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Report Highlights:

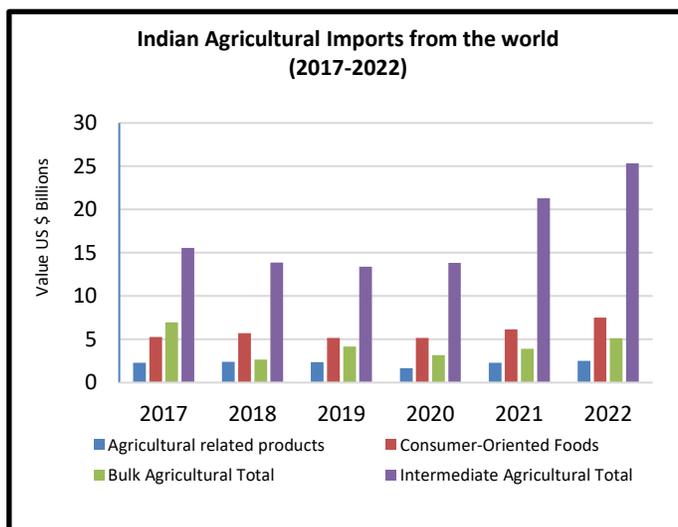
The Indian market remains a bright spot, as its economic growth continues in 2023. India is one of the fastest-growing major economies in the world despite the volatile geopolitical and economic conditions, India is on an upward trajectory. Post pandemic, Indian consumer preferences toward premium products and perceived health foods remains high, despite continued high food price inflation and rupee devaluation. The Gen Z population is interested in novel foods and new ingredients. The grocery sector is the largest segment of the Indian retail market. It is also the third largest food and grocery market in the world. India's modern retail sector, including e-retail, which is rapidly developing, 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

Summary:

India remains one of the fastest-growing major economies in the world. It is currently the fifth largest economy by nominal GDP, leapfrogging France, and the United Kingdom and third largest by purchasing power parity. India is a dynamic, middle-income, market economy and it is the 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) [October 2023 World Economic Outlook \(WEO\) report](#), India's GDP growth has increased from 6.1 to 6.3 percent for the 2023 financial year due to stronger than expected consumption.

Indian 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 \$33.65 billion in 2021 to \$40.50 billion in 2022, and exports grew from \$51.43 billion to \$55.9 during the same period.



Source: Trade Data Monitor

Total Agricultural and Related Imports (USD billion)/U.S. market share in 2022	\$40.50/6.22 percent
Total Consumer Food Imports (USD billion)/U.S. market share in 2022	\$7.49/15.05 percent
Total Bulk Agricultural Imports (USD billion)/U.S. market share in 2022	\$5.12/10.45 percent

List of Top Agricultural Imports from the United States:

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

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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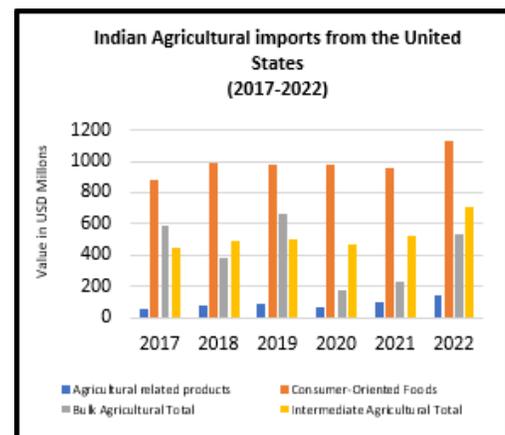
SECTION I: MARKET SUMMARY

General Economy and Policy Environment

India remains one of the fastest growing major economies, despite a volatile global economic condition in 2022. It has taken over China as the most populous country in 2023 with 1.4 billion accounting for 17.7 percent of the world's population. India also maintains the largest youth population, with over 800 million persons aged 35 years and below and as per United Nations Population Fund's projections, India will continue to have one of the youngest populations in the world until 2030. The demographic consists of mostly young, aspirational middle and upper middle-income consumers who seek a greater range of premium products.

According to the International Monetary Fund (IMF),¹ India's gross domestic product (GDP) is projected at 6.3 percent in Indian fiscal year 2024 (IFY) more than double the world average (2.9 percent). India is also on road to become the world's third largest economy by FY2028, surpassing both Japan and Germany. Additionally, India's GDP is estimated to be \$5.2 trillion, crossing the \$5 trillion benchmark in FY 28.² India is also expected to become the world's third largest consumer market by FY2027 where consumer spending could cross \$4 trillion by the year 2030. The consumers spending on food is expected to increase by two folds by the end of the decade as the population of Indians with large, disposable incomes increases. Despite its improved business climate, high tariffs, redundant trade policies, and ever-changing import requirements continue to challenge longstanding food and agricultural exporters to India, including the United States.

India's agricultural and related imports increased from \$33.65 billion 2022 to \$40.4 billion in 2022. In the same period, agricultural and related product imports from the United States saw an increase from \$ 1.87 billion to \$2.5 billion a high growth of 33 percent. This boost in U.S. exports is led by the consumer-oriented product category, which has remained consistent post pandemic. In 2022, India's tree nut imports from all origins reached \$3.46 billion, with the U.S. market share representing nearly 1/3 or \$1.01 billion.



The demand demographics for consumer-oriented goods has broadened to include the Indian middle-class. India's import of consumer-oriented goods has increased from \$6.1 billion in 2021 to \$7.4 billion in 2022. 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. Tree nuts and berries are normally part of a gift boxes which are exchanged during these festivals.

¹ Source [Reuters](#): "IMF raises India's FY24 GDP growth forecast to 6.3% - report published on October 10, 2023.

² See: [Ernst & Young Report](#); "India — towards becoming the third largest economy in the world," published on August 25, 2023.

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 created awareness and allowed easy access to foods. Improved supply chain infrastructure, booming e-commerce, swift payment mechanisms including digital payments like India's unified payment interface (UPI), especially in smaller cities (Tier-II and Tier-III), has improved access to healthy daily essentials including fresh fruits and vegetables, meats, dairy products, and others.

The Indian retail market is expected to reach \$1.1 trillion by 2027 and \$2 trillion by 2032 growing at 25 percent CAGR. However, the Indian retail market remains largely unorganized. Over the next 3-5 years, the share of modern retail (including e-commerce) will increase to 30-35 percent with the share of the traditional retail coming down to 65-70 percent.³ Food and grocery are the largest segment of the Indian retail market constituting 63-65 percent share in retail. It is also the third largest food and grocery market in the world.⁴ This transformation is due to rapid digitalization with close to 880 million Indians connected on the Internet. India has also witnessed one of the fastest accelerations in digital adoption anywhere in the world with number of digital transactions crossing 9.2 billion in 2022-23.⁵

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. Yet, India remains a potentially advantageous and diverse export market for U.S. food and agricultural goods. India's import of consumer-oriented goods has increased from \$6.1 billion in 2021 to \$7.4 billion in 2022. In this segment, United States retained the largest market share at 15.05 percent or \$1.1 billion. 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.

With world's 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,

³ Source: [Invest India](#): India- The Top Retail Destination

⁴ Source: [Invest India](#): Food Retail

⁵ Source: [Live Mint](#) "UPI transactions surged to 9.3 billion in June 2023, driven by P2M, says Worldline report"

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.

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

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

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

- As per the recent survey called Trend talk done by Meta, GenZ in India are most excited to try diverse food and ingredients.⁷
- Gen Z are interested in trying trending foods and ingredients, with 45% saying they are interested in consuming vegan products, and 42% saying they are interested in trying plant-based meat.
- Another preference which is rising is demand for "Fresh" and "High quality" as one criteria for purchasing the food.⁸
- Post pandemic has also changed attitudes of consumers toward healthy, non- preservative foods, ready-to-eat, and ready-to-cook foods.
- Average Indian’s food preference shifted toward proteins, fresh fruits, and vegetables consumption.
- 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 on-the-go Healthy Snacks.
- There is also increased Demand for Low-Calorie Snacks. Indian Snack Market will reach \$23.69 Billion in 2028 and it will expand at a CAGR of 12 percent from 2023 to 2028.⁹
- 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.
- 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.
- Sweets and desserts are an important food category in India and one that will continue to grow. Restaurants are, therefore, predicted to invest in their sweet offerings as diners will seek to visit restaurants specifically for signature desserts.¹⁰

⁷ Source: Meta “ [2024 Instagram Trend Talk: Indian Gen Z Are Trend-Setters!](#)”

⁸ Source: [Statista survey](#) “Purchase criteria for food in India as of September 2023”

^{9 9} Source: Global News wire “[India Snacks Market, Size, Forecast 2023-2028: New Brands and Start-Ups Begin to Find Foothold in the Sector](#)”, published on March 31, 2023

- Gen Z are also focusing on sustainable choices whether its packaging or sourcing and they are willing to pay premium for it.

SECTION III: IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

The Food Safety and Standards Authority of India (FSSAI) Manual for Food Imports (2019 edition) details the procedures and requirements to export food products to India. Please refer to the 2019 Edition of Food Imports Manual for more information. The full text of the manual is accessible on FSSAI's [website](#).

General import and inspection procedures for 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 \(2022\)](#) 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 \(2022\)](#)).

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	Table 2B: Top Consumer-Oriented

¹⁰ Source: Money Control- [How India eats: Godrej's report reveals top 9 food trends for 2023](#)

Imported from the World			Products Imported from the United States		
Description	USD (Millions)		Description	USD (Millions)	
	2022	2023 Jan - September		2022	2023 Jan - Sep
Cashew Nuts, Fresh or Dried, In Shell	1,881	1,118	Almonds, Fresh or Dried, In Shell	915	566
Almonds, Fresh or Dried, In Shell	967	621	Apples, Fresh	5	1
Apples, Fresh	320	263	Walnuts, Fresh or Dried, In Shell	7	5
Dates, Fresh or Dried	229	140	Almonds, Fresh or Dried, Shelled	12	5
Pepper of Genus Piper, Neither Crushed nor Ground	203	116	Food Preparations Nesoi	14	9
Other	4,128	3,121	Other	175	183
Total	7,499	5,379	Total	1,128	769

Source: Trade Data Monitor and FAS India Analysis

Table 3. India: Products Present in Market with Good Sales Potential

Product Types	Import Value (\$ Million) CY 2023 (Jan - Sep)	U.S. Market Share (percent)	Impacting Factors
Almonds (in shell and shelled)	621	91.3	<ul style="list-style-type: none"> Strong preference for U.S. almonds Increased consumption, including for snacking
Pistachios Fresh or Dried, In Shell	100	11.96	<ul style="list-style-type: none"> Increased consumption, including for snacking. Strong preference for U.S. pistachios
Beverages, Spirits and Vinegar	836	16.46	<ul style="list-style-type: none"> Increased consumption and lack of domestic production

Source: Trade Data Monitor and FAS India Analysis

Table 4: Products Not Present in Significant Quantities but With Good Sales Potential

Product Types	Import Value (\$ Million) CY 2022	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	23,493	No data found	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 2023-0066
Sugars and sugar confectionery	376	3.53	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	457	3.59	UAE's dates fresh or dried represented 50 percent of India's 2022 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	571	1.3	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)	0.8	20.86	India offers a large opportunity for U.S. poultry. However, pricing, high tariffs and the regulatory environment may limit sales.

Source: Trade Data Monitor and FAS India Analysis

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 2022	Major Suppliers	Strengths of Key International Suppliers	Advantages (A) and Disadvantages (D) of Local Suppliers
Animal or Vegetable Oils, Fats, and their products	21,399	Indonesia Malaysia Argentina Brazil Thailand	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	23,493	Thailand Bhutan Italy New Zealand	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	4,412	USA Cote d'Ivoire Ghana Benin Afghanistan	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	376	Brazil Netherlands Germany USA Turkey	Price competitiveness	India is a large producer, consumer and usually a net exporter of sugar (D).
Coffee, Tea, Mate and Spices	1,001	Vietnam Indonesia Sri Lanka Madagascar Nepal	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	37	France Italy United Kingdom Germany Denmark	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 and FAS India Analysis

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

- [FAS India Retail Report](#)
- [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:

No Attachments