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# India

# Food Processing Ingredients

# India's Food Processing Sector Poised for Growth


**Approved By:**
Adam Branson
**Prepared By:**
Radha Mani and Varun Anthony



**Report Highlights:**
India's food processing sector continues to grow in response to changing demographics, evolving preferences for branded and convenient items, retail and food service sector modernization, and government efforts to develop food manufacturing. Increasing health consciousness is influencing the development and sales growth of packaged foods. Imports of non-standardized processed foods and ingredients remain a challenge, though regulatory reforms are supporting progress.

**Post:**
New Delhi

**Executive Summary:**

**Section I. Market Summary**

Increasing urbanization, lifestyle changes, greater affluence, and increased rates of women working outside of the home are driving demand for processed foods. According to the India Brand Equity Foundation (IBEF) 2017 Indian Food Processing report, the Indian food processing industry accounts for 32 percent of the country's total food market. It contributes around 8.8 and 8.4 percent of Gross Value Added (GVA) in Manufacturing and Agriculture, respectively. In addition, it accounts for 13 percent of India's exports and six percent of total industrial investment.

As per the 2016-2017 Annual Survey of Industries, there are 37,175 registered food processing units in the country that employ approximately 1.7 million people in food and beverage manufacturing. According to an Assocham Grant Thorton study, the Indian food processing sector has the potential to attract $33 billion in investment and generate employment for 9 million persons by 2024.

Most food is sold fresh or partially processed from stalls, street carts, and open-air shops. A significant segment of food processing is in primary processing (e.g., milling and crushing) of cereals, pulses and oilseeds along with the simple processing of foods such as traditional pickles, spice mixes and snack foods (cookies and savory snacks). Until the late 1990s, most of the food processing sector was limited to small-scale industries where only small firms were allowed to obtain a license to process foods. In recent years, laws changed to allow large firms to invest and Indian and global food companies have entered the sector. Despite increasing investment and modernization in the industry, various challenges exist, including; dynamic policy regulations; lack of appropriate processing; lack of training in food processing/safety; storage and transportation infrastructure; price constraints; and, several sanitary or phytosanitary requirements that limit market access.

The Government of India (GOI) 'Make in India' campaign launched in 2014 facilitates investment in manufacturing in various sectors; including, food processing. With the campaign, the government aims to reduce food losses and keep food inflation in check while generating local employment and demand for local agricultural products. Food parks are under development across the country to support domestic demand for processed foods, beverages, and ingredients for food service and retail sale.

**Key Factors Driving Growth in the Indian Food Processing Sector**

**Demographic Changes -** India's current population is nearly 1.3 billion, up from 670 million in 1980. The pace of growth is slowing, but the country's age structure promises continued gains for some time. The median age is rising but is still relatively low – just 27.9 years in 2016. About 33.5 percent of India's population is urban and nearly 61 percent is under the age of 35. The Indian government projects that there will be 400-500 million people in the work force before 2025, but if female empowerment takes off that figure might increase to 600 or 700 million.

**Rising Disposable Incomes -** Income growth has increased consumer appetites and discretionary spending. This shift in spending appears promising for manufacturers and service providers, especially in hotel, leisure, healthcare and household goods and service categories. According to the GOI, the per capita income during 2016-17 was U.S. $1,599 (INR 103,291); a rise of 9.7 percent over the previous period. The per capita gross domestic product was U.S. $6,700.

**Changing Lifestyles and Women in the Workplace -** Urbanization and the increasing number of working women has pushed consumers to look for products offering convenience. This is leading to trading up from unpackaged to packaged and unbranded to branded products. Additionally, consumers have gained some health consciousness, which has led them to choose packaged foods products more wisely. Given that the industry is underpenetrated, improved competition will create more awareness and better availability through stronger distribution and bolster volume growth.

**Rising Organized Retail and E-Retail –** Although small, traditional outlets dominate the food retail sector and account for 98 percent of sales, modern retail chains offering a consumer-friendly shopping experience are emerging. Organized retail stores exceed 5,300 in 2016. India remains a growing market for consumer-ready food products. With a sharp rise in mobile penetration across India, online and e-commerce retail opportunities have opened up and afforded options to consumers on payment mechanisms as well as conveniences for time and cost savings.

**Emerging Casual Dining Restaurant (CDR) and Quick Service Restaurant (QSR) Segments -** India has witnessed a sizeable shift in its CDR and QSR sector and many of the players require preformed and ready to heat products to quickly serve their customers. CDRs and QSRs have gone from largely serving Indian snacks to serving western foods with an Indian flavor. The restaurant sector in India is divided into the organized and unorganized market. The unorganized international-style market includes roadside vendors, vans and trolleys serving Chinese and Italian-style foods. The QSR and CDR span organized and unorganized markets and include pubs, bars, and cafes as well as street vendors. Standalone restaurants are emerging and competing in this segment against several chain and group-owned QSRs and CDRs. Gaining consumer loyalty to a restaurant and its brand is the major challenge the segment faces.

**Foreign Direct Investment (FDI) Policy and Other Measures to Attract Investment -** The Ministry of Food Processing Industries (MoFPI) is an advocate for investing in India with the goal of exporting processed products as well as catering to domestic demand. Use of imported ingredients in these facilities remains limited. As per the current policy, the GOI allows 100 percent FDI under controlled conditions and for any foreign investment beyond 51 percent, 30 percent of the value of goods used in food processing must be sourced from India. Additionally, to encourage food processing industries, the GOI reduced excise duties on food processing and packaging machinery from 10 percent to 6 percent, allowed food processing units a 100 percent income tax exemption on profits for the first five years of operation, and a 25 percent income tax exemption on profits for years six to ten of operation and provided other incentives.

**Food Safety Regulation Revisions and Reforms -** FSSAI made it mandatory for every food business operator (FBO) in the country (including Food Processing Companies) to follow and comply with the Food Safety and Standards Act, 2006, and its Rules and Regulations, 2011. After a number of extensions, the final date of compliance was August 4, 2016 (See GAIN IN6075for additional information). On November 9, 2017, FSSAI implemented the Food Safety and Standards (Organic Food) Regulation, 2017. The Regulations incorporated comments from stakeholders and was notified to the WTO on May 4, 2017 (GAININ7139).

On September 11, 2017, India implemented its Food Safety and Standards (Approval for Non-Specified Food and Food Ingredients) Regulations, 2017 in the Official Gazette of India. Comments received on the draft regulation were incorporated in the final regulation. All FBOs who had earlier submitted applications for approval of their products before the discontinuation of the product approval system were notified to submit additional documents as per the new regulation requirements. Earlier, on January 31, 2017, FSSAI published a draft regulation on new product approval procedures in the Official Gazette of India and invited a 30-day comment period only from the domestic stakeholders. FSSAI had termed these categories of food or food ingredients as "non-specified food and food ingredients." The draft regulation outlined new product approval procedures for the following food and/or food ingredients:

a. Novel foods or food containing novel ingredients with no history of human consumption in India;
b. Food ingredients with a history of human consumption in India, but are not specified under any other regulations made under the Food Safety and Standards Act, 2006;
c. New additives and processing aids; and
d. Foods manufactured or processed through novel technologies.

On June 23, 2017, the GOI amended the Legal Metrology (Packaged Commodities) Rules, 2011 and published these in the Official Gazette of India. This was 2017's first amendment to Legal Metrology Rules. The enforcement date mentioned in the document's December notification was extended until January 1, 2018. There are no major revisions between the draft and final amendment. The primary amendments of the Rules were listed in GAIN IN7001. It is recommended that interested parties review the June, 2017 final notification. A notification related to the same subject was published on July 4, 2017, to explain the impact of the GST on the unsold stocks of pre-packaged commodities (GAIN IN7086).

FSSAI published Food Safety and Standards (Food Products Standards and Food Additives) Amendment Regulations, 2016 to facilitate the ease of doing business related to proprietary food. With this amendment, nutraceuticals, health, and dietary supplements and certain other food products are no longer considered "proprietary food" and will be reviewed and approved under separate categories. The new definition of proprietary food allows for the manufacture, sale, distribution and import of such foods without product approval. However, the onus of ensuring the safety of such category of foods was shifted to the FBO. All required information on proprietary foods can be accessed from GAIN reports IN6016, IN6026,IN6050 and IN6082.

**Table 1. India: Registered Manufacturing Units in the Food Processing Sector**

| Code (4-Digit NIC, 2008 | Items | Number of Factories | Number of Persons Engaged |
|---|---|---|---|
| 1010 | Processing and preserving of meat | 148 | 25,607 |
| 1020 | Processing and preserving of fish, crustaceans and molluscs and products thereof | 466 | 44,178 |
| 1030 | Processing and preserving of fruits and vegetables | 1,101 | 58,331 |
| 1040 | Manufacture of vegetable and animal oils and fats | 3,300 | 107,623 |
| 1050 | Manufacture of dairy products | 1,753 | 145,601 |
| 1061 | Manufacture of grain mill products | 18,272 | 296,548 |
| 1062 | Manufacture of starches and starch products | 744 | 23,111 |
| 1071 | Manufacture of bakery products | 1,498 | 96,561 |
| 1072 | Manufacture of sugar | 791 | 247,953 |
| 1073 | Manufacture of cocoa, chocolate and sugar confectionery | 505 | 37,469 |
| 1074 | Manufacture of macaroni, noodles, couscous and similar farinaccous products | 105 | 9,948 |
| 1075 | Manufacture of prepared meal and dishes | 298 | 18,153 |
| 1079 | Manufacture of other food products n.e.c. | 5,546 | 426,659 |
| 1080 | Manufacture of prepared animal feeds | 820 | 44,786 |
| 1101 | Distilling, rectifying and blending of spirits; ethyl alcohol production from fermented materials | 369 | 54,226 |
| 1102 | Manufacture of wines | 71 | 7,859 |
| 1103 | Manufacture of malt liquors and malt | 143 | 28,302 |
| 1104 | Manufacture of soft drinks; production of mineral waters and other bottled waters | 1,520 | 68,120 |
| | **Total** | **37,175** | **1,689,176** |

Source: Annual Survey of Industries (ASI), Ministry of Statistics and Program Implementation; MOFPI Annual Report 2016-17, Government of India (GOI).

**Table 2. India: Advantages and Challenges for U.S. Food Ingredients**

| Opportunities | Challenges |
|---|---|
| • Growth in the food processing industry | • Processed foods still seen as inferior to fresh foods by many consumers |
| • Increasing disposable incomes, dual income households, urbanization, increasing numbers of nuclear families, preference for convenience foods | • Forward and backward linkages still developing |
| • Seasonality of raw materials produced in India | • Fragmented and long supply chain |
| • Indian consumers are becoming more accepting of foreign foods and flavors | • Processing firms source most of their ingredients locally |
| • Small but growing modern food retail and e-retail sector | • Modern retail sector is relatively small |
| • Increasing demand for quality ingredients and foods | • High tariffs and market access issues |
| • Rising number of foreign brands is boosting quality via competition throughout the sector | • Despite expanding palates, most consumers prefer Indian cuisine. |
| • U.S. food ingredients are well-known and considered of high quality. | • New local food developments follow global market trends (natural foods, juices, processed meats) |
| • Local processors are increasing their production capacity and food quality to meet higher export standards for foreign markets. | • Dynamic food safety policy regulations |
| • Government support to attract FDI in food processing sector | • Low levels of processing, storage and transportation infrastructure |
| • Consumers moving away from cereals towards higher protein rich diet | • Price-sensitive market |

## Section II. Roadmap for Market Entry

A. Entry Strategy

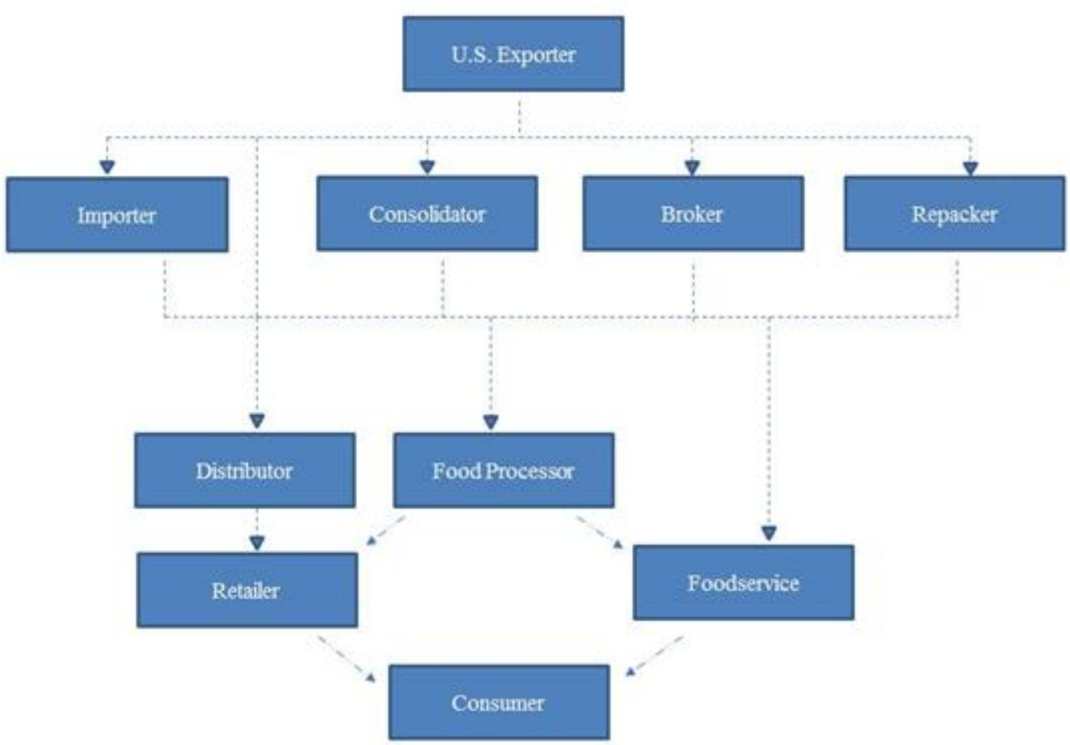
The best way to begin exporting to India is to identify a firm that imports and distributes food ingredients. These firms are adept at navigating the import and distribution processes and are able to engage directly with India-based food processors. While a few firms specialize in ingredients, others may handle retail-ready products in addition to ingredients. Some importers are approved suppliers for multinational food processors and restaurants operating in India. U.S. processors that already supply major food processors in the United States or other foreign markets may wish to investigate similar supply relationships with firms that have a presence in India. Key initial factors to consider when researching the market are whether a product has a market access and the landed post-duty cost of a product.

- Survey existing and potential opportunities by reviewing FAS policy and market reports and consider engaging a market research firm to assist in analyzing market opportunities and challenges.
- Determine if your product has market access in India.
- Analyze the likely landed post-duty cost of a product. Recognize that after local margins and transportation, a product may be significantly more expensive.

- Establish a relationship with an Indian importer/distributor that provides services to the food processing sector.
- U.S. firms should examine all distributor prospects and thoroughly research the more promising ones. Check the potential agent's reputation through local industry or trade associations, potential clients or bankers.
- Consider whether participating in an Indian trade show would be an effective means of identifying a distributor.
- For products with a potentially longer shelf life and/or larger order volumes (e.g., from medium or large food processing chains), U.S. exporters may identify and explore supplying through consolidators based in Dubai, Singapore and Europe.

Participation in trade shows offers a good opportunity to get a sense of the Indian market and engage directly with potential importers or distributors. Until a successful working relationship is established, exporters may wish to consider vehicles such as an irrevocable letter of credit. Alternatively, Indian importers are accustomed to operating without credit and may be willing to pay cash prior to shipment. While FAS India receives a few notifications 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 offers some information on local legal services (refer IN4069), but these situations can be avoided with proper preparation and sale terms. For firms that qualify, the Export-Import Bank of the United States provides exporter insurance.

B. Market Structure




C. Company Profiles

The food processing sector is divided into the following categories:

- Large Indian companies
- Wholly-owned subsidiaries of foreign companies or joint ventures
- Medium-sized domestic food processing companies with a local or regional presence
- Small-scale companies or cottage industries in the “unorganized” sector.

**Table 3. India: Major Food Processing Players in the Indian Market**

| Company | Product Types | Brand | End-Use Channels | Production Location |
|---|---|---|---|---|
| Aachi Group (Aachi Masala Foods Pvt. Ltd., Aachi Spices and Foods Pvt. Ltd., Aachi Special Foods Pvt. Ltd.) | Pure and blended spice powders (Masalas), wheat products, edible oil, clarified butter/ghee, ready-to-cook products (RTC) and ready-to-eat (RTE), rice and wheat products for diabetic patients, tea, biscuits, pickled vegetable, soups | Aachi | Retail, Export | Karnataka |
| AB Mauri | Bread improvers, cake mixes, bread mixes, cake gels, sweet flavors, seasonings, emulsions for beverages, flavors and color blend | Tower, Prime, Mauripan, Mauri | Foodservice | Karnataka, Maharashtra, Uttar Pradesh, Kerala, West Bengal |
| Adani Wilmar (50:50 JV between Adani Group, India and Wilmar Holdings, Singapore) | Cooking oils, vanaspati, packaged basmati rice, pulses | Fortune, Fortune Plus, King's, Bullet, Raag, Fryola, Avsar, Jubilee, Pilaf, Alpha, Aadhaar, A-kote | Retail | Madhya Pradesh, Rajasthan, Gujarat, West Bengal, Maharashtra, Andhra Pradesh, Karnataka, Tamil Nadu |
| Agro Tech Foods Ltd. (A public limited company, affiliated with ConAgra Foods Inc., USA) | Edible oils, snacks, spreads, RTE & RTC popcorn, soups, puddings and desserts, meals and meal enhancers | Sundrop, ACT II, Hunt's Snack Pack, Crystal, Snack Break, 10 min Yummeals | Retail & Foodservice | Maharashtra, New Delhi, Andhra Pradesh and West Bengal |
| Al-Kabeer Exports Private Limited | Seafood, RTE meals, cottage cheese, snacks, nuggets, burgers, French fries | Al-Kabeer | Retail | Hyderabad |
| Allanasons | Halal frozen boneless buffalo meat, halal chilled vacuum packed buffalo and mutton, tropical fruit purees, pulps, spices, grains, coffee beans, feed ingredients and pet foods | Saffa, Premier | Retail & Foodservice | Andhra Pradesh, Maharashtra, Karnataka, Uttar Pradesh, Madhya Pradesh |
| Anmol Biscuits | Biscuits and cakes | Anmol | Retail | West Bengal and Delhi |
| AVT McCormick Ingredients Ltd. | Spices, oleoresins, spice mixes | McCormick | Export, Retail | Kerala |
| Balaji Wafers Pvt. Ltd. | Wafers and Indian snack foods | Balaji | Retail | Gujarat |
| Bikaji Foods International | Indian snacks, chips, Indian sweets, frozen snacks, cookies, canned sweets | Bikaji | Retail & Foodservice | Rajasthan |
| Bikanervala Foods Pvt. Ltd. | Syrups, Indian sweets, Indian savory snacks, biscuits, cookies, cakes, chocolates | Bikano | Retail & Export | Andhra Pradesh, Delhi, Gujarat |
| Britannia Industries Limited (Britannia New Zealand Foods Pvt. (50:50 JV between Britannia Industries Ltd. and Fonterra , New Zealand) | Biscuits, bread, cakes, cheese, dairy whitener | Britannia | Retail | Delhi, Maharashtra West Bengal & Tamil Nadu |
| Mondelēz International (Cadbury India Limited) | Chocolate, confectionery, milk based drinks, candy, chocolate, beverages, biscuits, gum | Cadbury Dairy Milk, Cadbury Celebrations, Bournville, 5 Star, Perk, Gems, Toblerone, Bournvita, Tang, Oreo, Halls, Bubbaloo | Retail | Maharashtra, Madhya Pradesh, Andhra Pradesh, Karnataka and Himachal Pradesh |

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|---|---|---|---|---|
| Capital Foods | Ketchup, cooking and curry pastes, soy sauce, baked beans, mango chutney, coconut milk powder, hakka and instant noodles, soup & sauce mixes frozen entrees | Ching's Secret, Smith and Jones | Retail & Foodservice | Maharashtra, Gujarat |
| Cargill India Private Limited | Vegetable oils, wheat flour, flavors etc. | Nature Fresh | Retail | Haryana |
| Cavinkare | Fruit drinks, milk, UHT and flavored milk, paneer/cottage cheese, buttermilk, Indian savory snacks, potato chips, pickles, peanut candy, pastes | Ruchi, Ruchi Magic, Chinnis, Garden, Cavin's, Maa, Cruncho | Retail | Maharashtra, Tamil Nadu, Telangana, Puducherry |
| Dabur Foods Limited | Fruit juices, vegetable pastes, tomato ketchup, honey | Real, Nature Care, Capsico, Homemade, Dabur | Retail | West Bengal, Nepal |
| Danone India | Dairy based beverages, yoghurts | Danone | Retail | Rai (near Delhi) |
| Darshan Foods Private Limited | Skinless sausages, pepperoni, German salami, sausages, lemon pepper breaded burger patty, black forest ham, chicken breast roll, imported French turkey | Meatzza | Retail & Foodservice | Haryana |
| Desai Brothers | Indian pickles, papads, appalams, cooking pastes, curry powders, ready to cook products, ready to eat products, chutneys, canned vegetables, mango pulp | Mothers Recipe, Dabee, Rozana | Retail | Maharashtra |
| Devyani Food Industries Pvt. Ltd. | Ice-cream | Cream Bell | Retail & Foodservice | Himachal Pradesh |
| DharampalSatyapal Group | Spices, snacks, flavored water, spring water, skimmed milk powder, whole milk powder, pasteurized cream, white butter, mouth freshener, powdered beverages | Catch, Dairy Max, Pass Pass, Piyoz, Yomil | Retail | Himachal Pradesh, Uttar Pradesh, Delhi, Assam and Tripura |
| Dr. Oetker India Pvt. Ltd./ Funfoods Pvt. Ltd. | Mayonnaises, sauces, spreads, salad dressings, cakes, dessert toppings, milk shake mixes, bar syrup concoctions, muesli | Dr. Oetker Fun Foods | Retail & Foodservice | Delhi |
| Dynamix Dairy Industries Ltd | Cheese, butter, clarified butter, whole milk powder, skimmed milk powder, dairy whitener, infant food, casein / lactose, whey products, UHT plain milk, flavored milk & juices | Dynamix | Retail, Foodservice, Export | Maharashtra |
| Ferrero India Private Limited | Chocolates, chocolate spread, mouth fresheners | Ferrero Rocher, Nutella, tic tac, kinder joy | Retail | Maharashtra |
| Field Fresh Foods Private Limited (A Joint venture between Bharti Enterprises & Del Monte Pacific Limited) | Packaged fruits, fruit drinks, ketchup, pasta sauces, olive oil | Del Monte, Fieldfresh | Retail & Foodservice | Tamil Nadu, Punjab |
| Foods and Inns | Processed tropical fruits pulps, purees and vegetables, canned, spray dried powders, frozen and IQF vegetables | N/A | Export | Maharashtra, Gujarat, Andhra Pradesh |
| General Mills India | Whole wheat flour, vermicelli, cake mixes, custard powder, canned corn and specialty vegetables, baking mixes and specialty flour, granola bars, ice cream, frozen Indian flat breads | Pillsbury, Betty Crocker, Nature Valley, Green Giant, Häagen-Dazs | Retail & Foodservice | Karnataka |

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|---|---|---|---|---|
| Gits Foods | Ready meals, instant mixes, dairy products | Gits | Retail | Maharashtra |
| GlaxoSmithKline Consumer Healthcare | Health food drinks, biscuits | Horlicks, Boost, Maltova, Viva | Retail | Punjab, Andhra Pradesh, Haryana |
| Gujarat Cooperative Milk and Marketing Federation | Packaged milk, butter, milk, fresh cream, milk powder, sweets, clarified butter, milk spray, cheese, chocolates, yogurt, infant milk formula, sweetened condensed milk, ice-cream and flavored milk | Amul | Retail, Export, Foodservice | Gujarat |
| Haldiram Snacks Pvt. Ltd. | Indian savory snacks and sweets, frozen foods | Haldiram's | Retail | Maharashtra |
| Hatsun Agro | Packaged milk, butter, milk, fresh and frozen cream, milk powder, sweets, clarified butter, yogurt, condensed milk, ice-cream and flavored milk | Arokya, Hatsun, Arun Ice cream, Hatsun Dairy, Ibaco | Retail & Foodservice | Tamil Nadu, Karnataka |
| Heinz India Private Limited | Tomato ketchup, baby food, energy drink | Complan, GluconD, Heinz | Retail | Uttar Pradesh and Karnataka |
| Heritage Foods Limited | Milk, ice cream, dairy products, beverages, instant foods, sauces, potato chips, honey, pickles, jams/marmalades, salt, spices, wheat flour | Heritage | Retail, Export | Andhra Pradesh, Tamil Nadu, Telangana, Karnataka, Maharashtra |
| Hershey India Private Ltd. (100% subsidiary of the Hershey Company. USA) | Confectionery, soymilk, juices, | Sofit, Jumpin, Hershey's Syrup, Nutrine (Maha Lacto, Maha Choco, NUTRINE Eclairs, NUTRINE Lollipop, NUTRINE SantraGoli, AASAY, KOKANAKA and HONEYFAB) | Retail & Foodservice | Madhya Pradesh and Andhra Pradesh |
| Hindustan Coca Cola Beverages Pvt. Ltd. | Aerated beverages, fruit juices, energy drinks, tea and coffee | Coca-Cola, Diet Coke, Kinley, Georgia, Thums up, Sprite, Fanta, Limca, Maaza, Minute Maid, Burn, Schweppes | Retail | Jammu, Uttarakhand, Uttar Pradesh, Rajasthan, Gujarat, Maharashtra, Madhya Pradesh, Goa, West Bengal, Andhra Pradesh, Karnataka, Orissa, Bihar, Meghalaya, Assam, Tamil Nadu |
| Hindustan Unilever Limited (Unilever holds 51.5 % equity in HUL) | Tomato ketchup, fruits drinks, vegetable soups, ice-cream, jams, ready to drink products | Kissan, Annapurna, Knorr | Retail | Maharashtra Madhya Pradesh, Uttar Pradesh |
| Indian Tobacco Company (ITC) | Fruit purees/concentrates, IQF/frozen fruits, prawns, spices, biscuits, salty snacks, wheat flour, RTE foods, confectionery | Sunfeast, Kitchens of India, Aashirwad, Candyman, Mint-o, Bingo | Retail | Karnataka and West Bengal |
| Indo Nissin Foods Ltd. (a subsidiary of Nissin Food Products Company Ltd., Japan) | Noodles | Top Ramen, Cup Noodles | Retail | Haryana and Karnataka |
| Kellogg's India Private Limited (A wholly owned subsidiary of Kellogg's U.S.A.) | Breakfast cereals, biscuits | Kellogg's | Retail | Maharashtra |
| Kohinoor Food Ltd. | Basmati rice, RTE meals, wheat flour, ready mixes, Indian savories, biscuits, cookies, dry fruits, rice bran oil, cottage cheese, | Kohinoor | Retail | Punjab and Haryana |
| Kraft Heinz India | Ketchup, energy drink, dairy based beverage mixes | Complan, Glucon-D, Heinz | Retail | Aligarh and Sitarganj |

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|---|---|---|---|---|
| KRBL Ltd. | Rice, edible oil, fuel additive, cattle feed | India Gate | Retail | Uttar Pradesh, Punjab, Delhi |
| Kwality Dairy | Dairy products (ghee, butter, yogurt, milk, sweet and flavored milk, UHT milk, paneer/cottage cheese, dairy creamers) | Dairy Best | Retail, Exports | Haryana |
| LT Foods Ltd | Rice, wheat, pulses, healthy snacks, value added products such as flex seeds and cashew nuts | Dawaat | Retail | Bhopal |
| Mahaan Foods Limited, Mahaan Dairies Limited, Mahaan Protein Limited | Coffee and dairy whiteners, edible casein, pharmaceutical and edible grade lactose, whey protein concentrate, milk protein concentrate, clarified butter, full cream milk powder, dehydrated milk fat, milk powder replacer, functional foods, infant food formulation, sports food, sauces and soups | Mahaan | Retail Foodservice Processing | Delhi |
| Maiyas Beverages and Foods | Beverages, frozen food, instant mix, spice powders pickles, ready to eat, savories, Indian sweets | Maiya's | Retail, Foodservice | Karnataka |
| MARS International India Pvt. Ltd. | Pet foods, confectionary | Pedigree, Whiskas; Boomer, Doublemint, Juicy Fruit, Orbit, PimPom, Solano, Trex | Retail | Karnataka, Himachal Pradesh |
| Marico | Edible oils, oats, muesli, salt | Saffola | Retail, Export | Goa, Puducherry, Kerala, Himachal Pradesh, Uttarakhand, Daman and Diu |
| McCain Foods India | Frozen french fries and potato specialties, burger patties | Smilies, Super Wedges, Cheese Shots | Retail, Foodservice, Export | Gujarat |
| Milkfood Ltd. | Skimmed milk powder, casein, whey powders, dairy creamers, ghee | Milkfood | Retail | Punjab, Uttar Pradesh |
| Monginis Food Ltd. | Cakes, cookies and chocolates | Monginis | Retail & Foodservice | Maharashtra, Gujarat, Goa, Karnataka, Andhra Pradesh |
| Mother Dairy Fruit and Vegetable Private Ltd. | Ice-cream, fluid milk, UHT and flavored milk, butter, clarified butter, cheese, yogurt, dairy whitener, juices, edible oils, fresh & frozen fruits & vegetables | Mother Dairy | Retail, Export and Restaurants | Delhi |
| Mrs. Bector's Foods Specialties-CREMICA | Sauces, mayonnaise, toppings, syrups, biscuits, Indian snack foods, stabilizer blends and ice cream | Cremica | Retail & Foodservice | Punjab |
| MTR Foods Limited (Owned by Norway- based Orkla) | Soups, RTE foods, rice meals, spice powders, instant sweet mixes, instant ice-cream mixes, vermicelli, pickles, ice-cream | MTR | Retail | Karnataka and Maharashtra |
| Nashik Vintners | Wine | Sula | Retail | Maharashtra |
| Nestle India (Nestlé India is a subsidiary of Nestle' S.A. of Switzerland) | UHT milk, yogurt, noodles, tomato ketchup, packaged milk, multi grain breakfast cereal, energy drinks, chocolates | Nescafe, Maggi, Milky Bar, Milo, Kitkat, Barone, Milkmaid and Nestea | Retail | Punjab, Haryana, Uttaranchal, Goa, Karnataka and Tamil Nadu |
| Parle Agro Private Limited | Coffee, juices, packaged water, snacks, confectionery, biscuits | Café Cuba, Appy Fizz Frooti, Bailley, Hippo, Frio, Dhishoom, Parle G, Monaco, Hide & Seek, Golden Arcs, Top, Krackjack,, Top, Milano, | Retail | 76 Manufacturing Facilities across the country |

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|---|---|---|---|---|
| | | Nimkin, Jam-in, Gold Star, Milk Shakti, Actfit Cream Cracker, Parle Maria, Kreams, Orange Bite, Londonderry, Melody, Mango Bite, Poppins, Mazelo, Parle's Wafers, Fulltoss, Cheeselings, Kismi, 2in1, Fruit Drops, | | |
| Parry Enterprises | Food flavors, cocoa products, taste enhancers, dairy ingredients, food additives, preservatives, protein, vegetable fat | Parry | Foodservice | Tamil Nadu |
| PepsiCo India Holdings Limited | Aerated beverages, fruit juices, potato chips, breakfast cereals | Pepsi, Lay's, Tropicana, Aliva, Aquafina, Cheetos, Dukes, Gatorade, Kurkure, Lehar, Mirinda, Mountain Dew, Nimbooz, Quaker Oats, Slice, Uncle Chips | Retail | |
| Perfetti Van Melle India (a subsidiary of Perfetti Van Melle, Italy) | Snacks, confectionery and chewing gum | Stop Not, Center Fresh, AlpenliebeCreamfills, AlpenliebeLollilop, Centre Fruit, Centre Shock, Mangofillz, Chlormint, Chocoliebe, Fruittella, Happydent White, ProtexHappydent, Marbels, Mentos Big Babol | Retail | Haryana, Tamil Nadu and Uttarakhand |
| Patanjali Foods | Honey, clarified butter, fruit juices, cookies, spices, candies, jam, biscuits, sweets, savories, cereals, flour, pickles, pulses, rice products | Patanjali | Retail and export | Uttarakhand, Maharashtra, West Bengal |
| Pioma Industries | Soft drink concentrate, instant drink powder, fruit jams, cordials, flavors, pickles, curry pastes, snacks, fruit syrups | Rasna | Retail, Export | Gujarat |
| Prataap (Prakash) Snacks Pvt. Ltd. | Potato chips, extruded snacks from corn and rice, Indian snack food | Yellow Diamond | Retail | Madhya Pradesh |
| Ruchi Soya Industries | Cooking oils (soybean, cotton seed, groundnut, sunflower, palmolein, mustard, rice bran), soya foods, vanaspati, bakery fats and feed ingredients | Ruchi, Nutrela, Sunrich, Mahakosh, Ruchi Gold and Ruchi Star | Retail | Jammu, Uttarakhand, Madhya Pradesh, Rajasthan, Gujarat, West Bengal, Maharashtra, Andhra Pradesh, Karnataka, Tamil Nadu |
| Sterling Agro Industries Ltd | Milk, Dairy Creamer, Skimmed Milk Powder, Butter, Butter Milk Powder, Butter Oil. Paneer, Ghee, Yogurt, Buttermilk | Nova | Retail, Foodservice, Export | Madhya Pradesh, Uttar Pradesh |
| Suguna Poultry Farm Limited | Poultry and poultry products (fresh, chilled, frozen and processed) | Suguna | Retail | Tamil Nadu, Karnataka, Kerala, Uttar Pradesh, Chandigarh, Gujarat Maharashtra and Andhra Pradesh |

| | | | | |
|---|---|---|---|---|
| Surya Food and Agro Pvt. Ltd. | Biscuits, cookies, chocolates, confectionery, juices and beverages | Priyagold | Retail | Uttar Pradesh and Gujarat |
| Tasty Bite | Ready-to-eat Indian entrees, rice and noodles, sauces | Tasty Bite | Retail, Foodservice | Maharashtra |
| Tata Global Beverages | Tea, coffee and bottled water | Tata Tea, Tetley, Good Earth, Himalayan, Tata Gluco, Jemča, Vitax, Eight O'Clock Coffee, Grand Coffee and Joekels | Retail, Foodservice, Export | Haryana, Maharashtra, Telangana, Kerala, Tamil Nadu |
| Unibic Biscuits India | Cookies | Unibic | Retail | Karnataka |
| United Breweries Limited (UBL) | Beer, spirits | Kingfisher, Zingaro, UB Export, London Pilsner, Kalyani Black Label, Bullet | Retail Foodservice Export | Punjab, Uttar Pradesh, Maharashtra Goa, Karnataka, Kerala, Tamil Nadu, Andhra Pradesh, Madhya Pradesh, West Bengal and Nepal |
| Ushodaya Enterprises Private Limited (Ramoji Group) | Pickles, powders, pastes, instant mixes, fruit pulp/puree, edible oils, Indian flat breads, palm kernel, RTE goods, rice | Priya | Retail | Telangana |
| Vadilal Industries Limited | IQF foods, fruit pulp, Indian breads, snacks, ready meals, mixes, condiments, desserts, canned products | Vadilal Quick Treat | Retail | Gujarat and Uttar Pradesh |
| Venkateshwara Hatcheries Group | Poultry and poultry products (fresh chilled, frozen and processed) | Venkys | Retail | Maharashtra and Madhya Pradesh |
| VRS Foods Limited | Bactofuged milk (bacteria free), yogurt, butter milk, cheese (cottage, mozzarella), UHT milk, clarified butter, instant dairy mix, demineralized whey powder, edible casein | Paras | Retail Processing | New Delhi and Uttar Pradesh |
| Weikfield Products Co. (India) Pvt. Ltd. | Custard powder, baking powder, drinking chocolate, cream caramel, chutneys, sauces and natural ayurvedic health foods | Weikfield | Retail | Maharashtra |

Note: Most information has been sourced from company websites. This list is neither exhaustive nor ranked in any particular order.

## D. Sector Trends

With the spread of cafés, chain restaurants, modern retail and efforts to attract investment in cold chains and food logistics, the food processing industry is expanding. Incentives and subsidies are offered for a variety of programs. A government study entitled "Human Resource and Skill Requirements in the Food Processing Sector (2022)" indicates that MoFPI will provide subsidies and incentive programs for cold chain infrastructure, storage and warehousing facilities, modernizing slaughter houses, as well as food park and laboratory development.

As part of the sector trend, the GOI has allocated nearly a billion dollars under the Twelfth Five-Year Plan (2012-17), to implement various programs for the promotion and development of the food processing sector. Programs include: infrastructure development, research and development, human resource development, and strengthening industry-related institutions. The MoFPI has renamed the Scheme for Agro-Marine Processing and Development of Agro-Processing Clusters to Pradhan Mantri Kisan SampadaYojana (PMKSY) for the period 2016-20 to supplement agriculture, modernize processing, and decrease agricultural loss/waste. The PMKSY scheme has a U.S. $60 billion budget and acts as umbrella policy incorporating ongoing schemes for the creation of mega food parks, integrating cold chain and value addition infrastructure, food safety and quality assurance programs, and the expansion of food processing and preservation capacities.

In volume and value terms, sales of every category of processed foods increased significantly between 2012 and 2016. Industry sources estimate that over 400 million consumers consume some type of processed food regularly. Urban areas account for over 75 percent of sales as consumers seek convenience and quality. For higher-value frozen and refrigerated foods, sales are almost exclusively in urban areas. Rural areas tend to have lower incomes and a preference for fresh ingredients. Nevertheless, rural areas are emerging as a market for well-priced, shelf-stable foods. Consumers in developed markets are more open to the idea of packaged food, which manufacturers often position for convenience, nutrition, and food safety.

**Table 4. India: Sales Volume of Packaged Foods 2012 and 2016 in Thousand Metric Tons**

| Category | 2012 | 2016 | Percent Change |
|---|---|---|---|
| Baby Food | 57 | 66 | 17 |
| Baked Goods | 2,477 | 2,758 | 11 |
| Biscuits and Snack Bars | 1,422 | 1,825 | 28 |
| Breakfast cereals | 24 | 53 | 119 |
| Confectionery | 361 | 536 | 48 |
| Dairy | 13,987 | 18,044 | 29 |
| Ice Cream and Frozen Desserts | 238 | 361 | 52 |
| Oils and Fats | 4,195 | 8,167 | 95 |
| Processed Fruit and Vegetables | 33 | 56 | 72 |
| Processed Meat and Seafood | 6 | 13 | 108 |
| Ready Meals | 18 | 32 | 84 |
| Rice, Pasta and Noodles | 1,727 | 2,669 | 55 |
| Sauces, Dressings and Condiments | 323 | 490 | 52 |
| Soup | 5 | 9 | 80 |
| Spreads | 23 | 31 | 35 |
| Sweet and Savory Snacks | 535 | 931 | 74 |

Source: Euromonitor

**Table 5. India: Sales Value of Processed Foods 2012 and 2016 in U.S. $ Billion**

| Category | 2012 | 2016 | Percent Change |
|---|---|---|---|
| Baby Food | 0.417 | 0.621 | 48.8 |
| Baked Goods | 1.673 | 1.971 | 17.8 |
| Biscuits and Snack Bars | 3.078 | 3.897 | 26.6 |
| Breakfast Cereals | 0.174 | 0.304 | 75.0 |
| Confectionery | 2.324 | 3.529 | 51.8 |
| Dairy | 10.626 | 15.323 | 44.2 |
| Ice Cream and Frozen Desserts | 0.994 | 1.487 | 49.6 |
| Oils and Fats | 8.001 | 15.909 | 98.8 |
| Processed Fruits and Vegetables | 0.129 | 0.189 | 46.8 |
| Processed Meat and Seafoods | 0.110 | 0.167 | 52.2 |
| Ready Meals | 0.163 | 0.261 | 59.6 |
| Rice, Pasta and Noodles | 2.987 | 4.540 | 52.0 |
| Sauces, Dressings and Condiments | 1.292 | 2.020 | 56.3 |
| Soups | 0.046 | 0.070 | 51.3 |
| Spreads | 0.122 | 0.202 | 66.2 |
| Sweet and Savory Snacks | 2.139 | 3.824 | 78.8 |

Source: Euromonitor

**Fruits, Nuts and Vegetables:** India is a large producer of fruits and vegetables, but only two percent are processed, when compared globally. Processing is relatively diffuse with many small-scale industries involved in production. The major processed items are fruit pulps, juices, Indian-style pickles, dehydrated vegetables, curried vegetables, dried fruits, and processed mushrooms. The United States, Tanzania, Benin, and Côte d'Ivoire, are major suppliers of dried fruits and nuts.

**Meat and Poultry:** The processed meat sector, which was formerly regulated by the MoFPI, is now regulated by FSSAI. There are around 4,000 municipal slaughterhouses in the country along with a number of modern, private-sector slaughterhouses and meat processing plants. Over 100 establishments are registered exporters; primarily buffalo meat and mutton.

**Dairy:** India is the world's largest dairy producer, but according to the National Dairy Development Board, demand for dairy products is growing at twice the rate of production. Sales of dairy products grew from $6 billion in 2011 to an estimated $15 billion in 2017. Sales of ice cream and frozen desserts increased from $640 million in 2011 to $1.5 billion in 2017. Western cheeses and yoghurt are emerging dairy categories. Other categories include milk powder, ice cream, infant foods, and condensed milk.

**Edible Oils:** Edible oils purchased by households or institutional users are sold in liquid form or as vanaspati (partially hydrogenated vegetable oil). According to industry sources, 35 to 40 percent of the Indian edible oil market is branded. India is the world's largest importer of vegetable oil.

**Milling and Baking:** Approximately 90 percent of grains undergo primary processing and wheat is the major grain processed in India. Milling of rice and pulses makes up the balance of the grain processing sector. Most grain processing is carried out in the informal sector but, some large players are active in the market and sell processed grains in branded retail packs. Additionally, imported specialty flours direct for retail have found a niche in the Indian market owing to greater awareness of their benefits or unique attributes.

**Food Ingredients:** 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. were valued at U.S. $160 million in 2016 and includes protein concentrates, animal feed preparations, peptones, vegetable seeds, mucilage and thickeners, mixtures of odoriferous substances, palmitic acid, stearic acid, essential oils, vegetable saps and extracts.

**Table 6. India: Top 10 Imports of Food Ingredients from United States (U.S. $ Millions)**

| HS Code | Description | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|---|
| 210690 | Food Preparations Nesoi | 16.91 | 19.02 | 13.85 | 11.62 | 18.95 |
| 350510 | Dextrins and other Modified Starches | 6.87 | 8.64 | 7.66 | 8.82 | 7.74 |
| 170211 | Lactose and Lactose Syrup Cont 99% More Lactse by Wt | 8.06 | 8.32 | 7.51 | 7.84 | 7.64 |
| 350790 | Enzymes and Prepared Enzymes, Nesoi | 2.81 | 6.46 | 6.64 | 10.14 | 13.64 |
| 170219 | Lactose in solid form and lactose syrup, Nesoi | 3.99 | 4.05 | 4.81 | 1.95 | 4.01 |
| 210390 | Sauces Etc., Mixed Condiments and Seasonings, Nesoi | 1.64 | 1.59 | 1.95 | 1.84 | 2.03 |
| 210210 | Yeasts, Active | 0.49 | 0.58 | 1.01 | 1.48 | 0.78 |
| 350220 | Milk albumin. IncConcen of 2 or more whey proteins | 4.38 | 5.11 | 4.99 | 5.7 | 7.2 |
| 180690 | Cocoa preparations, Not in Bulk form, Nesoi | 0.62 | 0.48 | 1.10 | 0.52 | 0.58 |
| 350290 | Albumin and Albumin Derivatives, Nesoi | 1.36 | 1.14 | 0.94 | 0.98 | 0.72 |

Source: Directorate General of Foreign Trade, Ministry of Commerce, Government of India

**Section III: Competition**

India's domestic industry is the primary competitor for U.S. food ingredient providers. India, with its diverse agro–climatic conditions, produces a variety of foods and ingredients at prices below most imported products or products made from imported ingredients. The quality is improving steadily, too. In addition, many third-country competitors enjoy a freight advantage and can supply at lower costs. Consolidators in markets like Dubai and Singapore offer quick delivery of small quantities; including for ingredients that originated from the United States. High import duties and restrictions on a number of imported raw materials pose additional challenges for direct U.S. exports to the market.

**Table 7. India: Competition in Major Product Categories**

| Product Category | Net Imports (In $ Million) CY 2016 | Major Supply Sources | Strengths of Key Supply Countries | Advantages (A) and Disadvantages (D) of Local Suppliers |
|---|---|---|---|---|
| Animal or Vegetable Oils, Fats and their products | 10,514 | Indonesia<br>Malaysia<br>Argentina<br>Ukraine | 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 | 4,014 | Canada<br>Myanmar<br>Australia<br>USA<br>Tanzania | Price Competitiveness, freight advantage (for countries like Myanmar) and the ability to produce specific kind of pulses demanded in India. | Local production is inadequate and more than 20 % of total demand for pulses is met through imports.(A) |
| Edible Fruits and Nuts | 2,808 | USA<br>Côte d'Ivoire<br>Guinea-Bissau<br>Tanzania<br>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 | 1,013 | Brazil<br>Germany<br>USA<br>Netherlands | Price competitiveness | India is usually a net exporter of sugar (D) |
| Coffee, Tea, Mate And Spices | 760 | Vietnam<br>Indonesia<br>Sri Lanka<br>Nepal | Price Competiveness and proximity | Most imports are for re-export (D) |
| Albuminoidal Substances; Modified Starches; Glues; Enzymes | 351 | China<br>USA<br>Germany<br>Thailand | Price Competiveness | Local production is limited (A), U.S. supplies good quality products with competitive prices (A) |
| Lac; Gums; Resins And Other Vegetable Saps And Extracts | 210 | Afghanistan<br>USA<br>China<br>Indonesia | Price Competiveness and proximity | Local production is limited (A), U.S. supplies good quality products with competitive prices (A) |
| Products of the milling industry, malt, starches, insulin, wheat gluten | 57 | Australia<br>China<br>UAE<br>Sri Lanka | Price Competitiveness, high quality | Growing domestic industry (A), Increasing awareness about health & quality food (A), Stringent food laws (D) |
| Dairy produce; birds' eggs; natural honey; edible prod. Of animal origin | 42 | France<br>New Zealand<br>Uganda<br>Denmark | Price Competiveness, sanitary requirements | Domestic production is not keeping pace with demand (A).<br>The Indian import protocol is very stringent and effectively prohibits imports of dairy products from the United States. (D) |

Source: Ministry of Commerce and Industries and FAS India analysis

## Section IV: Best Product Prospects

**Table 8. India: Products Present in the Market Which Have Good Sales Potential**

| Product Types | Import Value ($ Million) CY 2015 | Import Volume (Metric Tons) CY 2015 | 5–yr. Import growth by value (in %) | Basic Import Tariff | Key Constraints | Market Attractiveness For USA |
|---|---|---|---|---|---|---|
| Tree Nuts (mainly Almonds and walnuts)* | 1,066 | 200,384 | 18 | In shell Almonds (Rs. 35/Kg) Pistachios (10%) | Competition from other suppliers exists but is not substantial | High demand and growing retail industry |
| Cocoa and Cocoa {reparations | 205 | 53,715 | 10 | 30% | Strong competition from domestic and international suppliers | Strong quality and brand preference |
| Products of the milling industry, Malt, starches, insulin, wheat gluten | 57 | 74,381 | | 30% | Competition from domestic suppliers | Growing bakery and retail industry and increased popularity for processed foods |
| Leguminous Vegetables, Dried Shelled/Pulses | 3,613 | 5,414,320 | 12 | 0% | Price Competitiveness, freight advantage (for countries like Myanmar) and the ability to produce specific kind of pulses demanded in India. | Local production is inadequate and more than 20% of total demand for pulses is met through imports. |
| Apples, Pears and Quinces Fresh | 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 |
| Grapes Fresh or Dried | 66 | 202,259 | 21 | 30% | Competition from domestic and foreign suppliers | Seasonal shortages and high prices, increasing interest in quality fruits and growth of organized retail |
| Fruit Juices | 33 | 20,542 liters | 3 | 30% | Competition from domestic manufactures and foreign suppliers from neighboring countries | Increasing health awareness and shortage of quality products |

| | | | | | | |
|---|---|---|---|---|---|---|
| Beverages, Spirits and Vinegar | 569 | 392,140,302 liters | 16 | 150% | High import duty and competition from domestic suppliers | Growing consumption and lack of domestic production |
| Albuminoidal Substances; Modified Starches; Glues; Enzymes | 365 | 103,705 | 9 | 41% | Competition from domestic and foreign suppliers like China, Thailand and Taiwan | High demand and growing ready to eat (packaged) food industry |
| Essential Oils, Concentrates; Resinoids; Extracted Oleoresins; Concen Of Essen Oils And Terpenic Byproducts; Aqueous Solutns Etc. Of Essen Oil | 160 | 6,310 | 9 | 41% | Competition from domestic and foreign suppliers like China, Thailand and Taiwan | High demand and growing retail industry, Demand for additional flavorings |

*Includes almonds, walnuts, pistachios, hazelnuts, chestnuts etc.
Source: Ministry of Commerce and Industry, GOI and Post analysis

**Products Not Present Because They Face Significant Barriers**

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. Though imports of alcoholic beverages exist, market access is constrained by occasional state bans, local taxes, and a complex licensing system for distribution and sales.

Effective July 8, 2006, the 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 oil and canola oil derived from select events are the only biotech food/agricultural product currently approved for import. For more information on India's biotech import policy, please see GAIN IN7135 Agricultural Biotechnology Annual 2017.

**Section V: Post Contact and Further Information**

Foreign Agricultural Service, Embassy of the United States of America
Chanakyapuri, New Delhi - 110 021
Phone: 91-11-2419-8000, Fax: 91-11-2419-8530
**E-Mail:** agnewdelhi@fas.usda.gov
**Twitter:** @USDAIndia
**Web:** https://in.usembassy.gov/embassy-consulates/new-delhi/sections-offices/foreign-agricultural-service/

Office of Agricultural Affairs, American Consulate General
C-49, G-Block, BandraKurla Complex, Bandra (E)
Mumbai - 400 051
**Phone:** 91-22-2672-4863
**E-mail:** agmumbai@fas.usda.gov
**Twitter:** @USDAIndia
**Web:** https://in.usembassy.gov/business/agriculture-related-business/

The following reports may be of interest to U.S. exporters. These are accessible via the FAS Home Page: www.fas.usda.gov by clicking on "Data & Analysis" and selecting GAIN reports.

**Table 9. India. List of Relevant FAS GAIN Reports**

| Report Number | Subject |
|---|---|
| IN7135 | Agricultural Biotechnology Annual 2017 |
| IN7149 | Food Service/HRI Report 2017 |
| IN7151 | Retail Report 2017 |
| IN7152 | Food and Agricultural Import Regulations and Standards – Narrative |
| IN7153 | India Food and Agricultural Trade Show Calendar 2017 |
| IN7155 | Exporter Guide 2017 |

**Table 10. India: List of Major Indian Food Processing Associations**

| | |
|---|---|
| Wheat Products Promotion Society | http://www.wpps.org/ |
| All India Food Processors' Association | http://www.aifpa.net |
| Indian Pulses and Grain Association | http://www.ipga.co.in/ |
| Indian Beverage Association | http://in-beverage.org |
| The Solvent Extractors' Association of India | http://www.seaofindia.com/ |
| The Soybean Processors Association of India | http://www.sopa.org/ |
| The Indian Sugar mills Association | http://www.indiansugar.com/ |
| The Indian Dairy Association | http://www.indairyasso.org/ |
| The Poultry Federation of India | http://pfindia.org/ |
| All India Meat and Livestock Exporters Association | http://www.meat-ims.org/ |
| The All India Rice Exporters Association | http://www.airea.net/ |

**Table 11. India: List of Food Processing Research Centers and Institutions in India**

| | |
|---|---|
| The Indian Institute of Crop Processing Technology | www.iicpt.edu.in/ |
| Central Food Technological Research Institute | www.cftri.com |
| Directorate of Sorghum Research | www.sorghum.res.in/ |
| National Dairy Research Institute | www.ndri.res.in |
| CIFT (Central Institute of Fisheries Technology) | www.cift.res.in |
| The Central Marine Fisheries Research Institute, Kochi | www.cmfri.org.in/ |
| Central Avian Research Institute, Izatnagar | www.icar.org.in/cari/ |
| The Central Inland Fisheries Research Institute (CIFRI) | www.cifri.ernet.in |
| The Defense Food Research Laboratory (DFRL) | www.drdo.org |
| Central Potato Research Institute | http://cpri.ernet.in/ |
| Central Plantation Crops Research Institute | www.cpcri.gov.in/ |
| Indian Agriculture Research Institute | www.iaripusa.org |
| Indian Institute of Horticulture Research | www.iihr.ernet.in |

| | |
|---|---|
| Directorate of Mushroom Research (ICAR) | www.nrcmushroom.org/ |
| Directorate of Wheat Research (ICAR) | www.icar.org.in |
| Indian Institute of Packaging, Mumbai | http://iip-in.com |
| Indian Veterinary Research Institute | www.ivri.nic.in |
| National Institute of Fisheries Post-Harvest Technology and Training (NIFPHATT) | http://ifpkochi.nic.in |
| National Institute of Nutrition, Hyderabad | www.ninindia.org |
| Central Leather Research Institute | www.clri.org |
| Central Institute of Post-Harvest Engineering and Technology, Ludhiana (CIPHET) | http://www.ciphet.in/ |

Source: MoFPI

**Table 12. India: Organizations Under the Ministry of Food Processing Industries**

| Name | Objective |
|---|---|
| National Institute of Food Technology Entrepreneurship & Management (NIFTEM) | NIFTEM is expected to become a university dedicated to food processing technology. Located near New Delhi, the Institute will cater to the needs of all public and private sectors affiliated with food processing. Apart from teaching and Research, NIFTEM works as a sector promotion organization through its resources and expertise. |
| Indian Institute of Crop Processing Technology (IICPT) | IICPT is engaged in the research and development of food grain processing, value addition, and by-product utilization. |
| National Meat & Poultry Processing Board (NMPPB) | NMPPB fosters the development of the meat and poultry processing sectors and the production of healthy and hygienic meat and meat products |
| Indian Grape Processing Board (IGPB) | IGPB focusses on Research and Development, Extension, Quality Up-gradation, Market Research and Information, Domestic and International Promotion of Indian Wine |

**Source**: MoFPI Annual Report 2015-16