	Total Imports (\$ Million) CY 2021	Major Suppliers	Strengths of Key International Suppliers	Advantages (A) and Disadvantages (D) of Local Suppliers
Animal or Vegetable Oils, Fats, and their products	17,462	Indonesia Argentina Ukraine Malaysia Russia	Major production hubs and competitive prices	Local production is inadequate, and more than 40 percent of total edible oil consumption is dependent on imports (A).
Leguminous Vegetables, Dried Shelled/Pulses	2,095	Canada Myanmar Mozambique Tanzania Australia	Price competitiveness, freight advantage and the ability to produce specific varieties of pulses in demand in India	Record domestic harvests in the last two years have resulted in quantitative restrictions peas and pulse imports, which have slowed since 2018 (D).
Edible Fruits and Nuts	3,655	USA Afganistán UAE Tanzania Benín	Growing market demand, preference for specific quality, popular at certain holidays	Domestic production of some of the major fruits and nuts is insignificant (A).
Sugars and sugar confectionery	318	Brazil Germany Netherlands USA South Africa	Price competitiveness	India is a large producer, consumer and usually a net exporter of sugar (D).
Coffee, Tea, Mate and Spices	900	Vietnam Indonesia Nepal Madagascar Sri Lanka	Price competitiveness and proximity to India	Most imports are for re-export to other regions (A).
Dairy produce: bird eggs; natural honey; edible products of animal origin	30	France New Zealand Germany Turkey Belgium	Price competitiveness, sanitary requirements	Domestic production is not keeping pace with demand (A). Indian import protocol is stringent and effectively prohibits imports of many U.S. products (D).

Source: Trade Data Monitor

Please refer to Appendix I in the Attachment for:

1. U.S.-Based State Regional Trade Groups (SRTG)/Cooperators in India
2. Advantageous Indian Agencies of the India Central Government
3. Key Indian Trade Associations

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For additional information please visit the FAS website and FAS India GAIN reports:

- [FAS Homepage](#)
- [FAS India Retail Report](#)
- [India - City Specific Reports](#)
- [FAS India Online Grocery Market](#)
- [FAS India Sweet and Snack Industry Market](#)
- [Food and Agricultural Trade Show Calendar](#)
- [FAS India Food Processing Ingredients Report](#)
- [FAS India Food Service - Hotel Restaurant Institutional](#)
- [FAS India Plant-Based Meat Substitutes Market](#)

Attachments: [Appendix 1 - India Trade Associations and Relevant Ministries.pdf](#)