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Report Highlights:

The outbreak of COVID-19 and the resulting nationwide lockdown has significantly impacted the Indian food service sector. The industry has suffered a major setback in last six months and will require time to recover from unprecedented losses. Falling occupancy rates, limited restaurant operations, travel cancellations, and a decline in social events/gatherings are just a few of the challenges the sector is traversing as a result of the pandemic. Despite slashed revenues, job cuts, and high maintenance costs, sources forecast that the sector will begin to recover next year.

Executive Summary:

India is the second most populous country in the world with a population of 1.38 billion, which is equivalent to 17.7 percent of the total world population. The median age in India is 28.4 years and over 50 percent of its population is below the age of 25 and more than 65 percent is below 35. India is a mixed economy that is expected to become the world’s third largest economy over the next 10-15 years. COVID-19 has negatively impacted the Indian economy, resulting in a GDP drop of 23.9 percent during the first quarter of FY 2020-21 (April-June 2020). According to IMF’s latest forecast in the [World Economic Outlook](#), the Indian economy is projected to contract by 4.5 percent in 2020, however, select local sources expect the economy will rebound in FY 2021-22.

Food processors, importers, distributors, wholesalers, retailers, food service operators, hotels, restaurants and quick-service restaurants (QSR) are all part of a massive agribusiness sector. Apart from being a large food producer, India imported \$25.3 billion worth of bulk, intermediate, consumer oriented, and agricultural related products in 2019.

Imports of Consumer-Oriented Products:

Imports of consumer-oriented foods, led by tree nuts, spices, processed and fresh fruits, are among the fastest growing segments of imported agricultural products and reached \$4.7 billion in 2019, down from \$5.3 billion in 2018. The market for imported foods is growing gradually thanks to an increasing number of millennials, affluent professionals, brand-oriented importers, modern retailers, e-retailers, and food service outlets.

Although the majority of imported foods (tree nuts, fruits and processed products) are directed towards retail channels, there is a huge potential for these products in the hotel, restaurant and institutional (HRI) sector, whose menus demand the use of high-quality, premium ingredients. Most four- and five-star hotel chains in India also host specialty restaurants serving global cuisines (Chinese, Japanese, Italian, Mexican, etc.) which require imported food ingredients and beverages to meet quality, authenticity, and taste standards. Most of these hotels procure imported tree nuts, meats, cheese, alcoholic beverages, fresh fruits, and other consumer-oriented products through wholesale markets, distributors, or importers, through their central purchasing departments. Interestingly, chefs and bar managers are increasingly driving the selection of imported ingredients. Moreover, these chefs are visiting global food shows and reaching out to suppliers to procure new, high quality ingredients.

While opportunities for imported foods are improving in the HRI sector, there remains a unique set of challenges hurting their potential, such as high tariffs, import restrictions, price sensitivity, the weakening of the Indian rupee, and strong competition from domestic food processors.

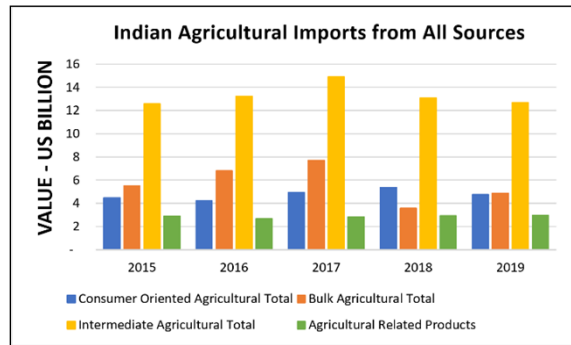


Figure 01: Indian Agricultural Imports from All Sources
Source: Trade data monitor

Food Service, Hotel Restaurant & Institutional:

The Indian food service market is valued at U.S. \$63.71 billion and is expected to reach \$95.75 billion by 2024. Rapid urbanization, a young population, rising disposable income, improved lifestyles, and changing consumption habits are key factors contributing to the growth of this sector, in addition to business travel, and international and domestic tourism. The sector is divided into two segments with the organized segment (standalone and chain restaurants) with 35 percent market share while the unorganized segment holds a 65 percent share. The unorganized segment’s share is expected to drop to 57 percent by 2022-23.

The Indian hospitality sector was valued at \$250 billion in FY 2018-19, contributing nearly 10 percent to the country’s GDP and 43 million jobs. India currently hosts over 2,503 hotels and resorts under the organized hotel sector. The sector experienced massive losses over the past six months as a result of historic low occupancy rates due to COVID-19.

Quick Facts Calendar Year 2019

Imports of Consumer-Oriented Products: US \$4.7 billion

List of Top Import Growth Products in India:

- Tree Nuts (Almonds and Walnuts)
- Fresh Fruits (Apples, Pears, Grapes, Non-Local/ Seasonal Fruit)
- Leguminous Vegetables and Dried Pulses
- Intermediate Products (Malt, Starch, Insulin, Wheat, Gluten)
- Beverages, Spirits, Sauces, Condiments and Vinegar
- Cocoa and Cocoa Preparations

Food Industry by Channels (U.S. billion) 2018/19:

Food Industry Output	\$358 billion (2018)
Food Exports	\$38 billion
Food Imports	\$25 billion
Retail	\$500 billion
Food Service	\$64 billion
Wet Market/Food Stalls/Street Karts	Unknown

Top Indian Hotel Chains (Five Star and Above):

- Taj Group of Hotels - Indian Hotels Company Limited
- The Lalit Hotels
- The Leela Palace
- Oberoi Hotels - East India Hotels Limited
- ITC Group of Hotels - ITC Limited

Top American Hotel Chains in India:

- Marriott International
- Hilton Hotels & Resorts
- Hyatt Hotels Corporation

GDP/Population (2020):

- Population (billions): 1.38 billion
- GDP (billions USD): 3.20 trillion (nominal)
- GDP per capita (USD): \$2,338 (nominal)

Sources:

- Trade Data Monitor and Annual Survey of Industries

SWOT Analysis:

Strengths	Weaknesses
<ul style="list-style-type: none"> • U.S. products are held in high regard • Demand for U.S. cuisine and restaurant franchises 	<ul style="list-style-type: none"> • Awareness of the range and value of U.S. products • Inadequate infrastructure for product handling
Opportunities	Threats
<ul style="list-style-type: none"> • Growth potential for imported ingredients and intermediate products in high-end hotels & restaurants • Changing consumer habits and shift towards healthier foods • Growing tourism sector 	<ul style="list-style-type: none"> • Tariffs and non-tariff barriers • Product substitutes and competition from local and international suppliers • Value of the Indian Rupee against the US Dollar

SECTION I: MARKET SUMMARY

General Economy and Policy Environment:

Prior to the COVID-19 pandemic, India was one of the fastest growing economies and by some estimates, was projected to become the world's third largest economy by 2025. However, the pandemic's effects on India have been immense and wide. Due to the unprecedented nationwide lockdown that was implemented in an effort to control the spread of COVID-19, gross domestic product (GDP) output declined by 23.9 percent year-on-year in the second quarter of calendar year (CY) 2020. GDP output is estimated to contract by 9.6 percent in July-September 2020 and drop 4.8 percent in October-December 2020, a massive reduction from the four percent growth experienced in January-March 2020. However, India's economy is expected to recover with 11 percent growth in 2021.¹

Although India has improved its ranking from 77th in 2018 to 63rd out of 190 countries in the World Bank's 2020 Ease of Doing Business Report², the Government of India (GOI) continues to raise tariffs and impose barriers on imported food and agricultural commodities. The Indian rupee's seven percent depreciation against the U.S. dollar between January-March 2020 would have presented an opportunity to attract greater foreign tourism and foreign exchange, but due to the pandemic and travel restrictions, the HRI sector struggled with reduced demand. The weakened Indian rupee also poses a significant challenge for countries that export to India, in addition to local food importers who have reduced their import purchases for use in the HRI sector. According to Fitch Solutions, the Indian Rupee is projected to average INR 77 per/USD in 2020, and INR 80 per/USD in 2021, amid ongoing global economic contraction.

India's bulk, intermediate, consumer-oriented, and agricultural related total imports were \$25.3 billion in 2019. According to the Trade Data Monitor, India's total agricultural imports from the United States have increased by 69 percent from \$1.3 billion in 2015 to \$2.2 billion in 2019. Consumer-oriented foods, led by tree nuts, are among the fastest growing segments of imported agricultural products and reached \$4.7 billion in 2019. India is a major importer of U.S. produced consumer-oriented food products, led by U.S. in-shell almonds. Meanwhile, India's food and agricultural exports have increased from \$35.3 billion in 2015 to \$38 billion in 2019, making it a net agricultural exporter. For an extended overview of the Indian agricultural market, read the [USDA Foreign Agricultural Service's Exporter Guide 2019](#) and International Agricultural Trade Report from October 2017: [Growing Opportunities for U.S. Agricultural Exports in India](#).

Hotel, Restaurant, and Institutional (HRI) Service Sector Overview:

India's HRI sector has been severely impacted by the COVID-19 pandemic with demand declining to historic low levels. At the beginning of the pandemic, India issued travel advisories, suspended visas, cancelled flights, and prohibited mass gatherings (Section-144 law). These measures and an unprecedented nationwide lockdown contributed to severe economic decline. According to the Federation of Hotel & Restaurant Associations of India, the COVID-19 pandemic could result in job losses for 38 million individuals within India's hospitality and tourism industry.

¹ See: [Fitch Report](#)

² Report has been suspended as of August 2020.

The Impact of COVID-19 on the HRI Food Service Sector:

- Late February - Indian HRI sector begins to feel the effects of COVID-19 fears with reduced footfall and revenue.
- The Government of India initiates a complete shutdown of the country on March 24, resulting in the mass migration of a large part of the country's HRI workforce, resulting in immediate turmoil and uncertainty for the sector.
- Gatherings of four persons or more in one location are prohibited through the imposition of Section 144.
- Food imports are delayed at ports due to the lack of personnel and the introduction of new safety instructions from late March to May 2020.
- Hotels and restaurants in Tier 1-2-3 cities are shut down or open with minimal occupancy for several months with strict safety requirements, severely hurting their commercial viability.
- Relaxation of strict limits on public gatherings, and partial reopening of restaurants were permitted on June 8.³ Hotel occupancy in key cities remains limited as the population is hesitant to use HRI services.
- Restaurants and other food establishments remain closed or have shifted their business to pick-up/delivery, facilitated mobile apps or other e-commerce mechanisms.

Other Factors Impacting the HRI Sector

- "Self-Reliant India" (Atmanirbhar Bharat) policy, the *Make in India* campaign, and the sourcing of local ingredients coupled with the price sensitivity of Indian consumers pose a significant challenge for imported food products and ingredients.
- Demand increases for locally sourced ingredients from restaurants that want to promote local cuisine and/or flavor profiles.
- Continued high tariffs on select food products, ongoing import restrictions, and strong competition from the domestic industry.

Moving Beyond COVID-19

Despite COVID-19 related challenges, U.S. agricultural exports can still benefit from India's relatively strong economic growth and demographic trends. Rising living standards, a young population, the rise of modern HRI outlets, and greater food experimentation will sustain demand for imported food products for years to come. New technologies and mobile applications will also help accelerate these new consumption trends and habits.

Moreover, consumers are increasingly paying attention to their personal eating habits and are searching for new ways to eat healthy in order to boost their immunity, which has grown in importance due to COVID-19.⁴ As a result, Indian consumers have increased their consumption of foods such tree nuts (almonds, walnuts) and fresh fruits like apples, which provide opportunities for similar U.S. products in the short term.

³ [See Link](#)

⁴ [Article in The New India Express](#)

Tourism

Over the last decade, India has strengthened its position as a key tourist destination.⁵ The availability of flights will be essential for the sector's recovery. In July, the GOI resumed international flights, but the number of flights remains limited. The Association of Domestic Tour Operators of India has asked the Ministry of Tourism to declare 2021 as the "Year of Domestic Tourism in India"⁶ in an effort to increase domestic travel in late 2020 and 2021.

India's natural resources, historic monuments, and relative price attractiveness, has made it a global tourist destination. The country is working fast to develop the necessary infrastructure to facilitate greater growth. This has prompted the GOI, as well as several state governments, to market India under the "Incredible India"⁷ promotional campaign and the "Atithi Devo Bhava"⁸ (Sanskrit for *The Guest is God*) program, which are designed to entice Indian stakeholders to increase investments in tourism and improve tourist hospitality.

With the expectation of a rebounding economy and increased travel next year, the outlook for imported foods and beverages post-COVID-19 looks positive. Despite local price sensitivities, the hotel sector has long invested in high-value, premium food and beverage products to enhance the guest experience, especially in four- and five-star hotels and their high-end specialty restaurants. Some of these specialty items and ingredients cannot be sourced in India and must be imported. These products include wine, distilled spirits, dairy products, meat, seafood, fruits, frozen potato products, sauces, condiments, sauces, drink mixes, and ingredients for foreign cuisines such as Italian, Thai, Japanese, Chinese, Peruvian, and Mexican.

In addition, many Indian five-star luxury hotel chains manage historical palaces and have converted them into heritage hotels, offering guests an ultra-luxurious, high-end experience. These hotel chains, whose clientele is willing to pay high prices for ultra-premium products, present a lucrative opportunity for imported products and ingredients.

Table 1: India: Key Indicators of the Travel and Tourism Industry

International Tourist Arrival	15,542,900 persons
International Tourist Inbound Receipts	US \$27.4 million
Average Receipt per Arrival	US \$452.00
Travel and Tourism Industry GDP (% of total)	US \$96.4 million (3.6 percent)

Source: World Tourism Organization and World Travel and Tourism Council

SECTION II. ROAD MAP FOR MARKET ENTRY

- **Entry Strategy:**

Key factors to consider before entering or introducing products into the Indian market

- **Can your product come into India and the local laws:**

1. Study India's varied, complex laws and regulations to determine if your product has market access.

⁵ See: [Travel & Tourism Competitiveness Report 2019](#)

⁶ Source: [Economic Times, May 29, 2020](#).

⁷ See [Link](#).

⁸ See: [Atithi Devo Bhava](#).

2. Review [FAS GAIN](#) policy and market reports. Consider engaging with a market research firm to assist with market entry, better understand the trade challenges and opportunities, and navigate the complex regulatory environment.
- **Find the Right Partner:**
 1. Identify a reliable importer/distributor who services the food retail sector.
 2. Avoid conflicts of interest – i.e. a partner who can ensure that all channels are followed within Indian laws.
 3. Consider whether participating in an Indian trade show or collaborating/participating in USDA endorsed promotional activities would be effective in finding a dependable importer/distributor/partner. This includes online trade shows in the short term, due to COVID-19 related travel challenges.
 - **Secure Payment Terms:**
 1. Until establishing a successful working relationship, U.S. companies or exporters may wish to consider vehicles such as an irrevocable Letter of Credit, advance payment, or payment at sight.
 2. FAS India offices do not have the authority to mediate contractual disputes or serve as a collection agent when differences over payment or other commercial issues arise. For information about local legal services, refer to GAIN Report [IN6155](#).

Market Structure and Distribution Channels:

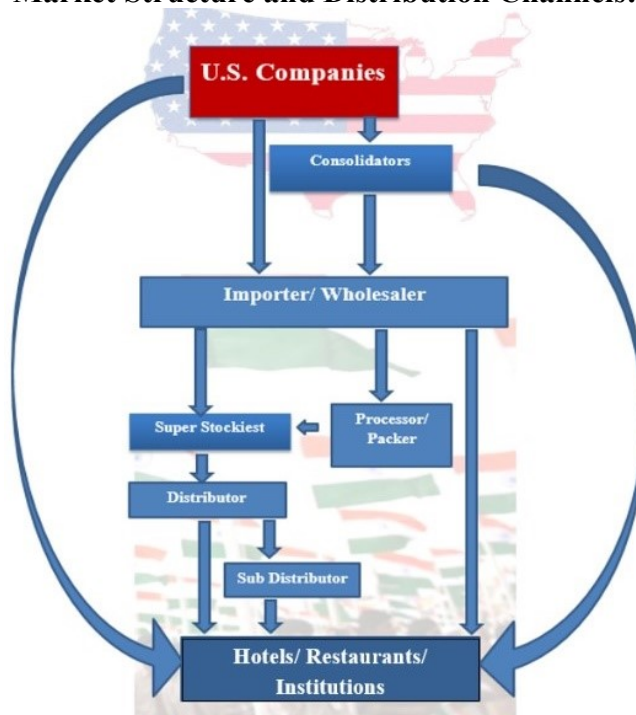


Figure 02: Distribution Channels

The COVID-19 pandemic has created unique hindrances for U.S. exporters attempting entry into the Indian market. Due diligence is advised to U.S. companies, while keeping in mind the current global trade scenario, public health, and other sanitary/phytosanitary concerns.

Sub-Sector Profiles:

Organized Hotels: India has a vast hotel sector, but only a small percentage are considered four-star or above. The overwhelming majority of hotels are small, traditional outlets that provide inexpensive accommodations and locally source all their food. According to the survey conducted by the Federation of Hotel & Restaurant Associations of India, there are over 2,500 hotels and resorts in India constituted as “organized” or “modern.”

Average 2020 occupancy rates in branded hotels are expected to decline by 17-21 percent, while average daily room rates are expected to decline 7-8 percent for 2020.⁹ As such, the Indian hotel sector is expected lose \$8.8-\$10 billion in revenue in 2020, reflecting a loss of 39 to 45 percent compared to last year.¹⁰

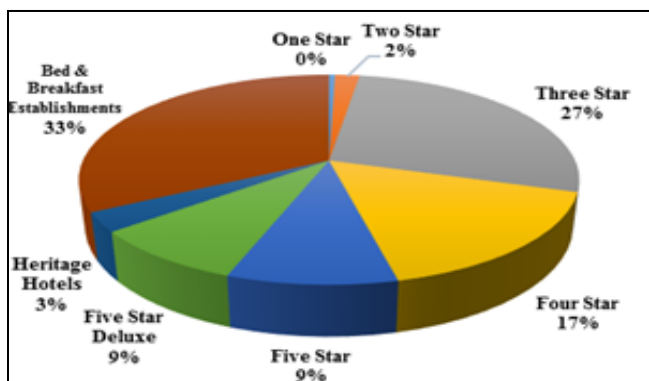


Figure 03: Classification of Indian Hotels

Source: Ministry of Tourism, Government of India

Four- and Five-Star hotels are able to obtain special licenses that enable them to purchase food and beverage items (and other items such as equipment and furniture) duty-free, subject to their foreign exchange earnings. Hotels typically use duty-free licenses to purchase items with the highest import tariffs and may not use the licenses to purchase food products.

Restaurants: According to a recent study, India’s organized restaurant sector was valued at nearly \$21 billion in fiscal year 2019¹¹, and employs more than 4 million people. Additionally, 75 percent of India’s organized restaurants are dine-in, with the remaining 25 percent are delivery/takeaway. There are approximately 1,137 restaurants in the “organized” or “modern” sector, defined as restaurants with more than twenty seats with an established menu. Around 66 percent of India’s restaurant sector is unorganized, where small restaurants and street-side stalls are common. As of 2020, there are 63 foreign restaurant brands/chains in India, compared to 57 in 2015.¹² India’s organized dine-in restaurants may see revenues fall by 50 percent in FY 2020 due to COVID-19 and the fall in demand due to lockdown restrictions.

Institutional: The institutional food service sector traditionally comprises catering services for events, Indian armed services, railways, ships, airlines, hospitals, schools, government meal programs, prisons, and government and corporate offices. Cost is a major consideration, and most food and beverage procurement requirements, including imported goods, are purchased through local importers or distributors rather than directly from the product’s origin. The effect of COVID-19 has been especially hard on the institutional sector as meetings, conferences,

⁹ Revenue per available room (RevPAR) is a performance measure used in the hospitality industry and is calculated by multiplying a hotel's average daily room rate by its occupancy rate.

¹⁰ See report by [HVS](#).

¹¹ See [CRISIL report](#)

¹² Refer to the January 2018 GAIN Report: [IN7160](#).

exhibitions, social and sporting events have either been canceled or deferred indefinitely.¹³ However, domestic airlines, which were originally shut down from March 25 to May 25 have shown some recovery. According to the Ministry of Civil Aviation, more than ten million passengers have flown on over 100,000 flights since domestic flights resumed operations,¹⁴ providing a bright spot to otherwise marred sector.

SECTION III: COMPETITION:

High import duties, labeling requirements, import restrictions, and the depreciating rupee coupled with concerns about the trade outlook are major points of deliberation for Indian businesses while making purchase decisions towards imported foods and beverages. India's domestic industry remains the primary competitor for U.S. foods and beverages within the HRI sector. In addition, many third-country competitors enjoy a freight and preferential trade advantage over the United States and can supply at lower costs.

Table 2. India: Competition in Major Product Categories				
Product Category	Total Imports (\$ Million) CY 2019	Major Supply Sources	Strengths of Key International Suppliers	Advantages (A) and Disadvantages (D) of Local Suppliers
Animal or Vegetable Oils, Fats and their products	9,854	Indonesia Malaysia Argentina Ukraine Nepal	Major production hubs and competitive prices	Local production is inadequate, and more than 40 percent of total edible oil consumption is dependent on imports. (A)
Leguminous Vegetables, Dried Shelled/Pulses	1,549	Canada Myanmar Tanzania Mozambique Brazil	Price competitiveness, freight advantage and the ability to produce specific varieties of pulses in demand in India.	Historically about 20 percent of total consumption demand for pulses was met through imports. However, back-to-back record domestic harvests in the last two years has resulted in the GOI imposing severe import restrictions, including quantitative restrictions on the imports of peas and other pulses, which have slowed down imports since 2018 (D).
Edible Fruits and Nuts; peel of citrus fruit or melons	3,076	USA Afganistán Benín UAE Cote d'Ivoire	Growing market demand, preference for specific quality, popular at certain holidays	Domestic production of some of the major fruits and nuts is insignificant (A)
Sugars and sugar confectionery	410	Brazil South Africa Netherlands USA Germany	Price competitiveness	India is a large producer, consumer and usually a net exporter of sugar (D)
Coffee, Tea, Mate and Spices	725	Vietnam Indonesia Sri Lanka Nepal Afghanistan	Price competitiveness and proximity to India	Most imports are for re-export
Dairy; birds' eggs; natural honey; edible products of animal origin	35	France Germany Italy Denmark UK	Price competitiveness, sanitary requirements	Domestic production is not keeping pace with demand (A). The Indian import protocol is very stringent and effectively prohibits imports of many products from the United States. (D)

Source: Trade Data Monitor

¹³ See Article: [Travel daily News](#)

¹⁴ See: [Ministry of Civil Aviation Press Release](#)

SECTION IV. BEST PRODUCT PROSPECTS

Table 3A: Products Present in Market and have Good Sales Potential

Product Types	Import Value (\$ Million) CY 2019	U.S. Market Share (%)	Impacting Factors
Almonds (Almonds, Fresh Or Dried, In Shell and Fresh Or Dried, Shelled)	849	83.38	United States with 81 percent market share of imported almonds has a supplier advantage.
Chocolate & Cocoa Products	196	1.75	Strong preference for recognized brands. Competition from domestic & international suppliers.
Beverages, Spirits and Vinegar	838	35.90	Increased consumption and lack of domestic production.
Fresh Fruits (Primarily Apples)	256	24.04	Counter-season supplier advantage. Brand preference for U.S. apples.

Source: Trade Data Monitor

Table 3B: Products Not Present in Significant Quantities but have Good Sales Potential

Product Types	Import Value (\$ Million) CY 2018	U.S. Market Share (%)	Limiting & Impacting Factors
Tree nuts (Except Almonds)	1,449	5.57	India imports a large variety of other types of tree nuts such as pistachios from Iran and other competing regions, thus limiting exports from the United States. Lack of awareness for tree nuts such as pistachios and pecans.
Leguminous Vegetables, Dried Shelled/Pulses	1,549	2.53	About 20 percent of India's total consumption demand for pulses previously was met through imports. However, back-to-back record domestic harvests in last two years has resulted in GOI imposing severe import restrictions, including quantitative restrictions on imports of peas and few other pulses have slowed down imports of pulses since 2017. However, India country will always have a requirement for pulses, whose demand may not be always met by local production.
Sugars and sugar confectionery	410	5.47	India is a large producer, consumer and exporter of sugar. Indian consumers consume many sweets, so innovative and new products in sugar confectionery are always preferred by consumers of all ages and class.
Fresh Fruits (Except Apples)	160	3.66	Seasonal availability of domestic fresh fruits and imports from other preferred destinations limit U.S. imports
Poultry Meat & Products. (ex. eggs)	0.8	20.23	There is still little knowledge of U.S. poultry, but marketing efforts are underway to increase consumer awareness.

Source: Trade Data Monitor

Table 4: India: Top Consumer-Oriented Product Imports

Table 4A: Top Consumer-Oriented Products Imported from the World			Table 4B: Top Consumer-Oriented Products Imported from the United States		
Description	US Dollars (Millions)		Description	US Dollars (Millions)	
	2018	2019		2018	2019
Cashew Nuts, Fresh or Dried, In Shell	1,704	1,101	Almonds, Fresh or Dried, In Shell	645	701
Almonds, Fresh or Dried, In Shell	763	802	Apples, Fresh	165	59
Apples, Fresh	304	246	Walnuts, Fresh or Dried, In Shell	24	14
Dates, Fresh or Dried	257	163	Almonds, Fresh or Dried, Shelled	12	07
Pepper of Genus Piper, Neither Crushed nor Ground	136	93	Food Preparations: food flavoring material, soft drinks other than sharbat, custard powder, other diabetic foods	23	23
Others	2,185	2,337	Others	116	163
Total	5,349	4,742	Total	985	967

Source: Trade Data Monitor

Products Not Present Because They Face Significant Barriers:

Currently, there are several trade restrictions that limit market access for U.S. food products. With the exception of poultry meat and poultry products, imports of most animal and livestock-derived food products are effectively banned due to established Indian import requirements. This includes certain sub-categories in the Harmonized Tariff Schedule under Chapters 2, 3, 4, 5, 16 and 21 (e.g., milk and dairy products, certain seafood, sheep and goat products, as well as pork products and pet food). Furthermore, imports of beef are banned due to religious considerations. If allowed, some of these products (e.g. cheeses) may have good sales potential for the food processing, retail, and HRI sectors.

Effective July 8, 2006, the GOI's Foreign Trade Policy (2004-2009) specified that all imports containing products of modern biotechnology must have prior approval from the Genetic Engineering Approval Committee (GEAC), Ministry of Environment, Forests and Climate Change. The policy also made a biotech declaration mandatory. Soybean oil and canola oil derived from select events are the only biotech food products (GE food) currently approved for imports in India. For more information on India's biotech import policy, please refer to: [USDA FAS India GAIN report IN2019-0109 Agricultural Biotechnology Annual 2020](#).

SECTION V. POST CONTACT

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For additional information please visit the FAS websites & useful FAS India GAIN reports

- [FAS Homepage](#)
- [FAS India Exporter Guide](#)
- [FAS India Food Processing Report](#)
- [FAS India Food Service - Hotel Restaurant Institution](#)

Attachments:

No Attachments