

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## India

## Exporter Guide

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**Report Highlights:**

The Indian economy is likely to grow at 8.5 percent during Indian fiscal year 2010/11. With a growing number of middle-income consumers (300 million), increasing urbanization, an increased number of restaurants and fast food chains, and greater exposure to international products, India remains an expanding market for U.S. high-value agricultural products. High tariffs on the majority of food items along with various non-tariff import requirements, that effectively prohibit imports of key products, continue to hamper U.S. export opportunities.

**Post:**

New Delhi

**Author Defined:****SECTION 1: MARKET OVERVIEW**

One-third of the area of the United States, the federal republic of India has a population of over 1.1 billion spread across 29 states and six union territories. The states differ vastly in resources, agro-climatic conditions, culture, food-habits, living standards, and languages. Agriculture provides a means of livelihood to around 60 percent of the Indian population and contributes approximately one-fifth of the total gross domestic product (GDP).

**Key Economic Indicators:**

- Despite a global recession, India has managed to retain its position as one of the fastest growing economies in the world and is forecast to grow at 8.5 percent during Indian fiscal year (IFY-April/March) 2010/11.
- India is ranked as the fifth largest economy in the world with a GDP estimated at \$970 billion in IFY 2009/10 and average annual growth of over seven percent during the last three fiscal years.
- Foreign exchange reserves in September were \$292 billion, up nearly \$12 billion from a year prior.

**Food purchasing behavior:**

Indian consumers spend a large share of their income on food. Nearly 45 percent of consumption expenditures go for food (51 percent in rural areas and 39 percent in urban areas). Consequently, pricing is an important consideration when supplying the Indian market. In urban areas, the consumption of processed and ready-to-eat (RTE) or convenience foods is higher due to relatively higher disposable incomes, exposure to a greater variety of processed foods, a preference for quick meals and familiarity with foreign foods or cuisines. Rural consumers tend to prefer traditional Indian foods prepared at home, but exposure to processed foods is increasing in rural areas.

Demand for specialty and high value foods such as chocolates, almonds and other dried nuts, cakes and pastries, imported fruits, fruit juices, and Indian sweets peaks during the fall festive season, especially at Deepawali - the festival of lights. This is also the best time to introduce new-to-market food products in India. With the penetration of modern retailing (also known as "organized" retail outlets) in the suburbs and semi-urban areas, more and more Indians are exposed to organized retail shops. Given the fact that the rural population constitutes the largest segment of consumers (60 percent) some organized retailers are also expanding to rural areas to tap the large consumer base.

**Consumer Demographics:**

On the demographic front, India has a large and expanding young population with a median age of 24. With a growing number of middle-income consumers, increasing urbanization, increasing numbers of nuclear and dual-income families, steady transformation of the food retail sector, rising numbers of restaurants and fast food chains, and greater exposure to international products, India's food consumption and expenditure habits are changing rapidly.

Assuming the Indian economy grows at a real compound rate of 7.3 percent per annum from

2005 to 2025 [McKinsey Global Institute Study], the number of households categorized as “seekers,” with real annual household disposable incomes of \$4,380 to \$10,940 (\$23,530 to \$58,820 at purchasing power parity (PPP)) and “strivers” at \$10,940 to \$21,890 (\$58,820 to \$117,650 at PPP) would grow to an estimated 583 million people (128 million households) by 2025. Furthermore, middle-income growth is expected to spread beyond India’s largest cities to mid-sized and small cities. Average real household disposable income would grow from Rs. 113,744 (\$2,527) in 2005 to Rs. 318, 896 (\$7,086) by 2025, a compound annual growth rate of 5.3 percent. India could become the world’s fifth largest consumer market by 2025.

<b>Advantages</b>	<b>Challenges</b>
Large and growing middle class	Diverse food habits and preference for fresh and traditional foods
Increasing urbanization and growing number of working women	Diverse agro-industrial base offering many products at competitive prices
Increasing exposure to international products and western lifestyle	Indian food companies (including many multinational companies) produce western style food products at competitive prices
A gradual transformation of the retail food sector in urban and rural areas	Difficulties in accessing vast semi-urban and rural markets due to infrastructure bottlenecks
Consumer perception that U.S. food products are safe and of high quality	High tariffs, persistent sanitary and phyto-sanitary requirements that effectively prohibit imports and competition from other countries.
Strong U.S.-India political relations	Inability of U.S. exporters to meet Indian importers’ requirements (mixed shipments, changing product specifications to conform to Indian food laws, etc) and competition from countries having geographical proximity and freight advantage.

## **SECTION II: EXPORTER BUSINESS TIPS**

### **A. Food Preferences**

A large section of the Indian population is strictly vegetarian in accordance with the tenets of Hinduism. Those Hindus who eat meat tend to do so sparingly and beef consumption is taboo among Hindus, Jains and Sikhs who comprise just over 80 percent of India’s population. Furthermore, non-vegetarian food is not consumed during special days of religious observances. India’s large Muslim population does not consume pork.

Indians tend to take pride in many regional and varied foods that comprise Indian cuisine. In general, Indians have a strong preference for fresh products, traditional spices and ingredients, which has generally slowed the penetration of American and other Western-type foods. The acceptance of packaged and ready-to-eat food products is increasing, especially among the urban middle class. Many Indians are quite willing to try new foods, but often return to traditional fare. While Western foods have a reasonably good chance of succeeding in casual dining, integrating them into the main family meal will be more difficult. Italian and Mexican foods are reportedly the fastest growing new cuisines in India.

Typical imported food items that can be spotted in retail stores in cities include dry fruits and nuts, cakes and cake mixes, pastries, cheese, chocolates and chocolate syrups, seasonings,

biscuits, canned fruit juices, canned soups, pastas, noodles, popcorn, potato chips, canned fish and vegetables, ketchup, breakfast cereals, and fresh fruits such as apples, pears, grapes, and kiwis.

## **B. Shopping Habits**

Indian consumers traditionally purchase their daily food needs from small neighborhood stores and vendors because of convenience, perceived freshness, and limited refrigeration and storage space at home. Quality is considered important, but there is a reluctance to pay a premium. With the penetration of organized retail outlets in larger cities, suburbs, and semi-urban areas, more and more Indians are gaining exposure to organized retail. A growing number of people in urban areas are widely travelled and have experienced international cuisines and branded food products. These consumer groups (mostly young professionals) have higher levels of disposable income and generally prefer making weekly/monthly purchases of processed foods and branded products. In general, women do most of the shopping and make most of the food purchasing decisions. In households that can afford hired help, servants often do much of the shopping. Availability of many fresh foods, particularly fruits and vegetables, is seasonal, and people are accustomed to adjusting their diet to the season.

A typical Indian household will make regular purchases of wheat flours, pulses, edible oils, ghee (clarified butter), dairy items (milk, butter, yogurt, paneer (a local cheese)), 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 to keep pricing low.

## **C. Distribution Systems**

Marketing channels for the majority of domestic and imported foods involve many intermediaries. Due to the prohibitive cost of establishing a warehouse, clearing and forwarding agents (CFAs) are regularly used by exporters in the Indian market. Domestic consumer goods are distributed through a multi-level distribution system. Typically, the CFAs transport merchandise from the factory or warehouse to "stockists" or distributors. While the CFAs do not take title to the product, they receive 2 to 2.5 percent margins, then invoice the stockist, and receive payment on behalf of the manufacturer. The stockists have exclusive geographical territories and a sales force that calls on both the wholesalers and on large retailers in urban areas. They usually offer credit to their customers and receive margins in the range of three to nine percent. The wholesalers provide the final link to those rural and smaller retailers who cannot purchase directly from the distributors. Sales to these retailers are typically in cash only and the wholesalers receive a margin of two to three percent. Margins for retailers range from five to 30 percent, and the total cost of the distribution network represents between 10 and 20 percent of the final retail price.

Retailers rarely import directly, relying on importers and distributors to handle the clearing and storage of products. As the retail sector expands and import volumes increase, retailers may begin to import directly. However, for now, most report a preference for allowing specialized importers to manage the import process. Imported foods enter India from regional trading hubs such as Dubai, Singapore and Hong Kong as well directly from supplying countries. Major importers are located in Mumbai, Delhi, Bangalore, Kolkata, and Chennai.

## **D. Infrastructure**

Refrigerated warehousing and transportation facilities are limited and costly, but facilities are improving. In some cases, high electricity costs and/or erratic power supplies have constrained cold chain development. Whereas infrastructure projects were previously reserved for the

public sector, private investors are now being encouraged to participate in developing roads, markets and transportation links.

India has 3.34 million kilometers of roads and roads in some areas have improved considerably over the past 10 years. Nevertheless, road travel can be slow and difficult. India also has over 63,000 km of railroads that carry over 11 million passengers and 1.1 million tons of freight per day.

India has 11 international ports in Kandla, Mumbai, Mundra, Cochin, Murmagoa, and New Mangalore on the west coast, and Chennai, Tuticorin, Vizagh, Paradeep, and Kolkata on the east coast. Container handling facilities are available at most major ports and in several major cities.

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

It is essential to survey existing and potential markets for products before initiating export sales to India and gain an understanding of tariff rates and potential import requirements that could restrict access for products. Market research firms in India can assist new exporters. In addition, this report and others outline import requirements for U.S. food products.

If aspiring U.S. companies have products with promising sales potential in India, their best option is to locate a reliable importer/distributor who handles imported food products. A group of professional importers who can manage brands and regional or national distribution is developing in India and many are interested in expanding their product lines. Importers of this nature typically seek exclusive rights to market a particular product or brand. Generally speaking, U.S. companies should avoid the temptation to establish a relationship with an importer/distributor merely because they are the most persistent suitor. India effectively prohibited imports of most food products until 10 years ago. Hence, the food import business is relatively new and exporters would be wise to meet potential importers and research their business profile carefully. If possible, setting up a base through some type of investment in warehousing, cold chains or processing in India is another way to approach the market. Indians and Indian officials often like to see foreign companies investing in India rather than selling from abroad.

A visit to India to gain a first-hand feel of the Indian market, preferably coinciding with a major food show, such as "AAHAR", is another way to make contact with potential importers and gain a greater understanding of this complex market.

Consider the following before selecting an agent/distributor:

- Determine who their potential customers are, and where in India these customers are located.
- Recognize that agents with fewer principals and smaller set-ups may be more adaptable and committed than those with a large infrastructure and established reputations.
- There may be a conflict of interest with other products the agent is carrying, be sure to ask about their other products and brands.
- U.S. firms should examine all distributor prospects, and thoroughly research the more promising ones. Check the potential agent's reputation through local industry/trade associations, potential clients and bankers.

- Exporters should be prepared to take a long-term approach to the Indian market. Be prepared to start small and be patient working with a distributor to gain product and brand awareness.

Franchising is another way of introducing new products. An increasing number of chains are opening in India including casual dining, fast food and cafes. While many of these companies source locally in India, some require specialized ingredients or imports of certain items that are not readily available in India. Exporters should check with importers to see if they are approved suppliers for franchises. Additionally, India's hotel sector has traditionally represented a small but consistent market for certain high-value food products that cannot be readily sourced in India.

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. 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.

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. There are several U.S. based state regional trade groups / cooperators in India active in India. For more information please refer Appendix C.

## **F. Trade Policy**

There are several key trade restrictions that limit market access for U.S. food products. Imports of most animal and livestock-derived food products are effectively banned because of established Indian import requirements. This includes dairy, poultry, sheep, goat and pork products including pet foods. Imports of beef are banned due to religious concerns.

Imports of alcoholic beverages are constrained by high import tariffs, local taxes and a complex licensing system for distribution and sales. Exporters should work closely with local Indian importers of alcoholic beverages.

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 only exception is soybean oil derived from Roundup Ready Soybeans, which was approved for importation on June 22, 2007, by the GEAC. For more information on India's biotech import policy, please see IN9098.

## **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 television is especially popular in India, but costly. Increasing numbers of Indian consumers have access to a number of national and international channels through satellite television. Hindi channels are popular among the majority of the middle-income population. In addition to government-run 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 television subscribers are expected to reach 25 million by end of 2010. 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 the end of 2010. The growth of telecommunications has been exceptional with a total of 706.4 million telephone subscribers (including 36 million wired and 670.6 million wireless connections) estimated as of August 2010.

Mass advertising is expensive and India and exporters may want to consider smaller, more targeted promotional options that get information more directly to their intended audience.

A number of food expositions (Appendix B) are held in different cities in India. These shows are relatively new and often focus on both exports and imports. However, several shows are focusing more on imported products. Of these, AAHAR is the longest running popular food, beverage, and food processing equipment show and is held during the first half of March every year. The AAHAR show will be held from March 10-14 in 2011. Additional information on other Indian trade shows can be accessed from the following website:

<http://www.indiatradefair.com>

## **H. Business Etiquette**

India offers one of the largest English-speaking workforces in the world. Although Hindi is India's leading national language, most Indian officials and business people have an excellent command of English. Most Indian businessmen have traveled abroad and are familiar with Western culture. Business is not conducted during religious holidays that are observed throughout the many regions and states of India. Verify holiday information with the Consulate or Embassy before scheduling a visit. Indian executives prefer late morning or afternoon appointments between 11:00 a.m. and 4:00 p.m.

The climate in India can be 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 formal 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 "Mr.", "Mrs.", or "Miss." Talking about your family and friends is an important part of establishing a relationship with those involved in the business process. Hospitality is a key part of doing business in India; most business discussions will not begin until "chai" (tea), coffee, or a soft drink is served and there has been some preliminary "small talk." To refuse any beverage outright will likely be perceived as an insult. While an exchange of gifts is not necessary, most businessmen appreciate token mementos, particularly if they reflect the subject under discussion. Business lunches are

preferred to dinners. Try to avoid business breakfasts, especially in Mumbai. The best time of year to visit India is between October and March, so that the seasons of extreme heat and rains can be avoided. Although Delhi (the capital) has a cool, pleasant winter (November - February), summers (April –July) are fierce with temperatures of up to 120 degrees Fahrenheit. Mumbai (the business hub) and most other major cities have a subtropical climate – hot and humid year around. Most Indian cities have good hotels and are well connected by domestic airlines.

The following websites were found to be informative and user-friendly in providing information on Indian business culture and business etiquette. 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 below sites:

[http://stylusinc.com/business/india/cultural\\_tips.htm](http://stylusinc.com/business/india/cultural_tips.htm),  
[www.executiveplanet.com/index.php?title=India](http://www.executiveplanet.com/index.php?title=India)

## **I. 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 of three percent introduced in the February 2007 budget). A special Countervailing duty (SCVD) of 4 percent was introduced in the 2005 GOI Budget on all imports (agricultural and non-agricultural) with a few exceptions. With concerns over food inflation, the import duty on wheat, rice, corn and crude vegetable oils is zero.

**Basic Duty** – The basic customs duty is India’s external tariff applicable to goods at the time of entry. The majority of Indian tariffs are ad valorem. The basic duty on most processed food products is 30 percent. Exceptions in the agriculture/food group include “sensitive” items such as wine, liquor, poultry meat, wheat, rice, corn, coffee, tea, vegetable oils, cigarettes and tobacco, and several dairy products, which attract much higher basic duties.

**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. Agricultural products exempted from the CVD include fresh vegetables and fruits, seeds, raw wool, poultry and cattle feed, pulses, rice, wheat, and coarse grains.

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

## **J. Food Laws**

India has several food sector laws administered by various Ministries. Exporters have to follow various basic food laws related to the use of additives and colors, labeling requirements, packaging, weights and measures, shelf-life and phyto-sanitary 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 affecting Indian food importers are:

- **The Prevention of Food Adulteration (PFA) Act, 1954, and PFA Rules of 1955, as amended.** This is a basic statute established to protect consumers against adulterated foods, and it encompasses food colors and preservatives, pesticide residues, packaging, labeling, and regulation of sales. This is similar to the Federal Food, Drug, and Cosmetics Act of the United States’ Food and Drug Administration. Standards and regulations of the PFA apply equally to domestic and imported products. 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.

On July 7, 2010, the Food Safety and Standards Authority of India (FSSAI) notified the final draft of the Food Safety and Standards Regulations, 2010 to the WTO (G/SPS/N/IND/69), the details of which can be accessed from GAIN report [IN1070](#). The FSSAI also published guidelines for imported food clearance at sea ports, the details of which can be accessed from [IN1092](#) and [IN1095](#).

On June 9 and August 2, 2010, the Ministry of Health and Family Welfare published final Gazette notifications implementing additional labeling rules for packaged food products containing Polyols for various processed food products and artificial sweeteners. Details on this regulation can be accessed from the following GAIN report: [IN1053](#) and [IN1074](#).

- **The Standards of Weights and Measures Act, 1976, and the Standards of Weights and Measures (Packaged Commodities) Rules, 1977, as amended.** This Act established 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. These labeling requirements apply equally to imported and domestic packaged foods.
- **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: [www.plantquarantineindia.org/PQO\\_amendments.htm](http://www.plantquarantineindia.org/PQO_amendments.htm)

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](#)).

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

#### **A. Food Retail**

Food retailing in India is largely “unorganized,” which means that it is dominated by millions of small shops that rely on traditional wholesaling and distribution methods. The “organized” or more modern food retail sector in India is at a very nascent stage but has great potential for future growth. According to some experts, food, grocery and beverage (FGB) retailing in India

during Indian Fiscal Year (IFY) 2008/09 had market sales of over \$250 billion (annual growth rate of 10 percent). The share of organized FGB retail sector's in total FGB retail sales is estimated at \$3.2 billion.

The organized retail sector, which includes a mix of supermarkets, hypermarkets, specialty stores, convenience stores and department stores, is dominated by large Indian companies, some of which have foreign joint venture partners. Direct foreign investment in multi-product retail is not currently permitted and some foreign investors have established joint ventures in wholesaling or business-to-business sales. Some retailers have had to scale back their rapid expansion plans, but this is seen more as a learning experience as firms gain greater understanding of food retailing.

**Supermarkets** are basically larger grocery and convenience stores located in and around major cities. These "Indian supermarkets" are typically 3,000 to 5,000 square feet, and are self-service stores stocked with a wide range of Indian and, more recently, imported groceries, snacks, processed food, confectionary, personal hygiene, and cosmetic products. Imported items in the supermarkets consist mainly of almonds and other dry fruits, fruit juices, ketchup, chocolates, sauces, specialty cheese, potato chips, canned fruits/vegetables, cookies, and cake mixes. These shops generally are open from 9:30 a.m. to 7:30 p.m., six-seven days a week. They stock most national brands, regional and specialty brands, and sometimes their own brand of packaged dry products, and some international brands. Many have a small bakery/confectionary section, and some have fresh produce and dairy products. A few sell small quantities of frozen foods. A typical supermarket carries about 6,000 stock-keeping units. Most, however, have no item-based inventory control. Their margins average 15 percent. These higher margins are largely due to the ability to get somewhat better prices from suppliers on bulk purchases, and from the ability to generate income from selling advertising space and special in-store promotions to manufacturers.

There are few multi-unit supermarket chains in India. Most Indian supermarkets cater to the segment of the population that seeks wider selection and has financial means, storage space (including refrigerators), and their own transportation. Although the exact size of this population segment is not available, roughly 20 percent of the urban population is estimated to shop in these supermarkets, and this percentage is growing.

In recent years, hypermarkets (with floor area of 25,000 – 100,000 square feet) are being set up in major metropolitan cities, offering increased value to price-conscious middle-income consumers.

Unorganized stores source most products from the local market and usually do not feature imported food products. However, several traditional outlets located in the up-market segments of metropolitan cities prefer to keep imported food products to cater to upper-middle income consumers. These smaller stores, which typically occupy about 50 square meters, still account for a major share of the food and grocery sales in India. India is estimated to have more than eight million neighborhood stores growing at the rate of five percent per annum and people shop there on a regular basis. Shopping at these stores provides benefits in terms of easy reach, personalized services and extension of credit, but offer limited variety.

## **B. Food Service**

As per the 'Economic Survey of India' and 'Technopak' analysis (2008), the current market size of India's hospitality industry is \$23 billion, of which the organized sector contributes about 30 percent. The sector is forecast to grow to \$42 billion by 2018 and is expected to attract

investments of over \$11 billion in the next two years. India has some excellent hotel chains, including Indian Hotels Ltd. (Taj Group); East India Hotels Company Ltd. (Oberoi Group); ITC Ltd. (Welcome Group); Asian Hotel; and Leela Venture. Several international chains such as Radisson, Four Seasons, Best Western, Hilton, Marriott, 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 total revenues to the industry. 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 middle-tier cities and along major tourist circuits. Most of the 5-star business is generated from business travelers, and most of those are international. The mid-market segment (comprised of 3 and 4 star hotels) caters to a mix of business and leisure travelers and is mostly concentrated in second-tier cities and in major tourist locations. The budget segment (2 star ratings or below) is present in most towns and cities and places of tourist interest.

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. Because of the high freight costs and small quantities involved, little is directly imported from the United States. While leading hotels appreciate the excellent reputation of U.S. food products, higher freight costs and longer shipping times are constraints. Nevertheless, the Indian hotel and tourism sector can provide opportunities for U.S. exporters to position themselves in the market.

After a slow start, the fast food industry has shown impressive growth in recent years. Chains and franchises, both international and local, are doing well in the major urban areas and are spreading into smaller cities. To gain favor with Indian diners; pizza, burger, and other fast food makers have developed a range of Indianized 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, several 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, which should provide an opportunity for U.S. companies to supply products such as syrups, specialty coffees, etc. For a detailed report on HRI Food Service Sector, please see Post's GAIN report IN7114.

The ready-to-eat industry is small but growing fast. The growing number of nuclear families (where the family group consists only of a father, mother, and children) vis-à-vis joint families, higher household incomes, and increasing numbers of single men and women professionals, have opened opportunities in this segment. Presently, there are only a few Indian companies focusing on this segment.

### **C. Food Processing**

The market for processed foods is roughly \$115 billion. The food-processing sector has reportedly emerged as one of the top ten sectors to attract foreign direct investment. However, a large segment of the Indian food processing industry still operates in the unorganized sector, which consists of small enterprises often 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.

The almost year-round availability of fresh products across the country, combined with

consumers' preference for fresh products and freshly cooked foods, has tempered the demand for processed food products. However, with 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, the demand for convenient and hygienic foods is increasing. This is expected to increase demand for processed food products, giving a boost to the domestic food-processing industry, and providing opportunities for increased imports of processed foods and food ingredients. Industry sources confirm that over 300 million Indians, mostly upper and middle-income consumers, are the major consumers of processed food.

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, 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.

Some Indian food-processing companies have increased their market share by lowering 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.

**For details about India's Food Processing Industry, see Post's GAIN report [IN8030](#).**

#### **SECTION IV: BEST HIGH-VALUE PRODUCT PROSPECTS**

Description	Total Imports (2008/09)	Total Imports (2008/09)	5-year annual import growth	Total Import Tariff* 2010	Key constraints over market development	Market Attractiveness for USA
	Value in \$ million	Quantity in tons				
Potato and potato Products	6.7	15,978	10%	up to 36.13%	Competition from domestic suppliers EU and South Asia	Preference for imported brands and shortage of quality and range of products
Almonds	250	67,000	16%	30%	Competition from Australia and Afghanistan	High seasonal demand, increasing use and health consciousness
Pistachios	58	9,200	24%	36.25%	Competition from Iran and Afghanistan	High seasonal demand, increasing use and health consciousness
Grapes, Fresh	5.2	2,387	42%	31%	Competition from domestic and foreign suppliers like	Seasonal shortages and high prices, increasing interest in quality fruits and growth of organized

					Australia and Chile	retail
Apples, Fresh	91.9	98,895	47%	52%	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
Pears and Quinces	9.9	14,769	51%	31%	Competition from China and South Africa	Seasonal shortages and high prices, increasing interest in quality fruits and growth of organized retail
Sugar Confectionary	9.6	4,081	25%	up to 74.6%	Competition from domestic and foreign suppliers like China Malaysia and others	Consumer preference for imported products and shortage of quality domestic product
Cocoa and Chocolate Products	80	25,228	32%	36 to 50%	Competition from domestic suppliers China and South Asia	Consumer preference for imported products and shortage of quality domestic product
Pasta	10.7	8,467	39%	Up to 36.13%	Competition from domestic suppliers and Italy	Increasing popularity and growing food processing sector
Fruit Juices	23	19,703	23%	36.1 to 41.49%	Competition from domestic producers and nearby suppliers	Increasing health awareness and shortage of quality products
Sauces, preparations, mixed condiments & seasonings	11.1	3,470	5%	36.1 to 56.21%	Competition from domestic producers	Preference for imported brands and growing food processing sector
Beverages, Spirits and Vinegar	75	6100	30%	Up to 154.5%	High import duty competition from other suppliers	Growing consumption and lack of domestic products

\* Total import duty includes basic duty, countervailing duty, Special Countervailing duty, and education cess.  
Note: Post analysis based on trade data and information from market sources.

## SECTION V: KEY CONTACTS AND FURTHER INFORMATION

The following reports may be of interest to U.S. exporters interested in India. These, and related reports prepared by this office, can be accessed via the FAS Home Page: [www.fas.usda.gov](http://www.fas.usda.gov) by clicking on "Attaché Reports" and searching by the report number. Reports given below will provide additional information to exporters interested in the Indian market.

Report Number	Subject
<a href="#">IN1092</a>	The Food Safety and Standards Authority of India
<a href="#">IN1005</a>	India: The Retail Food Sector
<a href="#">IN9127</a>	Export Certificate FAIRS Report
<a href="#">IN9113</a>	Food and Agricultural Import Regulations and Standards Report
<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
<a href="#">IN8144</a>	Product Brief: The Indian Wine Market
<a href="#">IN8066</a>	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  
Chanakyapuri  
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)	11,722 (5.33%)
Consumer Food Imports from all countries (USD million) <sup>2</sup> / U.S. market share (percent)	1,723 (14.77 %)
Edible fishery imports from all countries <sup>3</sup> (USD million)/ U.S. market share (percent)	39.92 (0.77%)
Total Population <sup>4</sup> / Annual population growth rate (percent)	1.17 billion 1.5%)
Urban population <sup>5</sup> (millions)	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)	32.3
Proportion of population below 59 years <sup>9</sup> (percent)	60.5
Per capita Gross Domestic Product in IFY 2009/10 (USD)	917.16
Percent of female population employed	25.6
Exchange Rate I USD (as on October 25, 2010)	INR 44.36

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 FROM CALENDAR YEAR 2007 THROUGH 2009**

India Imports (in \$1000)		Imports from the World			Imports from the U.S.			U.S. Market share (%)		
Commodity	Description	2007	2008	2009	2007	2008	2009	2007	2008	2009
<b>Consumer Oriented Agri-Total</b>		1,269,364	1,695,679	1,723,669	227,268	236,888	254,588	18	14	15
080131	Cashew Nuts, Fresh Or Dried, In Shell	368,296	646,458	594,406	0	0	80	0	0	0
080211	Almonds, Fresh Or Dried, In Shell	181,382	187,651	188,642	155,116	153,260	141,997	86	82	75
080410	Dates, Fresh Or Dried	74,050	77,285	96,770	5	8	0	0	0	0
080810	Apples, Fresh	52,556	66,255	82,762	20,625	19,163	36,838	39	29	45
080250	Pistachios, Fresh Or Dried, Shelled Or Not	48,073	49,096	48,847	3,969	6,015	12,510	8	12	26
350790	Enzymes And Prepared Enzymes, Nesoi	37,481	44,191	46,565	2,409	3,101	2,468	6	7	5
040590	Fats And Oils Derived From Milk, Nesoi	2,280	1,561	43,863	6	7	0	0	0	0
090411	Pepper Of Genus Piper, Neither Crushed Nor Ground	36,682	50,263	41,979	4	54	228	0	0	1
080212	Almonds, Fresh Or Dried, Shelled	29,657	33,786	40,727	6,336	5,390	11,646	21	16	29
210690	Food Preparations Nesoi	17,409	31,723	32,465	8,228	10,588	10,555	47	33	33
220290	Nonalcoholic Beverages, Nesoi	31,080	34,112	31,132	456	707	434	1	2	1
080290	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	12,807	22,893	20,194	7	7	0	0	0	0
180690	Cocoa Preparations, Not In Bulk Form, Nesoi	17,250	23,158	19,454	207	373	445	1	2	2
350510	Dextrins And Other Modified Starches	9,657	12,897	18,875	2,066	3,335	5,072	21	26	27
170211	Lactose & Lactose Syrup Cont 99% More Lactse By Wt	17,304	17,195	17,191	2,890	2,287	4,173	17	13	24
080620	Grapes, Dried (Including Raisins)	12,156	13,546	13,514	20	31	57	0	0	0
170490	Sugar Confection (Incl Wh Choc), No Cocoa, Nesoi	8,093	7,507	8,943	396	608	383	5	8	4
080820	Pears And Quinces, Fresh	4,401	7,010	8,785	1,277	1,782	1,986	29	25	23
200980	Juice Of Any Single Fruit/Vegtble Unfermentd Nesoi	4,761	6,114	8,767	864	1,022	1,874	18	17	21
190219	Pasta, Uncooked, Not Stuffed Etc., Nesoi	2,653	8,614	7,923	6	5	1	0	0	0
080510	Oranges, Fresh	2,581	4,027	6,552	222	2,028	710	9	50	11
210390	Sauces Etc Mixed Condiments And Seasonings Nesoi	5,520	7,989	6,108	818	1,140	1,332	15	14	22
091030	Tumeric (Curcuma)	3,342	1,952	5,734	0	0	9	0	0	0
	Other Consumer Oriented Foods	289,892	340,396	333,474	21,342	25,977	21,791	7	8	7

<b>Fish &amp; Seafood Products Total</b>		26,409	58,494	39,924	1,413	249	310	5	0	1
030269	Fish, Nesoi, With Bones, Fresh Or Chilled	12,607	40,840	23,768	0	0	0	0	0	0
030613	Shrimps And Prawns, Including In Shell, Frozen	5,200	7,226	5,470	1,353	190	84	26	3	2
030749	Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine	626	249	652	0	0	106	0	0	16
160414	Tunas/Skipjack/Bonito Prep/Pres Not Minced	29	79	235	0	9	10	0	11	4
160590	Molluscs, Etc., Prepared Or Preserved	321	365	192	0	11	3	0	3	1
160510	Crab, Prepared Or Preserved	125	195	120	0	1	2	0	1	2
030623	Shrimps/Prawns Inc Live, Fr/Ch/Drd/Salted/In Brine	1	0	104	0	0	62	0	0	59
160520	Shrimps And Prawns, Prepared Or Preserved	427	229	91	0	0	1	0	0	1
030799	Molluscs Etc Nesoi, Frozen, Dri, Salted Or In Brin	207	26	64	40	0	0	19	0	0
160420	Fish, Prepared Or Preserved, Nesoi	46	4	50	0	0	2	0	7	4
160413	Sardines/Sardinella/Brisling Prep/Pres, Not Minced	41	12	33	18	0	0	43	2	0
030729	Scallops Incl Queen, Frozen/Dried/Salted/In Brine	4	25	24	0	9	0	0	36	0
160411	Salmon, Prepared Or Preserved, Whole Or Pieces	1	78	17	0	1	3	0	1	15
160530	Lobster, Prepared Or Preserved	2	11	7	0	11	6	0	100	82
030721	Scallops Incl Queen Scallops, Live, Fresh, Chilled	0	41	3	0	9	0	0	23	0
030530	Fish Fillets, Dried, Salted Or In Brine, Nt Smoked	2	0	2	0	0	0	0	100	0
160419	Fish, Prepared Or Preserved, Whole Or Pieces Nesoi	5	1	0	0	0	0	0	4	0
	Other fish and Seafood Products	6,765	9,111	9,091	2	7	33	0	0.1	0.4
<b>Agricultural Products Total</b>		7,191,930	8,755,029	11,722,266	437,375	510,507	624,816	6	6	5
<b>Agriculture, Fish and Forestry Total</b>		8,538,054	10,377,575	13,189,413	444,065	521,165	634,876	5	5	5

Source: USDA/FAS Global Trade Database

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

<b>Calendar Year: 2007 - 2009</b>			
<b>Value in \$1000</b>	<b>2,007</b>	<b>2,008</b>	<b>2,009</b>
World	1,269,364	1,695,679	1,723,669
United States	227,268	236,888	254,588
Cote d Ivoire	111,709	197,080	155,425
Guinea-Bissau	72,618	98,728	116,467
Afghanistan	59,298	103,664	93,978
Benin	40,299	79,875	92,981
China	59,935	72,727	88,028
Tanzania	37,236	79,706	82,586
Indonesia	72,593	110,475	77,326
Australia	31,493	37,453	57,230
Nepal	45,077	69,595	56,321
Pakistan	62,839	35,813	49,324
New Zealand	12,220	12,404	47,296
Iraq	0	11,711	38,505
Sri Lanka	34,992	65,695	37,092



Ghana	18,859	37,201	35,872
Other Countries	382,927	446,664	440,651

Source: USDA/FAS Global Trade Database

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

Calendar Year: 2007 - 2009			
Value in \$1000	2007	2008	2009
World	26,409	58,494	39,924
Bangladesh	12,997	43,442	23,773
Unidentified Country	2,688	5,989	5,025
Yemen	41	1,036	1,889
Oman	1	184	1,478
Vietnam	91	30	909
Thailand	375	850	770
Indonesia	143	970	746
Pakistan	1,032	707	729
UAE	145	423	599
Singapore	1,011	536	454
Japan	1,315	472	453
United Kingdom	366	297	439
Norway	654	1,158	362
United States	1,413	249	310
China	829	430	306
Other Countries	3,309	1,720	1,683

Source: USDA/FAS Global Trade Database

## **APPENDIX B: MAJOR FOOD AND AGRICULTURAL TRADE SHOWS IN INDIA IN 2010/11**

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

March 10-14, 2011

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, 2011(tentative)

Venue: Pragati Maidan, New Delhi

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

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

(IFDE was organized in December 2009 for the first time but is expected to be an annual event thereon. IFDE India 2010 had a FAS endorsed USA pavilion)

### **ANNAPURNA**

**Nov. 16 - 18, 2011**

**Venue:** Bombay Exhibition Centre - NSE Exhibition Complex

**Goreagon (East), Mumbai**

**Organizer:** Koelnmesse GmbH and FICCI

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

**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

Chimes, 61, Sector 44,

Gurgaon, Haryana

Tel: 91-124-441 7501

Fax: +91 124 404 4744

Email: [www.genesisbm.in](http://www.genesisbm.in)

**California Dried Plum Board**

Website: [www.cdpcb.org](http://www.cdpcb.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  
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  
Home page: <http://www.scs-group.com>

#### **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 Indian Agencies of Central Government:****Department of Animal Husbandry, Dairying and Fisheries (DADF)**

Ministry of Agriculture,

Krishi Bhawan

New Delhi.

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

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

**Ministry of Agriculture and Cooperation (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.assocham.org/>
- Indo-American Chambers of Commerce (IACC)  
Website: <http://www.iaccindia.com/>
- American Chambers of Commerce and Industry (AMCHAM India)  
Website <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>
- Forum of Indian Food Importers  
[www.fifi.in](http://www.fifi.in)