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India

Food Service - Hotel Restaurant Institutional

2013

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Report Highlights:

India's hotel, restaurant and institutional (HRI) sector continues to expand and modernize as the number of domestic, foreign, and business travelers increases and more consumers patronize both domestic and foreign chain restaurants. The number of four and five star hotels has increased 585 in recent years as new chains enter the market and existing chains expand. While traditional hotels and restaurants dominate the market, four and five-star hotels and modern restaurants are benefiting from a willingness among consumers to try new foods and cuisines and increasing urbanization. Imported foods must compete with improving locally produced and processed foods in terms of both quality and price. High tariffs and ongoing market access issues also limit opportunities for imported food products. Nevertheless, niche opportunities for products that are not readily available in India are improving. Identifying a reputable local importer with a strong distribution network continues to be the best way to supply the Indian HRI sector.

Post:

New Delhi

Market Summary

In 2010, annual GDP growth reached 8.5 percent, then slipped to a ten-year low of 5 percent in 2012 and to 4.4 percent for the quarter ending June 30, 2013. The economy is challenged by year-long depreciation of the rupee, stubborn inflation and a looming fiscal deficit. Nevertheless, India has one of the world's fastest growing large economies and, by some estimates, is projected to become the world's third largest economy by 2025.

Food inflation, which has been in the double digits for much of the past few years, is a particular concern. Food inflation has moderated to 8-10 percent over the past few months, but remains stubbornly high despite the excellent 2013 monsoon. Thus far, the Government of India has not taken recent steps to lower tariffs or to improve access for imported products as a means of easing food inflation. Nevertheless, led by commodities such as pulses and vegetable oil for which tariffs were already low, India's agricultural imports jumped from \$7.2 billion in 2007 to \$20.3 billion in 2012. Imports of consumer-ready foods, led by nuts and fresh and dried fruits have doubled since 2008 to \$2.1 billion.

Status of HRI Service Sector

India's hotel, restaurant and institutional sectors are benefiting from India's relatively strong economic growth, foreign investment, rising incomes, a young population and changing consumer consumption patterns. While opportunities for foreign food exporters in the sector are improving, the market for imported food products continues to be relatively small, due in large part to ongoing import restrictions and strong competition from domestic foods.

India has a vast hotel sector, but only a small percentage of hotels are considered three stars and above. The overwhelming majority of hotels are small traditional outlets that provide inexpensive accommodations for travelers and source all of their food locally. There are an estimated 585 hotels and resorts in India that constitute the "organized" or modern sector. Nevertheless, as foreign and domestic travel has increased in recent years, the number of modern hotels that carry at least small amounts of imported foods on their menus is on the rise. Hotels are able to obtain a special license that enables them to purchase food items (and other items such as equipment and furniture) duty-free subject to their foreign exchange earnings. Hotels tend to use the duty-free licenses to purchase the items with the highest import tariffs and may not use the licenses to purchase food.

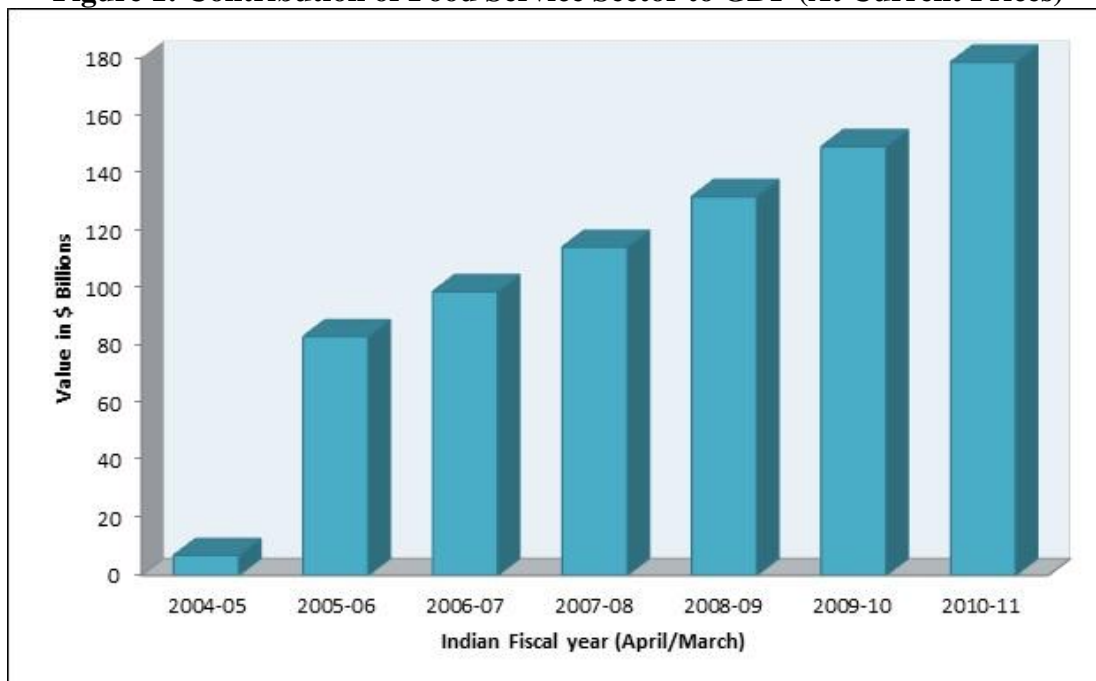
Traditionally, Indians have tended to eat at home and eat Indian food. Those who ate outside the home often ate street foods from the enormous number of street stalls and informal eateries that are common across India. Eating out in a restaurant was reserved for special occasions. However, India appears to be in the early stages of a significant transformation in the restaurant sector. Indian consumers are eating out more frequently and younger Indians are shedding the biases of their elders against international franchises and foreign foods. With only an estimated 100,000 modern restaurants (20 or

more seats, wait staff, menus) in India, there is plenty of room for growth in the industry. It is estimated that Indians spend 7 to 10 percent of their food expenditures outside the home in restaurants, cafeterias and other food establishments.

After struggling with supply chain issues for many years, major franchises have developed a handful of suppliers in India who can meet quality requirements, placing existing restaurants in a better position to expand and easing the way for new restaurants seeking to enter the market. While the number of casual dining, fast food restaurants and coffee shops is growing, high tariffs and other trade restrictions tend to limit the use of imported food products on restaurant menus. Imports are typically limited to specialty ingredients that are not available in India. However, if food inflation in India remains strong, restaurants could start to increase the use of imported foods.

The institutional sector is geared in large part to serving public sector institutions such as the Indian railways and public offices. Corporate catering is a relatively new concept, but some large companies are providing meals to their employees. Catering for parties and special events is a common and longstanding practice in India, but is dominated by traditional caterers providing local foods and cuisines. However, even traditional caterers are expanding their menus to include pasta bars and other non-Indian cuisines. Cost is a major factor in the institutional sector and the high cost of imported food products, after tariffs and other fees are applied, tends to limit opportunities for exporters in this sector. India's fragmented and multi-layered food supply chain system continues to slow the growth of the modern food sector. However, investment in supply chain infrastructure and logistics presents a significant opportunity as the retail and HRI sectors modernize, creating greater demand for safe and efficient product delivery from port or farm to fork. Despite the shortcomings of the supply chain, the value of the food service sector continues to increase. See Figure 1 below.

Figure 1: Contribution of Food Service Sector to GDP (At Current Prices)

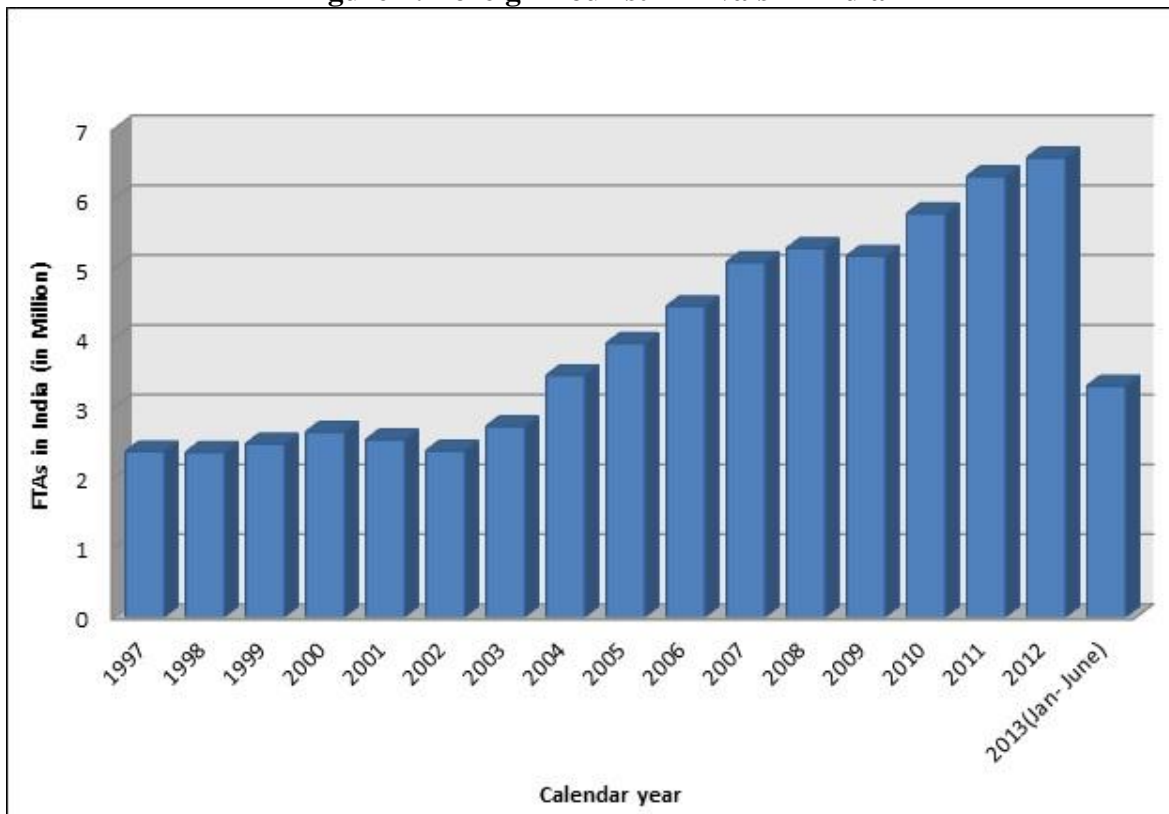


Source: Reserve Bank of India

Tourism on the Rise

Foreign tourist and business arrivals have nearly tripled over the past decade, rising to 6.6 million in 2012. The rapid growth of domestic air travel and improvement in the quality and number of hotels has helped to fuel the rise and increase the number of higher income travelers (India was traditionally a backpacker destination). India continues to market itself with the “Incredible India” promotion campaign (www.incredibleindia.org) and the “Atithi Devo Bhav” (Sanskrit for “the Guest is God”) program, which is designed to sensitize Indian stakeholders to the value of tourists and tourism.

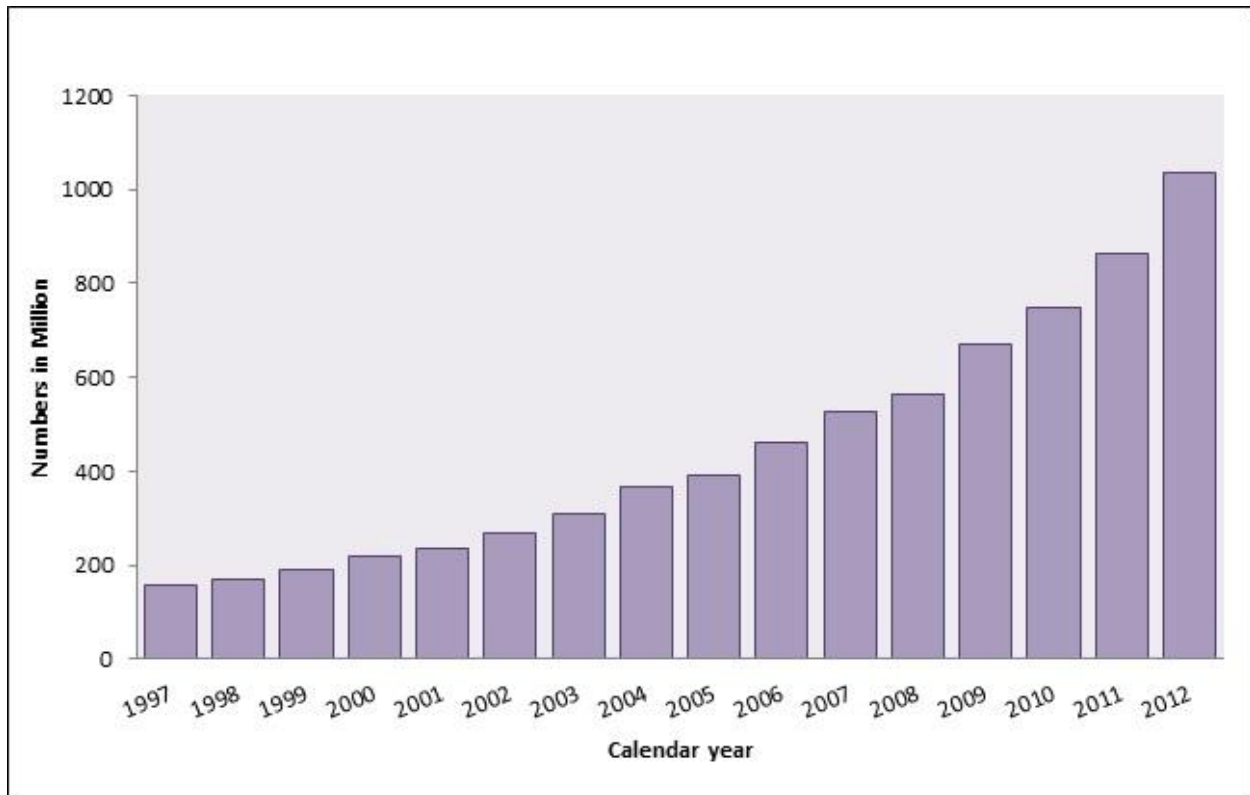
Figure 2: Foreign Tourist Arrivals in India



Source: Ministry of Tourism India

Perhaps even more notable than the rise in foreign travelers has been the increase in domestic travel. The number of Indians traveling in India has increased dramatically since 1997, rising from less than 200 million to over a billion in 2012. The rise reflects a variety of factors such as increased car ownership, improved and less expensive domestic air travel, rising disposable incomes, improved accommodations, a strong rail network and exposure to travel and tourism abroad. A survey of Indian hotels determined that nearly 75 percent of hotel rooms are occupied by domestic guests, with foreign travelers accounting for the balance. Indians are also traveling abroad in greater numbers for tourism, business, and among foreign travelers, the United States accounts for over 15 percent of trips followed closely by the United Kingdom.

Figure 3: Number of Domestic Tourists in India



Source: Ministry of Tourism India

Factors Affecting the HRI Sector

The hotel, restaurant and travel sectors have grown notably in recent years. Around 50 four and five star hotels have opened over the past three years, an increase of 12 percent. Foreign and Indian fast food and casual dining chains are increasing in number and existing chains are adding outlets. A significant weakening of the rupee over the past year from Rs. 44 per dollar to Rs. 60 per dollar could prompt more Indians to travel in India and encourage more foreign travelers to visit India. At the same time, the weaker rupee, persistently high food inflation, and slower economic growth (from 8 percent annual growth to under five percent) are leading to higher costs for consumers, thinner margins and weaker demand for travel and business services.

The following list outlines some of the positive factors that are expected to facilitate the growth of the sector over the longer term.

- Chefs working in the HRI sector are keen to introduce new cuisines and culinary practices.
- Restaurants and hotels are “Indianizing” their services and foods to better meet Indian preferences.
- The modern segment of the HRI sector is striving to match high standards of quality and service.
- International hotel chains are penetrating in the Indian market.

- Low-fare domestic airlines are providing greatly improved travel service.
- Rising numbers of working women, increased urbanization and a very young population are all expected to lead to changes in eating patterns and practices.
- Strong growth in the casual dining and fast food sectors from both domestic and foreign chains are introducing new dining options and foods.
- Increased competition is keeping costs in check and ensuring that firms are delivering value for money in a price-sensitive market
- Slowdown in global economy has led to increase in country and more domestic travelers are opting for leisure destinations within India.

Import Market

India opened its market to imported food products a decade ago. The market for imported foods grew slowly at first, but developments over the past few years such as a growing number of professional brand-oriented importers and an increase in the number of modern retail outlets and hotels all point to stronger growth prospects, albeit from a small base. Unique labeling requirements, ongoing non-tariff trade restrictions, complex state and local taxes, a weaker rupee, and a slow-to-develop distribution infrastructure continue to complicate the import process.

Among modern hotels and restaurants, opportunities are typically for foods or ingredients that are not readily available in India. Even luxury hotels are very cost conscious and often seek to minimize food costs by using local ingredients. Among four and five-star hotels, imported products include wine, other alcoholic beverages, dairy products, meat, seafood, fruits, frozen French fries, sauces, seasonings, and condiments, drink mixes, and ingredients for foreign cuisines such as Thai, Japanese, Chinese, Mexican, Spanish, and Italian.

Within the restaurant sector, imported food and ingredients are typically limited to products that cannot be sourced in India. Among the growing number of Indian and foreign chain restaurants, high tariffs and other trade restrictions generally lead restaurants to look for local suppliers who can meet their needs. Some specialty items and ingredients that cannot be sourced in India are imported. There are a few high-end restaurants that are not affiliated with hotels in major cities that serve imported food products.

Regional trading hubs such as Dubai and Singapore continue to be important suppliers to the Indian market. However, as the food import community shifts its focus from simply trading to professional brand management, distribution and marketing, importers are increasingly looking to represent foreign exporters in India. Key importers are located in cities such as Delhi, Mumbai, Chennai, Kolkata, Cochin and Goa, but tend to be concentrated in Mumbai and Delhi.

The import process continues to be complex and relatively costly. Consequently, hotels and restaurants typically source their products from local importers and distributors who have the expertise in clearing, storing, and transporting products. Most hotel chains purchase through centralized procurement offices on annual contracts with local importers, ordering small quantities of food products as needed and

minimizing food storage at hotels. Restaurants also rely on local distributors for their needs and some require importers to become an approved supplier.

Trade Policy

While India lifted its effective ban on food imports in the early 2000s, tariffs on consumer- ready food imports remain high. Wine and spirits attract significantly higher tariffs and excise taxes. Additionally, 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 products classified in Chapter 4 and 21 of the Harmonized Tariff Schedule, poultry meat, lamb and mutton, seafood, goat and pork products including pet foods. Imports of beef are banned due to religious concerns. Exporters should also ensure that their products comply with India's food labeling and inspection requirements.

In May 2003, the Government of India allowed hotels and restaurants duty-free imports of liquor and wine up to five percent of their foreign exchange earnings over the preceding three years (see [GAIN IN3062](#)). The entitlement of duty – free imports offers a significant cost savings for foreign exchange earning hotels and restaurants. Hotels also have the option of applying their duty- free benefits to food products, but typically utilize this program for expensive items such as equipment and high – tariff items such as alcohol.

Advantage	Challenges
A growing tourism sector.	High tariffs and non-tariff restrictions.
Increasing urbanization and a growing number of working women.	Specific labeling and clearance requirements and procedures.
Expanding young population and increasing growth of fast food chains and casual dining restaurants.	Developing food distribution infrastructure and a long and fragmented supply chain.
Growing popularity of American culture and foods. Many U.S. fast food franchises are present in the market.	Strong competition from local suppliers including multinational food companies.
Eating out culture is growing among upper and middle class Indians along with a greater willingness to try new cuisines.	Competition from countries with closer geographic proximity.
U.S. products generally have a good quality image among consumers.	U.S. exporters' unwillingness to work with small volumes, consolidated shipments and special labeling requirements.
Strengthening economic ties between India and the United States.	Consumers' preference for traditional Indian foods.
The global economic downturn resulted in price sensitive domestic travelers opting for trips within India leading to increased demand for hotels.	The Indian economy is challenged by year-long depreciation of the rupee, stubborn inflation, and a looming fiscal deficit.

SECTION II: Road Map for Market Entry

A. Entry Strategy:

- Survey existing and potential opportunities by reviewing FAS policy and market reports and consider engaging a market research firm to assist in analyzing market opportunities and challenges. ([GAIN IN3089](#))
- Determine if your product has market access in India.
- Identify an Indian importer/distributor who services the HRI sector.
- Examine all prospective candidates, and thoroughly research the more promising ones. Check the potential agent's reputation through potential clients and bankers.
- Recognize that agents with fewer principals and a smaller set-up may be more adaptable and committed.
- Avoid conflicts of interest where a potential agent handles similar product lines from competing suppliers.
- Consider whether participating in an Indian trade show would be an effective means of identifying a distributor.
- For products with a potentially longer shelf life and/or larger order volumes (e.g., from large hotel chains), U.S. exporters may identify and explore supplying through consolidators based in Dubai, Singapore and Europe.
- Make sure you understand India's varied food laws, particularly those pertaining to use of additives, labeling requirements, shelf life, and sanitary and phytosanitary regulations.

Ensuring payment is another important consideration when establishing a relationship with an importer. Until a successful working relationship is established, exporters may wish to consider vehicles such as an irrevocable letter of credit. Alternatively, Indian importers are accustomed to operating without credit and may be willing to pay cash prior to shipment. While FAS India receives few queries concerning delinquent Indian importers, our offices do not have the authority or expertise to mediate contractual disputes or serve as a collection agent when differences over payment arise. FAS India can recommend local legal services, but these situations can be avoided with proper preparation and sale terms. For firms that qualify, the Export Import Bank of the United States provides exporter insurance.

B. Market Structure

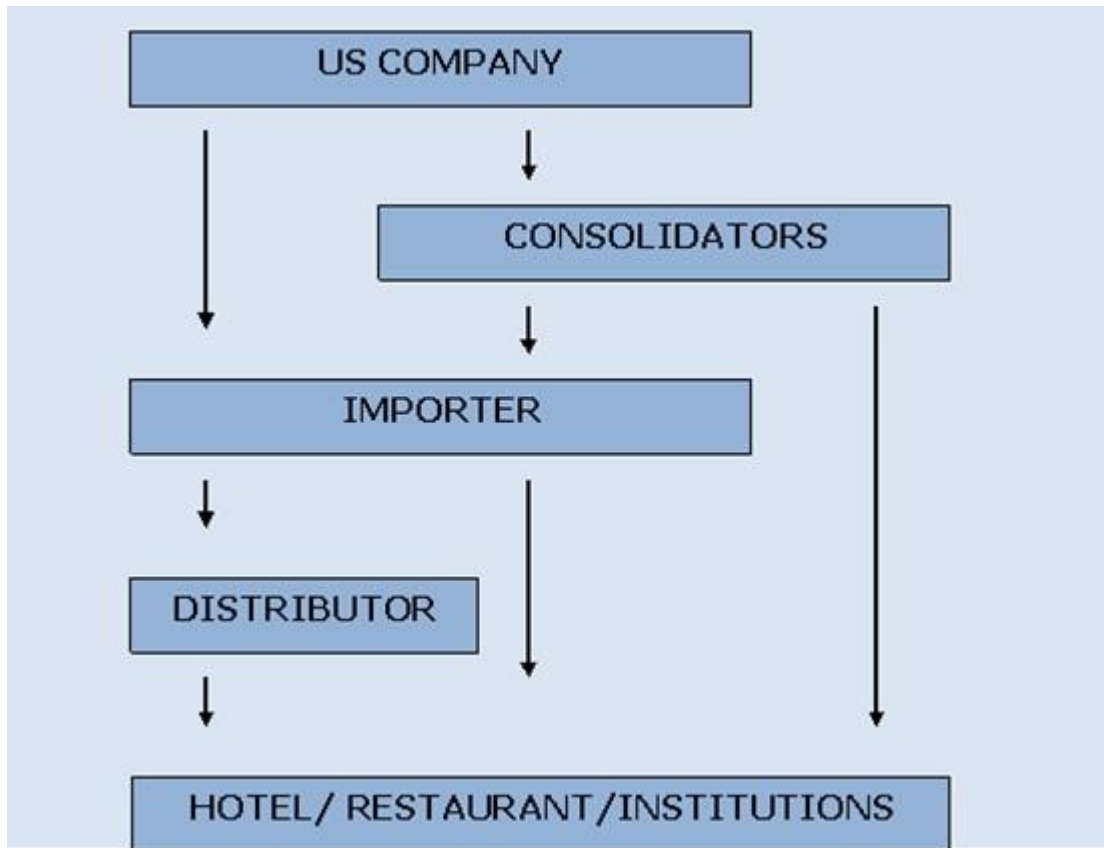
Hotels and restaurants, depending on their procurement systems, buy imported food and beverage products from alternate distribution chains based on the type of products and the volume of the consignment.

- Imported fresh produce is generally bought from wholesalers and distributors.
- Imported meats, fish, seafood, and dairy products are obtained from dedicated importers and their exclusive distributors who have the cold chain infrastructure to handle such products.

- Most establishments procure non-perishable items through distributors or, in a few cases, from importers.
- A few larger hotel and restaurant chains import specialty items through consolidators based in Dubai, Singapore, or Europe.

Wines and liquors are generally procured through importers, mainly private bonded warehouse operators, as most hotels and restaurants import liquor duty-free against their foreign exchange earning license.

The following flow chart gives an overview of the distribution network for imported food for hotel and restaurant sector buyers.

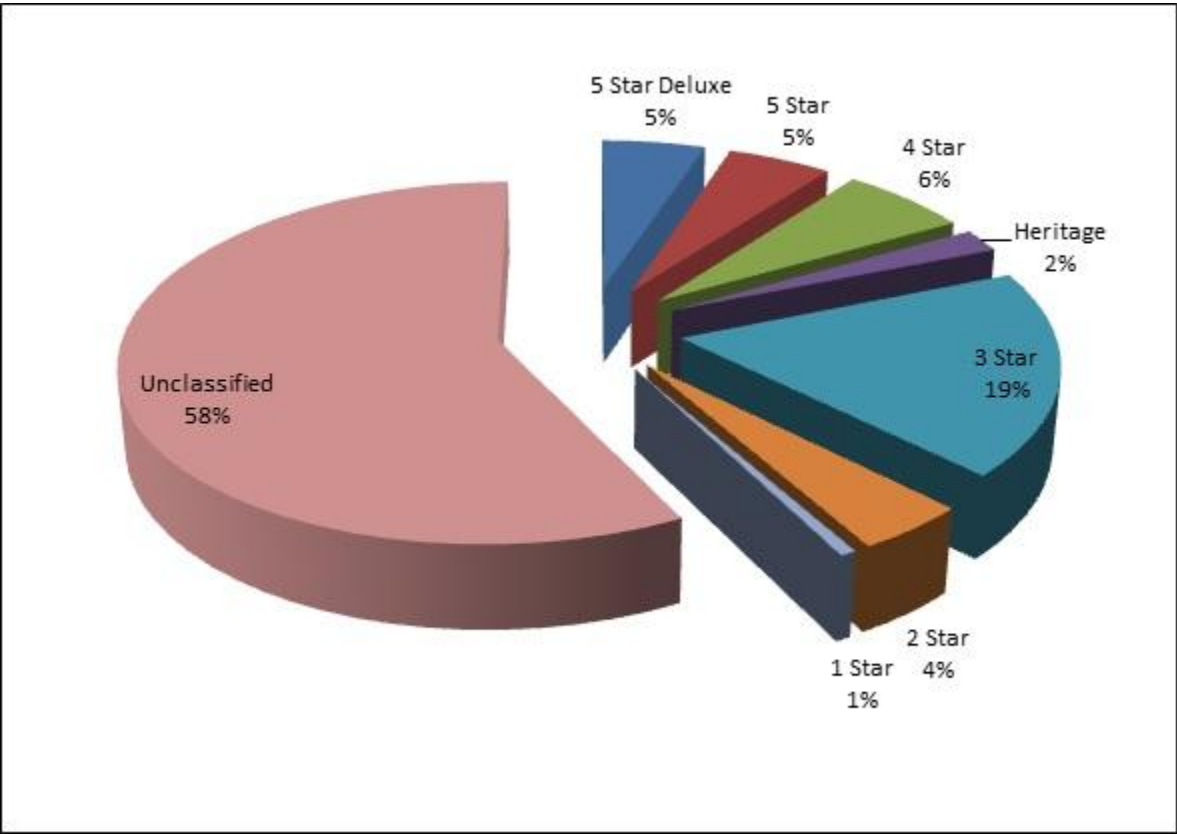


C. Sub – Sector Profiles

Hotels

There are an estimated 585 hotels and resorts in India that constitute the “organized” or modern sector. Most of these hotels are in the larger cities and major tourist or business destinations. India has several world class domestic hotel chains and several international chains have also established a presence through franchising or partnerships with Indian firms (see Annex 1). These branded hotels are mostly in the premium segment (5 star/5 star deluxe/heritage) and mid-range segments (4 star), which cater to business and leisure travelers. With the rise in tourism and business travel, several international brands are exploring the possibility of entering or expanding in India.

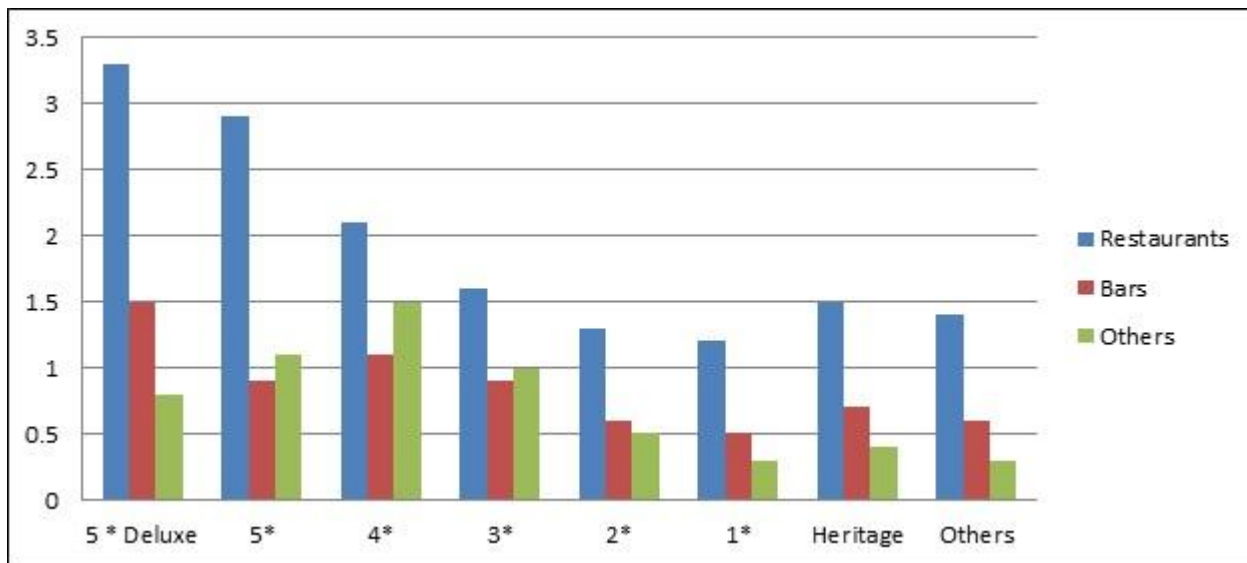
Figure 5: Profile of Organized Hotels in India



Source: Federation of Hotels and Restaurants in India (FHRAI)

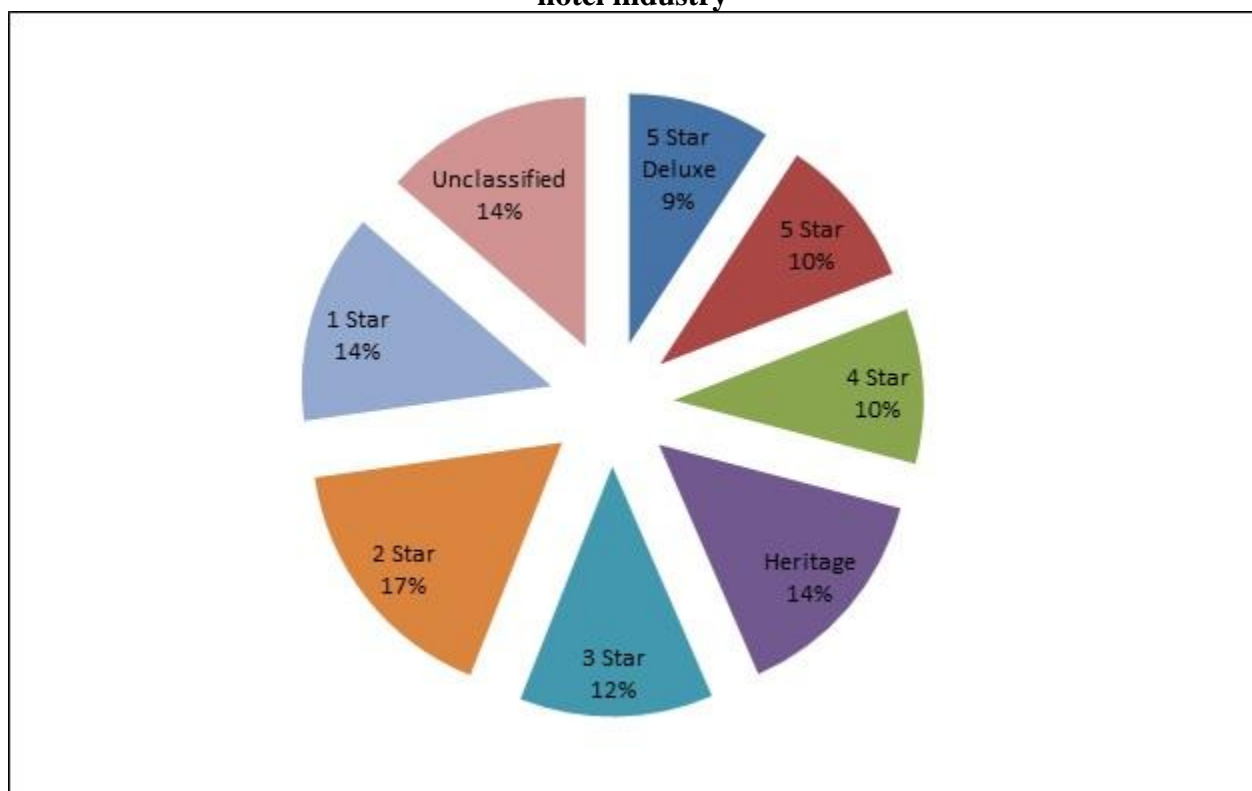
Food and beverage sales account for about a third of the revenue generated by hotels and five-star hotels typically have three to four restaurants per hotel. See Figures 6 and 7 below.

Figure 6: Average Number of FnB Outlets per Hotel (Star Category)



Source: Federation of Hotels and Restaurants in India, survey report

Figure 7: Percentage Contribution of Food & Beverages towards the total revenue generated by hotel industry



Source: Federation of Hotels and Restaurants in India, survey report

Imported food and alcoholic beverage products destined for the hotel sector are primarily sold to the luxury hotel segment (three star and above). The share of imported food products can vary from 5-20 percent of a hotel's total food budget while imported alcoholic beverages account for an estimated 40-

60 percent of the total liquor budget of any individual luxury hotel. The Indian wine industry estimates that half of all wine imports enter India via the hotel sector's duty-free exemption. Over the past five years, India has been touted as a wine market with tremendous potential which has attracted interest from wine suppliers around the world. While the development of the industry has proceeded more slowly than forecast, many wine exporters are competing to supply the relatively small hotel market, making it difficult to establish a relationship with existing importers who already carry a range of foreign wines.

Most hotels purchase imported food and beverages from Indian firms that import and distribute food products. However, some of the larger chains procure via consolidators based in Dubai, Singapore, Europe, and Bangkok. Indian importers typically import mixed containers and offer a range of products. Hotels often deal with multiple importers in order to get the desired range of imported foods. Exporters seeking to access the Indian hotel market should identify an importer that specializes in distributing to hotels and be prepared to offer small quantities or products or mixed containers

Restaurants

It is difficult to assess the number of restaurants in India as the sector is largely in what is referred to as the "unorganized" sector where small restaurants and street side stalls are common. There are approximately 100,000 restaurants in the "organized" or modern sector, which is defined as restaurants with more than twenty seats and a restaurant menu. Indians have traditionally preferred multi-cuisine restaurants where a family or group can order a range of different cuisines. A typical multi-cuisine restaurant might serve Chinese, various regional Indian dishes, and European style foods. That trend is changing as restaurants serving a single cuisine are becoming increasingly popular. Growth in the "organized" or modern sector is expected to grow at 8-10 percent annually for next few years because of increasing urbanization and higher disposable incomes. International fast food and local multi-unit restaurant groups are driving the expansion in the restaurant industry. South India is emerging as a key region for growth of multi-unit chains that supply reasonably-priced ethnic food with a quick-service concept.

Most foreign and local chains are doing well in major cities, and are expanding into mid-sized Indian cities referred to as tier-two and tier-three cities. Many of these fast food chains have developed a range of Indian styled products to suit local preferences. Although these chains procure most of their products locally, several products such as French fries, specialty cheeses, some meats and sea food, flavors, condiments, and other ingredients are often imported. Over the past few years, the 'coffee shop' culture has spread via chains like Costa Coffee, Mocha, Barista, Starbucks, and Café Coffee Day in major cities, and seems poised for future growth. These chains are currently sourcing syrups, nuts, and some bakery ingredients from foreign origins. ([IN3056 - India's Quick Service Restaurant Sector Growing](#))

Institutional

The institutional food service sector includes catering services for the armed services, railways, ships, airlines, hospitals, schools, government meal programs, prisons, and government and corporate offices.

The leading hotel chains and a few corporate caterers provide catering services to the airlines and for higher end corporate and private events. Cost is a major consideration and catering companies procure most of their food and beverage requirements from domestic sources. To the extent that caterers utilize imported foods, they commonly source from local firms that import and distribute foreign foods.

SECTION III: COMPETITION

The biggest competition for U.S. food and beverage products in India's HRI market is from the local food industry. India's diverse agro-industrial base offers many products at competitive prices. Leading multinational food companies and global brands have food processing operations in India that offer a range of western-style products at reasonable prices. Most local products are priced lower than comparable imported ones due to high import duties and marketing costs. While many high-end hotel and restaurant buyers are aware of quality differences and insist on world class standards, most are also very price conscious.

There are no reliable data on imports of food and beverage products specifically for the HRI sector in India. Based on a qualitative assessment of the market and information obtained from market sources, products from Australia, New Zealand, the European Union, the Middle East, and other Asian countries directly compete with items from the United States. In addition to the freight cost advantages, suppliers from these regions are often willing to supply mixed consignments of a wider range of smaller individual product lots, and willing to modify product specifications to meet Indian food laws.

SECTION IV: BEST PRODUCT PROSPECTS FOR HRI SERVICE SECTOR

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

Description	Total Imports CY 2011 - Value (\$	Total Imports CY 2011 - Quantity	5-yr. Import growth by	Base tariff	Key Constraints Over Market Development	Market Attractiveness for US
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	millions)	(tons)	value (in %)			
Nuts (mainly Almonds)*	529	173,270	13	In shell Almonds (Rs. 35/Kg) Pistachios (10%)	Competition from other suppliers exists but is not substantial	High demand and growing retail industry
Sugars and sugar Confectionery	465	787,029	44	up to 100%	Competition from domestic and other foreign suppliers	Consumer preference for imported products/ brands
Distilled Spirits	209	33,615,766 Liters	16	150%	High import duty, complex state laws, and competition from other suppliers	Increasing consumption and growing middle income population
Apples Fresh	197	186,387	24	50%	Competition from domestic and other foreign suppliers	Seasonal shortages and high prices, diverse fruits among India's middle income population and growing retail industry
Fruit Juices	39	19,296 Liters	20	30%	Competition from domestic manufactures and foreign suppliers from neighboring countries	Increasing health awareness and shortage of quality products
Wine	25	4,262 Liters	9	150%	High import duty, complex state laws, and competition from other suppliers	Increasing consumption and growing middle income population
Sauces, Preparations Mixes, Condiments, and Seasonings	13	7,369	19	30%	Competition from domestic brands	Consumer preference for imported products/ brands and growing fast food culture
Pasta	12	89	0	30%	Competition from domestic manufacturers and foreign suppliers	Increasing popularity
Cheeses	8	1,236	10	30%	US currently doesn't have market access	Rising demand in hotel sector
Meats	2	282	21	30%	US currently doesn't have	Rising demand in hotel sector

					market access	
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Products Not Present Because They Face Significant Barriers

There are several key trade restrictions that limit market access for U.S. food products. Imports of most animal and livestock-derived food products are effectively banned because of established Indian import requirements. This includes dairy products classified in Chapter 4 and Chapter 21 of the Harmonized Tariff Schedule, poultry meat, lamb and mutton, seafood, 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 [IN3083](#) – 'Agricultural Biotechnology Annual 2013'.

SECTION V: POST CONTACT AND FURTHER INFORMATION

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

Report Number	Subject
IN3150	Retail Report
IN3152	Exporter Guide Annual 2013
IN2059	India's Food Retail Sector Growing
IN3059	India's Food Retail Sector Takes a Breather
IN3027	E-retailing Grocery Market in India
IN3056	India's Quick Service Restaurant Sector Growing
IN2162	Wine Market Update 2012
IN3098	Livestock and Products Annual 2013
IN3083	Agricultural Biotechnology Annual 2013
IN3119	Dairy and Products Annual 2013
IN3153	Food Processing Ingredients 2013
IN3089	Agricultural and Agribusiness Consultants 2013

For additional information please contact:

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E-mail: agmumbai@fas.usda.gov

Annexure 1: Profile of Major Hotel Chains (4 star and above) Active in India

Hotel Chain	Hotel Brand	Hotel Sub-Brands	No. of Hotels	Purchasing Agent
Taj Hotels	Taj		17	Consolidators, Importers, and Distributors
	The Gateway		23	
	Vivanta By Taj		26	
	Other Hotels		12	
Hyatt Hotels	Park Hyatt		3	Importers, and Distributors
	Hyatt Regency		5	
	Grand Hyatt		2	
The Oberoi Hotels	The Oberoi		10	Consolidators, Importers, and Distributors
	Trident Hotels		9	
ITC Group	Fortune Hotels	Fortune	41	
	WelcomHotel		7	
	WelcomHeritage	Legend Hotels	9	
		Heritage Hotels	20	
		Nature Resorts	10	
Intercontinental Group	Holiday Inn		11	
	Crown Plaza		15	
	Intercontinental		1	
The Leela Hotel	The Leela Hotel		3	Consolidators, Importers, and Distributors
	The Leela Palace		4	
	The Leela Kempenski		1	
The Lalit	The Lalit		11	
The Imperial			1	
Hilton Hotels	Doubletree		3	Importers, and Distributors
	Hilton		4	
	Hampton		1	
	Hilton Garden Inn		3	
Four Season Hotels	Four Seasons		1	
Carlson Hotel Group	Radisson	Radisson hotels	8	Importers, and Distributors
		Radisson blu	25	
	Country Inn and Suites		73	
	Sarovar Hotels	Sarovar Premiere	4	
		Sarovar Portico	28	

		Hometel	6	
		Park Plaza	9	
		Park Inn	3	
		Le Dupleix	1	
		The Promenade	1	
		Radha Regent	1	
		The Royal Plaza	1	
		Aditya Park	1	
		Gokulam Park	1	
		Peerless Inn	1	
		Hotel Marine Plaza	1	
Starwood Hotels and Resorts	Le Meridien Hotels		7	Importers, and Distributors
	The Westin Hotels		6	
	Sheraton		4	
	The Luxury Collection (ITC)		10	
	ALoft		5	
	Four Points by Sheraton		5	
Sahara Star Hotels	Sahara Star		1	Importers, and Distributors
Pride Hotel			12	Importers, and Distributors
Clarks Groups of Hotels	Hotel Clarks		4	Importers, and Distributors
The Park Hotels	The Park		10	Importers, and Distributors
	The Park Pod		1	
Indian Tourism Development Corporation (ITDC)	The Ashok Group of Hotels		15	Consolidators and Distributors
Holiday inn	Holiday Inn		16	Importers, and Distributors
Marriott	The Ritz-Carlton		1	Direct Import, Importer, and Distributors
	JW Marriot		5	
	Courtyard		10	
	Marriot Hotel and Resorts		4	
	Marriott Executive Apartments		1	
	Renaissance Hotels		1	
	Fairfield Inn and Suites		1	
Wyndham Group	Ramada		24	Importers, and Distributors

ACCOR Hotels	Sofitel Hotels		1	Consolidators, Importers, and Distributors
	Novotel		8	
	FORMULE1		4	
	Mercure		3	
	ibis		8	
	Pullman		1	
Total			585	

Note: The above information has been sourced from industry sources or through the company websites. Therefore, USDA does NOT in any way endorse or guarantee the accuracy of the information contained in the above tables.