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## India

## EXPORTER GUIDE ANNUAL

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**Report Highlights:**

The global economic slowdown and food-price inflation have affected the buying behavior of Indian consumers during the past year. However, these factors are not expected to have a strong negative influence on the imported food segment. The Indian economy has maintained an impressive growth rate of 6.7 percent during 2008/09 even under the wave of the global economic recession. The main drivers supporting increased exports of U.S. high-value agricultural products to India are growing middle-income consumers, increasing urbanization, steady transformation of the food retail sector, an increased number of restaurants and fast food chains, and greater exposure to international products. However, onerous labeling requirements and food laws, high tariffs, and phytosanitary regulations continue to hamper the imported food market.

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**SECTION I: MARKET OVERVIEW**

**Key Economic Indicators**

- India's GDP is estimated at USD 1182 billion in IFY 2008/09 and grew by an average of over nine percent during the previous three fiscal years.
- With a population of over one billion, India ranked as the **fifth** largest economy in the world.
- The share of expenditures on food and beverages was 42.3 percent of the total private consumption expenditure for IFY 2007/08.
- Indian overall exports in IFY 2008/09 are estimated up by 3.6 percent at USD 168 billion and imports are estimated at USD 287 billion, up by 14.4 percent.

The Indian economy grew at an average rate of 9.4 percent between 2005/06 and 2007/08. The GDP growth rate <sup>[1]</sup> was 6.7 percent in 2008/09. Thus, despite global recession, India has managed to retain its position as one of the fastest growing economies in the world.

India is the second most populous country in the world after China, with a population of over 1.1 billion. The country is divided into 29 states and six union territories (under federal government rule). The states differ widely in resources, agro-climatic conditions, culture, food-habits, living standards, and languages. Over 50 percent of the population is still dependent upon agriculture. More than 50 Indian cities are estimated to have a population of more than one million people. India's large numbers of middle income consumers are driving the growth of imported foods in the Indian market. Around 50 percent of the Indian population is young (under the age of 25 years old) and prefer buying or eating out quality convenience and processed foods.

According to research <sup>[2]</sup> conducted on the Indian market, various segments of Indian consumers will continue to benefit from an overall average growth in the economy. Average real household income will grow from Rs. 113,744 in 2005 to Rs. 318, 896 by 2025, growing the middle-income segment to 583 million people. India will create a significant middle-income segment, represented by "seekers" with real annual household disposable incomes of \$4,380 to \$10,940 (or \$23,530 to \$58,820 at purchasing power parity or PPP) and "strivers" at \$10,940 to \$21,890 (or 58,820 to \$117,650 at PPP). Furthermore, middle-income growth will spread beyond top-tier to middle tier and smaller cities. Additionally, the upcoming changes in the Indian consumer market will create major opportunities and challenges for companies doing business in India.

Following the relaxation of quantitative restrictions on imports in 2001, the Indian consumer food import market has witnessed impressive growth. However, high tariffs on the majority of food items along with non-tariff barriers remain

a bottleneck for import growth. Import tariffs on most consumer food products range from 26 percent to 74.6 percent. Some sensitive items like alcoholic beverages, poultry meat, raisins, rice etc., attract much higher duties. Nonetheless, rising food prices and domestic shortages have forced the government to lower or completely abolish duties on some essential food items such as edible oils, wheat and sugar. Onerous labeling requirements and phytosanitary regulations, tedious import permit and licensing requirements for food products, and ambiguous procedures for sampling and testing of food products at the port of entry continue to hamper the imported food market.

Advantages and Challenges Facing U.S. Exporters of Food Products in India:

Advantages	Challenges
<ul style="list-style-type: none"> <li>Large and growing middle income consumer segment.</li> </ul>	<ul style="list-style-type: none"> <li>High tariffs, dated food laws, and unscientific sanitary and phytosanitary regulations.</li> </ul>
<ul style="list-style-type: none"> <li>Increasing exposure to international products and lifestyle.</li> </ul>	<ul style="list-style-type: none"> <li>Diverse food preferences throughout the country.</li> </ul>
<ul style="list-style-type: none"> <li>Increasing urbanization, large young population, and a growing number of working women.</li> </ul>	<ul style="list-style-type: none"> <li>Preference for fresh products and traditional foods.</li> </ul>
<ul style="list-style-type: none"> <li>Increased consciousness of healthy and hygienic food among the consuming segments.</li> </ul>	<ul style="list-style-type: none"> <li>Limited awareness about international products, due to historically closed market and diverse food habits.</li> </ul>
<ul style="list-style-type: none"> <li>A gradual transformation of the retail food sector in the urban and rural areas.</li> </ul>	<ul style="list-style-type: none"> <li>Difficulties in accessing vast semi-urban and rural markets due to poor infrastructure.</li> </ul>
<ul style="list-style-type: none"> <li>Consumer perception that U.S. food products are safe and of high quality.</li> </ul>	<ul style="list-style-type: none"> <li>Competition from countries with closer geographic proximity to India, which enjoy shorter shipping times and low cost freight advantage.</li> </ul>
<ul style="list-style-type: none"> <li>Growing number of western-style fast food restaurant chains and coffee shops.</li> </ul>	<ul style="list-style-type: none"> <li>Indian food companies (including many multinational companies) produce products at competitive prices due to the diverse agro-industrial base.</li> </ul>
<ul style="list-style-type: none"> <li>Improved U.S.-India political relations.</li> </ul>	<ul style="list-style-type: none"> <li>Competition from products imported via 'grey market' (smuggling etc.)</li> </ul>

<sup>[1]</sup> Department of Economic Affairs, Ministry of Finance, Government of India (GOI).

<sup>[2]</sup> The 'Bird of Gold': The Rise of India's Consumer Market, May 2007, Mckinsey Global Institute Study.

*Note: Please see Appendix A (Tables A, B, and C) for the statistical data on the key trade and demographic information.*

## SECTION II: EXPORTER BUSINESS TIPS

### A. Food Preferences

Indian tastes and preferences vary widely on the basis of cultural, religious and geographical differences in the population. Hindus constitute approximately 80.5 percent of the Indian population, followed by Muslims (13.4 percent), Christians (2.4 percent), Sikhs (1.9 percent), etc. A large section of the Indian population is vegetarian

(informal estimates of the Indian vegetarian population range between 20 and 40 percent). Furthermore, non-vegetarian food is not consumed during special days of religious observances, which vary from community to community.

Overall, consumption of processed foods in India is still low due to an inherent preference for fresh/homemade food. Additionally, most Indian households rely on domestic help for food preparation and have small kitchens with limited refrigeration capacity. Nonetheless, consumption of processed and ready-to-eat (RTE) foods is higher in urban areas because many families value convenient, time-saving products or have been exposed to international cuisines. People in rural areas tend to prefer basic fresh (prepared at home) cereals and milk products and generally do not have access to fast food or processed food. The rural population constitutes the largest segment of consumers (around 58-60 percent, compared to 40-42 percent of urban dwellers). Despite lower income levels, the retail sector is spreading operations to the rural areas to reach this untapped potential market.

A variety of imported foods such as confectionery items, beverages (fruit juices, carbonated and alcoholic drinks), jams, jellies, dairy products, health foods, biscuits, cookies, wafers, processed fruits and vegetables, soups, syrups and seasonings, fresh and dried fruits / nuts, pasta and noodles, etc can be easily found on the shelves of retail stores. Demand for imported specialty and high-value foods such as chocolates, dry fruits and nuts (mainly almonds, pistachios, and raisins), cakes, pastries, and fresh and exotic fruits is significantly increasing during festivals like Diwali (festival of lights), Eid, and Christmas. Hence, October to December is the best time to introduce new-to-market products in India. This is also the best time to organize promotions for new products.

## **B. Shopping Habits**

Indian consumers traditionally purchase their daily food needs from neighborhood / mom and pop stores (or kiranas) because of convenience, perceived freshness, and limited refrigeration and storage space at home. Meanwhile, upper-end consumers prefer to make purchases from organized retail stores on a weekly or a monthly basis. However, with the penetration of organized retail outlets in tier I and tier II cities, suburbs, and semi-urban areas, more and more Indians are getting exposure to organized retail.

A growing number of people in urban areas are widely travelled and have experienced international cuisines and branded food products. The growing populations of young professionals, working women, and households with dual-income-and-no-kids (DINKs) or dual-income-with-a-single-kid (DISKs) are driving the growth of the services and franchise sector. These consumer groups have higher levels of disposable income and generally prefer making weekly/monthly purchases of food (including processed, RTE, and branded products) and grocery items from organized retail stores. Women do most of the shopping and take decisions related to the purchase of food items. However, people in the upper-middle and upper economic sections of the society usually have domestic staff, who purchase and prepare food.

A typical Indian household will make regular purchases of wheat flours, pulses, edible oils, ghee (clarified butter), dairy items (milk, butter, yogurt, paneer or cottage cheese / Indian cheese etc.), spices and condiments, pickles, noodles, snack foods, jams and jellies, ketchup and sauces, and health drinks. Most packaged food items are sold in small containers due to customers' limited purchasing power.

### **C. Distribution Systems**

Marketing channels for the majority of domestic and imported foods involve many intermediaries, which push the final / retail cost higher. Furthermore, the lack of adequate cold-chain infrastructure and transportation facilities affect proper handling, storage, and transportation of imported foods. A large number of importers depend upon third party logistics (TPL) companies to hire services for cold chain and transportation. Indian TPL companies are limited and often lack resources to fulfill clients' expectations in terms of timely handling of consignments. Due to a dearth of players in the logistics sector, maintaining an imported product's cold-chain integrity can be costly. Additionally, due to the prohibitive cost of establishing a warehouse, clearing and forwarding agents (CFAs) are regularly used by exporters in the Indian market.

Typically, CFA's transport merchandise from the factory or warehouse to "stockists" or distributors. While the CFAs do not take title of the product, they receive 2 to 2.5 percent in margins, then invoice the stockist, and receive payment on behalf of the manufacturer. The stockists usually have exclusive geographical territories and a sales force that calls on both the wholesalers and large retailers in urban areas. They usually offer credit to their customers and receive margins in the range of three to nine percent. Wholesalers provide the final link to those rural and small retailers who cannot purchase directly from distributors. Sales to these retailers are typically in cash only and wholesalers receive a margin of two to three percent. Margins for retailers vary from four to 30 percent, and the total cost of the distribution network represents between 10 and 20 percent of the final retail price.

Dubai and Singapore are the common regional trading hubs used for imported food products due to their liberal trade policies and their traders' ability to meet Indian importers' requirements with low transaction costs. Major importers of food products are located in Mumbai, Delhi, Chennai, Kolkata, and Bangalore. Industry sources estimate that around 30-40 percent of the imported foods coming to India are brought through the grey (or illegal) market channels.

### **D. Infrastructure**

India has one of the largest road networks extending up to 3.34 million kilometers. The Indian road network serves 65 percent of freight and 85 percent of passenger traffic. India's total rail route length is about 63,327 km, out of which more than 17,000 kms is electrified. The railways connect most major cities and towns and carry over 11 million passengers and 1.1 million tons of goods per day. India also has a long coastline extending up to 4,000 miles. Around 90 percent of the sea trade is handled by the 11 major ports (please see appendix F) of Kandla, Mumbai, Mundra, Jawaharlal Nehru, Cochin, Murmagoa, and New Mangalore on the west coast, and Chennai, Tuticorin, Vizagh, Paradeep, and Kolkata on the east coast. India also has 139 minor ports in addition to the 11 international ports. Container handling facilities are available at most major ports and in several major cities.

Refrigerated warehousing and transportation facilities are limited and costly, resulting in high storage losses of perishable food items. An inadequate and irregular power supply also constrains cold chain development. Infrastructure projects were previously reserved for the public sector, but private investors are now being encouraged to participate in developing roads, markets, and transportation links. The field of telecommunications has particularly benefitted from privatization and strong foreign investor interest. However, the pace of development is much slower for power generation, roads, and other infrastructure needs, where the returns on investment take longer to materialize.

## **E. Finding a Business Partner**

### **Entry Strategy**

- It is critical for U.S. exporters to survey existing and potential markets for their products before initiating sales. Further, U.S. exporters are advised to review the relevant FAS-New Delhi market report(s) (see section V). A visit to India to gain a first-hand feel of the Indian market, preferably coinciding with a major food show, such as “AAHAR”, could be useful.
- The successful introduction of a new product to India depends on good local representation and an effective pricing strategy. The local representative should preferably be the importer and distributor. U.S. companies should avoid the temptation to establish a relationship with an agent or a distributor merely because he/she is the most persistent suitor. Consider the following before selecting an agent:
  - Determine through surveys who their potential customers are and where in India these customers are located.
  - Recognize that agents with fewer clients and smaller set-ups often are more adaptable and committed than those with large infrastructure and big reputations.
  - There may be a conflict of interest if the potential agent handles similar product lines.
  - U.S. firms should evaluate all distributors’ prospects, and thoroughly research the more promising ones. Check the potential agent’s reputation through local industry/trade associations, potential clients, bankers, and other foreign companies.
- U.S. exporters interested in the Indian market should understand that every state in India has a different cuisine and eating habits. One product may be preferable in one region and may not be accepted in the other. Therefore, a thorough understanding of the market is a must before targeting new products for the Indian market.
- Due to India’s vast regional diversity it is common to appoint more than one representative to cover specified regional markets. FAS-New Delhi maintains a list of potential importers, and assists exporters in meeting members of the Indian trade.
- Most Indian processed food importers prefer to:
  - Purchase mixed containers with smaller quantities of individual products.
  - Seek exclusive agreements from exporters.
  - Use the services of freight consolidators to handle their orders from various exporters.
- The key to success is to focus on a ‘reasonable’ entry pricing strategy for your product that is specifically targeted to the desired consumer base. Indian consumers are price sensitive and demand for imported products, while growing, is not immune to this tendency.

- Potential exporters should be familiar with India's varied food laws. Some products and ingredients that are approved in the U.S. or other countries are not necessarily approved in India.

## **F. Trade Policy**

Most animal and livestock products cannot be exported to India from the United States due to non-scientific Indian import protocols. The import of beef is banned in India due to religious concerns. Imports of dairy products, poultry, pork, sheep, and goat meat and meat products are also effectively banned due to India's scientifically unjustified import protocols for these products. Additionally, imports of alcoholic beverages are severely constrained by high import tariffs, local taxes, and by a complex licensing system of distribution and sales in the local markets.

Effective July 8, 2006, the Government of India's (GOI) Foreign Trade Policy (2004-2009) specified that all imports containing products of modern biotechnology must have prior approval from the Genetic Engineering Approval Committee (GEAC), Ministry of Environment and Forests. The policy also made a biotech declaration mandatory. No biotech food product or ingredient is officially permitted for commercial importation. The unique exception is soybean oil derived from Roundup Ready Soybeans, which was approved for importation on June 22, 2007, by the GEAC. Therefore, the direct entry of other biotech products is either effectively constrained or such products may be awaiting approval for imports to date. For more information on India's biotech import policy, please see [IN9098](#).

A number of regional trade associations, or chambers of industry, are active in India. These associations work on behalf of local and multinational food and food ingredient manufacturers, processors, importers, farmers, retailers, cooperatives etc. These associations make regular representations to the government according to the common interest of their members. Please see Appendix E for details on such trade associations operating in India. Exporters are advised to identify appropriate associations and work closely with these associations to explore opportunities in the Indian market.

## **G. Advertising and Sales Promotion**

Advertising and trade promotion in India is creative and well developed. Most major U.S. advertising firms choose local partners, as they know India and Indians best. Advertising through T.V. is especially popular in India. Increasing numbers of Indian consumers have access to a number of national and international channels through satellite television. Hindi channels are more popular among the majority of the middle income population. In addition to government-controlled television in various regional languages, there are several popular national, international, and regional privately-owned channels. Most urban households have televisions, and televisions are also increasingly present in rural India.

India also has a diverse and growing number of national and vernacular newspapers and magazines with a readership of 216 million. Satellite T.V. was able to reach 230 million people as of 2006. Radio is popular, with 27 percent of the population listening to any station in an average week. The number of internet and broadband subscribers is expected to increase to 40 million and 20 million respectively, by 2010. The growth of wireless subscribers has also been phenomenal with the telecommunication sector envisaging a total of 650 million telephone connections (including 66

million wired and 584 million wireless connections) by the end of 2012

A large number of food expositions are held in different cities in India. Of these, AAHAR is the most popular food, beverage, and food processing equipment show and is held during the first half of March every year. AAHAR provides a venue to introduce new U.S. food products to the Indian market, and provides an opportunity to U.S. companies to meet potential importers, distributors, representatives, and joint-venture partners attending the show. The AAHAR <sup>[1]</sup> show will be held from March 10-14 in 2010. Information on other Indian food trade shows can be accessed from the following website: <http://www.indiatradefair.com/events/calendar-events2008.html>.

## **Business Etiquette**

India offers one of the largest English speaking workforces, the majority of which are skilled in various aspects of scientific, technical, and managerial expertise. Although Hindi is India's leading national language, most Indian officials and business people have an excellent command of English. Additionally, English is one of the compulsory languages in most public and private schools and knowledge centers. Many Indian businessmen have travelled 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. Therefore, visitors should verify holiday information before scheduling a business trip. Indian executives prefer late morning or afternoon appointments between 11:00 a.m. and 4:00 p.m.

The climate in India can be very hot for most part of the year, so it is advisable to wear lightweight clothing to avoid discomfort. Men should wear a jacket and tie (and women should wear corresponding attire) when making official calls or attending business occasions. Always present a business card when introducing yourself. Refer to business contacts by their surname, rather than by their given name. Use courtesy titles such as "Dr.", "Mr.", "Mrs.", or "Miss". Talking about your family and friends is an important part of establishing relationships 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, businessmen appreciate token mementos, particularly if they reflect the subject under discussion. Business lunches are preferred to dinners. 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); the 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-round. Most Indian cities have good hotels and are well connected by domestic airlines and railroads.

The following websites were found to be informative and user-friendly in providing information on Indian business culture and business etiquettes. These websites are mentioned for readers' convenience. USDA/FAS does NOT in any way endorse, guarantee the accuracy of, or necessarily concur with the information contained in the following sites: [http://stylusinc.com/business/india/cultural\\_tips.htm](http://stylusinc.com/business/india/cultural_tips.htm) , <http://www.executiveplanet.com/index.php?title=India> , <http://madaan.com/indiabusiness.html>.

## **Import Duties**



High tariffs on the majority of food items along with the non-tariff barriers continue to hinder the growth of trade. Import tariffs on most consumer food products largely fall in the range of 26 percent to 74.6 percent. However, the GOI amends the duty structure for various food items from time to time depending upon market conditions and requirements. The computation of effective duty is often complex and involves an array of duties (described below), including, a Basic Duty, an Additional Duty (AD), also known as a “Countervailing Duty” (CVD), and an Education Cess (a special surcharge on all direct and indirect taxes at three percent introduced in the February 2007 budget). Additionally, a Special Countervailing Duty (SCD) also known as a Special Additional Duty (SAD) is applied to all agricultural and non-agricultural imports (with a few exceptions). This was done to account for the Value Added Tax (VAT) and other taxes applicable only to domestic products. Some of the agricultural products (fresh fruits and vegetables, seeds, raw wool, poultry and cattle feed, pulses, rice, wheat, and coarse grains) are exempt from the countervailing duty.

The basic duty on most processed products is 30 percent. However, food items such as wine, liquor, poultry meat, coffee, tea, cigarettes and tobacco, and several dairy products have much higher basic duties. Import duties on wheat, edible oils and sugar have been lowered or completely abolished by the government due to the rising food inflation.

**Basic Duty** – The Basic custom duty is India’s external tariff applicable to goods on entry in India. The majority of Indian customs tariff duties are on an ad valorem basis.

**Countervailing Duty (CVD)** – The CVD is an additional customs duty which is levied on imported goods equal to the Central Value Added Tax (CENVAT) / domestic tariff or excise duty applicable on goods produced or manufactured in India. The calculation of the CVD on packaged goods is based on the Maximum Retail Price (MRP) minus the abatement notified for similar domestic goods in India, which makes the calculation more difficult.

**Special Additional Duty (SAD) or special CVD** – The SAD is a levy imposed to counter balance various internal taxes like Sales Tax, VAT, etc.

## **Food Laws**

India has several food sector laws administered by various Ministries. Exporters have to follow various basic food laws which mainly related to the use of additives and colors, labeling requirements, packaging, weights and measures, shelf-life, and phytosanitary regulations. The GOI has recently constituted a Food Safety and Standards Authority of India (FSSAI), following the enactment of the “Food Safety and Standards Act, 2006.” The objective of the FSSAI is to consolidate various food laws and establish a single regulatory agency in place of the current multiple regulatory agencies (See: <http://www.fssai.gov.in/> ).

Some of the major food laws of interest to U.S. exporters are:

**Prevention of Food Adulteration Act** - The Prevention of Food Adulteration Act (PFA) of 1954, (along with the PFA Rules of 1955, as amended from time to time) is the law intended to protect India against impure, unsafe, and fraudulently labeled foods. This is the most important food law in the country. The PFA standards and regulations are meant to apply equally to domestic and imported products. The PFA covers various aspects of food processing and

distribution, such as food color, preservatives, pesticide residues, packaging and labeling, and regulation of sales. The PFA Act and Rules and recent notifications are available at: <http://mohfw.nic.in/pfa.htm> . The law, previously enforced by the Director General of Health Services, Department of Health (DH), Ministry of Health and Family Welfare (MOHFW), Government of India (GOI), is now enforced by the Food Safety and Standards Authority of India.

The Ministry of Health implemented a nutritional labeling regulation for packaged food (Prevention of Food Adulteration (5<sup>th</sup> Amendment Rules, 2008) in March 2009. The new rule would require listing of ingredients and nutritional information on the label of the packaged food (with some exceptions) in a prescribed format. Details on this regulation can be accessed from the following reports: IN8119, [IN9033](#), and [IN9048](#).

**The Plant Quarantine (Regulation of Import into India) Order, 2003, and Amendments** - These legislative measures regulate imports of planting seeds and agricultural products into India. These can be accessed from: [http://www.plantquarantineindia.org/PQO\\_amendments.htm](http://www.plantquarantineindia.org/PQO_amendments.htm) .

**The Standards of Weights and Measures Act, 1976, and the Standards of Weights and Measures (packaged commodities) Rules, 1977, as amended** - This act establishes standards for weights and measures to regulate interstate trade and commerce in goods that are sold or distributed by weight, measure, or number. The Rules formed under the act require labeling regarding the nature of the commodity, the name and address of the manufacturer, quantity, date of manufacture, best-before date, and the Maximum Retail Price (MRP). These labeling requirements apply equally to imported and domestic packaged goods.

Additional details on other relevant Indian food laws and respective government regulatory agencies are available in FAS New Delhi's "Food and Agricultural Import Regulations and Standards Country Report 2009" ([IN9113](#)).

[1] <http://www.aaharinternationalfair.com/about-fair/introduction-aahar-international.html>.

### **SECTION III: MARKET SECTOR STRUCTURE AND TRENDS**

#### **Food Retail**

Food, grocery, and beverage (FGB) sector retail sales during IFY 2007/08 are estimated at USD 225 billion with an annual growth rate (between 2003/04 and 2007/08) of around 10 percent. The food retail sector in India is largely dominated by unorganized players while the organized FGB retail sector's share of the total retail sector is estimated at USD 2.3 billion or about one percent of the total FGB retail sales. Therefore, the organized food retail sector in India is at a very nascent stage but has great potential for future growth. The organized food retail sector exhibited exemplary growth in the past five years, although from a very small base. Encouraging overall economic growth rates made India one of the fastest growing economies in the past five years.

Retail sector growth in India was sluggish especially from the second half of 2008 into 2009. As a result, the majority of the organized retail players preferred to keep any large-scale expansion plans on hold. The economic slowdown and high food price inflation affected buying behavior of a large segment of the consumers. Retailers also suffered due to high rental rates during the major parts of the previous two years. A few country-wide and regional retail chains faced a

credit crunch leaving them with no other option than to slow expansion or close operations. Nevertheless, even under the wave of the global economic recession, India has managed to retain its position as one of the fastest growing economies in the world and experts are optimistic that economic growth will continue through 2009/10. India therefore remains a potential market for U.S. food products. India was ranked as the most attractive emerging market destination for retail investment <sup>[1]</sup>.

Imported foods are procured by high-end grocery stores or organized retail stores and grocery stores catering primarily to high-end customers in urban areas. Indian retail stores vary by format and size depending upon the target city market and range from hypermarkets and supermarkets to convenience stores etc. An organized food retail store may have 6,000 stock keeping units with margins ranging from four to 30 percent depending upon the type of products and the sourcing channel. Imported supermarket items include almonds and other dry fruits and nuts, fruit juices, ketchup, chocolates, sauces, specialty cheese, potato chips, canned fruits/vegetables, cookies, cake mixes, and various other processed foods. October to December is considered to be the best season for introducing new to market food products and for organizing product promotions as some of the major Indian festivals (Diwali, Eid and Christmas) fall within these months. Various imported foods including fresh fruits, dried fruits and nuts, chocolates, cookies, and other processed foods are the preferred gift items during the festive season.

Retail companies like Reliance, Aditya Birla, Future Group and Spencer's have registered a wide-spread geographical coverage in the organized food retail sector. Many retail players like Bharti, Heritage, Godrej Agrovet, ITC, and Future's group have also targeted semi-urban or rural areas for setting up retail stores. Semi-urban and rural consumers comprise a reasonably large segment of the consumers but are yet to be fully tapped by the organized retail sector.

The majority of the retail stores import various products directly or through importers (based in Delhi, Mumbai, Kolkata and Chennai) or distributors. Dubai and Singapore are the regional trading hubs preferred for bringing imported food products, due to their liberal trade policies and the ability of the traders to meet Indian importers requirements at low transaction costs.

## **Food Service**

The current market size [2] of India's hospitality industry is USD 23 billion, of which the organized sector contributes about 30 percent. The hospitality industry was affected by the global economic recession and terrorist attacks during the past year. However, the sector is forecast to grow to USD 42 billion by 2018 and is expected to attract investments of over USD 11 billion in the next two years. India has many excellent hotel chains, including Indian Hotels Ltd. (Taj Group); East India Hotels Company Limited (Oberoi group); ITC Limited (Welcome Group); Asian Hotel; and Leela Venture. Several international chains such as Radisson, Best Western, Hilton, Marriot, Country Inn and Suites by Carlson, and Quality Inn have also established a presence through franchising.

The premium segment (including 5 star deluxe and 5 star hotels) dominates the hotel business in India and accounts for roughly 65 percent of industry total revenues. Hotels in this segment are concentrated in major metropolitan cities such as New Delhi, Mumbai, Chennai, Bangalore, Hyderabad, and Kolkata, and are now spreading to tier I and tier II cities as well as major tourist locations. The budget segment (2 star ratings or below) are also present in these locations.

Premium and mid-market hotels source their food and beverage imports mostly through their agents who work with consolidators located in Dubai, Amsterdam, Singapore, and Australia. Direct imports from the United States are limited because of high freight costs and low import volumes. While leading hotels appreciate the excellent reputation of U.S. food products, higher costs are a constraint. Nevertheless, the Indian hotel and tourism sector provides opportunities for U.S. exporters to position themselves in the market.

The Indian restaurant sector has shown impressive growth in recent years through franchises. Most U.S. chains, such as McDonald's, Dominos, Pizza Hut, T.G.I. Friday's, KFC, Ruby Tuesday, along with domestic chains are doing well in the major urban areas and are spreading into smaller cities. Many international fast food chains have developed a range of products to suit local tastes. 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, products such as french fries, specialty cheeses, some meat and fishery products, flavors, condiments, and ingredients, are often imported. In the past few years, the "coffee shop" culture has spread throughout major cities and seems poised for further growth. This should provide an opportunity for U.S. companies to supply products such as syrups, and ingredients like dried fruits and nuts etc. Some of the leading coffee chains include Cafe Coffee Day, Barista Lavazza, Costa Coffee, Cafe Nescafe, Mocha Coffee shop, Java Green Coffee shop. Please see Post's GAIN report [IN7114](#) for additional details on the HRI Food Service Sector.

## **Food Processing**

The current size (estimated annual turnover) of the food processing industry is estimated at USD 70 billion and the market for processed food is roughly USD 115 billion. The food processing sector has reportedly emerged as one of the top ten sectors to attract foreign direct investment (FDI). However, a large segment of the Indian food processing industry still operates in the unorganized sector, which consists of small enterprises operating outside of India's legal, tax, and regulatory systems. These enterprises are pervasive in agricultural processing and marketing as well as other sectors of the economy and account for about 75 percent of the output of the food processing industry.

Changing lifestyle and consumption patterns, increasing purchasing power, the growing number of dual income families, exposure to international foods, changing demographics, and expanding organized retailing are drivers of rising consumption of processed foods. Indian consumers spend, on average, 50 percent of their disposable income on food. Industry sources confirm that over 300 million Indians, mostly upper and middle income consumers, are the major consumers of processed food. Imported processed food items like, pasta, cake mixes, dried fruits and nuts, processed fruits and vegetables, chocolate syrups, fruit juices, ketchup, chocolates, sauces, specialty cheeses, potato chips, and cookies are increasingly popular among these consumers.

The Indian food processing sector is poised for significant growth in coming years, given investor interest and consumer preference. Food processors are also introducing new products and traditional recipes using improved technology, innovative packaging, and aggressive marketing. This should create additional demand for raw material and food ingredients. Bulk food ingredient exports from the U.S. to India are primarily edible nuts and pulses. Other categories of food ingredients sourced by Indian food processing companies from the U.S. include essential oils, protein isolates, starch, vegetable saps, pectic substances, mucilages or thickeners, lactose, sugar and sugar syrups, mayonnaise, mixed seasonings, sauces and preparations, yeast, baking powders, sweeteners and other preparations for beverages,

vinegar, oleoresins, and gelatin and gelatin derivatives etc.

India's domestic industry is the primary competitor for U.S. food-processing and ingredient supplies in India. With its diverse agro-climatic conditions, India has a production advantage in many agricultural goods and the potential to cultivate a large range of raw materials (spices, spice oils, essential oils, condiments, and fruit pulps) required by the food-processing industry. Moreover, significant variations in food habits and culinary traditions across the country translate into a competitive advantage for small and medium sized local players who are familiar with local food habits and markets. Some Indian food-processing companies have increased their market share by decreasing product prices, while high import duties on processed food and food ingredients make imports relatively costly. Additionally, existing domestic food laws restrict the use of a number of ingredients, flavors, colors, and additives, thus posing an additional challenge to U.S. exporters interested in the Indian market.

<sup>[1]</sup> 2009, A.T. Kearney *Global Retail Development Index*

<sup>[2]</sup> *Economic Survey of India and Technopak Analysis (2008)*

#### **SECTION IV: BEST CONSUMER ORIENTED FOOD PRODUCTS PROSPECTS**

DESCRIPTION	TOTAL IMPORTS (2007/08) VALUE (\$ MILLION)	TOTAL IMPORTS (2007/08) QTY ('000)	5-yr Avg Annual Import Growth	Import Tariff Rate (2009)	Key Constraints Over Market Development	Market Attractiveness for USA
POTATOES AND POTATO PRODUCTS	6.44	5,995	17%	UP TO 36.13%	Competition from domestic suppliers and the EU and South Asia	Preference for imported brands and shortage of quality and range of domestic products
ALMONDS	198.76	50,210	30%	Rs. 100 per kg (shelled)	Competition from Australia and Afghanistan	High seasonal demand; increasing use; health consciousness
PISTACHIOS	50.55	7,777	18%	31%	Competition from Iran and Afghanistan	High seasonal demand; increasing use; health consciousness
GRAPES, FRESH	5.07	2,723	66%	31%	Competition from domestic and foreign suppliers like Australia and Chile	Seasonal shortages and high prices; increasing interest in quality fruits among India's middle income consumers and growing organized retail
APPLES, FRESH	52.96	58,401	48%	52%	Competition from domestic and foreign suppliers like China, Chile and New Zealand	Seasonal shortages and high prices; increasing interest in quality fruits among India's middle income consumers and growing organized retail
PEARS and QUINCES, FRESH	5.66	8,183	51%	31%	Competition from China and South Africa	Seasonal shortages and high prices; increasing interest in diverse fruits among India's middle income consumers and growing organized retail
SUGAR CONFECTIONERY	115	4,199	28%	UP TO 74.60%	Competition from domestic and foreign suppliers like China, Malaysia and other countries	Consumer preference for imported products/brands and shortage of quality domestic product
COCOA and CHOCOLATE PRODUCTS	203	5,793	35%		Competition from domestic suppliers and other suppliers, mainly China and South Asia	Consumer preference for imported products/brands and shortage of quality domestic product
PASTA	8.46	5,930	8%	UP TO 36.136%	Competition from Italian and domestic suppliers	Increasing popularity; growing food processing sector
FRUIT JUICES	16.83	11,394	24%	36.13% to 41.49%	Competition from nearby suppliers and domestic production	Increasing health awareness among middle income consumers and shortage of local quality products
SAUCES, PREPARATIONS MIXED CONDIMENTS and SEASONINGS	114	8,065	71%	36.136% to 56.217%	Competition from domestic suppliers	Preference for imported brands, growing fast food and food processing sectors
BEVERAGES, SPIRITS and VINEGAR	144	91,221	31%	UP TO 154.5%	High import duty; competition from other suppliers	Growing consumption and lack of domestic products

## SECTION V: KEY CONTACTS AND FURTHER INFORMATION

Reports given below will provide additional information to the U.S. exporters interested in the Indian market.

Report Number	Subject
<a href="#">IN9113</a>	Food and Agricultural Import Regulations and Standards Report
<a href="#">IN7090</a>	Export Certificate FAIRS Report
<a href="#">IN6111</a>	Retail Food Sector
<a href="#">IN7033</a>	Food Safety and Standards Act

<a href="#">IN7114</a>	HRI Food Service Sector
<a href="#">IN8030</a>	Food Processing Ingredients Sector
<a href="#">IN8075</a>	Product Brief: Snack Food Market In India
<a href="#">IN8150</a>	Product Brief: Indian Fresh Fruit Market
IN8144	Product Brief: The Indian Wine Market
IN8066	Product Brief: Hides and Skins

Please also see our Home Page (<http://www.fas.usda.gov/>) for accessing additional reports (FAIRS Subject Reports) related to the imports regulations and related publications released by the GOI from time to time.

The Country Commercial Guide (<http://www.buyusa.gov/india/en/ccg.html>) prepared by the Commercial Section of the US Embassy will also be of interest to exporters.

**For additional information and guidance please contact:**

Minister-Counselor  
Foreign Agricultural Service  
Embassy of the United States of America  
Chanakypuri  
New Delhi – 110021  
Phone: +91-11-24198000  
Fax: +91-11-24198530  
Email: [agnewdelhi@usda.gov](mailto:agnewdelhi@usda.gov)

**APPENDIX A – STATISTICS**

**TABLE A. KEY TRADE AND DEMOGRAPHIC INFORMATION**

Agricultural imports from all countries (USD million) <sup>1</sup> / U.S. market share (percent)	8,586.81 (5.82%)
Consumer Food Imports from all countries (USD million) <sup>2</sup> / U.S. market share (percent)	1, 649.36 (14.32 %)
Edible fishery imports from all countries <sup>3</sup> (USD million)/ U.S. market share (percent)	51.26 (0.48%)
Total Population <sup>4</sup> / Annual population growth rate (percent)	1.147 billion (1.5%)
Urban population <sup>5</sup> (millions) / Annual growth rate (percent)	286 million
Number of major metropolitan areas <sup>6</sup> (with population around one million or > one million)	> 50
Population Density <sup>7</sup> (Persons / Sq.Km.)	325
Proportion of population below 14 years <sup>8</sup> (percent)	35
Proportion of population below 59 years <sup>9</sup> (percent)	56.9
Per capita Gross Domestic Product in IFY 2008/09 (USD)	1031
Percent of female population employed	25.6
Exchange Rate I USD (as on September 16, 2009)	INR 48.20

Source: <sup>1,2,3</sup> USDA/FAS Global Trade Database

<sup>4</sup> Census of India (Projected 2008)

<sup>5,6</sup> Census of India

<sup>7</sup> 2001 Census of India

<sup>8,9</sup> 2001 Census of India

**TABLE B. CONSUMER FOOD AND EDIBLE FISHERY PRODUCT IMPORTS**

India Imports (in 1000 US \$)	IMPORTS FROM THE WORLD			IMPORTS FROM THE U.S.			U.S. MARKET SHARE (%)		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	1,134,579	1,269,364	1,649,366	181,116	227,267	236,188	15.96	17.90	14.32
Snack foods (Excl. Nuts)	19,628	35,119	40,638	524	925	1,229	2.67	2.63	3.02
Breakfast Cereals & Pancake Mix	13,402	4,496	6,468	12,947	4,030	5,792	96.60	89.64	89.55
Red Meats, Fresh/Chilled/Frozen	400	442	594	0	0	0	0.00	0.00	0.00
Red Meats, Prepared/Preserved	662	1,703	2,567	0	0	8	0.00	0.00	0.31
Poultry Meat	23	44	30	0	0	0	0.00	0.00	0.00
Dairy Products	20,004	12,024	11,985	330	2,129	2,741	1.65	17.71	22.87
Cheese	2,947	4,132	5,040	324	69	15	10.99	1.67	0.30
Eggs & Products	1,515	1,233	1,015	663	917	690	43.76	74.37	67.98
Fresh Fruit	125,302	175,656	200,166	13,331	25,864	26,578	10.64	14.72	13.28
Fresh Vegetables	793	2,128	1,185	7	26	17	0.88	1.22	1.43
Processed Fruit & Vegetables	39,076	43,672	54,548	3,944	5,859	7,301	10.09	13.42	13.38
Fruit & Vegetable Juices	13,225	18,218	15,424	1,207	1,634	1,406	9.13	8.97	9.12
Tree Nuts	628,826	640,819	907,942	130,605	165,427	164,307	20.77	25.81	18.10
Wine & Beer	12,178	18,004	18,326	738	770	870	6.06	4.28	4.75
Nursery Products & Cut Flowers	5,970	8,531	11,754	186	277	945	3.12	3.25	8.04
Pet Foods (Dog & Cat Food)	1,774	3,084	5,048	845	113	44	47.63	3.66	0.87
Other Consumer-Oriented Products	248,854	300,059	366,636	15,465	19,227	24,245	6.21	6.41	6.61
<b>FISH &amp; SEAFOOD PRODUCTS</b>	24,104	26,408	51,263	2,448	1,413	248	10.16	5.35	0.48
Salmon	956	842	1,543	3	0	0	0.31	0.00	0.00
Surimi	46	418	500	0	0	0	0.00	0.00	0.00
Crustaceans	6,811	7,561	8,482	2,257	1,353	214	33.14	17.89	2.52
Groundfish & Flatfish	1,505	649	444	103	2	7	6.84	0.31	1.58
Molluscs	964	2,939	2,680	66	40	18	6.85	1.36	0.67
Other Fishery Products	13,822	13,999	37,614	19	18	9	0.14	0.13	0.02
<b>AGRICULTURAL PRODUCTS TOTAL</b>	5,822,897	7,191,929	8,386,814	321,225	437,375	499,766	5.52	6.08	5.82
<b>AG, FISH &amp; FORESTRY TOTAL</b>	6,814,925	8,538,054	10,165,355	327,066	444,065	510,163	4.80	5.20	5.02

Source: USDA/FAS Global Trade Database

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

USD1,000	2006	2007	2008
United States	181,116	227,267	236,188



Cote d'Ivoire	126,150	111,709	193,230
Indonesia	78,862	72,593	107,670
Afghanistan	32,445	59,298	103,592
Benin	46,924	40,299	79,822
Tanzania	59,709	37,236	79,706
Guinea-Bissau	42,299	72,618	76,197
China	33,721	59,934	71,507
Sri Lanka	33,990	34,991	65,388
Nepal	29,250	45,076	64,913
Iran	61,770	73,933	55,750
Ghana	31,057	18,859	37,101
Australia	22,192	31,493	36,558
Pakistan	73,175	62,839	35,803
Mozambique	20,574	14,971	34,442
Other	261,345	3,06,248	3,71,499
<b>World</b>	<b>1,134,579</b>	<b>1,269,364</b>	<b>1,649,366</b>

Source: USDA/FAS Global Trade Database

**TABLE C (II): TOP 15 SUPPLIERS OF EDIBLE FISHERY PRODUCTS**

USD1,000	2006	2007	2008
Bangladesh	13,687	12,996	37,202
Unidentified Country	1,246	2,687	5,833
Norway	790	654	1157
Thailand	207	374	850
Yemen	304	40	844
Pakistan	98	1,031	706
Singapore	228	1,010	522
Indonesia	568	143	500
Japan	351	1,315	471
China	260	828	429
Sri Lanka	616	44	319
Belgium	159	220	300
United Kingdom	274	365	297
UAE	249	144	294
United States	2,448	1,413	248
Other	2,619	3,144	1,291
<b>World</b>	<b>24104</b>	<b>26408</b>	<b>51263</b>

Source: USDA/FAS Global Trade Database

## **APPENDIX B: MAJOR FOOD AND AGRICULTURAL TRADE SHOWS IN INDIA IN 2009/10**

### **AAHAR, THE INTERNATIONAL FOOD FAIR 2010**

March 10-14, 2010

Venue: Pragati Maidan

Organizer: The Indian Trade Promotion Organization (<http://www.indiatradefair.com/>)

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

(Annual Event, organized in March. The FAS has endorsed and participated in AAHAR from 2001 onwards, except for

2006)

### **INTERNATIONAL FOOD AND DRINK EXPO INDIA (IFDE India) 2009**

December 2-4, 2009

Venue: Pragati Maidan, New Delhi

Organizer: The Tarsus Group ([www.tarsus-group.com](http://www.tarsus-group.com))

Website: <http://indiafooddrinkexpo.com/>

(IFDE will be organized in December 2009 for the first time but is expected to be an annual event thereon. IFDE India 2009 will have a FAS endorsed USA pavilion)

### **APPENDIX C: U.S. BASED STATE REGIONAL TRADE GROUPS / COOPERATORS IN INDIA**

#### **Almond Board of California**

Website: [www.AlmondsAreIn.com](http://www.AlmondsAreIn.com)

Local Representative Office Address:

Genesis Burson-Marsteller

Gurgaon

Tel: 91-124-4044-999

Cell: 91-98998-88172

Email: [deepika.thapar@bm.com](mailto:deepika.thapar@bm.com)

#### **American Soybean Association (ASA-IM)**

Website: <http://www.asaimasc.org/>

Local Representative Office Address:

301A, Spanish Court

Block-C1, Palam Vihar

Gurgaon, Haryana-122017

Tel: +91-124-4259591-3

Fax: +91-124-4259594

#### **California Dried Plum Board**

Website: [www.cdpb.org](http://www.cdpb.org)

Local Representative Office Address:

The SCS Group

SCO 29, Sector 15-II

Gurgaon, Haryana 122 001

Ph:+91-124-434 4500

Fax:+91-124-434 4501

E-Mail: [ksunderlal@scs-group.com](mailto:ksunderlal@scs-group.com)

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

#### **Cotton Council International**

Website: [www.cottonusa.org](http://www.cottonusa.org)

Local Representative Office Address:

Technopak Advisors

4th Floor, Tower A, DLF Building 8,

DLF Cyber City, Phase II, Gurgaon-122002

Tel: +91-124-4541111

Fax: +91-124-4541198, 4541199

[www.technopak.com](http://www.technopak.com)

### **Pear Bureau Northwest**

Website: [www.usapears.org](http://www.usapears.org)

Local Representative Office Address:

The SCS Group

SCO 29, Sector 15-II

Gurgaon, Haryana 122 001

Ph:+91-124-434 4500

Fax:+91-124-434 4501

E-Mail: [ksunderlal@scs-group.com](mailto:ksunderlal@scs-group.com)

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

### **California Table Grape Commission**

Website: [www.tablegrape.com](http://www.tablegrape.com)

Local Representative Office Address:

The SCS Group

SCO 29, Sector 15-II

Gurgaon, Haryana 122 001

Ph:+91-124-434 4500

Fax:+91-124-434 4501

E-Mail: [ksunderlal@scs-group.com](mailto:ksunderlal@scs-group.com)

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

### **U.S. Dry Pea and Lentil Council**

Website: [www.pea-lentil.com](http://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](mailto:Shakundalal@hotmail.com) ;

[shakundalal@rediffmail.com](mailto:shakundalal@rediffmail.com)

**U.S. Grains Council**

Website: [www.grains.org](http://www.grains.org)

Local Representative Office Address:

FF 303 G, Sushant Shopping Arcade

Sushant Lok I

Gurgaon - 122 002

Phone: +91-124-404-5892

Fax: +124-239-6209

E-Mail: [usgcindia@gmail.com](mailto:usgcindia@gmail.com)

**Washington State Apple Commission**

Website: [www.bestapples.com](http://www.bestapples.com)

Local Representative Office Address:

The SCS Group

SCO 29, Sector 15-II

Gurgaon, Haryana 122 001

Ph:+91-124-434 4500

Fax:+91-124-434 4501

E-Mail: [ksunderlal@scs-group.com](mailto:ksunderlal@scs-group.com)

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

**The Southern United States Association**

Website: [www.susta.org](http://www.susta.org)

Local Representative Office Address:

Imports2India Consulting

10, Sunder Nagar

New Delhi – 110 003

Phone: 91-11-24355047/24351798

Fax: 91-11-51507155

Email :[devna@i2iconsulting.biz](mailto:devna@i2iconsulting.biz)

Homepage: [www.i2iconsulting.biz](http://www.i2iconsulting.biz)

**Food Export Association of the Midwest USA**

Website: [www.foodexport.org](http://www.foodexport.org)

Local Representative Office Address:

The SCS Group

SCO 29, Sector 15-II

Gurgaon, Haryana 122 001

Ph:+91-124-434 4500

Fax:+91-124-434 4501

E-Mail: [ksunderlal@scs-group.com](mailto:ksunderlal@scs-group.com)

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

### **Food Export USA-Northeast**

Website: [www.foodexport.usa.org](http://www.foodexport.usa.org)

Local Representative Office Address:

The SCS Group,

SCO 29, Sector 15-II

Gurgaon, Haryana 122 001

Ph:+91-124-434 4500

Fax:+91-124-434 4501

E-Mail: [ksunderlal@scs-group.com](mailto:ksunderlal@scs-group.com)

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

### **California Tree Fruit Agreement**

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

Local Representative Office Address:

The SCS Group,

SCO 29, Sector 15-II

Gurgaon, Haryana 122 001

Ph:+91-124-434 4500

Fax:+91-124-434 4501

E-Mail: [ksunderlal@scs-group.com](mailto:ksunderlal@scs-group.com)

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

### **Northeast Apple Growers**

Local Representative Office Address:

The SCS Group,

SCO 29, Sector 15-II

Gurgaon, Haryana 122 001

Ph:+91-124-434 4500

Fax:+91-124-434 4501

E-Mail: [ksunderlal@scs-group.com](mailto:ksunderlal@scs-group.com)

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

## **APPENDIX D: Useful Central Government of India Agencies:**

### **Department of Animal Husbandry, Dairying and Fisheries (DADF)**

Ministry of Agriculture,

Krishi Bhawan

New Delhi.

Website: <http://www.dahd.nic.in/>

**Lead Role:** Regulates imports of livestock and livestock products into India

### **Ministry of Agriculture and Cooperation (AGRICOOOP)**

Ministry of Agriculture

Krishi Bhawan

New Delhi.

Website: <http://agricoop.nic.in/>

**Lead Role:** Regulates imports of plants and plant products into India

### **Plant Quarantine Organization of India (PPQ)**

Plant Quarantine Division

Directorate of Plant Protection Quarantine and Storage

Department of Agriculture and Cooperation

Government of India.

N.H. IV, Faridabad (Haryana)

Website: <http://www.plantquarantineindia.org/index.htm>

**Lead Role:** Inspection and regulation of the imports of plants and plant products

### **Food Standards and Safety Authority of India (FSSAI)**

FDA Bhawan

Kotla Road, New Delhi

Website: <http://www.fssai.gov.in/Default.aspx>

**Lead Role:** Regulates manufacturing, processing, distribution, sale and import of food with the aim of ensuring safe and wholesome food for human consumption.

### **Department of Health (DOH)**

Ministry of Health and Family Welfare

<http://www.mohfw.nic.in/pfa.htm#Draft%20Notifications>

**Lead Role:** Regulates standards for various domestic and imported food products

### **APPENDIX E: List of Indian Trade Association:**

- Confederation of Indian Trade and Industry (CII)

Website: <http://www.cii.in/>

- Federation of Indian Chambers of Commerce and Industry (FICCI)

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

- Associated Chambers of Commerce and Industry (ASSOCHAM)

Website: <http://www.assochem.org/>

- Indo-American Chambers of Commerce (IACC)

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

- American Chambers of Commerce and Industry (AMCHAM India)

Email: <http://www.amchamindia.com/>

- Retailers Association of India (RAI)

Website: <http://www.rai.net.in/>

- Indian Importers Association (IIA)

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

- All India Food Processors Association (AIFPA)

Website: <http://www.aifpa.net/>

- Indian Dairy Association (IDA)

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

- Council of Leather Exports (CLE)

Website: <http://www.leatherindia.org/>

- Compound Livestock Feed Manufacturers Association (CLFMA)

Website: <http://www.clfmaofindia.org/>

- The Solvent Extractors Association of India (SEA)

<http://www.seaofindia.com/>

- United States India Business Council (USIBC)

<http://www.usibc.com/usibc/about/default>