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India

Exporter Guide

2018

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Report Highlights:

With an outlook of a promising consumer market, India's hotel, restaurant and retail food sectors continue to grow in 2018. Rising disposable income, urbanization and societal change has increased consumer spending. Although Indian demographics appear favorable, with a population of 1.35 billion with 50 percent below the age of 25, the market is still difficult to navigate with high tariffs, a constantly changing regulatory environment, and geographic proximity of competing countries.

MARKET FACT SHEET

Summary:

List of Top Agricultural Imports from the United States

Bulk Agricultural:

Cotton

Lentils, Dried Shelled, Including Seed

Intermediate Agricultural:

Protein Concentrates & Textured Protein Substances

Animal Feed Prep except Dog or Cat Food, Retail

Consumer- Oriented Agricultural:

India is the world's second most populous country with a population of 1.35 billion, of which 50 percent are below the age of 25. India's GDP has grown by 6.8 percent during Indian Fiscal Year 2018-2019¹ and already exceeds \$2.9 trillion. The economy is on track to become the world's third-largest economy by 2025. Food processors, importers, wholesalers, retailers, food service operators, hotel and restaurants are all part of a developing agribusiness sector. India's bulk, intermediate, consumer-oriented, and agricultural related imports grew from \$23.3 billion in 2013 to \$30.2 billion in 2017, while exports declined from \$45.6 billion to \$38.4 billion during the same period.

Figure 1: India: Agricultural Imports (2012-2017)

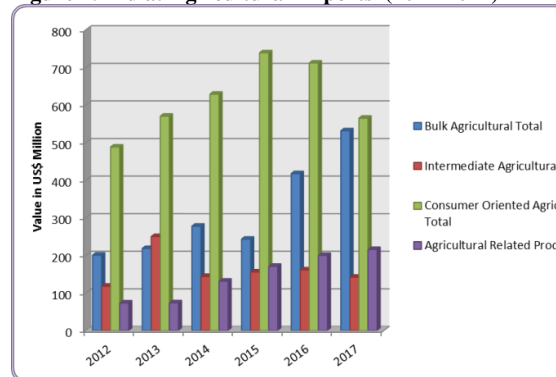
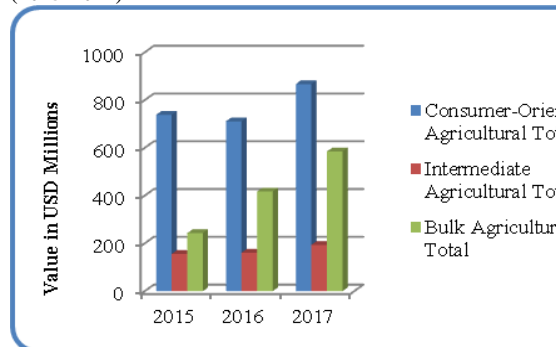


Figure 2: India: Imports from the United States (2015-2017)



Total Agricultural Imports (USD billion) / U.S. market share	\$22/ 7.21 %
Total Consumer Food (USD billion) / U.S. market share	\$5.34/ 18.41%
Total Bulk Agricultural Imports (USD billion) / U.S. market share	\$3.56/ 10.6%

Useful FAS Websites and FAS India GAIN Reports

- FAS Homepage
- FAS India Food Processing Report
- FAS India Retail Report
- FAS India HRI Report

SWOT Analysis:

Strengths	Weaknesses
<p><i>Consistent supply</i> <i>Scalability of production</i> <i>U.S. products perceived as high quality and safe</i></p>	<p><i>Unwillingness of U.S. exporters to meet Indian importers' requirements (mixed shipments, changing product specifications to conform to Indian food laws, etc.).</i> <i>Preferential Trade Agreements between countries like Chile leading to a tariff benefit for a similar range of products from other country origin.</i> <i>Lack of awareness of the range and value of U.S. products</i></p>
Opportunities	Threats
<p><i>Growth potential for imported ingredients and intermediate products.</i></p> <p><i>Aspiration of growing middle class and increased exposure to international products and western lifestyle.</i></p>	<p><i>High tariffs, persistent sanitary and phyto-sanitary requirements that effectively prohibit or restrict imports, and competition from other countries.</i> <i>Fluctuating value of the Indian Rupee against the US Dollar.</i> <i>Stringent food regulations regarding biotech foods, ingredients and certain food additives.</i> <i>Competition from countries having geographical proximity and a freight advantage.</i></p>

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Website: www.fas.usda.gov
Source: Global Trade Atlas and Annual Survey of Industry

MARY

General Economy and Policy Environment:

¹ (Source: [Economic Survey 2018-19](#))

With a total population of 1.35 billion people², India accounts for 17.74 percent of the global population³ and is the world's second most populous country. India is expected to be the world's most populous country by 2026. With 50 percent of the population under the age of 25, India has the title of the youngest country in the world. With this status however, it is facing a disparity with the number of people entering the workforce and job creation, with the added burden of accommodating rural-to-urban population migration patterns.

India has one of the world's fastest-growing large economies and is projected, by some estimates, to become the world's third largest economy by 2025, behind the U.S. and China. The Government of India (GOI) reports gross domestic product (GDP) growth for the last quarter (October - December) of 2018 at 6.6 percent. The GDP growth in the 'Agriculture, Forestry and Fishing' is estimated to be 2.9 percent, during this period. However, the [World Factbook](#) reports an estimated per capita GDP in 2017 of \$7200 USD, with 21.9 percent of the population below the poverty line⁴. Anecdotal estimates are that 340 million people are considered 'affluent' however, this affluent population is spread among various cities throughout the country.

Population dynamics will continue to be a vital component in shaping India's overall growth trajectory, and in shaping how Indian markets will develop, as the preferences of the population evolve. However, the demographic factor alone may not be enough for a spurt in GDP growth.

India maintains its rank as 77 out of 190 countries in the most recent [World Bank's Doing Business Report](#). While there are efforts to improve the business investment climate and support Indian exports, the GOI continues to raise tariffs on imported food and agricultural commodities. Purchasing of value-added imported foods is mostly limited to higher income consumers. The consumption patterns and preferences are shaped by several factors such as: the emergence of fine dining restaurants, cafes, quick service restaurants, supermarkets, processed foods, larger refrigerators, 24-hour television food channels, easier access to imported foods, dual income earning households, larger disposable incomes, high smartphone adoption, widespread availability of mobile broadband infrastructure, and the introduction of international cuisines. Demand for specialty and high-value foods such as chocolates, nuts and dried fruits, cakes, fresh fruits, confectionary items, and fruit juices peak during the fall festival season, especially at Diwali, the Hindu festival of lights, which occurs during October or November.

For an additional overview of the Indian agricultural market, read the [USDA Foreign Agricultural Service's Exporter Guide 2017 \(IN7155\)](#) [USDA Foreign Agricultural Service's Exporter Guide 2017 \(IN7155\)](#) and the International Agricultural Trade Report, [Growing Opportunities for U.S. Agricultural Exports in India](#).

² (Source: [IMF](#))

³ (Source: [World Population Review](#))

⁴ (Source: [RBI](#))

SECTION II: EXPORTER BUSINESS TIPS

India is a potentially lucrative export market for U.S. food and agricultural goods, with a large and rapidly expanding middle class, rising disposable incomes, and shifting consumption patterns toward higher-value and processed products. India's modern retail sector is expanding, food processors want access to a global supply chain, and food service chefs want to innovate and attract consumers. Nonetheless, the market for imported food products remains relatively small due to high tariffs, ongoing import restrictions, an ever-changing regulatory environment, strong competition from the domestic industry, ongoing trade tensions between India and the United States, rupee value fluctuations, and stakeholders' concerns about the global trade outlook.

Entry Strategy

Key factors to consider before entering the market:

- **Can your product come into India and comply with the local laws?**
 - ✓ Determine if your product has market access in Indian commerce.
 - ✓ Study India's varied laws, particularly those pertaining to foods and beverages.
 - ✓ Review FAS policy and market reports and consider engaging a market research firm to assist with opportunities and challenges.

- **Find the Right Partner**
 - ✓ Identify a reliable importer/distributor who services the food retail sector.
 - ✓ Avoid conflicts of interest.
 - ✓ Consider whether participating in an Indian trade show would be an effective means of identifying a key importer/distributors/partner.
 - ✓ Consider if collaborating/ participating in USDA-endorsed promotional activities would be an effective way to create and/or increase market awareness and penetration.

- **Secure Payment Terms**
 - ✓ Until a successful working relationship is established, exporters may wish to consider vehicles such as an irrevocable Letter of Credit, advance payment, or payment at sight.

FAS-India's offices do not have the authority to mediate contractual disputes, or to serve as a collection agent when differences over payment or other commercial issues arise. For information about local legal services, please refer to GAIN report [IN6155](#).

Table 1. India: Imported Food Product Pricing (Profit Margins at Various Channels)

Distribution Channel	Margins
Clearing and forwarding agents	2-6 percent
Wholesalers	2-6 percent
Super Stockists	3-7 percent
Distributor	7-12 percent
Importers	5-35 percent

Source: USDA/FAS Analysis

Local Business Customs and Trends

Although Hindi is India's leading national language, most Indian officials and business people have an excellent command of English. In addition, many Indian business people have traveled internationally and are familiar with western culture. Note that business is not conducted during religious holidays that are observed throughout the many regions and states of India, verify holiday information with the Embassy or Consulate before scheduling a visit. ([U.S. Embassy and Consulate in India Holiday Calendar](#)). Indian executives prefer late morning or afternoon appointments between 11:00 a.m. and 5:00 p.m.

The climate in India can be hot for most of the year; 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 and refer to business contacts by their surname, rather than by their given name. Use courtesy titles such as "Mr.," "Mrs.," or "Ms." 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."

Advertising and trade promotion in India are creative and well developed. Advertising through television is especially popular in India, and with the growth of cooking shows, there are often opportunities to co-brand or market products indirectly with the shows or celebrity television chefs. With the younger and urban generation of the Indian population having increased access to technology, social media is becoming a cost-effective and far-reaching marketing tool.

General Consumer Tastes and Preferences

- Urbanization, dual-earning households, more women entering the workforce, increased consumer exposure through high smartphone adoption and the widespread availability of mobile broadband infrastructure, have become influencing factors in purchasing choices quicker than most businesses expected.
- Thirty to thirty-five percent of the Indian population remains vegetarian in accordance with the tenets of Hinduism. Furthermore, a majority of the Indian population do not consume non-vegetarian food (i.e. chicken, lamb/mutton, etc.) during special days or religious observances. India's large Muslim population (estimated at 172 million as per the 2011 census) does not consume pork and eats Halal.
- Like its geography and population, India's cuisine is varied and diverse and is a source of pride in each region. In general, Indians have a strong preference for freshly cooked products, traditional spices, and local ingredients.
- The acceptance of packaged, convenience and ready-to-eat food products are

increasing, especially among younger consumers, and the urban middle and upper-middle class. Many Indian consumers are slowly diversifying their consumption patterns.

- Imported food items often spotted in retail stores include dry fruits and nuts, fresh fruits such as apples, pears, kiwis, and grapes, olive oils, cakes and cake mixes, chocolates and chocolate syrups, seasonings, biscuits/cookies, canned/packaged fruit juices, canned soups, pastas/noodles and sauces, popcorn, potato chips, canned fish and vegetables, ketchup and other sauces, and breakfast cereals, among others. Exotic items like truffle oil, artisanal cheeses, quinoa, fresh and dried berries like cranberries and blueberries, etc. are also making their way into the Indian market.
- Indian consumers have very traditional habits when it comes to food shopping. They use a variety of small neighborhood stores and pushcart vendors, but most dry goods and household items are purchased from unorganized (mom-and-pop) or organized retail stores. Urban, young consumers are bypassing brick-and-mortar retail and increasingly shopping via e-commerce platforms.
- In general, women make most of the shopping and food purchasing decisions. In households that can afford hired help, domestic employees 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.
- Most packaged food items are sold in small containers to keep pricing low and to accommodate limited storage space.

SECTION III: IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

On August 5, 2011, the [Food Safety and Standards Authority of India \(FSSAI\)](#) formally implemented its Food Safety and Standards Rules, 2011 as published in the Indian Official Gazette Notification No. G.S.R. 362 (E). The Food Safety and Standards Rules, 2011 contains the provisions for establishing enforcement mechanisms, sampling techniques, and other legal aspects instituted under Section 91 of the Food Safety and Standards Act 2006.

On September 11, 2017, India published its new product approval procedures in the Official Gazette of India ([Food Safety and Standards \(Approval for Non-Specified Food and Food Ingredients\) Regulations, 2017](#)). All food business operators (FBOs) who had earlier submitted applications for product approval, before the discontinuation of the product approval system, were notified to submit additional documents/information as per the new regulation requirements, as well mention their application number for consideration of their pending applications. For more information on food laws related to food products imported into India, please refer to the Food and Agricultural Import Regulations and Standards (FAIRS) 2018 report - [GAIN IN8138](#).

General Import and Inspection Procedures

- Imported food products can be subject to multiple regulatory authorities that sometimes have overlapping responsibilities.

- Importers may need to have an import permit for some consumer-oriented food products that will subject the item to the Food Safety and Standards Authority of India (FSSAI) as well as Indian animal health or plant health scrutiny.
- Pre-Arrival Document Review (PADR) refers to the scrutiny of the documents submitted by the importer via their customs house agent (CHA) to authorized officers in advance, before the actual arrival of the consignment.
- Upon arrival of the consignment at the port, the CHA will file an integrated declaration form in the Customs Single Window Integration for Facilitating Trade (SWIFT)
- The CHA is required to furnish the following documents to the authorities for food and beverage products imported into India:
 - Bill of Lading
 - Invoice
 - Packing List
 - Certificate of Origin
 - Health Certificate
 - Permits wherever applicable (Animal and Plant Quarantine)
 - Sanitary certificate
- Every imported food & beverage consignment should carry a label based on the requirements as specified in [Food Safety and Standards \(Packaging and Labelling\) Regulations, 2011](#)
(Note: The labelling regulation has been revised and the draft regulation is out for public comments. The regulation will cover only labeling and display features, as packaging is now a separate regulation.).
- Upon clearance of the application, the applicant must pay the sampling fees for document revision, visual inspection, and product testing.
- Customs authority, via its single window clearance system, also validates the declared value of the articles in the consignment.

Additional information on the import and inspection procedures is available on FSSAI's website <https://www.fssai.gov.in>.

High tariffs on the majority of food items, along with prohibitory requirements on certain products, hinder the growth of food imports. Import tariffs on consumer food products range from zero to 150 percent, but most products face tariffs in the range of 30 to 40 percent. India's tariff structure is such that there is considerable flexibility to raise or lower tariffs. India routinely uses tariff measures to encourage or limit trade, to keep domestic food price inflation in-check, and to attempt to guarantee certain commodity prices for local farmers and manufacturers.

On July 1, 2017, the GOI enacted a GST, which applies varied rates (zero, five, twelve, eighteen, and twenty-eight percent) on food products based on their level of importance in the Indian food basket, as well as the level of product processing. Additionally, the GOI's Union Budget of 2018 abolished the Education Tax and the Secondary and Higher Education Tax and introduced a Social Welfare Surcharge of 10 percent of the basic customs duty on imported goods, including food and processed food products.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

India's domestic industry remains the primary competitor for U.S. food, beverages and ingredients. 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: Top Consumer-Oriented Product Imports

Table A: Top Consumer-Oriented Products Imported from the World			Table B: Top Consumer-Oriented Products Imported from the United States		
Description	US Dollars (Millions)		Description	US Dollars (Millions)	
	2016	2017		2016	2017
Cashew Nuts, Fresh or Dried, In Shell	\$1,182	\$1,455	Almonds, Fresh or Dried, In Shell	\$531	\$581
Almonds, Fresh or Dried, In Shell	\$617	\$701	Apples, Fresh	\$56	\$97
Apples, Fresh	\$238	\$307	Walnuts, Fresh or Dried, In Shell	\$17	\$43
Dates, Fresh or Dried	\$214	\$242	Almonds, Fresh or Dried, Shelled	\$29	\$29
Pepper of Genus Piper, Neither Crushed nor Ground	\$183	\$165	Food Preparations: food flavoring material, soft drinks other than sharbat, custard powder, other diabetic foods	\$19	\$24
Others	\$1,773	\$2,061	Others	\$60	\$93
Total	\$4,207	\$4,931	Total	\$712	\$867

Source: Global Trade Atlas

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

Product Types	Import Value (\$ Million) CY 2017	U.S. Market Share (%)	Impacting Factors
Tree nuts (Almonds)	\$701	82.79	United States with almost 83 percent market share of imported almonds has a supplier advantage.
Chocolate & Cocoa Products	\$167	2.28	Strong preference for recognized brands. Competition from

			domestic & international suppliers.
Beverages, Spirits and Vinegar	\$707	35.33	Increased consumption and lack of domestic production.
Fresh Fruits (Primarily Apples)	\$307	31	Counter-season supplier advantage. Brand preference for U.S. apples.

Source: Global Trade Atlas

Table 4: Products Not Present in Significant Quantities but which have Good Sales Potential

Product Types	Import Value (\$ Million) CY 2017	U.S. Market Share (%)	Limiting & Impacting Factors
Tree nuts (Except Almonds)	\$1,773	3.44	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 consumer recognition and higher prices for pecans are limiting factors.
Leguminous Vegetables, Dried Shelled/Pulses	\$3,936	2.61	About 20 percent of India's total consumption demand for pulses was previously met through imports. However, back-to-back record domestic harvests in the last two years has resulted in the GOI imposing severe import restrictions, such as increased tariffs and quantitative restrictions on pea and pulse imports, which have essentially stopped U.S. exports to the market. India being a plant protein consuming country will always have a requirement for pulses, whose demand may not be always met by local production.
Sugars and sugar confectionery	\$1,162	1.91	India is a large producer, consumer and exporter of sugar. However, Indian consumers consume many sweets, so innovative and new products in sugar confectionery are always in demand by consumers of all ages and class.
Fresh Fruits (Except Apples)	\$114	6	Seasonal availability of domestic fresh fruits and imports from other preferred destinations limit U.S. imports.
Poultry Meat & Products. (ex. eggs)	\$0.5	0	Recently gained market access, offers a large opportunity for the US poultry industry. However, pricing and high

			tariffs may limit sales.
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Source: Ministry of Commerce and Industries and FAS India analysis

Products Not Present Because They Face Significant Barriers:

Currently, several trade restrictions limit market access for U.S. food products. Imports of most animal and livestock-derived food products are effectively banned due to established Indian import requirements. This includes certain sub-categories in the Harmonized Tariff Schedule under Chapters 2, 3, 4, 5, 16 and 21 (e.g., milk and dairy products, certain seafood, sheep and goat products, as well as pork products and pet food). Furthermore, imports of beef are banned due to religious concerns. 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 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 at the port of entry. Soybean oil and canola oil derived from select events are the only biotech food products currently approved for import. For more information on India’s biotech import policy, please see: [GAIN Report IN8129: Agricultural Biotechnology Annual 2018](#).

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Table 5. India: Competition in Major Product Categories in Calendar Year (CY) 2018

<u>Product Category</u>	<u>Net Imports (In \$ Million) CY 2017</u>	<u>Major Suppliers</u>	<u>Third Country Suppliers Advantage</u>	<u>Advantages (A) and Disadvantages (D) of Local</u>
Animal or Vegetable Oils, Fats and Rendered products	\$9,467	Indonesia Argentina Ukraine Malaysia	Major production hubs and competitive prices	Local production is inadequate and more than 40 percent of total edible
Leguminous Vegetables, Dried Shelled/Pulses	\$924	Myanmar Canada Australia Mozambique Russia	Price competitiveness, freight advantage (for countries like Myanmar) and the ability to produce specific kinds of pulses demanded in India.	Local production is inadequate and more than 20 percent of total demand
Edible Fruits and Nuts	\$3,546	USA Côte d’Ivoire Benin Tanzania Afghanistan	Growing market demand, preference for a specific quality,	Domestic production of some of the major fruits and nuts is insignificant (A)

Sugars and Confectionery	\$632	Brazil Germany USA Netherlands	Price competitiveness	India is usually a net exporter of sugar (D)
Coffee, Tea, Mate And Spices	\$705	Vietnam Sri Lanka Indonesia Madagascar	Price competitiveness and geographic proximity	Most imports are for re-export (D)
Albuminoidal Substances; Modified Starches; Glues; Enzymes	\$462	China USA Germany Thailand	Price competitiveness	Local production is limited (A), U.S. supplies good quality products with competitive prices (A)
Lac; Gums; Resins and Other Vegetable Gums and Resins	\$223	Afghanistan China Indonesia USA	Price competitiveness and proximity	Local production is limited (A), U.S. supplies good quality products with competitive prices (A)
Products of the Milling Industry, Malt, Starches, Insulin, and Wheat Gluten	\$71	China Australia Sri Lanka Cambodia	Price competitiveness, high quality	Growing domestic industry (A), increasing awareness about health & quality food (A), stringent food laws (D)
Dairy Produce; Birds' Eggs; Natural Honey; Edible Prod. of Animal Origin	\$32	France Turkey Germany Denmark	Price competitiveness, sanitary requirements	Domestic production is not keeping pace with demand (A). Indian import protocols are very stringent and effectively prohibit imports of dairy products from the United States. (D)
Source: Ministry of Commerce and Industries and FAS India analysis				

Table 6: U.S. BASED STATE REGIONAL TRADE GROUPS (SRTG) / COOPERATORS PROMOTING FOOD OR AGRICULTURE IN INDIA

SRTGs/ Cooperator	Website
Almond Board of California	www.almondboard.com
American Hardwood Export Council	http://www.americanhardwood.org/
California Walnut Board & Commission	http://www.walnuts.org/walnuts/
California Olive Committee	http://calolive.org/
Cotton Council International	www.cottonusa.org
Cranberry Marketing Committee	https://www.uscranberries.com/
Pear Bureau Northwest	www.usapears.org
Softwood Export Council	http://www.softwood.org/
Southern United States Association	www.susta.org
U.S. Apple Export Council	http://www.usapples.com/en/index.html
U.S. Dry Pea and Lentil Council	www.pea-lentil.com
U.S. Highbush Blueberry Council	http://www.blueberry.us/home.html
U.S. Grains Council	www.grains.org
U.S. Soybean Export Council, Inc.	www.ussec.org
Washington State Apple Commission	www.bestapples.com

USEFUL INDIAN AGENCIES OF THE CENTRAL GOVERNMENT

Department of Animal Husbandry and Dairying (DAHD)

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

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

Department of Agriculture, Cooperation and Farmers Welfare

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

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

Plant Quarantine Organization India (PPQ)

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)

Website: <https://www.fssai.gov.in/>

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

Ministry of Food Processing Industries, India (MoFPI)

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

Lead Role: Regulates and promotes the food processing sector in India.

LIST OF INDIAN TRADE ASSOCIATION

[All India Food Processors Association](#) (AIFPA)

[American Chambers of Commerce and Industry](#) (AMCHAM India)

[Associated Chambers of Commerce and Industry](#) (ASSOCHAM)

[The Advertising Standards Council of India](#) (ASCI)

[Compound Livestock Feed Manufacturers Association](#) (CLFMA)

[Confederation of Indian Trade and Industry](#) (CII)

[Council of Leather Exports](#) (CLE)

[Federation of Hotels and Restaurants in India](#) (FHRAI)

[Forum of Indian Food Importers](#) (FIFI)

[Federation of Indian Chambers of Commerce and Industry](#) (FICCI)

[Indo-American Chambers of Commerce](#) (IACC)

[Indian Dairy Association](#) (IDA)

[Indian Importers Chambers of Commerce and Industry](#) (IICCI)

[Indian Sugar Mills Association](#) (ISMA)

[National Restaurant Association of India](#) (NRAI)

[Retailers Association of India](#) (RAI)

[The Solvent Extractors Association of India](#) (SEA)

[United State India Business Council](#) (USIBC)

SECTION VI. POST CONTACT

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