
**INDIA RESEARCH STUDY
FOR CALIFORNIA AGRICULTURAL EXPORTERS**



Hypercity, Mumbai

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for the Buy California Marketing Agreement

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I. EXECUTIVE SUMMARY

Marketing conditions for imported agricultural products have improved considerably in India as a result of its growing economy and rising number of middle class consumers. With annual growth rates of more than seven percent since 1996, India's economy is expanding rapidly, enabling greater economic prosperity. As a result, there will be an estimated 583 million middle-class Indian consumers by 2025.¹

Opportunities for California products are concentrated in large urban areas that boast strong per capita incomes, high population density, and modern organized retail systems. These urban areas are dispersed throughout India. Although the distribution systems to reach them are fragmented, they are improving. Modern organized retail includes supermarket, hypermarket, and convenience store formats. These outlets offer the best point of sale distribution opportunities for California products due to their infrastructure and more affluent consumer base. Middle class consumers are increasingly shopping in the organized sector for the convenience and quality it offers.

Meanwhile, opportunities are limited in the Hotel, Restaurant and Institution (HRI) sector for California agricultural products, with the exception of wine. Demand for Western foods is growing, however, premium hotels and restaurants are limited. Greater opportunities are anticipated with the growth of international restaurant chains.

India is a significant world producer of fruits, vegetables, and grains. However, India still imports many agricultural goods in order to feed its large population and supplement domestic production. India sources several agricultural products from California including almonds, table grapes, and oranges. India also sources many other products from foreign producers that are in closer proximity such as Pakistan.

California agricultural producers and exporters still face a number of constraints in the Indian market. One major constraint is India's high tariff rates on agricultural products, which range from 25 percent to over 125 percent. India also levies taxes and fees which add up to an additional 30 percent. Furthermore, phytosanitary restrictions on imported agricultural products from California are significant and other documentation requirements can be onerous.

Despite these constraints, there are strong opportunities in India for California agricultural products. BCI recommends carefully assessing market access and competitiveness, then working closely with local partners to successfully launch and promote new California products.

¹ Singh, Santosh Kr. "India Report – Retail Food Sector 2006." USDA Foreign Agricultural Service. 21 December 2006. www.fas.usda.gov/gainfiles/200612/146269832.pdf

II. INTRODUCTION

In September 2007, Bryant Christie Inc. (BCI) was retained by the Buy California Marketing Agreement (BCMA) to study the market for California agricultural products in India. The objective of the Indian market research study is to provide information about the current market potential for California agricultural products. This report provides a basis for interested California agricultural product suppliers on market potential, entry, distribution, and marketing. The project consisted of desk research augmented with in-country assistance.

It should be noted that the BCMA received grant funds from the California Department of Food and Agriculture (CDFA) for this project.

III. METHODOLOGY

BCI conducted extensive desk research while preparing this report. Sources included the United State Department of Agriculture (USDA) Foreign Agricultural Service (FAS) attaché reports, CIA World Factbook, U.S. and India government websites, the Global Trade Atlas, and news articles. BCI also worked with SCS Group, an Indian consulting firm with expertise in the food and agricultural market in India.

It is important to note that not all agricultural products available in California were included in this research. Instead, this report focused on broader product categories and detailed information on specific products was provided where available. Product categories include fresh fruit (table grapes, figs, oranges, lemons, cherries, pears, and tree fruits), dried products (raisins, figs, almonds, and pistachios), processed products (olives and tomato), and wine.

IV. COUNTRY AND MARKET OVERVIEW

India's large population and growing middle class make it a market of significant interest for California products. However, the country's current levels of poverty and under-developed infrastructure confine opportunities for California products to only the most prosperous areas of India.

POPULATION

India's large population is one of the primary reasons India has attracted the attention of worldwide suppliers. Specifically, India has a population of more than 1.1 billion and is the world's second most populous country after China. Moreover, India's population continues to grow at 1.6 percent per year, representing more than

13 million new citizens each year.² Given this rate of growth, over 58% of India's population is under the age of 20.³

India combines high population with very high population density.⁴ In addition to its three largest cities which have between 12-16 million residents, India has 24 other cities with over one million residents. Further, the urban population is projected to grow from 318 million in 2007 to 523 million by 2025.⁵

ECONOMY

The growth of India's middle class reflects the overall economic growth and prosperity of the Indian market. India became the world's twelfth \$1 trillion economy in April 2007.⁶ As a major provider of services worldwide, India's service sector provides over 60 percent of Gross Domestic Product (GDP). Further, the Indian economy has grown at more than seven percent each year since 1996 and is expected to double by 2010.

India's middle class is growing rapidly, providing a larger consumer base with the necessary disposable income to make the country a major consumer of imported goods. Middle-class is defined as households with real annual disposable income of approximately Rs 200,000 to 1,000,000 (US\$5,090.35 to \$25,451.77). FAS reports there will be 583 million middle-class Indians by 2025. This will move India up from the world's twelfth largest consumer market to the fifth.⁷ Products that enter the market as this expansion is occurring will be well-positioned to establish themselves as the trusted brands of these new middle class consumers.

In contrast to the spending growth among India's middle class, almost 80 percent of the Indian population still lives on less than two dollars per day and most consumers make purchase decisions based on low prices rather than food quality and variety. Overall, Indians spend 51 percent of their income on food, but this is mainly for basic food items.⁸ Therefore, most consumers simply do not have the disposable income to purchase more expensive imported products. For this reason, **it is important for California exporters to target areas with concentrated wealth that provide the greatest opportunities for imported products.**

² "2007 India Country Commercial Guide." U.S. Commercial Service. June 2007.

³ "2007 India Country Commercial Guide." U.S. Commercial Service. June 2007.

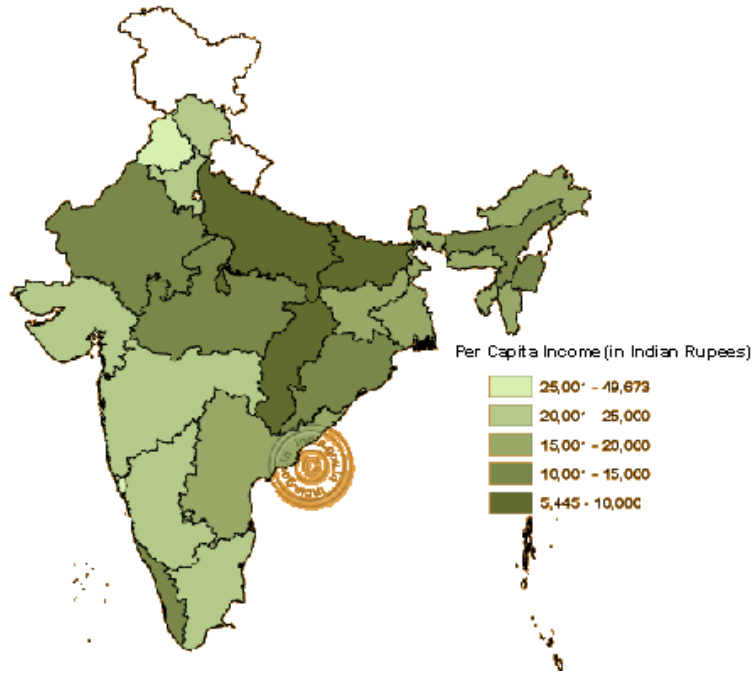
⁴ "2007 India Country Commercial Guide." U.S. Commercial Service. June 2007.

⁵ Beinhocker, Eric D., et al. "Tracking the Growth of India's Middle Class." The McKinsey Quarterly. 2007.

⁶ "India, now a \$1-trillion economy!" Rediff. 26 April 2007. <http://inhome.rediff.com/money/2007/apr/26india.htm>

⁷ Beinhocker, Eric D., et al. "Tracking the Growth of India's Middle Class." The McKinsey Quarterly. 2007.

⁸ Singh, Santosh Kr. "India Report – Retail Food Sector 2006." USDA Foreign Agricultural Service. 21 December 2006. www.fas.usda.gov/gainfiles/200612/146269832.pdf



Source: Reproduced from the Government of India – National Portal of India

| Top 10 States with the Highest Per Capita Income | | | | |
|--|-----------------------------------|-----------------------------|-----------------|------------------------|
| State | Per Capita Income, US\$ (2005-06) | Population, millions (2001) | Population Rank | Average Household Size |
| Chandigarh (central) | 1,735 | 0.9 | 29 | 4 |
| Delhi (north) | 1,257 | 13.9 | 18 | 5 |
| Goa (west) | 1,214 | 1.3 | 26 | 5 |
| Pondicherry (south) | 930 | 1.0 | 28 | 5 |
| Haryana (north) | 764 | 21.1 | 16 | 6 |
| Maharashtra (west) | 743 | 96.9 | 2 | 5 |
| Punjab (north) | 731 | 24.4 | 15 | 6 |
| Andaman & Nicobar Islands | 698 | 0.4 | 32 | 5 |
| Himachal Pradesh (north) | 694 | 6.1 | 21 | 5 |
| Gujarat (west) | 678 | 50.7 | 10 | 5 |

The map and chart above show the concentration of wealth per capita by state in India. In general, states in southwestern and northern India have the highest per capita incomes. However, while per capita income is an important indicator of buying power, per capita income alone is not an adequate gauge of market attractiveness. **Instead, the best markets for imported products are likely to be in areas with high per capita incomes combined with high population density.** For example, the state of Chandigarh has the highest per capita income of US\$1,735; however, it has a fairly small population with less than one million people.⁹ On the other hand, Delhi, which has the second highest per capita income, provides a larger consumer base and better opportunities for imported food

⁹ India's Ministry of Finance and India Census, 2001

products. The per capita income in Delhi is US\$1,257 with 13.9 million consumers.¹⁰

The table below lists India's most populous cities and consumer buying power in each:

| City | State | City Population, millions (2001) | State Per Capita Income, US\$ (2005/06) | No. of Households in the State (2001) | Average Household Size | % of Middle Class* |
|-----------|----------------|----------------------------------|---|---------------------------------------|------------------------|--------------------|
| Mumbai | Maharashtra | 16.4 | 743 | 19,063,149 | 5 | 48.1 |
| Kolkata | West Bengal | 13.2 | 524 | 15,715,915 | 5 | 36.8 |
| New Delhi | Delhi | 12.8 | 1,257 | 2,554,149 | 5 | 51.0 |
| Chennai | Tamil Nadu | 6.4 | 621 | 14,173,626 | 4 | 22.8 |
| Bangalore | Karnataka | 5.7 | 558 | 10,232,133 | 5 | 40.0 |
| Hyderabad | Andhra Pradesh | 5.5 | 544 | 16,849,857 | 4 | 31.0 |
| Ahmadabad | Gujarat | 5.0 | 678 | 9,643,989 | 5 | 37.8 |
| Pune | Maharashtra | 4.0 | 743 | 19,063,149 | 5 | 48.1 |

Source: India Census 2001 and Government of India - Ministry of Finance

1 USD = 39.1300 INR

*based on the percent of households within the State with availing banking services

FOOD RETAIL SECTOR

The growth of India's economy over the past ten years has resulted in the expansion and modernization of the retail sector. According to the India Brand Equity Foundation (IBEF)¹¹, there are now approximately 12 million retail outlets in India, of which more than five million are food retail outlets. The total retail market is valued at \$330 billion, of which the organized retail sector represents four percent of the total market and is expected to increase its market share to 22 percent by 2010.¹² **The growth trend of the organized retail sector presents significant opportunities for California agricultural exporters.**

The retail sector in India is divided into two categories: unorganized and organized retailing. Unorganized retailers or traditional retailers are small, independent, single outlet, family-owned operations, also known as kirana stores. Unorganized retailers represent approximately 99.2 percent of the food and grocery retail sector in 2005/06.¹³ Organized retailers include cash and carry, discount, hypermarkets, supermarkets and convenience stores. Imported products are predominantly available at organized retail chains and grocery stores that cater to high-end consumers in major urbanized cities, although some fresh fruits have limited distribution in independent shops and vendors.

¹⁰ India's Ministry of Finance and India Census, 2001.

¹¹ IBEF is a public-private partnership between the Ministry of Commerce and Industry, Government of India, and the Confederation of Indian Industry.

¹² "Retailing." India Brand Equity Foundation. 4 December 2007. www.ibef.org/industry/retail.aspx

¹³ Singh, Santosh Kr. "India Report – Retail Food Sector 2006." [USDA Foreign Agricultural Service](http://www.fas.usda.gov/gainfiles/200612/146269832.pdf). 21 December 2006. www.fas.usda.gov/gainfiles/200612/146269832.pdf

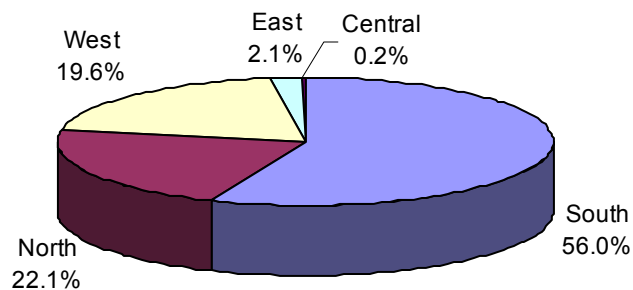
Organized retailers, specifically hypermarkets and supermarkets, offer the best potential for the sale of imported California products due to better infrastructure and distribution systems. As organized retail expands, distribution opportunities for California products are likely to grow. Currently, the organized sector represents only 0.8 percent of the market; however, organized retail is expected to expand at a growth rate of 30 to 35 percent each year.¹⁴ Although approximately 40 percent of the organized retailers are currently located in smaller cities, **the most significant expansions in the modern retail sector are occurring in urban areas including Mumbai, Delhi, Pune, Hyderabad, Bangalore, Chennai, and Kolkata.**

Regional Differences

India's retail sector is highly segregated by geography. Historically, retailers were primarily located in Southern India; however, in recent years the Western and Northern areas of India have developed and more retailers have expanded their stores to these two regions. **California agricultural products are more likely to penetrate the more developed regions of India (South, West and North) where organized retailers are expanding and consumers are more likely to know about imported offerings and more able to afford them.**

Southern India: Historically, most organized retail has been concentrated in Southern India due to better distribution technology, cheaper real estate, and a greater degree of Western influence in the region. Importantly, **the Southern region offers more organized transportation systems and cold storage facilities.** This infrastructure provides reliable delivery and minimizes product deterioration and damage. As a result, modern retail began in here and it continues to be one of the leading regions for organized retail.¹⁵

Percentage of Indian Retail Stores by Region*



*Percentage based on retailers listed in the table on page 9

Western India: Due to favorable consumer characteristics and higher incomes, many retail chains have recently expanded to Western and Northern India. **Western India has the highest per capita income in India and the strongest consumer product awareness.** Residents in the West receive the highest level of education

¹⁴ Singh, Santosh Kr. "India Report – Retail Food Sector 2006." [USDA Foreign Agricultural Service](http://www.fas.usda.gov/gainfiles/200612/146269832.pdf). 21 December 2006. www.fas.usda.gov/gainfiles/200612/146269832.pdf

¹⁵ "Aditya Birla Retail sees growth in South." [Business Standard](http://www.business-standard.com/common/news_article.php?leftnm=1&autono=311725). 26 January 2008. www.business-standard.com/common/news_article.php?leftnm=1&autono=311725

and are well traveled (internationally) compared to other regions. Mumbai, one of the major cities and the financial capital of India, is located in West India.

Northern India: Northern India is another region influenced by Western culture. The growing population in Northern India has been a key factor in the significant growth of organized retailers in the region. **The North is considered an emerging retail market for international brands and national retailers and is one of the leading regions in organized retailing.**¹⁶ The capital of India, Delhi, is located in North India.

Eastern India: **Meanwhile, the Eastern region of India is still highly underdeveloped and will not likely be a potential market for California products in the short-term.** The East has the lowest average per capita income (Rs. 10,315 or US\$264) across India. Due to financial barriers, most consumers do not have the means to purchase imported products and shop almost exclusively in unorganized retail outlets.

Retail Formats

Historically, consumers in India shopped several times a week and visited specialty stores (fruit/vegetable, meat, household stores) to purchase specific products. Such specialty stores, called kirana stores, are very small, typically ranging from 100 to 500 square feet, and primarily sell non-perishable food products due to the lack of cold storage infrastructure. These stores are therefore not a feasible distribution option for most fresh California agricultural products.

To meet changing consumer demand for greater convenience and quality, some Indian retailers are introducing supermarket, hypermarket, and convenience store formats. The number of supermarket and convenience store outlets remains low compared to the number of independent outlets in India. However, many large retailers, such as Food Bazaar, Spencers, and Aditya Birla, are rapidly opening hypermarket stores throughout India. **As this modern sector becomes more competitive, retailers are looking for products that will help them to differentiate their offerings, including imported products.**

The infrastructure available at the supermarkets and hypermarkets presents a viable point of distribution for California produce. Supermarket stores typically have 3,000 to 6,000 square feet of floor space and are usually located within 3 to 4 km (1.9 to 2.5 miles) from consumers' residences. Supermarkets, such as Foodworld, Tinehra and Nilgiri's, focus on weekly and monthly needs of consumers while hypermarkets or larger discount stores cater to consumers' bulk shopping. Hypermarkets are large - 25,000 to 100,000 square feet - and carry both food and non-food items in large packages. Some of the main hypermarkets in India include Spencer's, Big Bazaar, and Star India Bazaar.

¹⁶ "The Shop' summit reckons North India is leading in organized retailing." IndianTelevision.com. 28 June 2006.
<http://indiantelevision.net/mam/headlines/y2k6/june/junemam132.htm>

Despite the rapid growth of supermarkets, hypermarkets, and convenience stores, accessibility and affordability issues present significant barriers for retail expansion into rural areas. Distributors are the main channel through which most modern retailers source imported products and these distributors are primarily located in large metropolitan cities and their suburbs. Moreover, the affluent consumer base more likely to shop in modern outlets is concentrated in urban areas.

The following table is a list of some of the leading organized retailers (potential destinations for California agricultural products):

| Organized Retailers in India | | | | | |
|--|--|--|----------------------------------|---|---|
| Retailer | Format | # of Outlets | Sales (\$ million) ¹⁷ | Purchasing Agent | Locations |
| Subhiksha (Subhiksha Trading Services Pvt.) | Supermarket and discount stores | 1,000 ¹⁸ | \$74.1 | Local manufacturers and distributors | Delhi, Uttar Pradesh, Punjab, Hariyana, Gujarat, Maharashtra, Andhra Pradesh, Karnataka and Tamil Nadu |
| Reliance Fresh and RelianceMart (Reliance Industries Ltd.) | Convenience stores and hypermarkets | 300 Reliance Fresh and 1 RelianceMart ¹⁹ | \$66.04 ²⁰ | Directly from local manufacturers and importers, and interested in sourcing directly from exporters | Hyderabad, Jaipur, Chennai, NCR, Guntur, Vijayawada and Visakhapatnam |
| Food Bazaar (Pantaloon Retail India Ltd.) | Supermarkets | 110 ²¹ | \$76.2 | Mainly distributors; directly from local manufacturers and few importers | National (major metros and larger cities) |
| Big Bazaar (Pantaloon Retail India Ltd.) | Hypermarket | 76 ²² | n/a | n/a | National (major metros and larger cities) |
| Spencers (RPG group) | Hypermarkets, supermarkets, convenience stores | 350 ²³ | \$70.8 | Mainly distributors; directly from local few manufacturers and importers | Major cities in South India and some in North and West India |
| Star India Bazaar (Trent – retail arm of Tata Group) | Hypermarket | 1 ²⁴ | n/a | n/a | Ahmedabad |
| Hypercity/Expresscity (K Raheja Corp Group) | Hypermarket, convenience stores | 1 hypermarket, 3 convenience stores ²⁵ | n/a | n/a | Mumbai, Jaipur, and Thane |
| Choupal Fresh and Choupal Sagar (ITC) | Retail and wholesale | 9 Choupal Fresh, 50 additional stores planned; ²⁶ 12 Choupal Sagar, 51 additional stores planned ²⁷ | n/a | Focuses on fresh horticultural products | Choupal Fresh: Chandigarh, Pune and Hyderabad Choupal Sagar: Madhya Pradesh, Uttar Pradesh and Maharashtra |

¹⁷ Singh, Santosh Kr. "India Report – Retail Food Sector 2006." USDA Foreign Agricultural Service. 21 December 2006.

www.fas.usda.gov/gainfiles/200612/146269832.pdf

¹⁸ www.subhiksha.in/aboutus.htm

¹⁹ www.ril.com/rportal1/DownloadLibUploads/1190109982119_AR0607.pdf

²⁰ www.ril.com/rportal1/DownloadLibUploads/1190109982119_AR0607.pdf

²¹ www.innews.com/realestateproperty/india/retail/pantaloon_retail_announces_lau.html

²² www.innews.com/realestateproperty/india/retail/pantaloon_retail_announces_lau.html

²³ www.spencersretail.com

²⁴ www.tata.com/trent

²⁵ www.hypercityindia.com/aboutus.asp

| Organized Retailers in India (continued) | | | | | |
|--|--|---|----------------------------------|--|--|
| Retailer | Format | # of Outlets | Sales (\$ million) ²⁸ | Purchasing Agent | Locations |
| Nilgiri's | Supermarkets and convenience stores | 32 ²⁹ (plans to have a total of 50 outlets by end of 2007 ³⁰ ; plans to have 500 stores by the end of 2011 ³¹) | \$76 ³² | Mainly distributors; directly from few local manufacturers and importers | Major cities in South India (Bangalore, Chennai, Coimbatore, Erode) |
| Trinethra/Fabmal (Aditya Birla Retail 90% shareholding; India Value Limited 10%) | Supermarkets and convenience stores | 172 ³³ (Trinethra outlets are refurbishing to More stores.) ³⁴ | \$67.4 | Mainly distributors; directly from few local manufacturers and importers | Major cities in Andhra Pradesh, Tamil Nadu, Karnataka, and Kerala |
| More. (Aditya Birla Retail) | Supermarkets and hypermarkets | 100 ³⁵ (plans for 1,000 supermarkets and hypermarkets by 2010) ³⁶ | n/a | n/a | Pune, Mumbai, Ahmedabad, Delhi, Vizag, Bangalore, Vijayawada and Chennai |
| Adani Stores | Supermarkets, hypermarkets, and convenience stores | 47 ³⁷ (plans for additional 15 outlets in Gujarat and expansion into Maharashtra, Rajasthan, Madhya Pradesh and Chhattisgarh) | \$24.7 | Mainly distributors; directly from few local manufacturers and importers | Major cities in Gujarat |
| Indiabulls Mart and Indiabulls Megastore (Named Trumart previously. Wholesale Services acquired the stores from Piramyd Retail Ltd.) | Hypermarkets and convenience stores | 35 convenience stores and seven hypermarkets (plan for 15 additional convenience stores and 30 hypermarkets in cities such as Jaipur and Ahmedabad) ³⁸ | n/a | Mainly distributors; directly from few local manufacturers and importers | Major cities in Maharashtra and Gujarat |
| Hyperexpress | Convenience stores | 3 | n/a | n/a | Jaipur |
| Fresh @ (Heritage Foods India Ltd) | | 44, plans to double ³⁹ | n/a | n/a | n/a |
| Namdhari's Fresh | Retail and wholesale | 2 retail outlets ⁴⁰ | n/a | n/a | Bangalore |

²⁶ www.regoverningmarkets.org/en/news/south_asia/india_itc_details_plans_for_choupal_fresh.html

²⁷ www.thehindubusinessline.com/2007/01/18/stories/20070118033330500.htm

²⁸ Singh, Santosh Kr. "India Report – Retail Food Sector 2006." [USDA Foreign Agricultural Service](http://www.fas.usda.gov/gainfiles/200612/146269832.pdf). 21 December 2006.

www.fas.usda.gov/gainfiles/200612/146269832.pdf

²⁹ <http://relianceretail.blogspot.com/2007/02/nilgiris-to-expand-from-40-to-500.html>

³⁰ www.imagesretail.com/cover_story1_aug06.htm

³¹ www.act.is/portfolio/nilgiris-group.asp

³² www.imagesretail.com/cover_story1_aug06.htm

³³ http://economictimes.indiatimes.com/Trinethra_Birlas_first_retail_takeover/articleshow/1028058.cms

³⁴ www.indiaretailbiz.com/blog/2007/11/04/33-trinethra-supermarkets-relaunched-as-more-stores-in-andhra-300-stores-to-be-relaunched-by-march-2008/

³⁵ www.adityabirla.com/our_companies/indian_companies/retail.htm

³⁶ <http://retailnu.wordpress.com/2007/11/28/aditya-birla-group-plans-1000-%e2%80%98more-%e2%80%99-supermarkets-in-3-years/>

³⁷ www.adanigroup.com/comp_b2c.html

³⁸ Sarkar, Ranju. "Piramyd's Trumart is now Indiabulls Mart." [Business Standard](http://www.business-standard.com/common/news_article.php?leftnm=lmnu1&subLeft=1&autono=312025&tab=r). 30 January 2008. www.business-standard.com/common/news_article.php?leftnm=lmnu1&subLeft=1&autono=312025&tab=r

³⁹ www.livemint.com/2007/11/16003807/Heritage-Foods-plans-to-raise.html

| Organized Retailers in India <i>(continued)</i> | | | | | |
|---|---|---|----------------------------------|--|--|
| Retailer | Format | # of Outlets | Sales (\$ million) ⁴¹ | Purchasing Agent | Locations |
| Radhakrishna Foodland Pvt Ltd | Distributor/wholesale | 3 distribution centers | n/a | Distributes to retailers and foodservice | Mumbai and Delhi |
| Foodland Fresh (Radhakrishna Group) | Convenience stores | 38 | n/a | Own distribution center | Mumbai, Navi Mumbai & Thane |
| Metro (Metro AG, Germany) | Cash & Carry (wholesale only) and Hypermarket | 5 (plans to open 35 outlets in between 2006-2008) | n/a | Mainly local manufacturers and importers | Bangalore, Hyderabad, Kolkata, and Mumbai |
| Nuts 'n' Spices | Specialty store | 10 ⁴² | n/a | Imports nuts, dried fruit, confectionery, spices | Chennai |
| Margin Free | Discount and supermarkets | 300 (plans to open hypermarkets in Ernakulam, Thiruvananthapuram and Kozhikode) ⁴³ | n/a | Local manufacturers and distributors | Major cities in Kerala, Tamil Nadu and Karnataka |
| Vitan Super Stores | Supermarket | | n/a | n/a | Chennai |

As indicated in the table above, India-based retailers are expanding rapidly across the country; thousands of new outlets are expected to open over the next few years. Foreign retailers are also considering entering this rapidly developing sector. However, market entry by a foreign company remains subject to severe government restrictions and is limited to the wholesale sector. These restrictions show signs of relaxing however, due to pressure from local and foreign companies. As an example, the government of India relaxed its restrictions to open up foreign direct investments (FDIs) for single-branded retailing (up to 51 percent) in January 2006. Single-branded requires that only one brand may be sold in a store. For example, Starbucks could not sell its own coffee and Italian espresso machines. Meanwhile, Wal-Mart has entered into an agreement with Indian company Bharti Group, although they have not yet opened any stores. The first outlet, which will most likely be co-branded, is expected to open in March 2008.⁴⁴

HOTEL, RESTAURANT, AND INSTITUTIONAL (HRI) SECTOR

India's hotel, restaurant, and institutional (HRI) food service sector currently offers limited opportunities for imported products. Therefore entry into this sector would be secondary for most California exporters, with the exception of California wine. However, as in the retail sector, the organized segment of India's HRI food sector is growing and offers increasing potential for imported goods. Specifically, consumer expenditure in the food service sector in India increased from \$8 billion in 2003 to \$13.5 billion in 2006/07 and is projected to increase 12-15

⁴⁰ www.namdharifresh.com/

⁴¹ Singh, Santosh Kr. "India Report – Retail Food Sector 2006." [USDA Foreign Agricultural Service](http://www.fas.usda.gov/gainfiles/200612/146269832.pdf). 21 December 2006.

⁴² <http://nutsnspices.in/index.htm>

⁴³ www.indiaretailindustry.com/retail-top-food-retailer.htm

⁴⁴ K S Narayanan. "Bharti-Wal-Mart's Mega." [Newindpress.com](http://www.newindpress.com/NewsItems.asp?ID=IEB20071210194857&Page=B&Headline=Bharti-Wal-Mart's+mega+plan&Title=Business&Topic=0) 11 December 2007.

percent in the next few years.⁴⁵ Currently, most of the HRI sector purchases domestic food products (imported food products account for less than two percent) due to their competitive pricing, but with the growing demand for high quality products among consumers, this sector should be considered for potential opportunities in the future.⁴⁶ The most promising opportunities are the hotel and restaurant segments.

Hotels

The growing number of domestic and foreign visitors is expected to open opportunities for California agricultural exporters in the hotel segment, as many hotels seek to fill demand for Western-style foods. Both luxury and business tourism have rapidly increased, due in part to increased interest from foreigners, the “Incredible India” tourism promotional campaign, and India’s rapidly growing economy. According to a survey conducted by HVS International, international hotel guests represented almost 25 percent of all guests in 2006. India receives the most visitors from the United Kingdom, accounting for 16.1 percent of foreign visitors followed by the U.S. with 12.3 percent.⁴⁷

In 2003, FAS estimated there were 10,000 hotels of which only 1,800 were in the organized sector. In 2007, FAS has estimated that the number of hotels has doubled to 20,000 in the last four years; of these 2,100 are categorized in the organized sector. Most of the hotels are located around popular tourist destinations and concentrated in major metropolitan cities such as New Delhi, Mumbai, Chennai, Bangalore, and Hyderabad.

| Top 10 Cities in India with Premium & Mid-Range Hotels | | | | |
|--|--------|----|----|-------|
| City | Rating | | | TOTAL |
| | 5+ | 4 | 3 | |
| Mumbai | 22 | 11 | 26 | 59 |
| New Delhi | 23 | 10 | 5 | 38 |
| Chennai | 9 | 7 | 20 | 36 |
| Kochi | 5 | 4 | 17 | 26 |
| Goa | 16 | 1 | 8 | 25 |
| Hyderabad | 4 | 3 | 16 | 23 |
| Bangalore | 8 | 3 | 4 | 15 |
| Jaipur | 10 | 1 | 5 | 16 |
| Ahmadabad | 5 | 1 | 6 | 12 |
| Pune | 4 | 3 | 5 | 12 |

Source: Federation of Hotel and Restaurant Associations in India - FHRAI

Imported products are most likely to be procured by mid-range (three to four star), premium (five star and up), and Heritage hotels (a hotel built before 1950 on a fort, palace or historical building) as they cater to high-end

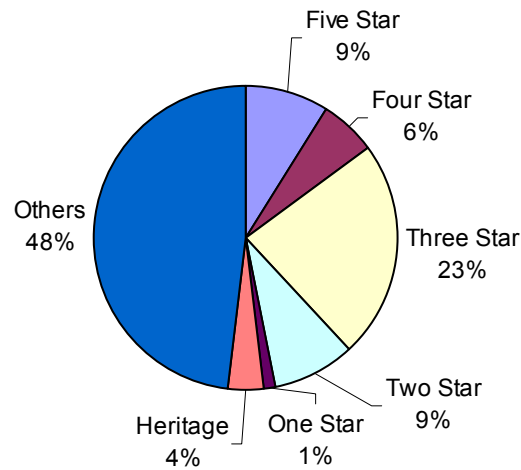
⁴⁵ Santosh Singh. “India HRI Food Service Sector Annual 2007.” [USDA Foreign Agricultural Service](http://www.fas.usda.gov/gainfiles/200712/146293269.pdf). 14 December 2007. www.fas.usda.gov/gainfiles/200712/146293269.pdf

⁴⁶ Santosh Singh. “India HRI Food Service Sector Annual 2007.” [USDA Foreign Agricultural Service](http://www.fas.usda.gov/gainfiles/200712/146293269.pdf). 14 December 2007. www.fas.usda.gov/gainfiles/200712/146293269.pdf

⁴⁷ HVS International

consumers and international travelers.⁴⁸ The three-plus star hotels average at least two restaurants per hotel.⁴⁹ Mumbai tops the list with a total of 59 hotels in the three-plus star range, followed by New Delhi and Chennai with 38 and 36 hotels respectively.⁵⁰ FAS reports that of the total food budget of the luxury hotels in India, imported food products represent approximately five to 20 percent of the total and imported alcoholic beverages make up 40 to 60 percent of the total liquor budget. In 2006, food and beverage sales accounted for 25 percent of the hotel revenues.⁵¹

Organized Hotel Sector by Category (2007)



Source: FAS

Hotels in India generally purchase imported foods and beverages through wholesalers, distributors, or importers. Several larger hotel chains, such as Taj Hotels, Oberol Hotels, Ashok Group Hotels, and the Leela Palaces and Resorts, prefer to import through freight consolidators based in Dubai, Singapore, Europe and Bangkok. **Currently, there are no hotels that source imported food products or alcoholic beverages directly from the U.S.** although there are some international hotel chains or franchisees (Marriot and Nikko) that directly import products from other countries. In general, alcoholic beverages are purchased through importers, specifically private bonded warehouse operators and manufacturers, given that a majority of the hotels are allowed duty-free imports against their foreign exchange earning license.

Restaurants

Restaurants in India mainly purchase food products and ingredients locally, although some also import specialty products from other countries, such as bakery ingredients, french fries, cheese, meats, flavors, condiments, and other ingredients.

⁴⁸ Santosh Singh. "India HRI Food Service Sector Annual 2007." [USDA Foreign Agricultural Service](http://www.fas.usda.gov/gainfiles/200712/146293269.pdf). 14 December 2007. www.fas.usda.gov/gainfiles/200712/146293269.pdf

⁴⁹ "Indian Hotel Industry Survey 2005-06." [HVS International](http://www.hvsinternational.com) February 2007.

⁵⁰ Federation of Hotel & Restaurant Associations of India (FHRAI) www.fhrai.com.

⁵¹ "Indian Hotel Industry Survey 2005-06." [HVS International](http://www.hvsinternational.com) February 2007.

If they do purchase imported food products and beverages, they do so through wholesalers and distributors. Currently, the majority of imported food products are procured by Western-style fast food restaurants and restaurants serving other foreign cuisine. **While the export opportunities are not presently strong, the potential is likely to grow in the future as more restaurant chains are developed and new international fast food chains, such as Wendy's, Burger King, Taco Bell, and Starbucks enter the Indian market.**

There are no official data on the number of roadside eateries and tea/snack shops in the unorganized restaurant sector; however, FAS estimates there were between 100,000 and 500,000 in 2005. This compares to an estimated 700,000 restaurants in the organized sector in 2007, an increase from 500,000 in 2005. Growth in the restaurant sector is expected to increase seven to eight percent annually for the next few years as urbanization in India continues and disposable incomes increase.⁵²

Growth in India's restaurant sector is largely attributed to growing disposable incomes, a large population of young adults (20-34 year age group) and a popular "going out to eat" trend. The growth is particularly apparent in the rising number of Western-based fast food chains in India, which cater to the middle class consumers who have less time to shop and cook at home. Specifically, India's young urban population is willing to buy restaurant food as they have more disposable income and less desire to cook at home. Also, women have increasingly found jobs outside of the home and now have less time to spend cooking. According to the HRAI Survey, an estimated 4.5 percent of urban Indian consumers eat out at least once a week and about 12 percent eat out at least once a month.⁵³

Institutional

Currently, there are very limited opportunities for California agricultural exporters in India's institutional food service sector. This sector only purchases their food and beverages from domestic sources at this time.

CONSUMPTION TRENDS AND CULTURAL NUANCES

India's rapid increase in incomes, falling poverty, changing lifestyles and preferences and developing retail sector will cause the food market to evolve dramatically in the coming years. This should provide market opportunities for imported goods, such as products from California.

It is estimated that approximately 51 percent of household expenditures are on food in India, spent largely on basic items such grains, vegetable oils and sugar.⁵⁴ However, surveys have indicated that consumer spending on value added food

⁵² Santosh Singh. "India HRI Food Service Sector Annual 2007." USDA Foreign Agricultural Service. 14 December 2007. www.fas.usda.gov/gainfiles/200712/146293269.pdf

⁵³ Santosh Singh. "India HRI Food Service Sector Annual 2007." USDA Foreign Agricultural Service. 14 December 2007. www.fas.usda.gov/gainfiles/200712/146293269.pdf

⁵⁴ Singh, Santosh Kr. "India Report – Retail Food Sector 2006." USDA Foreign Agricultural Service. 21 December 2006. www.fas.usda.gov/gainfiles/200612/146269832.pdf

products such as milk, meat, eggs, fruit, and vegetables will increase in the near future as the number of affluent consumers rises.

Retail modernization in India has been driven by consumer demand for convenience and higher disposable incomes. Historically, consumers have shopped at different venues for specific products but due in part to the increasing number of women entering the workplace, consumers are looking for ways to make shopping easier and faster. **Also, the disposable incomes of young adults are growing. These consumers are much more willing to spend money for the added convenience of a one-stop shop rather than spend time shopping for groceries at several locations.**

Consumption has also been shaped by changing consumer preferences for international foods. Westernization is inevitable as India's young population continues to grow. The median age of India's population is 25 years⁵⁵ and approximately 40 percent of its population falls in the range of 20-44 years. These young middle-class consumers are heavily influenced by Western cultures as they gain knowledge through television and travel. Further, with more single young workers, nuclear families, working mothers, and fast-paced lifestyles, the new urban middle-class is spending more than previous generations on eating out and experimenting with alternative cuisines and more diverse food and beverage products. These changing mindsets and lifestyles provide significant opportunities for imported products.

With over one billion people, all major world religions and ethnic strains can be found in India. Religion plays an important role in the consumption of various food categories. The majority of consumers in India do not consume meat due to their religious beliefs and the high cost of purchasing meat. Approximately 83 percent of India's population is of the Hindu, Sikh, or Jains religion in which beef is considered taboo.

| | Religious compositions | Population |
|---|------------------------|---------------|
| | All Religions | 1,028,610,328 |
| 1 | Hindus | 827,578,868 |
| 2 | Muslims | 138,188,240 |
| 3 | Christians | 24,080,016 |
| 4 | Sikhs | 19,215,730 |
| 5 | Buddhists | 7,955,207 |
| 6 | Jains | 4,225,053 |
| 7 | Others | 6,639,626 |
| 8 | Religion not stated | 727,588 |

Source: Reproduced from Census of India, 2001

MARKETING AND PROMOTION

It is important to have effective marketing and promotion strategies for imported California agricultural products in India as these products are competing with low-cost alternatives produced locally and in neighboring countries. **Selecting the right target stores, locations, timing of promotions, in-store advertising, merchandising and monitoring are crucial factors when carrying out an effective marketing and promotion program.**

Historically, there were very few methods to help build product awareness in India. However, in conjunction with the country's rapidly growing economy, larger media and retail industries have emerged, altering consumption trends. In the past few years, consumption patterns in both urban and rural areas have been effectively influenced by advertising campaigns. In fact, advertising, now a \$3.4 billion industry in India,⁵⁶ has successfully generated significant demand for some products that were once unfamiliar to Indian consumers.

The National Readership Survey 2006 estimated the audience reach of media publications (dailies and magazines) was 110 million in rural areas and 112 million in urban areas, representing an annual increase of three percent.⁵⁷ Meanwhile, radio, which is the least expensive method of advertising in India, is making a comeback among consumers. In fact, the government-owned "All India Radio" (AIR) reaches over 90 percent of the population.⁵⁸ Advertising on television also has significant reach, as most consumers have televisions in urban areas and the number of households in the rural area with televisions is rising. In a 2006 survey, the audience reach for television was 230 million people.⁵⁹

Most food products build demand through a combination of trade and consumer marketing activities. Specifically, trade marketing through trade shows (a list of trade show opportunities can be found in Appendix IX) and trade relations activities help producers and manufacturers make and keep the necessary partnerships for successful distribution. Consumer marketing tactics including in-store promotions and television, newspaper, and magazine advertising are the most widely used methods to introduce a product, increase consumer awareness, and drive sales in India.

Examples of in-store promotion activities that are successful for imported food products in India include sampling, distribution of product information, and in-store promotions. **Indians are generally not impulse food shoppers; 90 percent of food purchases are planned.⁶⁰ Therefore, conducting activities at the point of sale can be very valuable.** This enables consumers to taste the product, obtain

⁵⁶ "2007 India Country Commercial Guide." U.S. Commercial Service. June 2007. www.buyusa.gov/india/en/ccg.html

⁵⁷ Govindan, A. "India – Exporter Guide." USDA Foreign Agricultural Service. 1 October 2007. www.fas.usda.gov/gainfiles/200710/146292588.pdf

⁵⁸ "2007 India Country Commercial Guide."

⁵⁹ Govindan, A. "India – Exporter Guide." USDA Foreign Agricultural Service. 1 October 2007. www.fas.usda.gov/gainfiles/200710/146292588.pdf

⁶⁰ SCS Group

product information, and generally differentiate the offering from other products available. Contests, special promotional offers on food with an entertainment aspect, eye-catching creative displays, kiosks, danglers, visuals, wobblers, and floor splashes can also be used during the in-store promotions to attract attention. Given the current and growing health trend among the Indian population, particularly for the children and the elderly, materials emphasizing the health benefits can also be an effective method to increase awareness.⁶¹

There are many marketing and promotional opportunities to increase trade and consumer demand for California producers. However, timing of the promotions is critical. A large percentage of the total food expenditure for Indians is spent during major holidays, such as Diwali (Festival of Lights) and New Year. For this reason, **promotions carried out during the winter season (October through December) are most effective when introducing new food products to Indian consumers.**

V. COMPETITION AND DISTRIBUTION

Agriculture is the lifeblood of India's economy and India produces a wide variety of agricultural products, including many of those produced in California. However, domestic production volumes are insufficient to meet demand, providing opportunities for California exporters.

LOCAL AGRICULTURAL ECONOMY AND PRODUCTION

Three fifths of the country's workforce is employed in agriculture, which accounts for 17.5 percent of India's gross domestic product (GDP).⁶² The agricultural sector has been slowly declining since 2000, while the industrial and service sectors have risen in terms of a percentage of GDP.⁶³ Despite this decline, India's agricultural sector remains a significant factor in India's economy.

The diverse climatic conditions - warm and humid due to the tropical monsoons in the south and moderate in the north - make India a major agricultural producer. In 2005, India produced approximately 239 million metric tons of cereals, 44 million metric tons of fruits, 82 million metric tons of vegetables, and one million metric tons of nuts.⁶⁴ India is the third largest producer of cereals behind China and the U.S. and the second largest producer of fruits and vegetables in the world behind China.

India's land (slope and elevation), climate, and soil properties are very favorable for the production of horticultural crops almost year-round. A majority of the primary

⁶¹ SCS Group

⁶² CIA World Fact Book

⁶³ "India Data Profile." [The World Bank Group](http://devdata.worldbank.org/external/CPPProfile.asp?PTYPE=CP&CCODE=IND), April 2007.

<http://devdata.worldbank.org/external/CPPProfile.asp?PTYPE=CP&CCODE=IND>

⁶⁴ Food and Agriculture Organization of the United Nations (FAO)

crops are grown in the north, south, and west regions of India, with some production in the northeast and central India.⁶⁵

The two tables that follow list the top ten fruits and vegetables produced in India. **Despite India's large production fruits and vegetables that California also produces, India will continue to be a large importer of agricultural products in order to meet internal demand of the country's 1.1 billion people.**

| Top 10 Fruits Produced in India | | | | | |
|---------------------------------|-------------------|--------|--------|--------|--------|
| Commodity | 2002 | 2003 | 2004 | 2005 | 2006 |
| | 1,000 metric tons | | | | |
| Bananas | 16,820 | 11,954 | 11,388 | 11,710 | 11,710 |
| Guavas/mangoes/ mangosteens | 10,640 | 10,780 | 1,831 | 11,140 | 11,140 |
| Oranges | 3,120 | 3,070 | 3,312 | 3,469 | 3,469 |
| Apples | 1,160 | 1,470 | 1,522 | 1,739 | 1,739 |
| Lemons and limes | 1,440 | 1,420 | 1,540 | 1,618 | 1,618 |
| Grapes | 1,210 | 1,150 | 1,475 | 1,546 | 1,546 |
| Pineapples | 1,180 | 1,310 | 1,234 | 1,229 | 1,229 |
| Papayas | 700 | 700 | 751 | 783 | 783 |
| Pears | 200 | 200 | 200 | 200 | 200 |
| Peaches and nectarines | 150 | 150 | 155 | 160 | 160 |

Source: FAO

| Top 10 Vegetables Produced in India | | | | | |
|-------------------------------------|-------------------|-------|-------|-------|-------|
| Commodity | 2002 | 2003 | 2004 | 2005 | 2006 |
| | 1,000 metric tons | | | | |
| Eggplants (aubergines) | 8,350 | 7,830 | 8,477 | 8,704 | 8,704 |
| Tomatoes | 7,460 | 7,600 | 8,126 | 8,638 | 8,638 |
| Onions, dry | 5,450 | 4,506 | 5,923 | 6,435 | 6,435 |
| Cabbages and other brassicas | 5,680 | 5,800 | 5,595 | 6,148 | 6,148 |
| Cauliflowers and broccoli | 4,890 | 4,800 | 4,940 | 4,508 | 4,508 |
| Pumpkins, squash and gourds | 3,500 | 3,500 | 3,609 | 3,678 | 3,678 |
| Okra | 3,320 | 3,530 | 3,631 | 3,525 | 3,525 |
| Peas, green | 2,040 | 3,200 | 1,901 | 1,918 | 1,918 |
| Lettuce and chicory | 790 | 790 | 802 | 810 | 810 |
| Other melons (inc. cantaloupes) | 645 | 645 | 650 | 653 | 653 |

Source: FAO

⁶⁵ "Fruit and Vegetables." India AGRO Industry. December 2007. www.agriculture-industry-india.com/agricultural-commodities/fruits-vegetables.html

Production areas include: Jammu and Kashmir (North), Himachal Pradesh (North), North Uttar Pradesh (North), Punjab (North), Tamil Nadu (south), Karnataka (south), Andhra Pradesh (south), Gujarat (west), Rajasthan (west), Maharashtra (west), West Bengal (west), Orissa (west), Tripura (north east), Assam (north east), and Madhya Pradesh (central).

IMPORT TRADE AND STATISTICS

Although India is a large producer of fruits and vegetables, India's large and growing population makes it a large importer of agricultural commodities. **California products enjoy varying degrees of market penetration, with opportunities to benefit from overall increases in demand as well as to steal share from competing suppliers.** According the California Department of Food and Agriculture, India was the eighth largest California agricultural export destination in 2005 (most recent data available). The leading agricultural products exported from California to India were almonds, cotton, and table grapes.

California almonds and grapes enjoy the widest access and perhaps the greatest opportunities in India among California products. Due in part from industry support and promotion, they have a strong presence in the market, and are well received by the Indian population. Despite growing competition from other countries, established trade and consumer support is expected to drive continued demand for these products.

Other California products have also successfully entered the Indian market, but with lesser degrees of market penetration. For example, California oranges have a strong presence in India, although they are dwarfed by supplies from Australia. In addition, pistachios, figs, and raisins are exported in significant volumes, but account for a small fraction of total imports. The bulk of India's imports of these products come from countries that are geographically closer to India, such as Iran and Pakistan. **Given the close proximity of these suppliers, California may have difficulty competing due to transportation costs. As a result, California suppliers would do well to differentiate their offering to justify a higher price.**

The tables below display top Indian imports in the fruit, vegetable, and nut categories. There are also tables for specific commodities that India currently imports from California, including the commodities mentioned above. A brief explanation accompanies each table.

Fruit

| India - Top 10 Fruit Imports | | | | | |
|-------------------------------|--------------------------|--------|--------|-------|--------|
| Fruit | 2001 | 2002 | 2003 | 2004 | 2005 |
| | <i>1,000 metric tons</i> | | | | |
| Dates | 121.6 | 125.94 | 117.63 | 98.94 | 116.26 |
| Apples | 18.64 | 20.15 | 21.41 | 22.02 | 35.9 |
| Grapes | 7.1 | 6.87 | 12.22 | 11.86 | 13.63 |
| Pears and quinces | 1.22 | 2.65 | 2.37 | 2.73 | 4.31 |
| Fruit, nec (incl. persimmons) | 0.82 | 0.64 | 0.81 | 0.69 | 2.9 |
| Oranges | 0.17 | 0.7 | 0.73 | 0.8 | 1.66 |
| Kiwi fruit | 0.19 | 0.28 | 0.32 | 0.39 | 0.73 |
| Lemons and limes | 0.53 | 0.33 | 0.1 | 0.46 | 0.49 |
| Bananas | 0.05 | 0.08 | 1.23 | 0.2 | 0.3 |
| Guavas, mangoes, mangosteens | 0.11 | 0.21 | 0.25 | 0.25 | 0.25 |

Source: FAO

In 2005, India imported over 175,000 MT of fruit. The leading fruit imported was dates (116,260 MT) in 2005, followed by apples and grapes with total imports of 35,900 MT and 13,630 MT respectively.

Vegetables

| India - Top 10 Vegetable Imports | | | | | |
|----------------------------------|--------------------------|-------|-------|-------|------|
| Vegetables | 2001 | 2002 | 2003 | 2004 | 2005 |
| | <i>1,000 metric tons</i> | | | | |
| Garlic | 27.58 | 47.76 | 18.75 | 19.73 | 5.86 |
| Peas, green | 8.79 | 12 | 3.77 | 3.94 | 4.29 |
| Cabbages and other brassicas | 2.39 | 2.72 | 0.14 | 2.19 | 1.97 |
| Other melons (incl. cantaloupes) | 1 | 0.9 | 1.45 | 0.67 | 0.95 |
| Legum. veg., nec | 5.97 | 0.84 | 0.49 | 0.36 | 0.48 |
| Tomatoes | 0.04 | 0.05 | 0.07 | 0.04 | 0.23 |
| Beans (incl. string), green | 0.02 | 0.35 | 0.52 | 0.31 | 0.18 |
| Onions (incl. shallots) | 0.17 | 0.13 | 0.32 | 0.19 | 0.1 |
| Vegetables, nec (incl. okra) | 0.04 | 0.04 | 0.06 | 0.05 | 0.08 |
| Chilies and peppers, green | 0.03 | 0.03 | 0.04 | 0.09 | 0.06 |

Source: FAO

India is a net exporter of vegetables. In 2005, India produced 82 million MT and consumed 75 million MT of vegetables. Meanwhile, India imported 14,200 MT of vegetables in 2005 with leading imports including garlic and green peas.

Nuts

| India - Nut Imports | | | | | |
|---------------------|--------------------------|--------|--------|--------|--------|
| Nuts | 2001 | 2002 | 2003 | 2004 | 2005 |
| | <i>1,000 metric tons</i> | | | | |
| Cashew nuts | 219.27 | 386.59 | 420.29 | 448.34 | 499.04 |
| Nuts, nec | 41.79 | 43.88 | 47.67 | 80.8 | 101.16 |
| Almonds | 25.69 | 24.78 | 26 | 26.68 | 33.12 |
| Pistachios | 6.05 | 4.83 | 7.38 | 4.94 | 4.27 |
| Walnuts | 0.38 | 0.42 | 0.45 | 0.6 | 0.32 |
| Hazelnuts | 0.04 | 0.06 | 0.06 | 0.05 | 0.02 |
| Chestnuts | 0.05 | 0.03 | 0.01 | 0.02 | 0.01 |

Source: FAO

India imports over 600 MT of nuts annually with cashew nuts and almonds being the primary imports. India is the third largest producer of cashew nuts, producing 573,000 MT in 2006. In 2005 India consumed over 660,000 MT of cashew nuts and almost 43,000 MT of almonds.

India Import Statistics and Market Analysis by Specified Commodity

| GRAPES FRESH (HS 080610) | | | | | | |
|--------------------------|----------------------|-------------|--------------|-----------------|-----------------|--------------|
| Country | Value (US\$ Million) | | | Quantity (MT) | | |
| | 2005-2006 | 2006-2007 | %Growth | 2005-2006 | 2006-2007 | %Growth |
| U.S. | 1.25 | 1.16 | -7.20 | 1,018.58 | 879.35 | -13.67 |
| Australia | 0.32 | 0.65 | 103.13 | 311.10 | 738.48 | 137.38 |
| Chile | 0.10 | 0.35 | 250.00 | 105.10 | 297.98 | 183.52 |
| South Africa | 0.03 | 0.06 | 100.00 | 19.70 | 43.10 | 118.78 |
| Italy | | 0.03 | | | 17.00 | |
| Total | 1.75 | 2.25 | 28.57 | 1,454.48 | 1,975.91 | 35.85 |

Source: Government of India – Ministry of Commerce and Industry, Department of Commerce⁶⁶

Table Grapes: In FY 2006-07 (April – March), California table grapes accounted for almost 45 percent of the imported table grape market in India. Though California was the leading supplier of table grapes to India with exports of 879 MT, other countries' table grape exports to India increased dramatically in the same period. Australia followed the U.S. with 738 MT of table grapes exported to India, followed by Chile with almost 298 MT in FY 2006-07. Australian exports increased 137.38 percent and Chilean exports increased 183.53 percent by volume during this period. Meanwhile, U.S. table grape exports to India declined by 13.67 percent.

There are several factors that make India a good market for California table grapes. First, California table grapes do not compete with local production; table grapes from California appear in India when the availability of the domestic table grape declines. Second, "California Grapes" is a well recognized brand name in India.⁶⁷ Lastly, upper-class Indians have a preference for seedless grapes, which bodes well for the California table grape industry as more of the population moves into this category.

| PISTACHIOS FRESH OR DRIED (HS 080250) | | | | | | |
|---------------------------------------|----------------------|--------------|--------------|-----------------|-----------------|--------------|
| Country | Value (US\$ Million) | | | Quantity (MT) | | |
| | 2005-2006 | 2006-2007 | % Growth | 2005-2006 | 2006-2007 | % Growth |
| Iran | 17.70 | 22.31 | 26.05 | 3,067.57 | 3,935.32 | 28.29 |
| Pakistan | | 13.26 | | | 1,483.29 | |
| Afghanistan | 6.87 | 3.81 | -44.54 | 1,197.69 | 439.88 | -63.27 |
| United Arab Emirates | 0.58 | 0.83 | 43.10 | 85.47 | 162.49 | 90.11 |
| U.S. | | 0.04 | | 0.01 | 30.19 | 301,800.00 |
| U.K. | | 0.03 | | | 5.20 | |
| Oman | | 0 | | | 0.18 | |
| Malaysia | | 0 | | | 0.06 | |
| Turkey | | 0 | | | 0.05 | |
| Saudi Arab | 0.06 | 0 | -99.77 | 7.50 | 0.03 | -99.60 |
| Total | 25.25 | 40.28 | 59.52 | 4,358.24 | 6,056.69 | 38.97 |

Source: Government of India – Ministry of Commerce and Industry, Department of Commerce

⁶⁶ Export Import Data Bank Version 6.0 Tradestat. Government of India - Ministry of Commerce & Industry Department of Commerce. 2007. <http://commerce.nic.in/eidb/Default.asp>

⁶⁷ SCS Group

Pistachios: While the U.S. is not a major supplier of pistachios to India, there is opportunity for growth. The total quantity of pistachios imported by India reached almost 6.1 million MT in FY 2006-07, of which U.S. market share was only 0.5 percent. By comparison, Iran and Pakistan are the leading suppliers of pistachios to India, representing nearly 90 percent of the imported pistachio market. The proximity of these competitors to India and current market position are major advantages. However, given the large size of the market, there is opportunity for California producers that have a competitive offering and can differentiate themselves from alternative supplies.

| ALMONDS FRSH OR DRIED IN SHELL (HS 80211) | | | | | | |
|---|----------------------|---------------|--------------|------------------|------------------|--------------|
| Country | Value (US\$ Million) | | | Quantity (MT) | | |
| | 2005-2006 | 2006-2007 | %Growth | 2005-2006 | 2006-2007 | %Growth |
| U.S. | 122.88 | 136.85 | 11.37 | 20,600.77 | 33,162.18 | 60.98 |
| Australia | 7.57 | 11.22 | 48.22 | 1,457.72 | 2,444.86 | 67.72 |
| Pakistan | | 4.56 | | | 1,891.35 | |
| Afghanistan | 5.50 | 1.30 | -76.36 | 1,713.76 | 613.12 | -64.22 |
| Chile | 1.68 | 0.19 | -88.69 | 285.77 | 40.82 | -85.72 |
| Iran | 0.14 | 0.06 | -57.14 | 23.00 | 29.54 | 28.43 |
| Sri Lanka | | 0.10 | | | 21.55 | |
| United Arab Emirates | 0.02 | 0.10 | 400.00 | 12.00 | 21.00 | 75.00 |
| Belize | | 0.06 | | | 20.41 | |
| Unspecified | | 0.09 | | | 20.41 | |
| China | | 0.13 | | | 18.20 | |
| U.K. | | 0.03 | | | 4.50 | |
| Syria | 0.14 | 0 | -100.00 | 31.08 | 1.00 | -96.78 |
| South Africa | | 0 | | | 0.06 | |
| Total | 138.20 | 154.70 | 11.94 | 24,124.10 | 38,289.00 | 58.72 |

Source: Government of India – Ministry of Commerce and Industry, Department of Commerce

Almonds: Within the nut category, almonds are a consumer favorite.⁶⁸ Currently, India's almond industry is small with production totaling 1,200 MT and domestic consumption estimated to be as high as 36,000 MT.⁶⁹ This imbalance points to significant opportunity for world almond suppliers, including the U.S.

The U.S. dominates the imported almond market in India exporting 33,162 MT in FY 2006-07. Australia, the U.S.'s closest competitor, exported 2,445 MT during the same period, followed by Pakistan with nearly 1,900 MT. Exports to India from these top three countries showed impressive growth in FY 2006-07, signaling continued growth in consumer demand.

⁶⁸ SCS Group

⁶⁹ SCS Group

| FIGS FRESH OR DRIED (HS 080420) | | | | | | |
|--|-----------------------------|------------------|----------------|----------------------|------------------|----------------|
| Country | Value (US\$ Million) | | | Quantity (MT) | | |
| | 2005-2006 | 2006-2007 | %Growth | 2005-2006 | 2006-2007 | %Growth |
| Pakistan | | 22.38 | | | 3,210.73 | |
| Iran | 0.18 | 0.37 | 105.56 | 188.39 | 388.80 | 106.37 |
| Afghanistan | 13.09 | 0.41 | -96.87 | 2,393.39 | 56.68 | -97.63 |
| Turkey | 0.01 | 0.05 | 400.00 | 4.37 | 30.00 | 586.50 |
| U.S. | 0.07 | 0.04 | -44.86 | 40.48 | 20.00 | -50.59 |
| U.K. | | 0 | | | 0.01 | |
| Total | 13.36 | 23.25 | 74.03 | 2,626.63 | 3,706.22 | 41.10 |

Source: Government of India – Ministry of Commerce and Industry, Department of Commerce

Figs (fresh and dried): Although the U.S. is not a major supplier of fresh or dried figs, the opportunity to become a larger supplier exists. According to FAO, India produced approximately 10,500 MT in 2004-05, while total consumption volume was double this figure at 20,000 MT. This trend has since continued. India's imports of fresh and dried figs increased 41 percent from FY 2005-06 to FY 2006-07. The bulk of India's fig imports are supplied by Pakistan, with Iran a distant second.

| DRIED GRAPES (080620) | | | | | | |
|------------------------------|-----------------------------|------------------|----------------|----------------------|------------------|----------------|
| Country | Value (US\$ Million) | | | Quantity (MT) | | |
| | 2005-2006 | 2006-2007 | %Growth | 2005-2006 | 2006-2007 | %Growth |
| Pakistan | 0.04 | 7.98 | 19,850.00 | 53.47 | 4,651.10 | 8,598.52 |
| Afghanistan | 11.39 | 5.33 | -53.20 | 7,463.63 | 3,762.99 | -49.58 |
| China | 0.21 | 0.31 | 47.62 | 171.04 | 285.77 | 67.08 |
| Iran | 0.02 | 0.04 | 100.00 | 60.00 | 89.40 | 49.00 |
| United Arab Emts | | 0.02 | | 12.36 | 48.62 | 293.37 |
| Uzbekistan | | 0.01 | | | 18.97 | |
| U.S. | 0.01 | 0.02 | 100.00 | 4.74 | 10.96 | 131.22 |
| Thailand | | 0.01 | | | 6.06 | |
| U.K. | | 0 | | | 0.14 | |
| Turkey | | 0 | | | 0.10 | |
| Total | 11.68 | 13.73 | 17.55 | 7,765.24 | 8,874.11 | 14.28 |

Source: Government of India – Ministry of Commerce and Industry, Department of Commerce

Raisins (Dried Grapes): U.S. raisins face strong competition from Pakistan and Afghanistan in India; these two suppliers account for 95 percent market share. Despite the U.S.'s small market share, exports from the U.S. have been growing, as has the size of the total market for imported raisins, which grew by 14.28 percent to 8,874 MT in FY 2006-07.

| ORANGES FRESH OR DRIED (HS 080510) | | | | | | |
|------------------------------------|----------------------|-------------|---------------|-----------------|-----------------|--------------|
| Country | Value (US\$ Million) | | | Quantity (MT) | | |
| | 2005-2006 | 2006-2007 | %Growth | 2005-2006 | 2006-2007 | %Growth |
| Australia | 0.47 | 1.23 | 161.70 | 961.43 | 1,794.31 | 86.63 |
| U.S. | 0.13 | 0.36 | 176.92 | 223.1 | 575.88 | 158.13 |
| South Africa | 0.09 | 0.1 | 11.11 | 167.21 | 129.28 | -22.68 |
| China | 0.08 | 0.06 | -25.00 | 182.79 | 96 | -47.48 |
| Total | 0.78 | 1.75 | 124.36 | 1,534.53 | 2,595.47 | 69.14 |

Source: Government of India – Ministry of Commerce and Industry, Department of Commerce

Oranges: There is strong competition from the domestic orange industry in India in terms of quality and timing, as Indian oranges are available in the market at the same time as California oranges. The U.S. increased its share of the Indian orange market in FY 2006-07, showing 158% growth in imports. However, Australia still exported more than three times the amount of oranges to India due in part to the favorable timing of its production season.

| CHERRIES FRESH (HS 080920) | | | | | | |
|----------------------------|----------------------|-----------|----------------|---------------|-------------|---------------|
| Country | Value (US\$ Million) | | | Quantity (MT) | | |
| | 2005-2006 | 2006-2007 | %Growth | 2005-2006 | 2006-2007 | %Growth |
| U.S. | | 0 | | 0.04 | 0.22 | 450.00 |
| Australia | 0.01 | 0 | -100.00 | 8.66 | 0.10 | -98.85 |
| Singapore | | 0 | | | 0.02 | |
| U.K. | | 0 | | | 0.01 | |
| Total | 0.02 | 0 | -100.00 | 8.70 | 0.35 | -95.98 |

Source: Government of India – Ministry of Commerce and Industry, Department of Commerce

Cherries: India is not a major importer of cherries, though in FY 2006-07 the U.S. surpassed Australia to become the main foreign supplier of cherries to India. Although currently the demand for cherries is low, there appears to be a growing demand as the middle-class emerges and distribution systems improve. In order for California cherries to be truly successful in the Indian market, producers will have to build demand for imported cherries among the Indian population.

| PEARS & QUINCES FRESH (HS 080820) | | | | | | |
|-----------------------------------|----------------------|-------------|--------------|-----------------|-----------------|--------------|
| Country | Value (US\$ Million) | | | Quantity (MT) | | |
| | 2005-2006 | 2006-2007 | %Growth | 2005-2006 | 2006-2007 | %Growth |
| China | 0.75 | 1.26 | 68.00 | 2,113.35 | 3,574.33 | 69.13 |
| U.S. | 0.69 | 0.53 | -23.19 | 1,173.89 | 782.65 | -33.33 |
| South Africa | 0.37 | 0.36 | -2.70 | 659.34 | 604.97 | -8.25 |
| Australia | 0.27 | 0.28 | 3.70 | 442.93 | 461.22 | 4.13 |
| Saudi Arab | 0.02 | 0.01 | -50.00 | 24.30 | 24.83 | 2.18 |
| Nepal | | 0 | | | 3.5 | |
| Total | 2.10 | 2.44 | 16.19 | 4,413.81 | 5,451.50 | 23.51 |

Source: Government of India – Ministry of Commerce and Industry, Department of Commerce

Pears: The U.S. is the second largest supplier of pears and quinces to India, following China. (Note: The U.S. pears exported to India to date have been from Washington and Oregon.) The U.S. lost market share to China in FY 2006-07

despite an overall 23.51% increase in pear and quince imports. South Africa and Australia are also major suppliers of pears and quinces to India. India imports nearly 5,500 MT annually, with growth in the overall product category, providing opportunities to California producers despite stiff competition from dominant China.

| Commodity: 080930 PEACHES INCL NECTARINES FRESH | | | | | | |
|---|------------------------|-------------|--------------|--------------|---------------|---------------|
| Country | Values in US\$ Million | | | Quantity | | |
| | 2005-2006 | 2006-2007 | %Growth | 2005-2006 | 2006-2007 | %Growth |
| Australia | 0.06 | 0.04 | -33.33 | 37.75 | 62.21 | 64.79 |
| Chile | | 0.01 | | | 23.00 | |
| U.S. | 0.01 | 0.01 | 0.00 | 14.77 | 18.74 | 26.88 |
| Spain | 0.01 | 0.02 | 100.00 | 7.20 | 18.18 | 152.50 |
| Austria | | 0 | | | 1.06 | |
| China | | 0 | | | 0.60 | |
| Oman | | 0 | | | 0.13 | |
| United Arab Emts | | 0 | | | 0.10 | |
| Saudi Arab | | 0 | | | 0.01 | |
| Singapore | 0 | | | 0.24 | | |
| Total | 0.08 | 0.09 | 12.50 | 59.96 | 124.03 | 106.85 |

Source: Government of India – Ministry of Commerce and Industry, Department of Commerce

Peaches: Although the U.S. is the third largest supplier of peaches and nectarines in India, Australia eclipses other peach suppliers. In addition, California also competes with India's domestic tree fruit industry. In 2006, India produced 160,000 MT of peaches and nectarines.

| Commodity: 080940 PLUMS AND SLOES , FRESH | | | | | | |
|---|------------------------|-------------|--------------|---------------|---------------|--------------|
| Country | Values in US\$ Million | | | Quantity | | |
| | 2005-2006 | 2006-2007 | %Growth | 2005-2006 | 2006-2007 | %Growth |
| Australia | 0.11 | 0.1 | -9.09 | 85.78 | 128.77 | 50.12 |
| U.S. | 0.07 | 0.11 | 57.14 | 90.48 | 109.36 | 20.87 |
| Chile | 0.02 | 0.07 | 250.00 | 28.32 | 67.85 | 139.58 |
| Italy | 0.02 | 0.04 | 100.00 | 18.69 | 37.06 | 98.29 |
| Spain | | 0.02 | | 1.55 | 17.63 | 1,037.42 |
| Thailand | | 0 | | 1.17 | 0.35 | -70.09 |
| Germany | | 0 | | | 0.02 | |
| Afghanistan Tis | 0 | | | 0.34 | | |
| Singapore | 0 | | | 0.12 | | |
| Total | 0.22 | 0.34 | 54.55 | 226.45 | 361.04 | 59.43 |

Source: Government of India – Ministry of Commerce and Industry, Department of Commerce

Plums: Similar to peaches and nectarines, Australia is the leading supplier of plums to India, followed closely by the U.S. In the past two years, the growth of imports for plums has doubled, offering opportunity for additional market expansion for the California tree fruit industry.

Lemons: California lemons have little opportunity in the Indian market and have not been imported to India in the last three years due to strong domestic production of lemons and high barriers to entry. According to the National Horticulture Board, India produced 1.5 million MT of lemon in 2005. In addition, the high duty and transit costs have posed insurmountable barriers to market entry for California.

LOGISTICS

India's significant distance from California and limited cold chain and other infrastructure can present logistical challenges for California products. As a result, **it is recommended that California exporters work closely with trusted importers and distributors to ensure their products arrive in good condition at final points of sale.**

Transportation

Depending upon the perishability and shelf life of the product in question, California producers can ship via ocean or air. For example, significant volumes apples are being regularly shipped from the U.S. West coast to India. However, cherries and tree fruit require air shipment. Due to India's high tariffs and sanitary and phytosanitary measures (SPS), many imported food products, including those from California, are transshipped through regional trading hubs such as Dubai.

India's eleven international ports are: Kandla, Mumbai, Mundra, Jawaharlal Nehru, Cochin, Mormugao, New Mangalore, Chennai, Tuticorin, Vizag, Paradeep, and Kolkata (FAS). Among these eleven major ports, one-fourth of all trade goes through Mumbai. Jawaharlal Nehru Port (near Mumbai) is India's busiest port, handling 25.85 million MT between the months of April through September 2007. In addition to Mumbai, Mormugao (west) and Vishakhapatnam and Chennai (east) are other large ports (based on volume) in India. There are also approximately 139 minor working ports along India's two coasts.

| Airports | Land Entry Points | Seaports | |
|--|---|---|--|
| <ul style="list-style-type: none"> • Amritsar (Punjab) • Bangalore (Karnataka) • Kolkata (West Bengal) • Chennai (Tamil Nadu) • Hyderabad (Andhra Pradesh) • Mumbai (Maharashtra) • New Delhi (Delhi) | <ul style="list-style-type: none"> • Agartala (Tripura) • Amritsar Rly. Stn. (Punjab) • Attari Rly. Stn. (Punjab) • Attari Wagha Border (Punjab) • Bongaon (West Bengal) • Gede Road Rly. Stn. (West Bengal) • Jogbani (Bihar) | <ul style="list-style-type: none"> • Alleppey (Kerala) • Bhavnagar (Gujarat) • Kolkata (West Bengal) • Calicut (Kerala) • Chennai (Tamil Nadu) • Cochin (Kerala) • Cuddalore (Tamil Nadu) • Goa (Goa) | <ul style="list-style-type: none"> • Mumbai (Maharashtra) • Mundra (Gujarat) • Nagapatnam (Tamil Nadu)* • Nova Shiva (Maharashtra) • Navlakhi (Gujarat) • Okha (Gujarat) • Paradeep (Orissa) • Pondicherry • Porbander (Gujarat)* |

| | | | |
|---|---|---|---|
| <ul style="list-style-type: none"> • Patna (Bihar) • Tiruchirapalli (Tamil Nadu) • Trivandrum (Kerala) • Varanasi (Uttar Pradesh) • Guwahati (Assam) | <ul style="list-style-type: none"> • Moreh (Manipur) • Panitanki (West Bengal) • Raxual (Bihar) • Rupadiha (Uttar Pradesh) • Sonauli (Uttar Pradesh) • Banbasa (Uttaranchal) • Indore (Madhya Pradesh) • Zokhwathar (Mizoram) | <ul style="list-style-type: none"> • Gopalpur (Orissa) • Haldia (West Bengal) • Jamnagar (Gujarat)* • Beypore (Kerala) • Kakinada (Andhra Pradesh) • Kandla (Gujarat) • Karwar (Karnataka) • Krishnapatnam (Andhra Pradesh) • Machlipatnam (Andhra Pradesh) • Mandvi (Gujarat) • Mangalore (Karnataka) | <ul style="list-style-type: none"> • Rameshwram (Tamil Nadu) • Tiruvananthapuram (Kerala) • Tuticorin (Tamil Nadu) • Veraval (Gujarat) • Visakhapatnam (Andhra Pradesh) • Vizhinjam (Kerala) <p>*For import of food grains by Food Corporation of India only.</p> |
|---|---|---|---|

Source: FAS

Understanding the need for additional ports and improved infrastructure, the government of India announced plans to begin building additional ports along the Delhi-Mumbai freight corridor in January 2008. These projects are forecast to be completed in seven years.⁷⁰ In addition to the three new ports, the government of India also plans to build new roads, power plants, industrial estates and special economic zones within the corridor.

Cold Chain/Infrastructure

Once in India, California products face the problem of limited infrastructure. Of critical importance, cold storage facilities are still lacking. Although India is a major producer of fruits and vegetables, approximately 30 percent or US\$13 billion in value of this produce reportedly deteriorates and is discarded due to the lack of cold chain facilities.⁷¹ Currently, the majority of perishable products are still transported in non-refrigerated or non-insulated vehicles and high rates of spoilage occur as a result.⁷²

The situation is slowly improving, with investors beginning to develop roadways and the power generating facilities necessary to maintain refrigerated storage and transportation chains.⁷³ However, the process of infrastructure improvement is only beginning, and it may be some time before concrete gains will be experienced. In the

⁷⁰ "On the Road." The Economist, 16 May 2007. www.economist.com/displayStory.cfm?story_id=9178857

⁷¹ Maheshwar, C. and Chanakwa, T.S. "Postharvest Losses Due to Gaps in Cold Chain in India - A Solution." Acta Hort. (ISHS) 712:777-784 www.actahort.org/books/712/712_100.htm.

⁷² SCS Group

⁷³ Govindan, A. "India – Exporter Guide." USDA Foreign Agricultural Service, 1 October 2007. www.fas.usda.gov/gainfiles/200710/146292588.pdf

meantime, **California agricultural exporters should work with local Indian importers/distributors that are already doing business with third-party logistics companies that can provide proper transportation to the targeted destinations.**

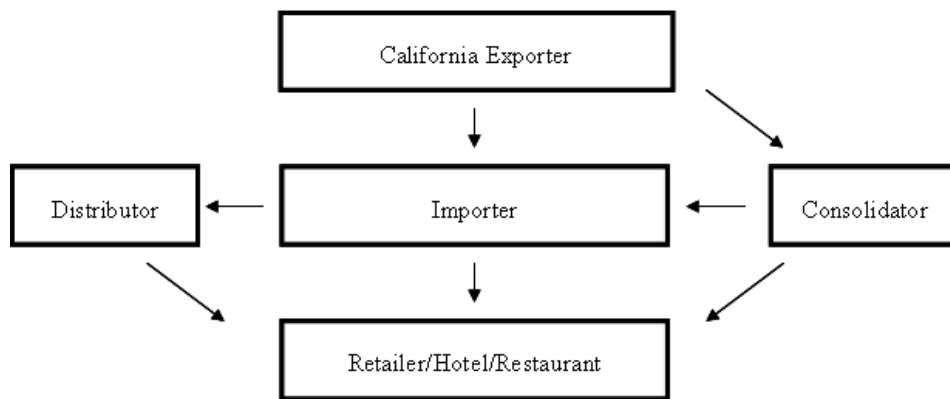
Distribution to Point of Sale

In general, retailers and hotel/restaurants purchase imported food products through distributors, importers or consolidators. Rarely do they do business directly with California exporters due to the relatively small volumes that they purchase. As retailers grow in size, more are sourcing food products through importers, while the importers source mix containers directly from the exporting country. As mentioned in the retail section, India's markets are geographically fragmented. Therefore, **it is often necessary to have several different agents for different geographical regions.**

Hotels and restaurants typically purchase fresh produce from wholesalers and distributors; some larger hotels and restaurant chains purchase through consolidators. Most hotels and restaurants import liquor duty-free against their foreign exchange earning license therefore supplies are generally purchased through private bonded warehouse operators or importers.⁷⁴

Major importers are located in Mumbai, Delhi, Chennai, and Kolkata. Lists of potential importers are provided in Appendix III – VIII by product category (fresh produce, dry fruit, wine, confectionary snack food, consumer food, and wine).

Distribution Channel in India



Source: FAS

⁷⁴ Santosh Singh. "India HRI Food Service Sector Annual 2007." [USDA Foreign Agricultural Service](http://www.fas.usda.gov/gainfiles/200712/146293269.pdf). 14 December 2007. www.fas.usda.gov/gainfiles/200712/146293269.pdf

TRADE POLICY OVERVIEW

In addition to challenges from competing countries and logistical factors, California exports also face trade restrictions and high tariffs in India.

Trade Regulations and Restrictions

According to the U.S. Export Services, India's new plant health import requirements are still under review by the U.S. The U.S. Export Services advises that until the review has been completed, **all shipments of plants and plant products to India must include a phytosanitary certificate and import permit.** Import permits must be submitted at least seven days in advance. A list of issuing authorities by location can be found in Appendix I.

Phytosanitary Requirements for Specific Commodities

In addition to the phytosanitary certificate and import permit, India imposes additional phytosanitary requirements for specific commodities such as almonds and raisins.

Almonds

Almond shipments require an additional declaration on the phytosanitary certificate: "The shipment is free from *Ephestia elutella*, *Ephestia kuehniella*, and *Plodia interpunctella*."

Shipments must also be free from the following three pests: 1) *Ephestia elutella* (Tobacco moth), 2) *Ephestia kuehniella* (Mediterranean flour moth), and 3) *Plodia interpunctella* (Indian meal moth).

In addition, almond shipments must be fumigated with phosphine or any other fumigant/substance in the manner approved by U.S. Department of Agriculture's (USDA) Animal and Plant Health Inspection Service (APHIS), Plant Protection and Quarantine (PPQ) for this purpose so as to result in the complete mortality of all life stages of prohibited pests (listed above). Fumigation treatment details must be included on the phytosanitary certificate.

When conducting any phosphine treatment, the commodity temperature must always be at or above 5°C (41°F). India does not allow any exceptions. Below are permitted treatment schedules:

| Commodity temperature | Exposure in Days |
|--------------------------------------|------------------|
| 5-9.9°C (41-49.9°F) | 10 |
| 10-14.9°C (50-58.9°F) | 8 |
| 15-19.9°C (59-67.9°F) | 4 |
| 20-24.9°C (68-76.9°F) | 3 |
| 25.0°C and above (77°F and above) | 2 |

The use of a phosphine/carbon dioxide mixture, such as Eco2Fume, is allowed but it must meet the same temperature and time durations as stated above for phosphine pellets, tablets, bags or trays.

For pellets, tablets, bags, trays and Eco2Fume the application rate is 40 gm/1,000 ft³ = 4.41 lbs/1,000 ft³.

Raisins

India requires methyl bromide (MB) fumigation treatments for raisins shipped from California. The following schedules conform to the methyl bromide label requirements, which also meet India's treatment requirements:

- 51.8°F to 60.7°F/2 lbs MB per 1,000 ft³
- 60.8°F to 69.7°F/1.5 lbs MB per 1,000 ft³
- 69.8°F and above/1 lb MB per 1,000 ft³

Guidelines for conducting chamber fumigations can be found in the treatment manual. Monitoring of tarpaulin fumigations should be as follows:

- 0.5 hour at 75% or more of original dosage
- 2 hours at 50% or more of original dosage
- 24 hours at 30% or more of original dosage

Documentation Requirements

Aside from the phytosanitary restrictions and requirements, there is additional documentation required for import. **India's Central Board of Excise and Customs of the Ministry of Finance requires that the following documentation accompany food shipments to India:**

- **Bill of lading or airway bill**
- **Commercial invoice**
- **Packing list**
- **Phytosanitary certificate**

In addition, **all food and agricultural products, including processed and packaged food, shipped to India must be accompanied by a certificate of origin.** The certificate of origin must include the order number, container number, port of discharge, buyer's name, and product description. A declaration stating, "The undersigned for [relevant organization] declares that the following mentioned goods as consigned above (or below) are the products of the United States of America. We hereby certify the goods to be of United States of America origin" must also be included on the certificate.

Tariffs and Taxes

Despite India's reduction of tariffs and taxes since 1991, **India is still highly protective of its domestic agricultural industry and its tariffs are among the highest in the world.** India's duties on agricultural products range from 25 to 150

percent with a majority at the 30 percent tariff rate. Tariffs on California raisins and wines are among the highest at 100 percent and 150 percent respectively. India levies the following tariffs on the specified products:

| Product | HS Code | 2007 Tariff Code |
|------------------------|------------|----------------------------------|
| Almonds (In Shell) | 0802.11 | 35 INR/kg |
| Almonds (Shelled) | 0802.12 | 65 INR/kg |
| Pistachios | 0802.50 | 30% |
| Figs (Fresh) | 0804.20.10 | 30% |
| Figs (Dried) | 0804.20.90 | 30% |
| Oranges | 0805.10 | 30% |
| Lemons | 0805.50 | 30% |
| Table Grapes | 0806.10 | 30% |
| Raisins | 0806.20 | 100% |
| Pears | 0808.20 | 30% |
| Cherries | 0809.20 | 30% |
| Peaches and Nectarines | 0809.30 | 30% |
| Plums | 0809.40 | 25% |
| Processed Tomatoes | 2002 | 30% |
| Processed Olives | 2005.70 | 30% |
| Wine | 2204 | 150% (sacramental wine - 30%) |

Source: U.S. Department of State

Furthermore, India levies numerous taxes on imported products, which include a landing charge, access deficit charge (ADC), education tax, and city, state, and regional taxes. The ADC tax was placed on imported products, with a few exceptions, such as fruit and vegetables, to account for the value added tax and other applicable taxes that pertained to domestic products. The additional fees and taxes may add up to an additional 30 percent when shipping to India. India levies the following taxes:

| Taxes (2007) | |
|---------------------------------|---|
| Landing Charge | 1% applied on CIF |
| Access Deficit Charge (ADC) | 4% based on the assessment is duty paid value |
| Education Tax | 3% (Education Cess Tax - 2% of aggregate duties and the Secondary and Higher Education Cess Tax - 1% of aggregate duties) |
| City, State, and Regional Taxes | Authorities levy a tax roughly 22% |

Source: U.S. Department of State

Labeling Requirements

India has strict labeling requirements for imported packaged products. **Products exhibiting only the standard U.S. label will not be allowed to enter** and it is the importer's responsibility to ensure that labels are applied to products prior to customs clearance. The Director General of Health Services (DGHS) requires that imported packaged food products adhere to labeling requirements provided in the recently amended Prevention of Food Adulteration Rules and Ministry of Commerce Notification No. 44 (RE-2000). Labels for imported packaged products must be printed in English or Hindi (Devnagari script) and be displayed in one of the following manners:

- Securely affixed to the package
- Printed on an additional wrapper containing the imported package
- Printed on the package itself
- Printed on a card or tape affixed firmly to the package or container

Appendix II provides the information that must be included on the labels of imported products. In addition, information on wax coatings, requirements for nutritional labeling, irradiated product labeling, vegetarian labeling, allergenic labeling, and genetically modified organism (GMO) labeling are also provided in the appendix.

Packaging Requirements

All food products from California must adhere to the same packaging requirements. The Food Adulteration Rules provide general regulations concerning packaging for food products. Under the rules, all food packaging materials must meet the following general guidelines:

- Packaging must be kept in a clean and sanitary condition
- Packaging must not be used for non-food storage purposes
- Packaging must be stored to prevent contamination

The rules prohibit the use of materials such as polyvinyl chloride (PVC) in most cities due to environmental concerns and waste disposal problems. However, no standards exist for additives used in the manufacture of food packaging materials, nor is there a clear mechanism for registering new packaging materials in India.

Trademark Laws

The Office of Trademarks Registry is the Indian trademark authority and the 1999 Trademarks Act and 2002 Trademarks Rules provide the regulatory framework for trademark registration. Prior to registering a trademark, the office recommends that applicants search the Trademarks Registry to ensure that their mark has not been previously registered.

To register a trademark, agents on behalf of applicants must submit an application with the following items and information:

- Depiction of the trademark
- Goods and services classification: Based on Nice Classification (www.wipo.int/classifications/fulltext/nice8/enmain.htm)
- Name and address of applicant and agent (if any)
- Power of attorney (if needed)
- Intended period of use of the mark

Applications are available from the Government of India's Ministry of Commerce and Industry Department of Industrial Policy and Promotion – Controller General of Patents Designs and Trade Marks' website:

www.ipindia.nic.in/tmr_new/first_schedule_forms/the_first_schedule.htm

It is important to note that it may take three to five years for the trademark to be officially accepted and notified. The following are fees related to the trademark registration process:

| Service | Required Form | Fee in Indian Rupees (Rs.) | Fee in U.S. Dollars (USD) ¹ |
|---|---|----------------------------|--|
| Official Trademark Search Request | Form TM-54 | 500.00 | 12.00 |
| Preliminary advice re: ability to register a mark | Form TM-55 | 500.00 | 12.00 |
| Trademark Registration Fee | Depends on Type of Registered Mark (Form TM-1, TM-2, TM-3, TM-8, TM-51) | 2,500 | 62.00 |
| Renewal of Trademark | Form TM-12 | 5,000.00 | 124.00 |
| Registration of a Removed Mark | Form TM-13 | 5,000.00 | 124.00 |
| Belated Renewal Surcharge | Form TM-10 | 3,000.00 | 74.00 |

¹Based on Currency Conversion Rate: 1 USD = 40.40 INR

Food Additives

India regulates food additives on imported food products, specifically Class II preservatives. Class II preservatives include:

- Benzoic acid and salts
- Sulphurous acid and salts
- Sorbic acid including its sodium, potassium and calcium
- Salts (propionates of calcium or sodium, lactic acid, and acid calcium phosphate)
- Nisin
- Sodium and calcium propionate.
- Methyl or propyl Parahydroxy-Benzoate
- Propionic acid, including esters or salts thereof
- Sodium diacetate
- Sodium, potassium and calcium salts of lactic acid.

Below are product specific content restrictions:

| Product | Class II Preservatives | Sulphur Dioxide | Benzoic Acid | Synthetic Food Colors |
|--|------------------------|-----------------|--------------|-----------------------|
| Figs (Fresh) (HS 0804.20.10) | | 600 | | |
| Figs (Dried) (HS 0804.20.90) | | | | |
| Oranges (HS 0805.10) | 1,000 | | | |
| Lemons (HS 0805.50) | 1,000 | | | |
| Table Grapes (HS 0806.10) | 1,000 | | | |
| Raisins (HS 0806.20) | 750 | | | |
| Pears (HS 0808.20) | 2,000 | | | |
| Cherries (HS 0809.20) | 1,000 | 2,000 | | None |
| Peaches and Nectarines (HS 0809.30) | 2,000 | | | |
| Plums (HS 0809.40) | 1,000 | | | |
| Processed Tomatoes (HS 2002) | 250 | | 750 | |
| Wine (HS 2204) | 450 | 450 | | |

Source: Indian Ministry of Health and Welfare

Other Restrictions

Sale of Insect Damaged Dry Fruits and Nuts

Raisins, figs, almonds, considered damaged, yet sellable produce cannot have more than 5 percent insect-damaged by count.

Product Irradiation

India's Food Adulteration Rules requires irradiated raisins and figs to adhere to specific requirements:

| | Dose of Irradiation | | |
|------------------|---------------------|---------|-----------------|
| | Minimum | Maximum | Overall Average |
| Raisins and Figs | 0.25 | 0.75 | 0.50 |

Source: Indian Ministry of Health and Welfare

VI. ADDITIONAL INFORMATION FOR CALIFORNIA EXPORTERS

The following additional information is provided only as a reference for California exporters interested in doing business in India. The information was collected from the U.S. Embassy, New Delhi, SCS Group, and the U.S. Department of Commerce, U.S. Commercial Service.

LANGUAGE AND COMMUNICATION

Although Hindi is India's leading national language, almost all Indian officials and business people are proficient in English. Communication technology has expanded, particularly in urban areas. Therefore, communication via e-mail and fax are good alternatives to telephone communication given the time difference between California and India.

BUSINESS CULTURE

Most business people in India have traveled abroad and are familiar with Western culture. Indians appreciate punctuality, but don't always practice it themselves. There are a number of religious holidays that are celebrated in India. As a result, business in India is not typically conducted during these holidays. Contacting the Consulate or Embassy regarding holidays observed before scheduling a visit is recommended.

Indians are very good hosts and will often invite you to their homes and indulge in small talk. This is part of the business culture. A small gesture of appreciation is always advised. For example, a box of sweets, chocolates or a bouquet of flowers would be positively received. In addition, family is strongly valued in India and the culture allows family to take priority over work whenever necessary.

Additional information can be obtained from the following websites:

- www.executiveplanet.com/index.php?title=India
- www.stylusinc.com/business/india/business_india.htm

SCHEDULING APPOINTMENTS

Meetings are often longer than planned; therefore keeping a fairly flexible schedule while in India is suggested. Scheduling meetings between 11:00 a.m. and 4:00 p.m. is preferable. It is also useful to confirm the meeting a few days in advance.

When trying to schedule a meeting with a government official in India, it can be fairly difficult compared to scheduling a meeting with a private organization. It is usual for appointments with government officials to be rescheduled or delayed for several hours.

TIME TO VISIT

Located in South Asia, the Indian climate varies from tropical to temperate. In general, October to March, which is India's winter season, is the best time to visit India. During this time, the temperature can decrease to as low as 2-3°C (35.6-37.4°F) in the Northern mountains of India. However, in most other parts of the country, the average temperatures are a comfortable 15-25°C (59-77°F). Indian summers (April to June) can be very hot, with the temperature reaching 50°C (122°F) in many locations.

VII. CONCLUSION AND RECOMMENDATIONS

India's large population and growing middle class have made it a desirable emerging market. The consumer base that can afford imported products is growing and the organized retail sector with the necessary infrastructure to handle fresh, perishable products is expanding rapidly. These conditions bode well for California agricultural exports.

However, market access and competitiveness must be assessed prior to moving forward with plans for market entry. Transport costs from the U.S., combined with some of the world's highest tariffs (ranging from 25 to 150 percent) challenge the competitiveness of California products. In addition, market competition often includes both local production and other foreign supplies. California producers must offer a competitive offering, a differentiated product offering, or ideally both.

Retail and foodservice entities rarely import directly, therefore, California exporters must seek out reliable local partners, including importers and distributors. These partners can assist in navigating various requirements for documentation and labeling. Since retail systems are fragmented, it may be necessary to work with more than one. We have provided importer lists in the appendices that follow. The Agricultural Trade Office may be able to assist with finding partners as well.

Finally, as with any product introduction, trade and consumer promotional support will help to ensure greater success in the Indian market. Targeting this effort to reach the right consumers at the right place and at the right time is important for an effective product launch and demand building.

Bryant Christie Inc. appreciated the opportunity to work with the Buy California Marketing Agreement on this important research project. If you have any questions about information contained within this report please contact Amy Thompson at (206) 292-6340 or by email at amyt@bryantchristie.com.

Appendices

Appendix I

Import Permit: Issuing Authorities

Import permits are required to be submitted to the port of entry at least seven days in advance of arrival. Below is a list of issuing authorities by location.

For all ports of entry for plants/plant materials and other items as: biocontrol agents, insects, microbial cultures, peat, soil, etc.:

Plant Protection Adviser to the Government of India
Ministry of Agriculture
Directorate of Plant Protection, Quarantine & Storage
NH-IV, Faridabad, Haryana - 121001

For New Delhi Airport, States of Delhi, Harayana, Himachal Pradesh, J&K, Rajasthan, U.P. and Uttaranchal for plants/plant materials for consumption or propagation:

Deputy Director (PP/Ent.)
National Plant Quarantine Station
Rangpuri, New Delhi - 110037

For Amritsar Airport and all points of entry bordering Pakistan in the States of Punjab and UT Chandigarh for plants/plant materials for consumption or propagation:

Deputy Director (PP/Ent.)
Regional Plant Quarantine Station
Ajnala Road, Near Airforce Station
Raja Sansi Airport, Amrisar - 143101

For Chennai Airport/Seaport and all ports of entry in Southern Zone in the States of Andhra Pradesh, Karnataka, Kerala, Lakshadeep, Pondicherry, Tamil Nadu, and UTs A&N Islands for plants/plant materials for consumption or propagation:

Deputy Director (PP/Ent.)
Regional Plant Quarantine Station
GST Road near Trident Hotel
Meenambakam, Chennai - 21

For Mumbai Airport/Seaport and all points of entry in Western Zone in the States of Daman & Diu, Gujarat, M.P. Chhatisgarh, Maharashtra, Goa, and UT Dadra & Nagar Haveli for plants/plant materials for consumption or propagation:

Deputy Director (PP/Ent.)
Regional Plant Quarantine Station
Haji Bunder Road
Sewri, Mumbai - 400 014

For Kolkata Airport/Seaport and all points of entry in Eastern Zone in the States of Arunachal Pradesh, Assam, Bihar, Jharkhand, Manipur, Meghalaya, Mizoram, Nagaland, Orissa, Sikkim, Tripura, and West Bengal for plants/plant materials for consumption or propagation:

Deputy Director (PP/Ent.)
Regional Plant Quarantine Station
F. b. Block Sector III
Salt Lake City, Kolkata - 24

Appendix II

Labeling Requirements

Imported product labels must provide the following information:

- Name, trade name, or description of product
- List of ingredients – Ingredients lists should adhere to the following requirements:
 - All ingredients should be listed in descending order by weight or volume.
 - Food products sold as mixtures should include ingoing ingredient percentage of the product by weight or volume at the time of manufacturing if the ingredient is included under the following conditions: (I) when emphasized on label through pictures (II) when needed to categorize the food in order to distinguish it from other types of products (III) when emphasized as ingredient in the product’s name (IV) when subject to a claim about fruits, sugars, or vegetables.
 - Compound ingredients may be listed if its constituent ingredients are listed following the compound in brackets and in descending order by weight. Compound ingredients that constitute less than five percent of the product and do not have a technological function do not require listing.
 - Added water must be declared in the list of ingredients except when water forms part of a compound ingredient such as brine, syrup, or broth.
 - Dehydrated or condensed products requiring reconstitution must include the following statement: “ingredients of the product when prepared in accordance with the direction on the label”.
 - Ingredients evaporated during processing do not require listing.
 - When a combined declaration of colors and flavors are given, their international code number may be used.
 - Any product containing an extraneous addition of coloring matter must include a declaration of its presence in the product.
- Name and address of manufacturer and importer
- Country of origin: The country of origin should be the country of the product’s last processing prior to entry into India
- Net weight or volume of contents: Liquid products must be declared by volume while solid foods must be declared by weight. Semi-solid and viscous foods may include either weight or volume.
- Distinctive batch, lot, or code number
- Preparation and storage instructions (if necessary)
- Month and year the product was manufactured or packed
- Month and year the product is best consumed: MOC Notification No. 22 (RE-2001) requires that all imported food products have a valid shelf life of no less than 60 percent of its original shelf life at the time of importation. Shelf life of the product is calculated based on the declaration given on the label of the product, regarding the date of manufacture and expiration date.
- Maximum retail price (MRP)

Wax Coatings

The implementation of the regulations pertaining to wax coating of fruits has been postponed from January 1, 2008 to March 1, 2008. According to the Prevention of Food Adulteration Rules (10th Amendment), fresh fruits may be coated with beeswax and carnauba wax, but all waxed fruits, packed or in loose form, have to be properly labeled (name of the wax and best before date).

Nutritional Labeling Requirements

India recently released amendments to the Food Adulteration Rules that require the following nutritional information be listed on all food products as of August 20, 2007. All of the following nutrients must be measured in milligrams (mg) per 100 mg or 100 ml unless otherwise listed:

- Energy value should be listed in kilocalories (Kcal) per 100 milligrams (mg) or milliliters (ml)
- Protein content
- Carbohydrate content
- Fat content
- Fatty acids including polysaturated, monosaturated, and transfatty acids as well as cholesterol
- Vitamin and mineral content

Irradiated Product Labeling Requirements

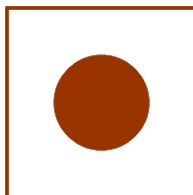
The PFA Rules require that any food product that is irradiated during processing include a statement indicating the treatment. In addition, the license number of irradiation units should be included along with the international food irradiation symbol below.



International Food Irradiation Symbol

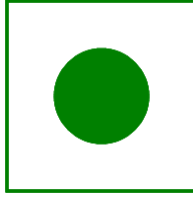
Vegetarian Labeling Requirements

Non-Vegetarian Products: Any product containing animal bi-products (including eggs) must have a symbol of a brown color-filled circle inside a square with a brown outline prominently displayed on the package, contrasting against the background on the principal display panel, in close proximity to the name or brand name of the food.



Non-Vegetarian Product Symbol

Vegetarian Products: Vegetarian products must have a symbol of a green color-filled circle inside a square with a green outline prominently displayed on the package, contrasting against the background on the principal display panel, in close proximity to name or brand name of the food.



Vegetarian Product Symbol

Allergenic Labeling Requirements

The PFA Rules require that any food product containing allergenic or hypersensitive ingredients include the following declaration: “This (product) contains (allergenic or hypersensitive ingredient).”

GMO Labeling Requirements

Currently, India maintains no labeling requirements for food products containing genetically modified organisms (GMO). However, the DGHS released Notification G.S.R 152(E) in March 2006 that would require labeling declarations for food products containing GMOs. Declarations should indicate that the product has been subject to genetic modification. As of yet, the Indian government has yet to adopt the notification.

Appendix III

Indian Importers of U.S. Consumer Food Products

The following list is not comprehensive and is only provided as a starting point.

| Name | Company | Address | Telephone/Fax | Email |
|------------------------|-------------------------------|--|--|---|
| Mr. Aliasgher Yusuf | Tajir Private Limited | Adie Mansion 334, Maulana Shaukatali Road Mumbai - 400 007 | Tel: 91-22-2307-3314 /78776/86077/63612 Fax: 91-22-2307-2757 /78761 | aliasger@tajir.com |
| Mr. Suresh Kumar | Suresh Kumar & Company | A-17 Som Tower Dr Mukherjee Nagar Commercial Complex | Tel: 91-11-2765-100 Fax: 91-11-2765-3938 | info@sureshkumarco.com |
| Mr. Uday Chugh | Exhilaron India P Ltd | 211, Antariksh Bhawan, 22 Kasturba Gandhi Marg, Connaught Place New Delhi-110 001 | Tel: 91-11-2373-0971 /72, 91-11-2684-8095 Fax: 91-11-2373-0972 | info@exhilaron-india.com |
| Mr. Jehangir D. Lawyer | Fortune Foods | 107 Adhayar Industrial Estates Sun Mill Compound, Lower Parel Mumbai 400 013 | Tel: 91-22-2495-5290 Fax: 91-22-2495-0387 | jlwyer@fortunegourmet.com jaylawyer@vsnl.com |
| Mr. Hemal Shah | Foodline Enterprises | 4th floor, Rajshree Castle Opp Balaji Mandir, Tilak Road, Ghatkopar east Mumbai 400077, Maharashtra | Tel: 91-22-2500-4725, Mobile: 91-98-2035-7577 | foodline@gmail.com |
| Mr. Puneet Gupta | Al Comps & Company | 809A International Trade Tower Nehru Place, New Delhi | Tel: 91-11-2628-7004 /3/98-1029-6543 Fax: 91-11-2628-700 | puneetg@glide.net.in puneet@lcomps.com |
| Mr. Kaivan Balsara | Kaivan Foods | 3 Kurla Industrial Estates LBS Marg, Ghatkopar (West) Mumbai 86 | Tel: 91-22-2511-679 Fax: 91-22-2513-9318 | kaivanfoods2003@rediffmail.com |
| Mr. Lalit Asrani | Rodaa Ji Company | First Floor, G.I 30 (main industrial area) G.T Karnal Road, New Delhi-110033 | Tel: 91-30978964 Mobile: 91-98-1001-6425 Fax: 91-98-1814-2101 | rodaajicompany@yahoo.co.in |
| Mr. Anil Chandok | Chenab Impex | J1/A Ansal Industrial Area Saki Vihar Road, Saki Naka Mumbai 72 | Tel: 91-22-2847-8880 /1623 Fax: 91-22-2847-0859 | info@chenabimpex.com www.chenabimpex.com |
| Mr. Joseph Thomas | Dukes' Thompson International | E 260, Shalimar Bungalow Park Sukhliya, Madhya Pradesh | Tel: 91-73-1406-6802 | |
| Mr. Sanjay Chawla | U & I Exim | P-3, Hans Aprtments East Arjun Nagar, Delhi 32 | Tel: 91-11-6529-0815 /91-120-225-0418 Fax: 91-12-0246-3862 | sales@uiexim.com |
| Mr. Rajesh Bheda | Talakshi Lalji & Company | 224/225 Gokul Arcade A Subhash Road, Vile Parle East Mumbai 57 | 91-22-2820-4247 | |
| Mr. Saket Khaitan | SAKET IMPEX | Nilhat House, 5th Floor, 11, R.N. Mukherjee Road, Calcutta - 700001 | Tel: 91-33-2243-5585 Fax: 91-33-2243-5597 | saketimpex@vsnl.com www.saketimpex.com |
| Mr. Rajiv Goyal | Lamb Weston | M-17, Kirti Nagar New Delhi 110 015 | Tel: 91-11-543-4659, 91-98-1006-5054 Fax: 91-11-511-6452 | |

| Name | Company | Address | Telephone/Fax | Email |
|---|---------------------------------|--|--|---|
| Mr. Rajesh Poddar | RR Trading Company | 108, Jolly Bhavan No. 1 New Marine Lines, Mumbai 400 020 | Tel: 91-22-2200-1411 /7387 Mobile: 91-98-2109-7762 Fax: 91-22-2200-7359 | rrtradingco@vsnl.net |
| Mr. H.B. Irani | HB Irani Bonds | 579, MJ Phule Market Mumbai 400 001 | Tel: 91-22-2340-1609 Fax: 91-22-2342-7963 | hbirani@usul.com hbirani@vsnl.com |
| Mr. Dinesh Dang | Kandhar Traders | F-51, APMC Market – 1 Phase-II, Turbhe, Vashi Navi Mumbai - 400 705 | Tel: 91-22-2766-5035 /59/99-6707-3555 Fax: 91-22-2765-5910 | dineshdang@hotmail.com |
| Mr. Kanwarjit Bajaj | Fairways Trading Company | 581/7, Katra Ishwar Bhawan, Khari Baoli Delhi 110 006 | Tel: 91-11-2391-3193 /2391-3199 Fax: 91-11-2294-1987 | fairways@del3.vsnl.net.in |
| Mr. Diljit Singh Nimesh Cheda | Harnav Trading | 1, Jayshivshankar C.H.S, Shivaji Park Road No.5, Mumbai, Maharashtra, India – 400016 Nimesh Chheda | Tel: 91-22-3091-694 Mobile: 91-98-2122-0002 | harnav_trading@rediffmail.com nimeshcheda@rediffmail.com |
| Mr. Riyadh R. Oomerbhoy /G.M. Dangra, Managing Director/General Manager | R. R. Oomerbhoy Private Limited | 5, Soona Mahal, 143, Marine Drive, Veer Nariman Road Mumbai - 400 020 | Tel: 91-22-5639-9000 /5639-9090 Fax: 91-22-2202-6929 | riyadh@rropl.com kdangra@rropl.com |
| Mr. G.K. Nayar | Gee Kay Sales Corporation | C-15, Hari Nagar, Near DDU Hospital New Delhi 110 064 | Tel: 91-11-2512-9085 /2549-6238/6264 Mobile: 91-98-6810-3833 Fax: 91-11-2512-7292/2614-8212 | gknayyar2000@yahoo.co.in |
| Mr. Subhash Dogra, Managing Director | Golferia Foods India Pvt. Ltd. | B-154 2 nd Floor, Malviya Nagar New Delhi 110 017 | Tel: 91-11-2668-5536 Fax: 91-11-2463-3962 | sdogra@anwpl.com |
| Mr. Sanjay Jain | Dugar Overseas Pvt. Ltd. | D 65 Anand Niketan New Delhi 110021 | Tel: 91-11-5166-0446 /981187-2999 Fax: 91-11-5166-1310 | dugar@satyam.net.in |
| Mr. Nilesh Agrawal, Director | Universal Corporation Ltd. | K-27, Lajpatnagar II New Delhi | Tel: 91-11-5172-4647 /48, 91-93-3108-0038 Fax: 91-11-5172-4649 | uclindia@vsnl.net howrahispal@vsnl.net |
| Mr. Chetan Asrani | GJ Foods Pvt Ltd. | 1088, Balaswa Village, Outer Ring Road New Delhi 110 009 | | info@gjfoods.net |
| Mr. Prashant Asrani | A.M.K. Exim Pvt Ltd | B-320, Lok Vihar, Pitampura New Delhi | Tel: 91-98-9150-7712 | prashant_asrani1973@yahoo.com |
| Mr. B.K. Pardal, President | World Wines & Spirits | 65A, Pocket 14, Kalkaji Extn New Delhi 110 019 | Tel: 91-98-1106-9990 Fax: 91-11-2609-3272 | bkpardal@vsnl.net |
| Mukul Mehra | Global Tax Free | 87, Sainik Farms Central Avenue New Delhi 110062 | Tel: 91-2955-1039 /2955-2574 /981-0810-1155 Fax: 91-2955-1683 | mukul_mehra@hotmail.com info@globaltaxfreetraders.com |

Appendix IV

Indian Importers of Fresh Produce

The following list is not comprehensive and is only provided as a starting point.

| Name | Company | Address | Telephone/Fax | Email |
|----------------------|--|--|---|---|
| Mr. Jitendra Lohani | DJ Exports Pvt. Ltd. | B-11, Basement, Gujrawala Town, Part I (Below Bank of Punjab), Delhi 110 009 | Tel: 91-11-27121531 /1549/1550 Fax: 91-11-2721-3074 | djexport@vsnl.net |
| Mr. Gagan Khosla | NGK Trading Company | A 340, New Sabzi Mandi Azadpur, Delhi 110 033 | Tel: 91-11-2741-3477 Fax: 91-11-2741-3105 | gagan@ngktrading.com |
| Mr. Vinay Gidwani | IFC International | B - 153, New Fruit Market Azadpur, Delhi 110 033 | Tel: 91-11-2744-6267 Fax: 91-11-2740-8806 | ifcint@hotmail.com |
| Mr. Lalit K Sethi | Agro World | C-601, New Subzi Mandi Azadpur, Delhi 110 033 | Tel: 91-98-1141-5081 Fax: 91-11-5213-3102 | lalitksethi@vsnl.net |
| Mr. Girish Gaba | KLG Imports & Exports | B-160 New Subzi Mandi, Azadpur Delhi 110 033 | Tel: 91-11-2725-1114 Mobile: 91-98-1160-5295, 91-93-1123-1001 Fax: 91-11-2721-9610 | klgimpex@hotmail.com |
| Mr. Vikas Singhal | Sarveshvar Commodities (India) Pvt. Ltd. | 4088-4093 Naya Bazar Delhi 110 006 | Tel: 91-11-2391-5394 Fax: 91-11-2396-7513 | scil.vikas@hotmail.com |
| Mr. Anish Bindra | A. T. Enterprises | C-56, Azadpur Subzi Mandi New Delhi - 110 033 | Tel: 91-11-2711-4170 /2742-8020/4179-4875/76 Mobile: 91-98-1013-7867 Fax: 91-11-2741-2360 | abindra@vsnl.com anishbindra@gmail.com |
| Mr. Sunil Sachdev | Aayush Impex | F-28/29, APMC Fruit Market Sector-19, Vashi, Navi Mumbai 400 703 | Tel: 91-22-2784-135 Fax: 91-22-2781-2380 | aayushimpex@vsnl.net |
| Mr. G.C. Arora | I.G International | F-85/86, APMC Fruit Market Sector-19, Vashi, Navi Mumbai 400 705 | Tel: 91-22-2765-9084/9184 Fax: 91-22-2784-0684 | gcarora@iginternational.net |
| Mr. Ambrish Karvat | Yupaa Group of Companies | 609, Om Chambers, Kemp's Corner, Mumbai 400 036 | Tel: 91-22-2368-4895/96 Mobile: 91-98-2107-1711 Fax: 91-22-2368-4079 | yupaa@vsnl.com |
| Mr. Nitin Agarwal | Euro Fruits Pvt. Ltd. | 202, Vikas Commercial Center Next to Basant Cinema, Dr. C.G. Road, Chembur, Mumbai 400 074 | Tel: 91-22-2555-7838/5964 Fax: 91-22-2555-5080 | eurofruits@eurofruits.com |
| Mr. Parin A. Shejwal | Bombay Exports | Matru Vatsalya, 33-35, Second Fofal Wadi Bhuleshwar, Mumbai 400 002 | Tel: 91-22-2240-6075 /2240-8642 | |
| Mr. Javed Memon | Kismat Fruit Traders | F- 61/62, A.P.M.C Fruit Market Sector-19 Vashi, Navi Mumbai 400 703 | Tel: 91-22-2784-1507 Fax: 91-22-2784-0193 | javed7770@yahoo.com |
| Mr. Deepak Dhir | Pride Trading Co. | 11/12, B-Wing, 6th Floor Groma House, Sector-19, Vashi, Navi Mumbai 400 703 | Tel: 91-22-2766-6195 Fax: 91-22-2766-6194 Mobile: 91-93-2010-2205 | pridetrading@mtnl.net.in |
| Mr. Sagar Mahuli | Pantheon Pvt. Ltd. | 105, Atlanta, Nariman Point, Mumbai 400 021 | Tel: 91-22-4030-1234 (Board) Ext. 208, 91-22-4030-1208 (Direct) Fax: 91-22-2284-4417 | sagar@pantheon.in www.pantheon.in |

| Name | Company | Address | Telephone/Fax | Email |
|--|--------------------------------------|---|---|--------------------------------------|
| Mr. P. K. Nath, Director – Intl. Trade | Jaideep International | H-646 APMC Fruit Market Sector-19, Vashi, Navi Mumbai 400 703 | Tel: 91-22-2784-1423 Fax: 91-22-2784-7162 | bhagyalaxmi_fruits@yahoo .co.in |
| Mr. Arun Goenka, Director | Garden Fresh | 227/2, AJC Bose Road, Ground Floor, Kolkata 700 020 | Tel: 91-33-2287-5826 Fax: 91-33-2290-7706 | arun@gardenfresh- india.com |
| Mr. Deepak Balsaria | Gokul Vatika | P-339, C.I.T, Road, Sch. – VIM, Kolkata 700 054 | Tel: 91-33-2352- 9086/2364-9230/42 | |
| Mr. N.C. Alexander | N.C.A. India | T/A-118, Anna Fruit Market Koyambedu, Chennai 600 092 | Tel: 91-44-2479-7276 | fruitsking2003@yahoo.com |
| Mr. Ameerul Hussain | National Fruit Agency | T/A - 120, Anna Fruit Market Koyambedu, Chennai 600 092 | Tel: 91-44-2477-9163 /487-3383 Fax: 91-44-2479-2598 | ameerul@nationalfruits. com |
| Mr. S. Sathyanarayanan | M/s. Benchmarx LLC. | A-2 Mathi Apts, AK-20, TAS Enclave 10TH Main Road, Annagar West, Chennai 600 040 | Tel: 91-98-4031-6449 | benchmarx@rediffmail. com |
| Mr. D. Manivannan | D Manivannan & Co. | T/C - 39, T/D – 95, Anna Fruit Market, Koyambedu Chennai 600 092 | Tel: 91-44-2479-1264 /5549-4228, 91-44-2479- 1264 | dmcfruit@yahoo.co.in |
| Mr. E. Duraisamy | E. Duraisamy & Bros. | T/B 110, Anna Fruit Market, Koyambedu, Chennai 600 092 | Tel: 91-44-2477-0145 /2487-3899/5564-3030 Fax: 91-44-2477-0145 | edschennai@yahoo.com |
| Mr. K Unnikrishnan | Mudra Exports | TA 138, Anna Fruit Market, Koyambedu, Chennai 600 092 | Tel: 91-44-2479-7018 Mobile: 91-98-4002-9915 Fax: 91-44-2479-4840 | unni_menon@yahoo.com |
| Mr. Suresh Kumar Khatumal | D D Impex | 625, Big Bazar Street, Coimbatore 641 001 | Tel: 91-422-239-2455/56 Fax: 91-422-230-4458 | jeetu@md3.vsnl.net.in |
| Mr. Q. Luqman | Naushie Exports | 55, New StreetKotta, Nagercoil 629 002 | Tel: 91-46-5224-0482 Fax: 91-46-5224-5206 | naushie@md4.vsnl.net.in |
| Mr. Javed Memon | EAM & Sons | 95, Fruit Market, Naroda Road, Ahmedabad 380 025 | Tel: 91-79-2220-3040 Fax: 91-79-2220-1642 | javed7770@yahoo.com |
| Mr. Ramchand Gajumal Vadhwa | Gajumal Mulchand Fruits Pvt. Ltd. | 24, New Fruit Market Naroda Road, Near Vijay Mill, Ahmedabad 390 025 | Tel: 91-79-2220-4122 Mobile: 91-98-9807-8277 | gm_fruits@yahoo.com |
| Mr. Mohammed Sadiq | MJ and Sons International | A#22, Fruit Market, Gaddianarm, Hyderabad 500 660 | Tel: 91-40-2404-6887 Fax: 91-93-9001-2297 | mjandsonsinternational @yahoo.com |

Appendix V

Indian Importers of Dry Fruit

The following list is not comprehensive and is only provided as a starting point.

| Name | Company | Address | Telephone/Fax | Email |
|--|------------------------------------|--|--|---|
| Mr. Muffadal Yousuf / Aliasger Yousoof | Tajir Private Limited | Adie Mansion 334 Maulana Shaukatali Rd. Mumbai 400 007 | Tel: 91-22-2301-0446 /2307-8776 /98200-25152 Fax: 91-22-2307-8761 | muffadal@tajir.com aliasger@tajir.com www.tajir.com |
| Mr. Subhash Bhatia | Uttam Chand Diwan Chand | #573, Katra Ishwar Bhawan Khari Baoli, Delhi 110 006 | Tel: 91-11-2294-0632 /2397-6160, 91-98-1002-5745 Fax: 91-11-2391-9557 | subhash@bhatia.net |
| Mr. Raju Bhatia/ Rakesh Bhatia | Rakesh Kumar & Co | #573 Katra Ishwar Bhawan Khari Baoli, Delhi 110 006 | Tel: 91-11-2395-4973 /2396-2294, 91-98-1001-9298 Fax: 91-11-2618-1746 /2291-7295 | rkcon@giasdl01.vsnl.net.in |
| Mr. G. S. Kataria | Pratap Singh & Sons | Shri Pratap Udyog, 274, Captaion Gaur Marg Srinivaspuri, New Delhi 110 065 | Tel: 91-11-2684-8865 /2683-3386, 91-98-1002-7702 Fax: 91-11-2692-1206 | sunproduce@hotmail.com |
| Mr. Kanwarjit Bajaj | Fairways Trading Company | #581/7, Katra Ishwar Bhawan Khari Baoli, Delhi 110 006 | Tel: 91-11-2391-3193 /2391-3199, 91-98-1005-6619 Fax: 91-11-2294-1987 | vbajaj@hotmail.com |
| Mr. Vikas Bansal | Nirmal Agro Foods | #589, Katra Ishwar Bhawan Khari Baoli, Delhi 110 006 | Tel: 91-11-6565-5618, 91-98-1102-5048 Fax: 91-11-2686-6948 /2393-0132 | nafoods@vsnl.com |
| Mr. Charanjit Singh, Proprietor | Bhai Pardhan Singh & Sons | #553, Katra Ishwar Bhawan Khari Baoli, Delhi 110 006 | Tel: 91-11-2392-5412 /2398-4777, 91-98-1011-6604/05 Fax: 91-11-2398-9373 | bps777@vsnl.net, raja777@vsnl.net |
| Mr. Dinesh R. Dang | Kandhar Traders | Shop No. F - 51, A. P. M. C. Market - 1, Phase -2, Turbhe, Mumbai 400 705 | Tel: 91-22-2766-5035 /5059, 91-98-2111-3907 Fax: 91-22-2765-5910 | dineshdang@hotmail.com |
| Mr. Vijay Nagpal, Director | Speedway Food & Beverage Pvt. Ltd. | B-205, Derawala Nagar Delhi 110 009 | Tel: 91-11-2712-8787 /88/2711-8788, 91-98-1011-5858 Fax: 91-11-2711-8787 | speedwayho@hotmail.com, speedway@vsnl.com |
| Mr. Suniel Chabria | Dolathram Thikamdas | Shop No. F – 45/46, A. P. M. C. Market – 1, Phase -2, Sector-19, Turbhe, Mumbai 400 705 | Tel: 91-22-2766-6189 /3098-3020, 91-98-2007-2608 Fax: 91-22-2756-7118 | nationexim@hotmail.com, deetees@bom5.vsnl.net.in |
| Mr. Mukesh Dattani, Director | The African Trading Co. Pvt. Ltd. | 3/C Avsar , 77/81 Kazi Sayed Street Mumbai 400 003 | Tel: 91-22-2766-2272, 91-98-2080-4900 Fax: 91-22-2413-4459 | atc@giasbm01.vsnl.net.in |
| Mr. Devang Mehta, Director | D. R. Corporation | 76-80/3, Dr. Kuverji Raishi Road, Mumbai 400 009 | Tel: 91-22-2371-6453 /2372-3600/3095-0023 Fax: 91-22-2373-8430 | megha@bom2.vsnl.net.in |

| Name | Company | Address | Telephone/Fax | Email |
|--|------------------------------|---|--|-------------------------------|
| Ms. Babso Kanwar | Permedia Foods Pvt. Ltd. | 39 The Arcade, World Trade Center Mumbai 400 005 | Tel: 91-22-2218-8885/6 Fax: 91-22-2218-2189 | babsokanwar@permediafoods.com |
| Mr. Baljit S. Chadha, P.C., President | Balcorp Limited | 512 Ansal Chambers II 6 Bhikaji Cama Place, New Delhi 110066 | Tel: 91-11-2619-4792 /2610-1305 | |
| Mr. Narayanan Rajagopalan, CEO | Dalmia Continental Pvt. Ltd. | 10, Daryaganj, New Delhi 110 002 | Tel: 91-11-2324-6198 /2327-7823 Fax: 91-11-2327-7875 | narayanan@leonardoolives.com |
| Mr. Gunjan V Jain | V.K.C. Nuts Private Ltd. | 52 B Birpur Industrial Estates Bari Brahmna, Jammu, J&K 181 113 | Tel: 91-19-2322-0292 /2738, 91-94-1918-6602 | gunjan@vkcnuts.com |

Appendix VI

Indian Importers of U.S. Confectionary Snack Food Products

The following list is not comprehensive and is only provided as a starting point.

| Name | Company | Address | Telephone/Fax | Email |
|--------------------------------|-------------------------------------|--|--|--|
| Mr. Atul Khanna | Optimum Marketing Pvt Ltd | 203, Okhla Estate Delhi 83 | Tel: 91-11-5100-0034 /35/36 Fax: 91-11-5100-0037 | optimum@ommindia.com |
| Mr. Aliasgher Yusuf | Tajir Private Limited | Adie Mansion 334, Maulana Shaukatali Rd. Mumbai - 400 007 | Tel: 91-22-2307-3314 /78776/86077/63612 Fax: 91-22-2307-2757 /8761 | aliasger@tajir.com |
| Mr. Suresh Kumar | Suresh Kumar & Company | A-17 Som Tower Dr Mukherjee Nagar Commercial Complex Delhi 110 009 | Tel: 91-11-2765-1001 Fax: 91-11-2765-3938 | info@sureshkumarco.com |
| Mr. Uday Chugh | Exhilaron India P Ltd | 211, Antariksh Bhawan, 22 Kasturba Gandhi Marg, Connaught Place New Delhi-110 001 | Tel: 91-11-2373-0971 /72/2684-8095 Fax: 91-11-2373-0972 | info@exhilaron-india.com |
| Mr. Puneet Gupta | Al Comps & Company | 809A International Trade Tower, Nehru Place, New Delhi | Tel: 91-11-2628-7004 /3, 91-11-98-1029-6543 Fax: 91-11-2628-7003 | puneetg@glide.net.in puneet@lcomps.com |
| Mr. Kaivan Balsara | Kaivan Foods | 3 Kurla Industrial Estate LBS Marg, Ghatkopar (West) Mumbai 86 | Tel: 91-22-2511-6795 Fax: 91-22-2513-9318 | kaivanfoods2003@rediffmail.com |
| Mr. Lalit Asrani | Rodaa Ji Company | First Floor, G.I 30 (main industrial area) G.T Karnal Road, New Delhi-110033 | Tel: 91-11-3097-8964 Mobile: 91-98-1001-6425 Fax: 91-98-1814-2101 | rodaajicompany@yahoo.co.in |
| Mr. Rajesh Poddar | RR Trading Company | 108, Jolly Bhavan No. 1 New Marine Lines, Mumbai 400 020 | Tel: 91-22-2200-1411 /7387 Mobile: 91-98-2109-7762 Fax: 91-22-2200-7359 | rrtradingco@vsnl.net |
| Mr. Nilesh Agrawal, Director | Universal Corporation Ltd. | K-27, Lajpatnagar II New Delhi | Tel: 91-11-5172-4647 /48, 91-93-3108-0038 Fax: 91-11-5172-4649 | uclindia@vsnl.net howrahisp@vsnl.net |
| Mr. Diljit Singh /Nimesh Cheda | Harnav Trading | 1, Jayshivshankar C.H.S, Shivaji Park Road No.5, Mumbai, Maharashtra, India - 400016 Nimesh Chheda | Tel: 91-22-3091-6948 Mobile: 91-98-2122-0002 | harnav_trading@rediffmail.com nimeshchheda@rediffmail.com |
| Mr. Pankaj V Agrawal | Ichimaan Enterprise Private Limited | 1st Floor, Ilaco House Sir P. M. Road, Above Punjab National Bank, Fort, Mumbai - 400 001 | Tel: 91-22-2267-9918, 91-98-2012-3650 Fax: 91-22-2266-5188 | pankajvagarwal@rediffmail.com pankajvagarwal@gmail.com |

| Name | Company | Address | Telephone/Fax | Email |
|----------------------------------|--------------------------|--|--|--|
| Mr. G.K. Nayar | Gee Kay Sales Corp. | C-15, Hari Nagar, Near DDU Hospital New Delhi 110 064 | Tel: 91-11-2512-9085, 91-11-2549-6238/6264 Mobile: 91-98-6810-3833 Fax: 91-11-2512-7292, 91-11-2614-8212 | gknayyar2000@yahoo.co.in |
| Mr. Sanjay Jain | Dugar Overseas Pvt. Ltd. | D 65 Anand Niketan New Delhi 110021 | Tel: 91-11-5166-0446, 91-98-1187-2999 Fax: 91-11-5166-1310 | dugar@satyam.net.in |
| Mr. Chetan Asrani | GJ Foods Pvt Ltd. | 1088, Balaswa Village, Outer Ring Road New Delhi 110 009 | Tel: 91-11-2763-0202 Fax: 91-11-2763-8081 | info@gjfoods.net |
| Mr. Prashant Asrani | A.M.K. Exim Pvt Ltd | B-320, Lok Vihar, Pitampura New Delhi | Tel: 91-98-9150-7712 | prashant_asrani1973@yahoo.com |
| Mr. B.K. Pardal, President | World Wines & Spirits | 65A, Pocket 14, Kalkaji Extn New Delhi 110 019 | Tel: 91-98-1106-9990 Fax: 91-11-2609-3272 | bkpardal@vsnl.net |
| Mukul Mehra | Global Tax Free | 87, Sainik Farms Central Avenue New Delhi 110062 | Tel: 91-98-2955-1039, 91-98-2955-2574, 91-98-1081-01155 Fax: 91-98-2955-1683 | mukul_mehra@hotmail.com info@globaltaxfreetraders.com |

Appendix VII

Indian Importers/Distributors of Liquor and Wine

The following list is not comprehensive and is only provided as a starting point

| Name | Company | Address | Telephone/Fax | Email |
|---|----------------------------------|---|---|--|
| Mr. Subhash Dogra, Managing Director | Golfera Foods India Pvt. Ltd. | B-154 2 nd Floor, Malviya Nagar New Delhi 110 017 | Tel: 91-11-2668-5536 Fax: 91-11-2463-3962 | sdogra@anwpl.com |
| Mukesh Sinham, General Manager | Brindco Sales Ltd | S-53, Okhla Phase – II New Delhi 110020 | Tel: 91-11-5161-6432, 91-93-1294-3385 Fax: 91-11-2638-6618 | mukesh.sinha@brindcolimited. com |
| Rukn Luthra | Seagrams India | Tower-B, 7th Floor, Global Business Park, Mehrauli Gurgaon Road, Haryana | Tel: 95-12-4406-0885, 95-98-1034-5453 Fax: 95-124-235-8067 | ruknluthra@seagram-india.com |
| Mr. B.K. Pardal, President | World Wines & Spirits | 65A, Pocket 14, Kalkaji Extn New Delhi 110 019 | Tel: 91-98-1106-9990 Fax: 91-11-2609-3272 | bkpardal@vsnl.net |
| Ms. Firdaus Khan Chaudhary | Francis Wacziarg | A-58, Nizamuddin East, New Delhi 110 013 | Tel: 91-11-2435-5910/01 Fax: As above | brands@fwacziarg.com |
| Mr. Rajiv Singhal | Ritu Overseas | 6F Vandhana, 11 Tolstoy Marg New Delhi 110 001 | Tel: 91-11-2335-9874/75 Fax: 91-11-2338-9293 | roverseas@vsnl.com |
| Mr. Sanjiv K Singh | TT&G Trading Pvt Ltd | 124, Thapar House, Janpath New Delhi 110 001 | Tel: 91-11-2336-8811/ 332, 91-98-1130-2823 Fax: 91-11-2336-8729 | great_vintages@rediffmail.com |
| Mr. H.B. Irani | HB Irani Bonds | 579, MJ Phule Market Mumbai 400 001 | Tel: 91-22-2340-1609 Fax: 91-22-2342-7963 | hbirani@usul.com |
| Mukul Mehra | Global Tax Free | 87, Sainik Farms Central Avenue New Delhi 110062 | Tel: 91-98-2955-1039 /2574, 91-98-1081-01155 Fax: 91-98-2955-1683 | mukul_mehra@hotmail.com info@globaltaxfreetraders.com |
| Mr. Amrit Kiran Singh | Brown Forman Worldwide, LL | A11/23, DLF Qutub Enclave Phase I, Gurgaon Haryana-122002 | Tel: 91-124-2355466 /2359560/2364561-3 /9810194409 Fax: 91-124-2356866 | amrit_singh@b-f.com |
| Mr. Sanjay Menon | Sansula | 95 Mittal Chambers, Nariman point Mumbai 400 021 | | mail@sansula.com |

Appendix VIII

Indian Food Retail Chains

The following list is not comprehensive and is only provided as a starting point.

| Name | Company | Address | Telephone/Fax | Direct Telephone | Email |
|---|---|---|---|-----------------------|--------------------------------|
| Mr. Vijay Kumat, Head International Business | Reliance Retail (Reliance Industries Limited) | Ground Floor, DLF Infinity Tower C DLF City Phase II, Gurgaon 122 002 | Tel: 91-12-4457-4600 /750 Fax: 91-12-4430-1873 /74 | Tel: 91-991-0347-8999 | vijay_v_kumar@ril.com |
| Mr. Sanjeev Asthana, President Agri & Food Supply Chain | | | | Tel: 91-12-4457-4604 | sanjeev.asthana@ril.com |
| Mr. Damodar Mall, President Food Business Division | Food Bazaar (Future Group) | Knowledge House, Shyam Nagar Jogeshwari East Mumbai 400 060 | Tel: 91-22-6644-2200 Fax: 91-22-6644-2201 | Tel: 91-93-2427-6408 | damodar.mall@pantaloon.com |
| Mr. Arvind Chaudhary, Business Head – Food | | | | Tel: 91-93-2402-9473 | arvind.chaudhary@pantaloon.com |
| Mr. Arbind Das, Vice President | Aditya Birla Retail Limited | Near Le Meridian Hotel, Sahar Andheri East Mumbai 400 099 | Tel: 91-22-6680-5555 Fax: 91-22-6680-5394 | | dasarabind@adityabirla.com |
| Mr. Satish Kokade, Head – Food Buying | | | | Tel: 91-99-2046-7739 | satish.kokade@adityabirla.com |
| Ms. Gayatri Kohli, Head Specialty Food | Spencer's Retail Limited (RPG Group) | Duncan House, 1 st Floor, 31 Netaji Subhas Road Kolkatta 700 001 | Tel: 91-33-4411-5600 Fax: 91-33-2231-8761 /62 | Tel: 91-99-0301-3180 | gayatri@rpgretail.in |
| Mr. Norman Yum, Chief Executive Officer | Foodworld Supermarkets Limited | No. 740, Easwari Industrial Estate Gate No 2, Hulimavu, Bannerghata Road Bangalore 560 076 | Tel: 91-80-5110-9702 /709 Fax: 91-80-5110-9710 | | Norman.yum@foodworld.in |
| Mr. S Srinath, Operation Director | | | | Tel: 91-98-4424-4044 | srinath@foodworld.in |
| Mr. Chandrasekhar, DGM Commercial | Subiksha Stores | 37F, Tambaram Velacherry Rod Velacherry, Chennai 42 | Tel: 91-44-2243-2950 Fax: 91-44-2243-2929 | Tel: 91-92-8234-0011 | chandra@subhiksha.biz |

| Name | Company | Address | Telephone/Fax | Direct Telephone | Email |
|---|---|---|---|-------------------------|-------------------------------|
| Mr. N.C. Venugopal, Managing Director | Nilgiri's Supermarkets (The Nilgiri Dairy Farm Pvt. Ltd.) | 171, Brigade Road, Bangalore 560 001 | Tel: 91-80-2558-1859 /2558-8401 Fax: 91-80-2558-2853 | | venugopal@nilgiris1905.in |
| Mr. Keith D'Cunha, Vice President Intl. Business | | | | Tel: 91-98-4425-3820 | nilgirisnest@eth.net |
| Ms. Eva Murch, Head Buying & Merchandising | Metro Cash & Carry India Pvt Ltd. | Survey No 26/3, A Block Ward No 9, Industrial Suburbs Subramanyanagar, Bangalore 560055 | Tel: 91-80-2219-2000 Fax: 91-80-2219-2249 | Tel: 91-99-4521-1408 | eva.murch@metro.co.in |
| Mr. Jean-Luc Poincot, Deputy Director Buying & Merchandising Food | | | | Tel: 91-99-0060-0124 | jean-luc.poincot@metro.co.in |
| Mr. M.S. Rao, President | Fresh @ Heritage Foods (India) Limited | 6-3-541/c, Panjagutta Hyderabad 500 082 | Tel: 91-40-2339-1221 /3295-5688 Fax: 91-40-2331-8090 | Tel: 91-98-4811-0999 | president@heritagefoods.co.in |
| Mr. P. Harish Kumar, Head – Agribusiness | | | | Tel: 91-93-9156-9996 | harish@heritagefoods.co.in |
| Mr. Uday Singh, Chairman & Managing Director | Namdhari's Fresh (Namdhari S. Pvt. Ltd.) | 119, 9 th Main Road, Ideal Homes Township Rajarajeshwarinagar, Bangalore 560 098 | Tel: 91-80-2860-2167 /69 Fax: 91-80-2860-2168 | Tel: 91-98-4547-1271/72 | usingh@namdhariseeds.com |
| Mr. M. Srinivasa Rao, Head – New Initiatives | IITC Fresh Stores (IITC Limited) | 31, S.D. Road Secunderabad 500 003 | Tel: 91-40-2780-3401 /00875 Fax: 91-40-2780-4476 | Tel: 91-98-4809-0403 | srinivasrao.m@itc.in |
| Mr. Raju Shete, Chairman | RK Foodland Pvt Ltd | Radha Krishna House, Majiwada Village Rd. Majiwada, Thane 400601 | Tel: 91-22-2598-6464 Fax: 91-22-2597-1767 /1395 | | rshete@rkfoodland.com |
| Mr. Sunil Sanklecha, Managing Director | Nuts 'n' Spices | 14, Krishnamma road Nuagambakkam Chennai 34 | Tel: 91-44-2821-3040 Fax: 91-44-2821-4050 | | nutsnpices@hotmail.com |
| Mr. V.P. Chokani, Director | Vitan Super Stores | 21 Spur tank Road Chettet, Chennai 31 | Tel: 91-44-2825-2075 Fax: 91-44-2822-5874 | | vitan@eth.net |
| Mr. Ted Huffman | Wal-Mart India* | Bharti Airtel Office 1/F First India Place, Vatika Centre MG Road, Gurgaon | Tel: 91-12-4417-3400 | Tel: 91-98-7177-3905 | Ted.Huffman@wal-mart.com |

*Wal-Mart has a joint venture with the Indian company Bharti Group for retailing in India

Appendix IX

Trade Shows

- **India International Fine Food & Wine Show**

January 17-19, 2008
New Delhi

The event showcases varieties food and beverages from around the world. Visitors include hoteliers, restaurateurs, bar and pub owners, importers and exporters of foods and drinks, producers, supermarkets, wholesalers, bonded warehouses, distributors, retailers, food consultant technologies. Exhibitors include: bakery & confectionary products, biological food products, condiments, mineral water, coffee & tea, accessories & articles for the cellar & bars & restaurants, machinery & equipment for fresh & preserved products, olive & other edible oils, packaged foods, ready to eat & cook food products, machinery & equipment for wine growing, cellar & wine collection.

- **Food and Beverages India**

January 25-28, 2008
Mumbai

This exhibition provides information on various aspects of food technology development including production, storage, processing, refrigeration, packaging and marketing of food and beverages.

- **Panacea**

January 30 – February 1, 2008
Mumbai

The show highlights exports and imports of natural products to and from India. This show helps create awareness for your brands, single point interface with end consumers, establish new business ties/reinforce existing ones, a meeting point of demand and suppliers in the natural products and allied industries. Buyers and exhibitors discover new products and new businesses and can attend informative and educational seminars.

www.biztradeshows.com/panacea-exhibition-expo-mumbai/

- **Foodex India**

January 24 – 27, 2008
Ahmadabad, Gujarat

A platform for the food industry, food processing technology, food packaging technology, cold supply chain and the retail chain segment.

www.biztradeshows.com/trade-events/foodex-india.html

- **Agrifare**
January 24 – 27, 2008 (runs concurrently with Foodex India)
Ahmadabad, Gujarat

Agrifare covers a variety of consumer and industrial products, services, machinery and technology.

www.biztradeshows.com/trade-events/agrifare.html

- **Food Retailing Expo**
January 31 – February 2, 2008
New Delhi

The expo is designed for Indian food companies, inputs suppliers and farmers to meet suppliers in the food retail industry and potential buyers who have the capacity and interest in purchasing healthy foods.

www.biztradeshows.com/trade-events/food-retailing-expo.html

- **AAHAR**
March 10-14, 2008
New Delhi

According to USDA FAS, AAHAR 2008 is one of India's most important food shows. In 2007 there were more than 325 exhibitors and about 25,000 business visitors. AAHAR is a platform for facilitating growth and modernization in the processed food and hospitality sector. The fair attracts domestic and foreign manufacturers, distributors, and suppliers.

www.biztradeshows.com/trade-events/aahar.html

- **Food & Healthcare Expo**
April 2008
Bangalore

Exhibitors include agriculture products, air and water pollution control equipment, bakery, confectionary and dairy products, beverages, bottling and canning technology, cold storage, air conditioning, refrigeration, freezing machinery equipments, dairy, bakery and confectionery equipment and machinery, health and fitness equipment, ice cream & desserts making machines, processed foods, sea foods, spices, frozen foods, packing, labeling, waste water treatment.

www.foodexpo2007.com

- **International FoodTec India / Sweet & Snack Factory India**
October 15-17, 2008
New Delhi

Exhibitors represent the processing and packaging, food ingredients, beverage technologies, cooling and refrigeration industry. The event is paralleled with the Dairy Universe and Sweet & Snack Factory trade shows which focus on the dairy industry and the sweet industry.

www.foodtecindia.com

www.sweetsnackfactory.com

- **Krishi 2007**
November 29 – December 3, 2007
Nashik

Exhibitors include agriculture, floriculture, aquaculture, animal husbandry, poultry/hatchery, dairy products/machinery, agro forestry, farm equipment, farm machinery, nets, fertilizers, organic manure, pesticides, seeds, cattle food, food processing, irrigation systems, greenhouse, cold storage, solar equipments, cottage industries, packaging/processing, windmills, telecommunication instruments, and rural housing.

www.biztradeshows.com/krishi/

- **Foodpro**
November 23 – 27, 2007
Chennai

This show focuses on the current trends in food processing; innovation through modern technology, which will be reflected in the products exhibited, and the concurrent events.

www.foodpro.in/food2007/home2007.php

- **Annapoorna – World of Food India**
November 13 - 15, 2008
Mumbai

Participants exchange innovation, ideas and business contacts for the food and beverage industry. The objectives of the show are: 1) promote your food products to the global range of visitors, 2) joint venture partnership, project collaborations, investments, and 3) create brand awareness, sales promotion, and launch new products.

www.worldoffoodindia.com/

- **IFE India**
December 6-8, 2007
New Delhi

The event focuses on food, drink and hospitality industry trade professionals across India.

www.ife-india.com/