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India

Exporter Guide

India offers promising export growth prospects for U.S. agriculture with a large and rapidly expanding middle class, rising disposable incomes and shifting consumption patterns toward higher-value agricultural commodities.

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Report Highlights:
India offers promising export growth prospects for U.S. agriculture with a large and rapidly expanding middle class, rising disposable incomes and shifting consumption patterns toward higher-value agricultural commodities. India's modern retail sector is expanding, food processors want access to a global supply chain, and food service chefs want to innovate and attract young and higher income consumers who are ready to try new products and global cuisines. Exporters should determine if a product has market access and be willing to start small and comply with specific labeling and packaging requirements.

Post:
New Delhi

Executive Summary:

Section 1: Market Overview:
India has one of the world's fastest growing large economies and, by some estimates, is projected to become the world's third largest economy by 2025. In 2010, annual gross domestic product (GDP) growth reached 8.9 percent but slipped to 6.9 percent in 2013. However, in 2015, the GDP rose 7.6 percent (based on a revised base year). The International Monetary Fund and World Bank, each, have projected India's growth to remain between 7.5 and 8 percent in the medium term.

The "Make in India" program encourages manufacturing development as a major goal. Although India was ranked 130th out of 190 countries in the World Bank's Doing Business 2017 report, the country made progress since 2014 by implementing several business friendly laws and the country is on the verge of instituting a nationwide Goods and Services Tax (GST) to replace existing state-by-state taxes and duties. In addition, the country's food safety authorities are looking at a move to more risk-based inspection of imported items. Despite efforts to improve business and trade, the Government of India has not lowered tariffs or noticeably improved access for imported food and agricultural products over the past several years.

India's bulk, intermediate, consumer-oriented, fishery and forestry imports grew from $13.2 billion in 2009 to $25.3 billion in 2015. Imports of consumer-oriented foods, led by tree nuts and fresh and dried fruits essentially have doubled since 2009 to $4.5 billion in 2015. India's food and agricultural exports jumped from $16.8 billion in 2009 to $35.06 billion in 2015.

Table 1. India: Imports of Ag., Fish, and Forestry Products from the World (U.S. $ Billion)

Category	2009	2015	2016 (YTD) Jan- Sep' 16
Bulk	3.871	6.101	4.949
Intermediate	6.152	12.175	9.108
Consumer- Oriented	1.723	4.489	3.166
Fishery and Seafood	0.040	0.068	0.045
Forestry	1.446	2.482	1.637
Total	**13.232**	**25.315**	**18.905**

Source: India's Ministry of Commerce

Table 2. India: Exports of Ag., Fish, and Forestry Products to the World (U.S. $ Billion)

Category	2009	2015	2016 (YTD) Jan- Aug'16
Bulk	6.57	12.825	7.534
Intermediate	3.364	6.047	3.768
Consumer- Oriented	4.825	10.929	7.065
Fishery and Seafood	1.875	4.773	3.158
Forestry	0.153	0.49	0.304
Total	**16.787**	**35.064**	**21.829**

Source: India's Ministry of Commerce

India's GST, when implemented, is poised to change the country's architecture of indirect taxation. Most notably, by establishing an integrated common market for the whole country, it would replace the current state-by-state taxation system where service and value added taxes or excise duties would be collected uniformly for most goods. Accordingly, it should allow for faster movement of goods; especially, perishable agricultural products that can bypass state boundaries and lower transportation and transaction costs.

For an overview of the Indian market and agricultural trade, read the USDA Foreign Agricultural Service International Agricultural Trade Report from December 2016: India Agricultural Trade: Expanding Export Opportunities Amid Persistent Limitations.

A. **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 changing 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, and the introduction of foreign cuisines. In nominal terms, total expenditures on food increased 64 percent between 2009 and 2014 to an estimated $365 billion.

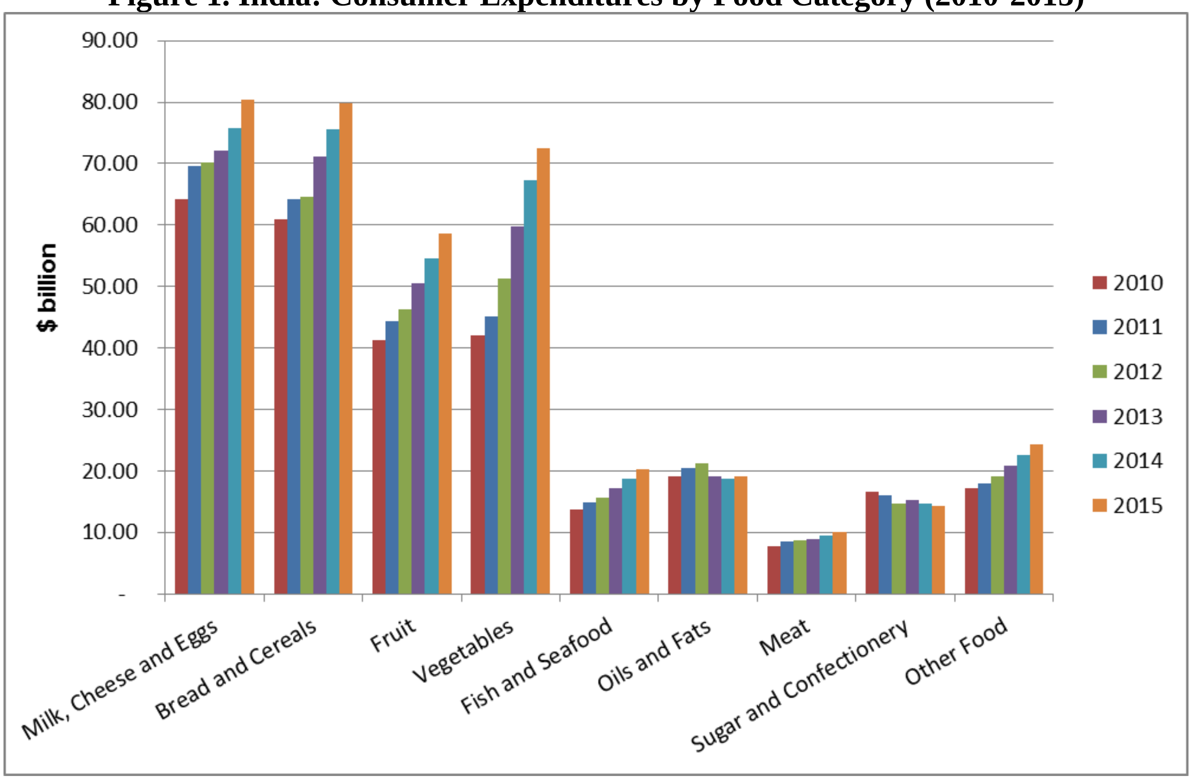
Table 3. India: 2015 Consumer Expenditure by Food Category

Categories	2015 (U.S. $ Billion)	2010 – 2015 Growth Percentage	2010-2015 CAGR
Milk, Cheese and Eggs	80.3	25.3	4.6
Bread and Cereals	79.9	31.2	5.6
Fruit	58.6	42.3	7.3
Vegetables	72.4	72.0	11.5
Fish and Seafood	20.2	46.8	8.0
Oils and Fats	19.0	0.4	0.1
Meat	10.0	29.4	5.3
Sugar and Confectionery	14.3	-13.0	-2.8
Other Food	24.2	41.4	7.2
Total	379.0	34.2	6.1

Source: Euromonitor

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

Figure 1. India: Consumer Expenditures by Food Category (2010-2015)



Source: Euromonitor

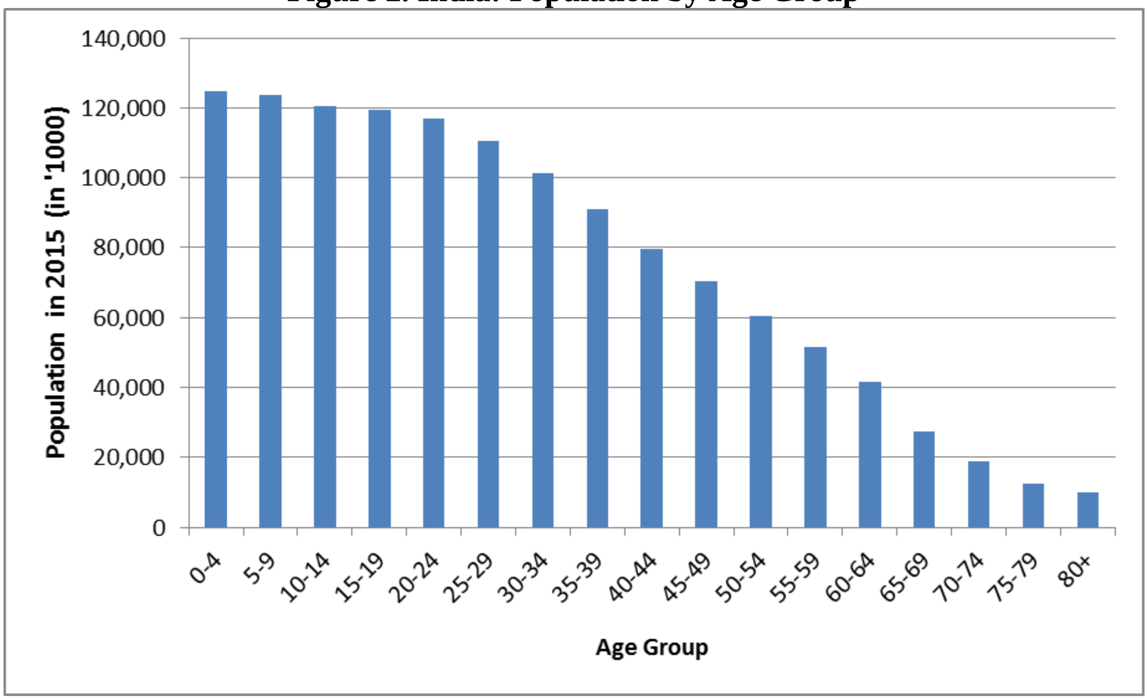
B. Consumer Demographics

Consumer Demographics

With a population of 1.27 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 27.6 years. Nearly 56 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.

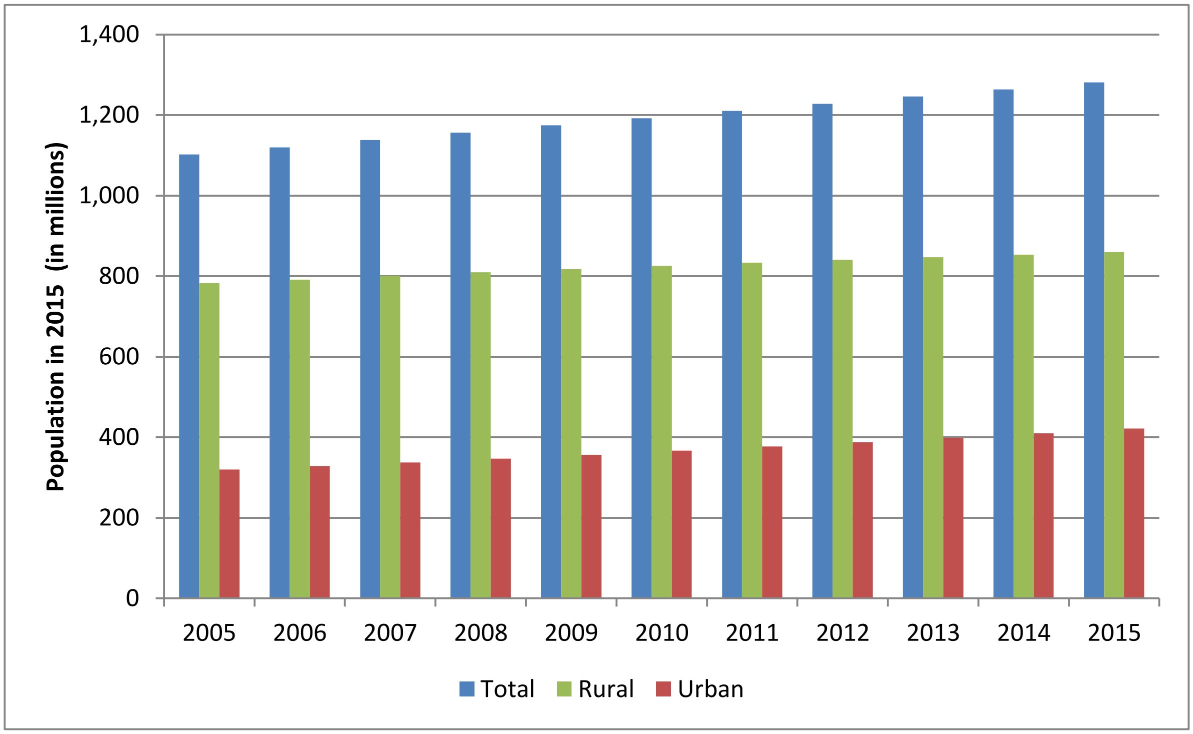
Nearly half of all Indians are married and families traditionally live in joint or extended families resulting in an average household size of 4.8 people in 2015. In urban areas, smaller nuclear families are becoming more common as mobility and employment opportunities increase though geographic, cultural, and socio-economic differences persist throughout the country and create divergent consumer demands and consumer profiles.

Figure 2. India: Population by Age Group



Source: Euromonitor

Figure 3. India: Population by Rural/Urban Composition



Source: Euromonitor

Over 855 million Indians live in rural areas compared to 415 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 17 percent of Indian GDP, but over half of Indians are employed in agriculture. Accordingly, urban areas will continue to gain population as surplus labor moves away from rural areas. Nevertheless, rural areas are emerging as important markets for fast moving consumer goods and daily staples like edible oils, pulses, fruits and vegetables. Imported value-added or consumer-ready foods are limited in rural areas, but show promise in Tier 1, Tier 2, and some Tier 3 cities.

Consumer Demographics: Opportunities at Both Ends of the Spectrum

While media reports touting the rise of the Indian middle class abound, incomes in India continue to be relatively low. The World Bank classifies India as a "low middle income" country. The annual per capita gross income was $1,590 during 2015 according to data compiled by World Bank. According to the World Factbook, India's GDP Per Capita on purchasing power parity (PPP) basis was $6,200 during 2015. The Government of India recently published a similar estimate indicating that real per capita annual disposable income grew 7.4 percent from 2014 to 2015 to Rs.93,293 ($1,371).

Persistent low incomes and rising food prices present nutritional challenges for many Indian consumers. As per the UNICEF State of the World's Children 2016 report, more than 29 percent of Indian children under the age of five years are underweight and 39 percent of

Indian children under the age of five have stunted growth. According to India's National Sample Survey Office, Indians continue to spend a large percentage of their income on food with rural Indians spending 57 percent and urban residents spending 44 percent. 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 stretch incomes in India. Indians continue to be excellent savers saving nearly 30 percent of their incomes on average.

Table 4. India: Population and Income Categories

2015 Per Capita Income Band	2010 (Million People)	2011 (Million People)	2012 (Million People)	2013 (Million People)	2014 (Million People)	2015 (Million People)	Annualized Percentage Category Growth 2010-2015
Population with Income of U.S. $0-500	178.50	152.10	167.60	166.10	159.60	153.00	-3
Population with Income of U.S. $501-1,000	231.90	219.60	229.80	230.10	227.20	223.90	-1
Population with Income of U.S. $1,001-1,500	146.60	152.70	153.90	156.60	159.60	162.30	2
Population with Income of U.S. $1,501-2,500	138.00	155.90	152.70	158.10	165.90	173.60	4
Population with Income of U.S. $2,501-3,500	55.10	66.40	63.80	67.20	72.30	77.50	6
Population with Income of U.S. $3,501-15,000	69.70	88.30	84.50	90.70	99.90	110.00	8
Population with Income of U.S. $15,000+	7.30	9.20	8.90	9.40	10.60	11.90	8

Source: Euromonitor

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 in large metros and emerging city markets. According to data provided by Euromonitor, average consumer expenditure (for all products) per household by the top 10 percent of Indian households rose to $9,711 in 2015 from $8,067 in 2010. Trade sources frequently estimate India's market for luxury goods is valued at $3.27 billion in 2016 and data from Euromonitor indicates that during 2011-2016, the luxury goods markets in India recorded real growth of 108 percent. There are nearly 656,000 households with annual incomes in excess of $150,000, up from 444,000 in 2010.

There are a large number of wealthy households in smaller cities with aspirations similar to their metro counterparts. These consumers are showing increasing interest in luxury goods. Changing lifestyle trends among these consumers is helping to drive demand growth of luxury and imported goods. Wealthy consumers situated in smaller cities are increasingly visiting metros to shop for luxury goods and use mobile commerce to order online and send products to their homes.

Regionally, the union territories of Delhi (Rs. 280,142), Chandigarh (Rs. 242,386), Goa (Rs.

274,939) and the small state of Sikkim (Rs. 227,465) have the highest per capita incomes. Among states, Haryana (Rs. 150,260), Karnataka (Rs. 148,485, home to Bengaluru, formerly known as Bangalore), Tamil Nadu (Rs. 143,547, home to Chennai), Maharashtra (Rs. 134,081, home to Mumbai), along with Gujarat (Rs. 124,518) have the highest per capita incomes. The states of Uttar Pradesh (Rs. 48,520) and Bihar (Rs. 34,168) have the lowest per capita incomes.

Advantages	Challenges
• Expanding number of middle and upper income consumers willing to diversify diets.	• Stringent food regulations regarding biotech foods and ingredients and certain food additives.
• Increasing urbanization and growing number of working women that has led dual-income households.	• Diverse agro-industrial base offering many products at competitive prices and preference for fresh traditional foods.
• Increasing exposure to international products and a western lifestyle.	• Indian food companies (including many multinational companies) produce western-style food products at competitive prices.
• Opportunities for bulk and intermediate products that can be used by the food processing sector under the Make in India campaign.	• High tariffs, persistent sanitary and phyto-sanitary requirements that effectively prohibit or restrict imports and competition from other countries.
• A slow but, 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 income consumers are spread throughout the country.
• Strong U.S.-India ties and political stability in India.	• Competition from countries having geographical proximity and freight advantage.
• Growing domestic and international tourism and rise in food/lifestyle media creating opportunities for niche and high-value products.	• Unwillingness of U.S. exporters to meet Indian importers' requirements (mixed shipments, changing product specifications to conform to Indian food laws, etc.).

SECTION II: EXPORTER BUSINESS TIPS

A. Food Preferences

Although studies suggest the vast majority of the Indian population is not vegetarian, an estimated 20-30 percent of the Indian population still is strictly vegetarian in accordance with the tenets of Hinduism. Those Hindus who eat meat tend to do so sparingly and beef (cow meat) consumption is taboo among Hindus, Jains, and Sikhs who comprise over 80 percent of India's population. Furthermore, non-vegetarian food (i.e., chicken, lamb/mutton, etc.) 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. Many non-vegetarian members of the Indian population, too, may not eat meat or poultry at home and may only consume it at restaurants or at food service establishments.

Indians 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 younger consumers and the urban middle and upper middle class. Many Indians are willing to try new foods while eating out, but often return to traditional fare at home. Italian, Chinese, Thai and Mexican foods are reportedly the fastest growing new cuisines in India and consumers are slowly diversifying their consumption patterns.

Imported food items often spotted in retail stores include dry fruits and nuts, cakes and cake mixes, chocolates and chocolate syrups, seasonings, biscuits/cookies, canned/packaged fruit juices, canned soups, pastas/noodles and sauces, popcorn, potato chips, canned fish and vegetables, ketchup and other sauces, breakfast cereals, fresh and dried berries like cranberries and blueberries, as well as fresh fruits such as apples, pears, grapes and kiwis.

B. Shopping Habits

Indian consumers have very traditional habits when it comes to food shopping. They use a variety of small stores such as bakeries and butchers, as well as push cart vendors, but most dry goods and household items are purchased from kirana stores, which are typically family-owned outlets found on almost every street corner that usually offer home delivery. However, with the recently implemented demonetization of 500 and 1000 rupee currency notes and a shortage of currency for making change in the marketplace, many shoppers turned to organized retail where they could purchase items with debit or credit cards. Since the initial disruption, many kirana stores have implemented electronic payment methods to win back previous customers.

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, domestic employees 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 (cottage cheese), spices and condiments, pickles, noodles, snack foods, jams and sauces. Most packaged food items are sold in small containers to keep pricing low and to accommodate limited storage space.

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 3 to 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 five to seven 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 four to six percent. Margins for retailers vary from 10 to 40 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 two to three times 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.

Table 5. India: Imported Food Product Pricing (Margins at Various Channels)

Distribution Channel	Margins
Clearing and forwarding agents	3-5 percent
Wholesalers	4-6 percent
Super Stockists	5-7 percent
Distributor	8-12 percent
Importers	5-25 percent
Retailer	10- 40 percent

Source: USDA/FAS Analysis

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 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, Hyderabad, and Chennai.

D. Infrastructure
Refrigerated warehousing and transportation facilities are limited and costly, but improving. In some cases, high electricity costs and/or erratic power supplies have constrained cold chain development. Road travel can be slow and difficult. India has 3.34 million kilometers (2 million miles) of roads and many have not been improved over the past 10 years. 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 a 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 and Delhi airport are limited and present a challenge for importers seeking to clear high-value food products with a short shelf life.

E. Finding a Business Partner
"Does my product have market access?" is the most important question exporters can ask as they research the Indian market. 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 two to three times more costly than the U.S. FOB price once it reaches the retail shelf. Consequently, determining whether a product should target the small number of high-income consumers or larger numbers of middle income consumers is the 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. Further, exporters should consider whether targeting one or a multiple of India's emerging city markets is sufficient or whether a larger, broader regional or national campaign is needed to make an inroad for the product.

If an exporter is still interested in the Indian market, the next step is to locate a reliable importer/distributor.

A visit to India to gain a first-hand feel of the Indian market, preferably coinciding with a major food show, such as Annapoorna (a USDA-endorsed show), the Food and Grocery Forum (January in Mumbai) or AAHAR (in March 2017 in New Delhi) (see Appendix B for more details) offers an opportunity to learn about the Indian market and meet prospective importers. Similarly, increasing numbers of Indian importers are visiting international food shows such as ANUGA, SIAL, Food and Hotel Asia, 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. 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 managing similar brands or products from other suppliers? If yes, then can this lead to conflict of interest or can be beneficial in having someone with experience in similar like of business.
- 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.
- Be prepared to start small by shipping a few pallets or cases of a product and recognize that it could take several months or years before an importer is ready to order full containers.
- Be willing to meet country specific labeling requirements and consider working through a consolidator or participating in mixed containers.

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 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 (refer IN6155), but these situations can be avoided with proper preparation and sale terms.

A number of regional trade associations and 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. There are several U.S.-based trade groups that are active in India. Exporters are advised to identify appropriate associations and work closely with these associations to explore opportunities in the Indian market.   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 due to established Indian import requirements. 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, poultry meat, certain seafood, ovine and caprine products, as well as pork products and pet food). Furthermore, imports of beef are banned due to religious concerns."

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. Soybean and canola oil derived from GE soybeans (select events) and canola are the only biotech food/agricultural product currently approved for import. For more information on India's biotech import policy, please see –IN6157 Agricultural Biotechnology Annual 2016'

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 the local market. Advertising through television is especially popular in India and with the growth of cooking shows, there are often opportunities to co-brand or market products indirectly with the shows or celebrity television chefs. Increasing numbers of Indian consumers have access to a number of national and international channels through satellite television. India also has a number of national and local newspapers in a variety of languages. The number of radio stations is also increasing, especially in larger cities and billboard advertising or placards alongside buses is common.

While mass advertising through television, radio or newspapers is relatively expensive, U.S. trade associations, cooperators or companies that have an established or growing presence in the market may find that a broader advertising strategy could help increase awareness and sales of their products. In addition to this social media platforms are becoming popular platform for advertising especially among tech savvy audience.

For smaller and new-to-market exporters, targeted promotions are likely a more appropriate and cost-effective approach to marketing. Indian importers and distributors are generally eager to support marketing campaigns (e.g., tastings, demonstrations, and point-of-sale information), but often note that foreign suppliers are unwilling to provide adequate marketing support.

There are a large number of annual trade shows focusing on various aspects of the food sector. These shows 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 shows in Appendix B, one of which, Annapoorna, is currently endorsed by USDA.

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 5:00 p.m.

The climate in India can be 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 yourself and refer to business contacts by their surname, rather than by their given name. Use courtesy titles such as “Mr.”, “Mrs.”, or “Ms.” 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 prohibitory requirements on certain products 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 range of 30 to 40 percent. India’s tariff structure is such that there is considerable flexibility to raise or lower tariffs. Consequently, tariffs are subject to review and change, especially at the start of the Indian fiscal year on April 1. The computation of the effective import tariff is often complex and can involve an array of additional duties. 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 and ensure all the details are in line with the specific Harmonized Tariff System code.

J. Food Laws

On August 5, 2011, the Food Safety and Standards Authority of India (FSSAI) formally implemented its 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, as well as the later amendments can be accessed on the FSSAI website: www.fssai.gov.in.

For more information on food laws related to food products imported into India please refer to Food and Agricultural Import Regulations and Standards (FAIRS) - Narrative report (available from the “Exporter Assistance” category of the FAS GAIN website).

On August 26, 2015, FSSAI discontinued its product approval process. However, on October 4, 2016, the FSSAI published its new draft Regulation called the “Food Safety and Standards

(Approval for Non-Specified Food and Food Ingredients) Regulations, 2016" The draft Regulation outlines new product approval procedures for all food products not already covered under any pre-existing Regulations under the Food Safety Act, 2006. These products have been termed by FSSAI as "non-specified food and food ingredients." The comment window for WTO member countries on the draft Regulation closed on December 16, 2016. See GAIN report IN6132 for more information.

SECTION III: MARKET SECTORS: STRUCTURE AND TRENDS

A. Food Retail

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. The number of "modern" retail outlets has increased from an estimated 200 outlets in 2005 to over 3,200 outlets in 2016). For more information see the IN6164 - Retail Foods Annual 2016.

Until modern food retail began to develop a few years ago, smaller "Mom and Pop" stores were the primary purveyors of imported foods. There are thousands of these stores around India and some are the only source of imported foods in their cities. These small stores continue to be an important sales platform for imported foods.

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 have been 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, meat and dairy products. A few sell small quantities of frozen foods. A typical supermarket carries about 6,000 stock-keeping units (SKUs).

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.

B. Food Service – Hotels, Restaurants and Institutional sector

According to Euromonitor, the estimated size of India's foodservice industry is around $95 billion, of which the "organized" or modern sector contributes about 20-25 percent. The sector is forecast to grow to $110 billion by 2018. India has 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 Starwood Group, Radisson, Four Seasons, Best Western, Hilton, Marriott, Country Inn and Suites by Carlson, and Quality Inn have 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. The mid-market segment (comprised of 3 and 4 star hotels) caters to a mix of business and leisure travelers and is 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 contract with local distributors on centralized annual supply contracts. Some hotels import directly through consolidators in Europe, the Middle East or Asia. 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 specialty products that are not available in the local market and may often choose to make some goods in house from both imported and local ingredients.

India has witnessed a sizeable shift in its casual dining restaurant (CDR) and quick service restaurant (QSR) sector. CDRs and QSRs have gone from largely serving Indian snacks to now serving western foods with an Indian flavor. 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 fast food restaurants 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 refer IN6165 -Food Service – Hotel, Restaurant, Institutional Annual for 2016.

C. Food Processing

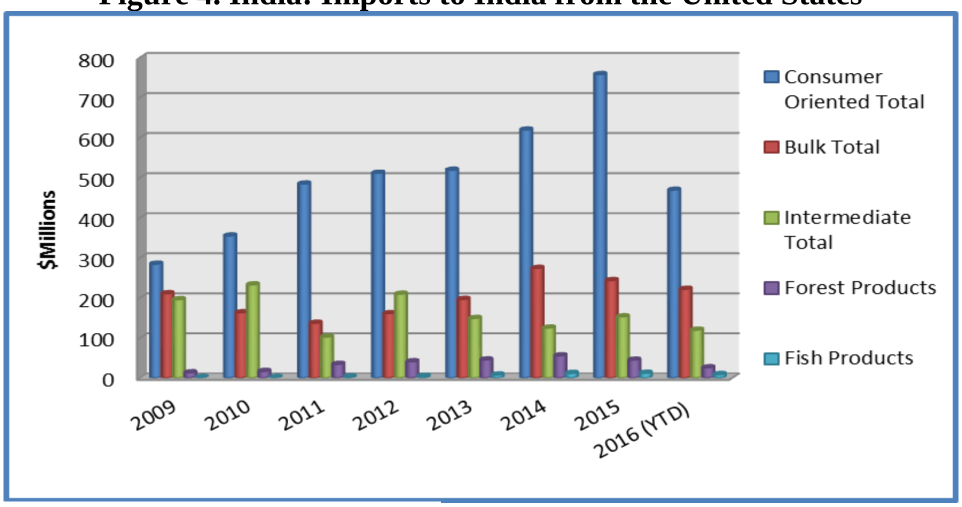
According to the Ministry of Food Processing, the food processing sector accounts for 1.7 percent of gross domestic product and is valued at $25 billion (based on a revised series). According to the latest Annual Survey of Industries, there are 37,175 registered food processing units in the country with 1.7 million people employed in the sector. As foreign multinational corporations have entered India, the food processing industry (FPI) has attracted $7.3 billion in foreign direct investment (FDI) since April 2000 accounting for 2.36 percent of total FDI inflows. A large segment of the Indian FPI still operates in the "unorganized" sector or informal sector.

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 400 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, 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, please see IN6166 Food Processing Ingredients Annual 2016.

Figure 4. India: Imports to India from the United States



Source: USDA/FAS Global Trade Database

SECTION IV. BEST PRODUCT PROSPECTS:

Category 1: Products Present in the Market that Have Good Sales Potential

Description	Total Imports CY 2015 - Value ($ millions)	Total Imports CY 2015 - Quantity (metric tons)	5–yr. Import growth by value (in)	Base tariff	Key Constraints Over Market Development	Market Attractiveness for US
Almonds	737	96,017	17	Rs. 35/ kg (in-Shelled)	Competition from Afghanistan and Australia	High seasonal demand, health consciousness
Pistachios	110	10,842	13	10	Competition from Iran and Afghanistan	High seasonal demand, health consciousness
Grapes Fresh or dried	66	202,259	21	30	Competition from domestic and foreign suppliers like China, Afghanistan, and Peru	Seasonal shortages and high prices, diverse fruits among India's middle income population and growing retail industry
Apples Fresh, Pears And Quinces, Fresh	236	215,676	10	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.
Cocoa and Cocoa Preparations	205	53,715	10	up to 30	Competition from domestic and other foreign suppliers like Indonesia, Malaysia and Singapore	Consumer preference for imported products and brands
Fruit Juices	33	20,542 liters	3	up to 30	Competition from domestic brands and neighboring countries like China, and UAE	Increasing health awareness and shortage of domestic products
Sauces, Preparations Mixes, Condiments, and Seasonings	14	6786	7	30	Competition from domestic brands and neighboring countries like Thailand and China	Consumer preference for imported products and brands and growing fast food culture
Beverages, Spirits, and Vinegar	569	392,140,302 liters	16	up to 150	High import duty, complex state laws, and competition from other suppliers like United Kingdom and France	Increasing consumption and growing middle income population

SECTION V. POST CONTACT AND FURTHER INFORMATION

The following reports may be of interest to U.S. exporters interested in India. These, and related reports, can be accessed via the FAS Home Page: www.fas.usda.gov by clicking on "Data & Analysis" and then selecting GAIN reports and choosing the "search reports" function to refine the desired criteria (e.g., category and date range)

Report Number	Subject
IN6165	Food Service- HRI 2016
IN6166	Food Processing Ingredients 2016
IN6164	Retail Foods 2016
IN6162	Food and Agricultural Import Regulations and Standards – Narrative
IN6080	Agricultural and Agribusiness Consultants 2016
IN6157	Agricultural Biotechnology Annual 2016
IN6159	India Food and Agricultural Trade Show Calendar 2017

For additional information please contact:

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Web: http://mumbai.usconsulate.gov/business/agriculture-related-business.html

APPENDIX A – STATISTICS

TABLE A: Key Trade and Demographic Information

Agricultural imports from all countries (USD billion)[1] / U.S. market share	22.76/ 5.07
Consumer Food Imports from all countries (USD billion)[2] / U.S. market share	4.48/ 17
Edible fishery imports from all countries[3] (USD million) / U.S. market share	68/ 18
Total Population[4]	1.27 billion
Urban population[5]	415 million
Rural population	855 million

Number of major metropolitan areas[6] (with a population of a million or more)	53
Population Density[7] (People per square kilometer)	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 11 (USD)[10]	1,581
Unemployment Rate 2014/15[11] ()	3.6
Female Work participation Rate[12] ()	25.51
Exchange Rate Rs. Per USD (as of December9, 2016)	67.56

Source: [1, 2, 3] USDA/FAS Global Trade Database; [4, 5,6,7,8, 9, 11] Census of India 2011
[10:] World Bank; [11, 12:] Ministry of Labor and Employment Government of India

TABLE B: Consumer Food and Edible Fishery Product Imports for Calendar Years 2014 & 2015 ($1,000)

Commodity	Description	Imports from the World		Imports from the U.S.		U.S. Market Share (%)	
		2014	2015	2014	2015	2014	2015
Consumer Oriented Agric. Total		3,890,257	4,489,083	643,496	757,827	16.5	16.9
020319	Meat Of Swine, Nesoi, Fresh Or Chilled	272	268	-	-	-	-
020322	Meat, Swine, Hams, Shoulders Etc, Bone In, Frozen	200	232	-	-	-	-
020329	Meat Of Swine, Nesoi, Frozen	830	825	-	-	-	-
020422	Meat Of Sheep, Cuts, Bone In Nesoi, Fresh, Chilled	193	82	-	-	-	-
020442	Meat Of Sheep, Cuts With Bone In, Nesoi, Frozen	735	715	-	-	-	-
020443	Meat Of Sheep, Boneless, Frozen	54	12	-	-	-	-
020741	Meat Of Ducks, Fresh Or Chilled, Not Cut In Pieces	-	26	-	-	-	-
020745	Cuts And Offal Of Ducks, Frozen	108	124	-	-	-	-
020890	Meat & Edible Meat Offal Nesoi, Fresh, Chld, Frozn	189	13	-	-	-	-
021019	Meat Of Swine Nesoi, Salted, In Brine, Dried, Smkd	-	1	-	-	-	-
040120	Milk/Cream Nt Cnctrd/Swt, Fat Content Ov 1 Nov-6	-	5	-	-	-	-
040150	Milk & Cream Fat Cont Gt 10, Not Concent Or Sweet	662	427	-	-	-	-
040210	Mlk & Crm,Cntd,Swt,Powdr,Gran/Solids,Nov 1.5 Fat	4,266	367	-	-	-	-
040221	Mlk/Cream Cnctrd Nt Swtn Pwd/Oth Solids Ov 1.5 Fa	-	76	-	-	-	-
040229	Mlk & Crm,Cntd,Swtnd,Powdr/Solids, Over 1.5 Fat	2,128	2,612	-	-	-	-
040299	Milk And Cream, Sweetened,	155	959	-	-	-	-

	Concen Or Not Nesoi						
040310	Yogurt, W/N Sweetened, Flavored Or Cntg Fruit/Coco	147	9	8	0	5.5	1.0
040390	Buttermilk/Kephir/Curdled Fermntd Acidfd Mlk & Crm	104	56	2	3	2.0	6.1
040410	Whey & Modfd Whey Whet/Nt Cncntrtd Cntg Add Sweetn	26,872	19,633	-	-	-	-
040490	Products Of Natural Milk Constituents, Nesoi	1,095	1,030	-	-	-	-
040510	Butter	657	1,288	-	-	-	-
040520	Dairy Spreads	-	1	-	-	-	-
040590	Fats And Oils Derived From Milk, N.E.S.O.I.	2,464	11,141	6	25	0.2	0.2
040610	Cheese (Unrpnd/Uncurd) Frsh Incl Whey Cheese Curd	339	273	-	-	-	-
040620	Cheese Of All Kinds, Grated Or Powdered	350	333	-	-	-	-
040630	Cheese, Processed, Not Grated Or Powdered	3,238	2,747	-	-	-	-
040690	Cheese, Nesoi, Including Cheddar And Colby	4,748	3,852	5	3	0.1	0.1
040711	Eggs Of Chickens, Fertilized For Incubation	388	304	-	-	-	-
040719	Eggs Of Birds, Fertilized For Incubation, Nesoi	-	15	-	-	-	-
040790	Birds' Eggs, In Shell, Preserved Or Cooked	708	700	165	167	23.3	23.8
040899	Birds' Eggs Nt In Shell, Frsh Frzn Cookd Water Etc	2	5	-	-	-	-
060110	Bulbs, Tubers, Corms, Crowns & Rhizoms Etc Dormant	1,513	1,158	-	-	-	-
060120	Bulbs, Etc In Growth Or Flower; Chicory	2,662	3,494	-	3	-	0.1
060210	Live Plant Cuttings And Slips, Unrooted	67	93	-	7	-	7.9
060220	Edible Fruit Or Nut Trees, Shrubs And Bushes	262	251	-	0	-	-
060240	Roses, Grafted Or Not	5	1	-	-	-	-
060290	Live Plants, Cuttings & Slips,Nesoi;Mushroom Spawn	7,143	6,723	245	300	3.4	4.5
060311	Fresh Cut Roses And Buds	1	3	-	-	-	-
060313	Fresh Cut Orchids And Buds	5,282	5,412	-	-	-	-
060314	Fresh Cut Chrysanthemums And Buds	20	39	-	0	-	0.5
060319	Fresh Cut Flowers & Buds For Bouquest,Nes	71	80	1	0	1.0	0.2
060390	Cut Flowers/Buds Dried, Dyed Or Otherwise Prepared	162	14	-	-	-	-
060420	Foliage Branches Etc W/O Flowers Grasses Etc Fresh	182	7	-	-	-	-
060490	Foliage Branches Etc W/O Flowers	779	558	92	2	11.8	0.4

	Grasses Etc Nesoi						
070200	Tomatoes, Fresh Or Chilled	-	51	-	-	-	-
070310	Onions And Shallots, Fresh Or Chilled	254	54,899	-	-	-	-
070320	Garlic, Fresh Or Chilled	51	1,195	-	-	-	-
070410	Cauliflower And Headed Broccoli, Fresh Or Chilled	-	5	-	-	-	-
070490	Edible Brassicas (Cabbages Etc) Nesoi, Fr Or Chill	586	625	-	-	-	-
070511	Head Lettuce (Cabbage Lettuce), Fresh Or Chilled	-	0	-	-	-	-
070519	Lettuce, Except Head Lettuce, Fresh Or Chilled	43	34	-	-	-	-
070690	Salad Beets, Radishes, Etc Nesoi, Fresh Or Chilled	3	22	-	-	-	-
070810	Peas (Pisum Sativum), Fresh Or Chilled	97	99	-	-	-	-
070890	Leguminous Vegetables, Nesoi, Fresh Or Chilled	0	1	-	-	-	-
070920	Asparagus, Fresh Or Chilled	276	552	-	-	-	-
070960	Fruits Of Genus Capsicum Or Pimenta, Fresh/Chilled	-	3,253	-	-	-	-
070992	Olives, Fresh Or Chilled	158	19	-	-	-	-
070999	Vegetables, Fresh Or Chilled, Nesoi	123	169	-	-	-	-
071010	Potatoes Uncookd/Cooked By Boiling In Water, Frozn	82	34	-	-	-	-
071021	Peas, Raw Cooked In Boiling Water, Frozen	-	28	-	-	-	-
071022	Beans, Raw Cooked In Boiling Water, Frozen	0	3	-	-	-	-
071040	Sweet Corn Raw/Cooked By Steam/Boiling In Water Fz	0	92	-	-	-	-
071080	Vegetables, Nesoi Raw/Cooked By Boiling, Frozen	1	4	-	-	-	-
071120	Olives, Provisionally Preserved, Inedible	519	1,218	-	-	-	-
071140	Cucumbers/Gherkins Provisionally Pres, Inedible	4	13	-	13	-	100.0
071151	Mushrooms Of Genus Agaricus,Provis Preserv,Inedibl	9	10	-	-	-	-
071159	Mushrooms/Truffles,Prov. Preserved, Inedible,Nesoi	538	407	-	-	-	-
071190	Veg Nesoi, Veg Mix, Provisionally Pres, Inedible	972	607	8	9	0.8	1.5
071220	Onions, Dried (Powder Etc), Not Further Prepared	354	324	321	300	90.8	92.5
071231	Dried Mushrooms Of Genus Agaricus, Whl/Ct/Slc/Pwd	251	136	-	-	-	-
071239	Mushrooms&Truffles, Dried,Wl/Ct/Slc/Bk/Pwd, Nesoi	71	92	-	-	-	-
071290	Vegetables Nesoi & Mixtures,	4,145	3,664	262	404	6.3	11.0

	Dried, No Furth Prep						
071430	Yams, Fresh, Chilled, Frozen Or Dried	-	0	-	-	-	-
080111	Coconuts, Dessicated	315	390	-	-	-	-
080121	Brazil Nuts, Fresh Or Dried, In Shell	-	16	-	13	-	83.6
080131	Cashew Nuts, Fresh Or Dried, In Shell	1,033,298	1,312,806	-	-	-	-
080132	Cashew Nuts, Fresh Or Dried, Shelled	3,916	17,225	-	437	-	2.5
080211	Almonds, Fresh Or Dried, In Shell	565,984	648,150	457,105	493,120	80.8	76.1
080212	Almonds, Fresh Or Dried, Shelled	61,824	89,218	20,225	47,181	32.7	52.9
080222	Hazelnuts Or Filberts, Fresh Or Dried, Shelled	239	442	-	-	-	-
080231	Walnuts, Fresh Or Dried, In Shell	1,338	12,633	1,333	11,657	99.6	92.3
080232	Walnuts, Fresh Or Dried, Shelled	852	1,750	258	417	30.3	23.8
080251	Pistachios, In Shell, Fresh Or Dried	33,883	47,490	6,974	4,185	20.6	8.8
080252	Pistachios, Shelled, Fresh Or Dried	41,774	62,259	412	1,043	1.0	1.7
080262	Macadamia Nuts, Shelled, Fresh Or Dried	-	11	-	-	-	-
080270	Kola Nuts, Fresh Or Dried	10	77	10	77	100.0	100.0
080280	Areca Nuts, Fresh Or Dried	85,587	135,763	-	-	-	-
080290	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	115,840	68,958	-	-	-	-
080410	Dates, Fresh Or Dried	198,612	193,356	-	-	-	-
080420	Figs, Fresh Or Dried	66,661	77,083	-	-	-	-
080440	Avocados, Fresh Or Dried	20	113	-	-	-	-
080450	Guavas, Mangoes And Mangosteens, Fresh Or Dried	1,080	1,261	-	-	-	-
080510	Oranges, Fresh	28,223	29,208	673	45	2.4	0.2
080520	Mandarins (Inc Tanger Etc) & Citrus Hybr Fr Or Dri	844	950	-	-	-	-
080540	Grapefruit, Fresh Or Dried	30	165	-	-	-	-
080550	Lemons And Limes, Fresh Or Dried	14	10	-	-	-	-
080590	Citrus Fruits, Inc Kumquats, Nesoi, Fresh Or Dried	-	3,567	-	1	-	-
080610	Grapes, Fresh	9,337	12,868	4,401	6,638	47.1	51.6
080620	Grapes, Dried (Including Raisins)	43,385	53,064	-	-	-	-
080711	Watermelons, Fresh	-	14	-	-	-	-
080719	Melons(Except Watermelons) And Papayas, Fresh	162	281	-	-	-	-
080810	Apples, Fresh	236,847	215,269	68,302	115,339	28.8	53.6
080830	Pears, Fresh	15,441	20,636	3,683	3,629	23.8	17.6
080910	Apricots, Fresh	56	53	0	0	0.1	0.4
080921	Sour Cherries, Fresh	696	497	98	21	14.0	4.3
080929	Cherries, Fresh, Nesoi	568	463	34	41	6.1	8.8
080930	Peaches, Including Nectarines, Fresh	42	80	3	10	7.7	12.3
080940	Plums, Prune Plums And Sloes, Fresh	2,333	2,574	569	2	24.4	0.1

081010	Strawberries, Fresh	5	8	-	-	-	-
081020	Raspberries/Blckberries/Mulberries/Loganberrs Frsh	3	28	-	-	-	-
081040	Cranberries, Blueberries, Etc, Fresh	5	117	-	104	-	88.5
081050	Kiwi Fruit (Chinese Gooseberries) Fresh	12,966	22,081	-	-	-	-
081060	Durians, Fresh	13	25	-	-	-	-
081090	Fruit Nesoi, Fresh	6,268	8,665	55	12	0.9	0.1
081110	Strawberries, Uncooked/Cooked By Water, Frozen	36	30	-	-	-	-
081120	Raspberries/Blckberries/Etc Uncookd/Cookd Water Fz	317	305	-	-	-	-
081190	Fruit Nesoi & Nuts, Sweetened Etc Or Not, Frozen	578	108	-	-	-	-
081210	Cherries, Provisionally Preserved, Inedible	0	8	-	-	-	-
081310	Apricots, Dried	12,609	14,054	-	-	-	-
081320	Prunes, Dried	852	1,573	432	1,102	50.7	70.0
081330	Apples, Dried	1,158	850	-	-	-	-
081340	Fruit, Dried, Nesoi, Ex That Of Heading 0801-0806	726	901	48	2	6.6	0.2
081350	Mixtures Of Dried Fruits, Nuts, Or Fruits And Nuts	1	6	-	-	-	-
081400	Peel, Citrus Or Melon, Frsh/Frzn/Dried/Provsl Pres	5	5	-	-	-	-
090112	Coffee, Not Roasted, Decaffeinated	-	82	-	-	-	-
090121	Coffee, Roasted, Not Decaffeinated	1,050	772	233	331	22.2	42.9
090122	Coffee, Roasted, Decaffeinated	230	17	-	9	-	52.3
090190	Coffee Substitutes With Coffee;Coffee Husks,Skins	763	515	-	26	-	5.1
090411	Pepper Of Genus Piper, Neither Crushed Nor Ground	180,816	195,341	12	8	-	-
090412	Pepper Of The Genus Piper, Crushed Or Ground	650	137	47	22	7.3	15.8
090421	Capsicum (Peppers) Or Pimenta (Allspice), Dried	1,102	1,064	-	-	-	-
090422	Capsicum/Peppers, Pimenta/Allspice, Crushed/Ground	1,099	399	93	32	8.5	8.1
090510	Vanilla, Neither Crushed Nor Ground	3,079	3,841	-	-	-	-
090520	Vanilla, Crushed Or Ground	177	368	22	106	12.1	28.8
090611	Cinnamon, Neither Crushed Nor Ground	3,316	3,783	0	2	-	0.1
090619	Cinnamon-Tree Flowers, Neither Crushed Nor Ground	45,808	39,775	-	-	-	-
090620	Cinnamon & Cinnamon-Tree Flowers, Crushd Or Ground	503	913	0	12	-	1.3
090710	Cloves, Neither Crushed Nor Ground	104,268	151,594	-	-	-	-
090720	Cloves, Crushed Or Ground	42	114	-	-	-	-
090811	Nutmeg, Neither Crushed Nor	5,804	3,173	-	-	-	-

	Ground						
090812	Nutmeg, Crushed Or Ground	5	5	-	-	-	-
090821	Mace, Neither Crushed Nor Ground	10,108	11,767	-	-	-	-
090822	Mace, Crushed Or Ground	697	658	-	-	-	-
090831	Cardamoms, Neither Crushed Nor Ground	38,470	54,041	-	-	-	-
090832	Cardamoms, Crushed Or Ground	447	801	-	-	-	-
090921	Coriander Seeds, Neither Crushed Nor Ground	16,160	18,732	1,605	779	9.9	4.2
090922	Coriander Seeds, Crushed Or Ground	74	28	-	-	-	-
090931	Cumin Seeds, Neither Crushed Nor Ground	1,040	6,250	-	48	-	0.8
090961	Anise Badian Etc Juniper Berries Nt Crushed/Ground	20,913	24,878	-	-	-	-
090962	Anise Badian Seed Etc Juniper Berries Crush/Ground	541	657	-	-	-	-
091011	Ginger, Neither Crushed Nor Ground	17,926	16,026	-	-	-	-
091012	Ginger, Crushed Or Ground	256	963	-	1	-	0.1
091020	Saffron	10,751	9,668	-	-	-	-
091030	Tumeric (Curcuma)	12,640	21,105	-	-	-	-
091091	Mixtures Of Spices Provided For In Diff Headings	550	899	-	-	-	-
091099	Spices, Nesoi	3,614	7,095	73	5	2.0	0.1
110520	Flakes, Granules And Pellets Of Potatoes	2,407	3,541	-	-	-	-
110610	Flour & Meal Of Dried Leguminous Vegetbles Of 0713	-	8	-	-	-	-
110630	Flour, Meal & Powder Of The Products Of Chapter 8	2,787	2,664	392	47	14.0	1.8
121120	Ginseng Roots, Fresh Or Dried	76	66	-	-	-	-
121299	Vegetble Prodcts (Inc Unrt Chicory Rt) Edible Neso	73	156	1	53	2.0	34.1
151710	Margarine, Excluding Liquid Margarine	0	1	-	-	-	-
152110	Vegetable Waxes (Other Than Triglycerides)	2,959	2,241	17	86	0.6	3.9
160100	Sausages, Similar Prdt Meat Etc Food Prep Of These	805	274	-	-	-	-
160210	Homogenized Preps Of Meat, Meat Offal Or Blood	6	14	-	-	-	-
160231	Prepared Or Preserved Turkey Meat, Nesoi	136	73	-	-	-	-
160239	Prepared Etc. Poultry Meat, Except Turkey, Nesoi	50	65	-	-	-	-
160241	Prepared Or Preserved Swine Nesoi, Hams Etc	730	531	-	-	-	-
160242	Prepared Or Preserved Swine Nesoi, Shoulders Etc	48	26	-	-	-	-

160249	Prepared Etc. Swine Meat, Offal, Etc. Nesoi	776	1,050	-	-	-	-
160290	Anml Meat Nesoi Blood Preps Of Any Anml, Prep/Pres	-	36	-	-	-	-
160300	Extracts Etc. Of Meat, Fish, Crustaceans, Etc.	320	116	-	-	-	-
170211	Lactose & Lactose Syrup Cont 99 More Lactse By Wt	46,292	40,696	7,516	7,848	16.2	19.3
170219	Lactose In Solid Form And Lactose Syrup, Nesoi	9,603	7,295	4,817	1,958	50.2	26.8
170410	Chewing Gum, Whether Or Not Sugar Coated	496	577	55	6	11.1	1.1
170490	Sugar Confection (Incl Wh Choc), No Cocoa, Nesoi	16,787	15,167	1,213	717	7.2	4.7
180610	Cocoa Powder Cont Added Sugar Or Other Sweetening	41	1,328	21	14	52.4	1.1
180620	Chocolate Prep Nesoi, In Blocks Etc. Over 2 Kg	20,268	15,532	157	131	0.8	0.8
180631	Chocolate & Othr Cocoa Preps, Not Bulk, Filled	24,176	24,178	-	-	-	-
180632	Chocolate & Othr Cocoa Preps, Not Bulk, Not Filled	6,622	1,333	-	-	-	-
180690	Cocoa Preparations, Not In Bulk Form, Nesoi	40,423	31,927	1,106	527	2.7	1.6
190110	Food Preparations For Infants, Retail Sale Nesoi	5,826	10,235	3	1	0.1	-
190120	Mixes & Doughs For Prep Of Bakers Wares Hdg 1905	2,618	2,523	450	290	17.2	11.5
190190	Malt Extract; Flour, Meal, Milk Etc Prod Etc Nesoi	2,850	3,451	40	3	1.4	0.1
190219	Pasta, Uncooked, Not Stuffed Etc., Nesoi	11,271	10,219	5	3	-	-
190220	Pasta, Stuffed, Whether Or Not Cooked, Etc.	789	468	-	0	-	-
190230	Pasta, Prepared Nesoi	2,444	2,511	12	6	0.5	0.2
190240	Couscous	505	512	1	0	0.3	-
190300	Tapioca And Substitutes From Starch In Flakes, Etc	329	111	-	0	-	-
190410	Prep Food, Swelling/Roasting Cereal/Cereal Product	2,098	1,144	356	361	17.0	31.5
190420	Prep Food From Unroasted Cereal Flakes/Mixtures	315	322	115	132	36.4	41.1
190430	Bulgur Wheat, Pre-Cooked Or Otherwise Prepared	3	4	-	-	-	-
190490	Cereals (Not Corn) In Grain Form, Prepared, Nesoi	4,785	383	173	182	3.6	47.5
190510	Crispbread	28	96	-	-	-	-
190520	Gingerbread And The Like	35	0	-	-	-	-
190531	Cookies (Sweet Biscuits)	5,474	5,751	47	20	0.9	0.3
190532	Waffles And Wafers	5,460	12,418	172	98	3.2	0.8
190540	Rusks, Toasted Bread And Similar	3,236	2,376	24	23	0.7	1.0

	Toasted Products						
190590	Bread, Pastry, Cakes, Etc Nesoi & Puddings	9,017	11,529	211	604	2.3	5.2
200110	Cucumbers, Gherkins, Prep/Pres Vinegar/Acetic Acid	190	25	0	0	0.1	0.4
200190	Vegt/Fruit/Nuts Etc Nesoi Prep/Pres By Vinegar Etc	573	507	2	2	0.3	0.5
200210	Tomatoes Whole/Pieces Prep/Pres Ex Vinegar Etc	277	369	-	-	-	-
200290	Tomato Paste Etc, Not Prepared With Vinegar Etc.	7,969	6,193	773	1,091	9.7	17.6
200310	Mushrooms Prep/Pres Ex By Vinegar/Acetic Acid	99	104	-	1	-	0.8
200390	Mushrooms,Nesoi,Prep/Pres Other Than By Vinegar	136	79	-	-	-	-
200410	Potatoes, Prepared Etc., No Vinegar Etc., Frozen	752	165	330	21	43.9	12.8
200490	Vegetables Nesoi, Prep Etc., No Vinegar Etc, Frozn	1,670	789	425	13	25.5	1.6
200510	Homogenized Vegetables (Baby Food Etc), Not Frozen	48	43	-	-	-	-
200520	Potatoes, Prepared Etc. No Vinegar Etc, Not Frozen	128	88	15	0	11.5	0.5
200540	Peas (Pisum Sativum) Prep/Pres Nesoi, Not Frozen	450	158	-	-	-	-
200551	Beans, Shelled, Prep Etc., No Vinegar Etc, Not Frz	21	233	-	9	-	3.9
200559	Beans, Not Shelled, Prep/Pres Nesoi, Not Frozen	173	217	8	3	4.	1.4
200560	Asparagus, Prepared Or Preserved Nesoi, Not Frozen	56	3	3	0	5.9	4.0
200570	Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen	2,067	2,561	-	-	-	-
200580	Sweet Corn, Prepared/Preserved Nesoi, Not Frozen	1,606	1,164	-	-	-	-
200591	Bamboo Shoots Prpd/Prsvd Exc By Vngr/Acetc Acd/Sug	117	107	-	-	-	-
200599	Veg & Mix Prpd/Prsvd Exc Vinegar/Acetic Acid/Sugar	1,098	585	48	0	4.4	-
200600	Veg/Fruit/Nuts/Fruit-Peel Etc, Preserved By Sugar	2,070	2,608	130	202	6.3	7.8
200710	Homogenized Preparatns Of Fruit (Baby Food Etc)	54	202	-	30	-	14.7
200791	Citrus Fruit Jams, Jellies, Marmalades, Pastes Etc	1	49	-	-	-	-
200799	Jams, Fruit Jellies, Pastes Etc Nesoi, Nut Pastes	4,481	4,846	412	408	9.2	8.4
200811	Peanuts, Prepared Or Preserved, Nesoi	2,083	1,102	452	500	21.7	45.4
200819	Nuts (Exc Peanuts) And Seeds, Prepared Etc. Nesoi	11,971	8,227	415	543	3.5	6.6

200820	Pineapples, Prepared Or Preserved Nesoi	1,643	1,309	-	-	-	-
200830	Citrus Fruit (Including Mixtures), Prep Etc Nesoi	351	1,046	58	111	16.5	10.6
200840	Pears, Prepared Or Preserved, Nesoi	1	14	-	-	-	-
200850	Apricots, Prepared Or Preserved, Nesoi	344	222	-	-	-	-
200860	Cherries, Prepared Or Preserved, Nesoi	1,935	1,246	12	23	0.6	1.8
200870	Peaches, Prepared Or Preserved, Nesoi	389	292	-	-	-	-
200880	Strawberries, Prepared Or Preserved Nesoi	1,792	1,141	-	1	-	0.1
200891	Palm Hearts, Prepared Or Preserved Nesoi	8	25	-	-	-	-
200893	Cranberries, Prepared Or Preserved, Nesoi	930	840	916	828	98.4	98.6
200897	Mix Of Fruit/Nut/Plant Parts, Prep/Preserved Nesoi	45	8	-	-	-	-
200899	Fruit & Edible Plant Parts Nesoi, Prep Etc. Nesoi	2,405	2,942	50	176	2.1	6.0
200911	Orange Juice, Frozen, Sweetened Or Not	5,151	8,014	196	1,358	3.8	16.9
200912	Orange Juice, Not Frozen,Of A Brix Value Not Ov 20	80	150	-	-	-	-
200919	Orange Juice, Other Than Frozen, Sweetened Or Not	546	926	-	1	-	0.1
200929	Grapefruit Juice,Nesoi,Nt Fortorified W Vitamins	536	522	4	10	0.7	1.9
200931	Juice Of 1 Citrus Fruit, Brix Value <=20, Nt Fortf	-	10	-	-	-	-
200939	Juice Of Other Single Cirtus Fruit,Nt Frot,Nesoi	3,495	2,968	-	-	-	-
200941	Pineapple Juice Of Brix Value	207	156	-	-	-	-
200949	Pineapple Juice, Nt Fort., Unfermnt, Nesoi	1,505	1,730	-	-	-	-
200950	Tomato Juice (Dry Weight Content Less Than 7)	25	28	-	-	-	-
200961	Grape Juice Of A Brix Value <= 20, Nt Fort W/Vitam	7	6	-	-	-	-
200969	Grape Juice, Nesoi,Nt Fortified With Vitamins/Min	1,398	1,356	-	-	-	-
200971	Apple Juice Of A Birx Value <=20,Nt Fort W Vitamin	18	25	-	-	-	-
200979	Apple Juice, Nesoi,Nt Fortified W Vitamins, Unferm	6,938	5,917	17	10	0.2	0.2
200981	Cranberry Juice Nt Fortified Unfermented No Spirit	145	151	42	55	28.9	36.2
200989	Juice Of Single Fruit/Veg, Not Fortified Etc Nesoi	7,770	10,793	2,711	4,853	34.9	45.0

200990	Mixtures Of Fruit And/Or Vegetable Juices	2,067	558	932	38	45.1	6.8
210111	Coffee Extracts, Essences Etc. & Prep Therefrom	9,855	7,337	343	61	3.5	0.8
210112	Coffee Extracts/Essences/Concentrates $ Prep	40	27	-	-	-	-
210120	Tea Or Mate Extracts/Essences/Concentrates & Preps	1,170	1,357	284	174	24.3	12.8
210130	Roasted Chicory & Other Roasted Coffee Substitutes	79	86	74	55	93.2	63.9
210210	Yeasts, Active	10,424	11,631	1,014	1,486	9.7	12.8
210220	Yeasts, Inactive; Oth Single-Cell Dead Micro-Orgnm	974	798	2	11	0.2	1.3
210230	Baking Powders, Prepared	82	283	79	280	96.4	98.9
210310	Soy Sauce	454	314	-	-	-	-
210320	Tomato Ketchup And Other Tomato Sauces	2,596	2,469	1,593	1,961	61.4	79.4
210330	Mustard Flour And Meal And Prepared Mustard	335	394	248	331	73.9	84.0
210390	Sauces Etc. Mixed Condiments And Seasonings Nesoi	8,886	10,679	1,955	1,843	22.0	17.
210410	Soups And Broths And Preparations Therefor	501	341	138	84	27.4	24.
210420	Homogenized Composite Food Prep (Baby Food Etc)	113	28	-	-	-	-
210500	Ice Cream And Other Edible Ice, With Cocoa Or Not	3,648	5,002	-	0	-	-
210690	Food Preparations Nesoi	59,820	53,821	13,854	11,628	23.2	21.6
220210	Waters, Incl Mineral & Aerated, Sweetnd Or Flavord	8,572	5,350	159	9	1.8	0.2
220290	Nonalcoholic Beverages, Nesoi	124,881	123,280	2,393	1,208	1.9	1.0
220300	Beer Made From Malt	4,648	8,304	1	50	-	0.6
220410	Sparkling Wine Of Fresh Grapes	6,506	8,032	34	3	0.5	-
220421	Wine, Fr Grape Nesoi & Gr Must W Alc, Nov 2 Liters	5,891	6,348	32	95	0.5	1.5
220429	Wine, Fr Grape Nesoi & Gr Must With Alc, Nesoi	7,349	8,861	1,371	997	18.7	11.3
220430	Grape Must Partly Ferment, Ov .5 Alcohol, Nesoi	8	0	-	-	-	-
220510	Vermouth/Grpe Wine Flavored Wth Plants Etc Ctr 2L<	128	85	-	-	-	-
220590	Vermouth/Grape Wine Flavored Wth Plants Etc Ov 2Ls	69	11	-	-	-	-
220600	Fermented Beverages Nesoi (Cider, Perry, Mead Etc)	144	114	-	-	-	-
220900	Vinegar & Substitutes For Vinegar From Acetic Acid	4,792	4,387	272	492	5.7	11.2
230910	Dog And Cat Food, Put Up For Retail Sale	19,509	21,299	224	88	1.1	0.4

350110	Casein	174	143	26	36	14.8	25.1
350190	Caseinates & Other Casein Derivatives; Casein Glue	11,239	7,774	715	188	6.4	2.4
350211	Egg Albumin, Dried	13	47	-	-	-	-
350220	Milk Albumin,Inc Concen Of 2 Or More Whey Proteins	10,383	12,385	4,993	5,705	48.1	46.1
350290	Albumin & Albumin Derivatives, Nesoi	4,346	2,647	941	988	21.7	37.3
350510	Dextrins And Other Modified Starches	41,928	44,080	7,664	8,824	18.3	20.0
350790	Enzymes And Prepared Enzymes, Nesoi	83,560	89,152	6,642	10,142	7.9	11.4
Fish & Seafood Products		58,662	68,867	11,026	12,315	18.8	17.9
030289	Fish, Fresh Or Chilled, Nesoi	16,324	18,816	-	-	-	-
030616	Cold-Water Shrimps And Prawns, Frozen	10,394	10,962	10,372	10,823	99.8	98.7
030499	Fish Meat, Frozen, Except Steaks And Fillets Nesoi	11,303	10,438	523	462	4.6	4.4
030462	Catfish Fillets, Frozen	4,607	5,865	-	-	-	-
030559	Fish, Dried, Whether Salted But Not Smoked Nesoi	3,960	4,715	-	-	-	-
030389	Fish, Frozen, Nesoi	3,557	4,192	-	-	-	-
030617	Shrimps And Prawns, Frozen, Nesoi	688	2,340	-	676	-	28.9
030279	Nile Perch And Snakeheads, Fresh Or Chilled	1,193	2,281	-	-	-	-
030441	Pacific, Atlantic, Danube Salmon Fillet Fresh/Chll	220	1,156	-	-	-	-
030615	Norway Lobsters, Frozen	383	1,111	-	-	-	-
030493	Tilapia Catfish Carp Eels Nile Perch Etc Frz Nesoi	46	976	-	-	-	-
030353	Sardines, Sardinella, Brisling Or Sprats, Frozen	80	768	-	-	-	-
030214	Atlantic Salmon And Danube Salmon Fresh Or Chilled	663	709	-	-	-	-
030219	Salmonidae, Nesoi, Fresh Or Chilled	3	511	-	-	-	-
030469	Carp, Eel And Snakehead Fillets, Frozen	205	405	-	-	-	-
030313	Atlantic Salmon And Danube Salmon, Frozen	145	374	-	-	-	-
030384	Seabass, Frozen	352	343	-	-	-	-
030459	Fish Meat Fresh/Chilled Exc Fillets & Steaks Nesoi	675	325	-	-	-	-
160569	Aquatic Invertebrates, Prepared Or Preserved Nesoi	281	306	-	-	-	-
030494	Alaska Pollock, Frozen, Except Fillets	-	267	-	267	-	100.0
160510	Crab, Prepared Or Preserved	94	219	2	-	2.4	-
030329	Salmonidae Nesoi, With Bones, Frozen	186	212	-	-	-	-
160414	Tunas/Skipjack/Bonito Prep/Pres	263	180	17	0	6.5	-

	Not Minced						
030739	Mussels, Frozen, Dried, Salted Or In Brine	275	162	-	14	-	8.7
030489	Fish Fillets, Frozen, Nesoi	-	134	-	-	-	-
030541	Pacific, Atlantic And Danube Salmon, Smoked	316	132	-	-	-	-
030449	Fish Fillets, Fresh Or Chilled, Nesoi	3	128	-	-	-	-
030369	Fish Bregmacerotidae Euclichthyidae Etc Frzn Nesoi	9	126	-	-	-	-
030354	Mackerel, Frozen	-	103	-	-	-	-
030729	Scallops Incl Queen, Frozen/Dried/Salted/In Brine	14	101	-	1	-	0.9%
030741	Cuttle Fish & Squid, Live, Fresh Or Chilled	214	98	-	-	-	-
030759	Octopus, Frozen, Dried, Salted Or In Brine	15	75	-	72	-	96.0
030749	Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine	943	70	-	-	-	-
030799	Molluscs Etc Nesoi, Frozen, Dri, Salted Or In Brin	9	46	-	-	-	-
030471	Cod Fillets, Frozen	-	41	-	-	-	-
030614	Crabs, Including In Shell, Frozen	34	35	-	-	-	-
030481	Pacific, Atlantic And Danube Salmon Fillets Frozen	-	33	-	-	-	-
030624	Crabs, Raw (Live Etc), Cooked (Stm Etc) Not Frozen	-	24	-	-	-	-
160411	Salmon, Prepared Or Preserved, Whole Or Pieces	24	21	9	-	36.3	-
160415	Mackerel, Prepared Or Preserved, Not Minced	5	13	-	-	-	-
160412	Herrings Prep Or Pres, Whole Or In Pieces	3	9	1	-	46.4	-
030629	Crustcns Nesoi Lve/Fr/Chl/Dry/Sltd/Brn Flrs H Cnsm	20	7	-	-	-	-
030319	Pacific Salmon, Nesoi, Excl Filet, Liver,Roe, Froz	-	6	-	-	-	-
030324	Catfish, Frozen	-	6	-	-	-	-
030221	Halibut/Greenland Turbot Ex Fillet, Lvr, Roe Fr/Ch	6	5	-	-	-	-
160555	Octopus, Prepared Or Preserved	-	3	-	-	-	-
160413	Sardines/Sardinella/Brisling Prep/Pres, Not Minced	18	3	7	-	38.8	-
030569	Fish Nesoi, Salted Or In Brine, Not Dry Or Smoke	31	3	-	-	-	-
160551	Oysters, Prepared Or Preserved	-	2	-	-	-	-
030251	Cod, Fresh Or Chilled	0	2	-	-	-	-
030342	Yellowfin Tuna Except Fillets, Liver & Roes Frozen	60	1	-	-	-	-
030731	Mussels, Live, Fresh Or Chilled	13	1	-	-	-	-
160529	Shrimp/Prawns Prep/Preserved In	-	1	-	-	-	-

	Airtight Container						
160420	Fish, Prepared Or Preserved, Nesoi	1	1	-	-	-	-
160431	Caviar	1	0	-	-	-	-
030721	Scallops Incl Queen Scallops, Live, Fresh, Chilled	2	0	-	-	-	-
030244	Mackerel, Fresh Or Chilled	-	0	-	-	-	-
	Agricultural Products total	**21,710,340**	**22,766,345**	**1,066,974**	**1,154,701**	**4.9**	**5.1**
	Agricultural Fish and Forestry Products	**24,541,295**	**25,317,232**	**1,147,063**	**1,212,057**	**4.7**	**4.8**

Table C(I): India: Top 15 Suppliers of Consumer Foods

Partner Country	United States Dollars			Share		
	2013	2014	2015	2013	2014	2015
World	3,227,562,387	3,890,257,216	4,489,082,626	100.00	100.00	100.00
United States	586,306,220	643,495,949	757,827,349	18.17	16.54	16.88
Cote d Ivoire	197,405,756	353,847,593	414,727,112	6.12	9.10	9.24
Sri Lanka	125,350,610	146,790,244	241,491,644	3.88	3.77	5.38
Afghanistan	152,675,038	164,492,483	227,563,047	4.73	4.23	5.07
Tanzania	183,282,887	184,096,095	223,352,300	5.68	4.73	4.98
Guinea-Bissau	131,936,321	160,105,837	197,156,521	4.09	4.12	4.39
Benin	100,252,031	143,782,978	191,942,710	3.11	3.70	4.28
Nepal	139,507,670	169,978,217	173,006,033	4.32	4.37	3.85
Australia	112,875,160	118,378,159	162,455,424	3.50	3.04	3.62
Vietnam	88,476,082	151,520,568	148,422,596	2.74	3.89	3.31
Indonesia	73,711,295	83,135,321	126,258,479	2.28	2.14	2.81
Iran	85,399,255	98,090,620	116,924,456	2.65	2.52	2.60
China	164,892,227	167,512,078	111,083,051	5.11	4.31	2.47
Madagascar	29,874,069	40,025,594	101,694,251	0.93	1.03	2.27
Pakistan	102,701,342	112,019,729	101,382,511	3.18	2.88	2.26

Source: USDA/FAS Global Trade Database

Table C (II): India: Top 15 Suppliers of Fish and Seafood Products

Partner Country	United States Dollars			Share		
	2013	2014	2015	2013	2014	2015
World	47,821,995	58,661,853	68,867,002	100.00	100.00	100.00
Bangladesh	18,525,001	20,769,050	25,701,815	38.74	35.40	37.32
Vietnam	11,800,906	14,750,000	16,943,966	24.68	25.14	24.60
United States	5,586,487	11,025,605	12,315,070	11.68	18.80	17.88
Myanmar	1,254,116	2,052,800	2,696,624	2.62	3.50	3.92
United Kingdom	833,924	1,477,029	2,191,288	1.74	2.52	3.18
Indonesia	633,352	1,602,157	1,072,898	1.32	2.73	1.56
Thailand	927,291	894,192	995,368	1.94	1.52	1.45
Denmark	552,598	754,017	883,280	1.16	1.29	1.28

Singapore	986,596	609,730	791,006	2.06	1.04	1.15
Norway	4,783	248,863	779,287	0.01	0.42	1.13
Ecuador	-	-	771,922	-	-	1.12
Japan	939,440	917,070	767,525	1.96	1.56	1.11
China	357,874	444,020	563,196	0.75	0.76	0.82
Pakistan	439,840	175,299	517,079	0.92	0.30	0.75
United Arab Emirates	489,236	217,156	511,544	1.02	0.37	0.74

Source: USDA/FAS Global Trade Database

APPENDIX B: INDIA: MAJOR FOOD AND AGRICULTURAL TRADE SHOWS IN

JANUARY 2017

Food & Grocery Forum India 2017
Jan 31 – Feb 2, MMRDA Ground, Mumbai
www.indiafoodforum.com
Organized by Images Multimedia Pvt. Ltd., India Food Forum combines India’s leading food conference with a concurrent trade show. USDA participated in the 2014, 2015, 2016 shows.

Food Hospitality World 2017
Jan 19 – 21, MMRDA Ground, Mumbai
www.fhwexpo.in
Organized by Global fairs & Media Pvt Ltd., the show caters to the food, beverage and hospitality industry. USDA participated in the 2014 and 2015 shows. The show takes place in Bangalore and Goa as well.

MARCH 2017

AAHAR International Food Fair 2017
Mar 7 -11, Pragati Maidan, New Delhi
www.aaharinternationalfair.com
Organized by the government-run Indian Trade Promotion Organization, AAHAR caters to the processed food and hospitality sector including machinery & technology. This is India’s oldest food show. USDA participated the show in 2016.

SEPTEMBER 2017

Annapoorna, World of Food India
Sept 14 – 16, Bombay Exhibition Center, Mumbai
www.worldoffoodindia.com
A joint-venture of Koelnmesse and the Federation of Indian Chamber of Commerce and Industry (FICCI), Annapoorna – World of Food India is an international exhibition on food and beverage products in India. This is a USDA endorsed show.

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

COOPERATORS DEALING IN FOOD OR AGRICULTURE 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 4492
Mobile: +91-9810955533
E-mail: sudarshan.mazumdar@gmail.com

American Pistachio Growers
Website: http://americanpistachios.org/
Local Representative Office Address:
i2i Consulting
Head Office: 10, Sunder Nagar
New Delhi – 110 003
Phone: 91-11-46590340/41004670
Email: devna@i2iconsulting.biz
Homepage: www.i2iconsulting.biz

California Table Grape Commission
Website: www.tablegrape.com
Local Representative Office Address:
The SCS Group
651, Pace City II, Sector 37
Gurgaon, Haryana 122 004
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: ctgc@scs-group.com
Home page: http://www.scs-group.com

California Walnut Board & Commission
Website: http://www.walnuts.org/walnuts/
Local Representative Office Address:
The SCS Group
651, Pace City II, Sector 37
Gurgaon, Haryana 122 004
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: walnuts@scs-group.com
Home page: http://www.scs-group.com

Cotton Council International
Website: www.cottonusa.org
Local Representative Office Address:
Antar Advisors
B/91, Vishal Residency
Ramdev Nagar-Anand Nagar Road
Satellite – Ahmedabad – 380015, Gujarat
Tel: +91-79-4030 0131
Mob: +91-96-8764-5345
Fax: +91-79-4032 7897
Email – antaradvisors@gmail.com / peush_narang@yahoo.com

Cranberry Marketing Committee
Local Representative Office Address:
The SCS Group
651, Pace City II, Sector 37
Gurgaon, Haryana 122 004
Ph: +91-124-434 4500
Fax: +91-124-434 4501
Email: services@scs-group.com
Home page: www.uscranberries.com

Distilled Spirits Council of the United States
Website: http://www.discus.org/index.asp
Local Representative Office Address:
Creative Consultants
8 Joel, 3rd Floor
St. Michael's School Marg, Off L J Cross Road No. 1,
Opp. St. Michael Pre-primary School
Mahim, Mumbai 400 016
Ph: +91-22-2445 1033
Fax: +91-22-2445 2750
Mobile: +91 9820220424
E-Mail: shatbhi@gmail.com

Food Export Association of the Midwest USA
Website: www.foodexport.org
Local Representative Office Address:
The SCS Group
651, Pace City II, Sector 37
Gurgaon, Haryana 122 004
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: foodexportusa@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
651, Pace City II, Sector 37
Gurgaon, Haryana 122 004
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: foodexportusa@scs-group.com
Home page: http://www.scs-group.com

Global Cold Chain Alliance
Website: http://www.gcca.org
Local Representative Office Address:
i2i Consulting
Head Office: 10, Sunder Nagar
New Delhi – 110 003
Phone: 91-11-46590340/41004670
Email: atul@i2iconsulting.biz
Homepage: www.i2iconsulting.biz

Pear Bureau Northwest
Website: www.usapears.org
Local Representative Office Address:
The SCS Group
651, Pace City II, Sector 37
Gurgaon, Haryana 122 004
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: usapears@scs-group.com
Home page: http://www.scs-group.com

Southern United States Association
Website: www.susta.org
Local Representative Office Address:
Head Office: 10, Sunder Nagar
New Delhi – 110 003
Phone: 91-11-46590340/41004670
Email: devna@i2iconsulting.biz
Homepage: www.i2iconsulting.biz

US Apple Export Council
Website: http://www.usaapples.com/en/index.html
Local Representative Office Address:
The SCS Group,
651, Pace City II, Sector 37

Gurgaon, Haryana 122 004
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: usa.apples@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. Highbush Blueberry Council
Website: http://www.blueberry.us/home.html
Local Representative Office Address:
30/25, Knowledge Park – III,
Greater Noida 201306, NCR Delhi
Phone: +91 98101 58318
Email: rajkapoor@aibtm.in

U.S. Grains Council
Website: www.grains.org
Local Representative Office Address:
Techpro (India) Pvt. Limited
431-A, Sector 45
Gurgaon – 122 003
Tel: +91-124-2381-430
Mb: +91-98110-61516
E Mail: amit@techproindia.in and usgcindia@gmail.com
Website: www.techproindia.in
Blog: www.techproindia.in/usgc

U.S. Pecan Council
Website: http://www.uspecans.org/
Local Representative Office Address:
i2i Consulting
Head Office : 10, Sunder Nagar
New Delhi – 110 003
Phone: 91-11-46590340/41004670
Email: devna@i2iconsulting.biz
Homepage: www.i2iconsulting.biz

U.S. Soybean Export Council, Inc
Website: www.ussec.org
Local Representative Office Address:
Director – India and ASC Soy Food Program
R 11/88 Raj Nagar,
Ghaziabad – 201 002, India
Phone: 91.120.2821456
Mobile: 91.9871917474
Email: RSharma@ct.ussec.org; vanand@ct.ussec.org

Washington State Apple Commission
Website: www.bestapples.com
Local Representative Office Address:
The SCS Group
651, Pace City II, Sector 37
Gurgaon, Haryana 122 004
Ph: +91-124-434 4500
Fax: +91-124-434 4501
E-Mail: apples@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 (AGRICOOP)
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#Draft20Notifications
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

All India Food Processors Association (AIFPA)
American Chambers of Commerce and Industry (AMCHAM India)
Associated Chambers of Commerce and Industry (ASSOCHAM)
The Advertising Standards Council of India (ASCI)
Compound Livestock Feed Manufacturers Association (CLFMA)
Confederation of Indian Trade and Industry (CII)
Council of Leather Exports (CLE)
Federation of Hotels and Restaurants in India (FHRAI)
Forum of Indian Food Importers (FIFI)
Federation of Indian Chambers of Commerce and Industry (FICCI)
Indo-American Chambers of Commerce (IACC)
Indian Dairy Association (IDA)
Indian Importers Association (IIA)
Indian Sugar Mills Association (ISMA)
National Restaurant Association of India (NRAI)
Retailers Association of India (RAI)
The Solvent Extractors Association of India (SEA)
United States India Business Council (USIBC)