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Report Highlights:

India recorded significant growth in almond, walnut, and pistachio imports in market year (MY) 2020/2021, increasing by 44, 20, and 34 percent, respectively, from MY 2019/2020. However, MY 2021/2022 almond and walnut imports are estimated to drop due to high domestic prices, increased domestic supply, reduced production in the United States, geopolitical tensions in regional suppliers (including Afghanistan), and various global shipping challenges. Conversely, India's pistachio imports are estimated to rise 11 percent to 31,000 metric tons (MT). The domestic market for pistachios remains marginal, albeit with promising growth prospects and imports are estimated to reach 50,000 MT by MY 2024/2025.

COMMODITIES:

ALMONDS, SHELLED BASIS

Table 1. India: Commodity, Almond, Production, Supply and Distribution (PSD)						
(Area in Hectares, Quantity in Metric Tons and Trees in Thousands)						
Almonds, Shelled Basis	**2019/20**		**2020/21**		**2021/22**	
Market Begin Year	**Aug-19**		**Aug-20**		**Aug-21**	
India	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted	0	48000	0	48000	0	48000
Area Harvested	0	45000	0	45000	0	45000
Bearing Trees	0	3000	0	3000	0	3000
Non-Bearing Trees	0	280	0	300	0	300
Total Trees	0	3280	0	3300	0	3300
Beginning Stocks	35000	35000	35000	30650	0	37470
Production	4500	4200	4500	4500	0	4500
Imports	105000	106100	125000	152500	0	125000
Total Supply	144500	145300	164500	187650	0	166970
Exports	0	150	0	180	0	200
Domestic Consumption	114500	114500	129500	150000	0	135000
Ending Stocks	30000	30650	35000	37470	0	31770
Total Distribution	144500	145300	164500	187650	0	166970

PRODUCTION:

FAS New Delhi (Post) forecasts India's market year (MY) 2021/2022 (August-July) almond production at 4,500 metric tons (MT) (kernel-weight basis), unchanged from last year's estimate. Almond production is concentrated in India's Union Territory of Jammu and Kashmir and in Himachal Pradesh state. Popular varietals grown include *Shalimar*, *Makdoon, Waris*, and *Kagazi.* Kashmir's local horticultural department promotes the production of the *Kagazi* (thin-shell) variety due to its higher yield and late blooming characteristics. Shelling rates range between 20 and 30 percent for hard-shell varieties, and 40 percent for thin-shelled varieties.

The Jammu and Kashmir territorial government, through its Almond Development program, aims to increase the region's almond cultivated area by upwards of 12,000 hectares and phase-in new higher yielding cultivars. However, as of 2021, only one almond nursery is currently under development, and located in the Shopian district.

CONSUMPTION:

FAS New Delhi forecasts MY 2021/2022 Indian almond consumption at 135,000 MT, 10 percent below the current year estimate. The MY 2020/2021 consumption numbers, however, have been revised upward to 150,000 MT reflecting stronger local demand. An abnormal drop in international prices led to atypical demand growth. While domestic consumption increased an astronomical 31 percent between MY 2019/2020 and MY 2020/2021, India will likely see a demand correction in the

upcoming market year, owing to higher domestic prices a result of reduced production in California. Global shipping constraints, including delays, transit congestions, and container shortages will also have an adverse impact.

India's almond demand nevertheless is still expected to remain high, with the domestic economy's recovery coupled with consumer spending increases following in the wake of the COVID-19 second wave. Almond consumption in India's hotel, restaurant, and institutional sector (HRI) is seen as increasing, which will offset a bit of the drop in retail demand. A return to traditional consumer activities, including outdoor events, weddings, and festive ceremonies, as well as dining out will further propel almond consumption in both the current market and forecast years. Almond sales through the end of 2021 are expected to remain strong in anticipation of this year's festive season. Bulk sales, associated with business and corporate gift giving, are likely to regain their footing.

Almonds' nutritional benefits, with their "immunity building characteristics," have been widely touted during India's COVID-19 second wave.[1] This has inadvertently led to fundamental changes in consumer behavior, which will likely endure at a minimum in the near- to medium-term.

The role of eCommerce, coupled to hyperlocal grocery delivery companies (i.e., Amazon, Big Basket, Flipkart, and Nature's Basket), continue to stimulate almond consumption. Additionally, an evolving supply chain, with the growing consumer awareness of perceived health benefits, will drive almond consumption in the food processing, personal care, and *Ayurveda* industries.[2] The increased use of almonds in breakfast cereal bars, snack foods, flavored dairy products, processed beverages, and confectionaries will help further demand growth.

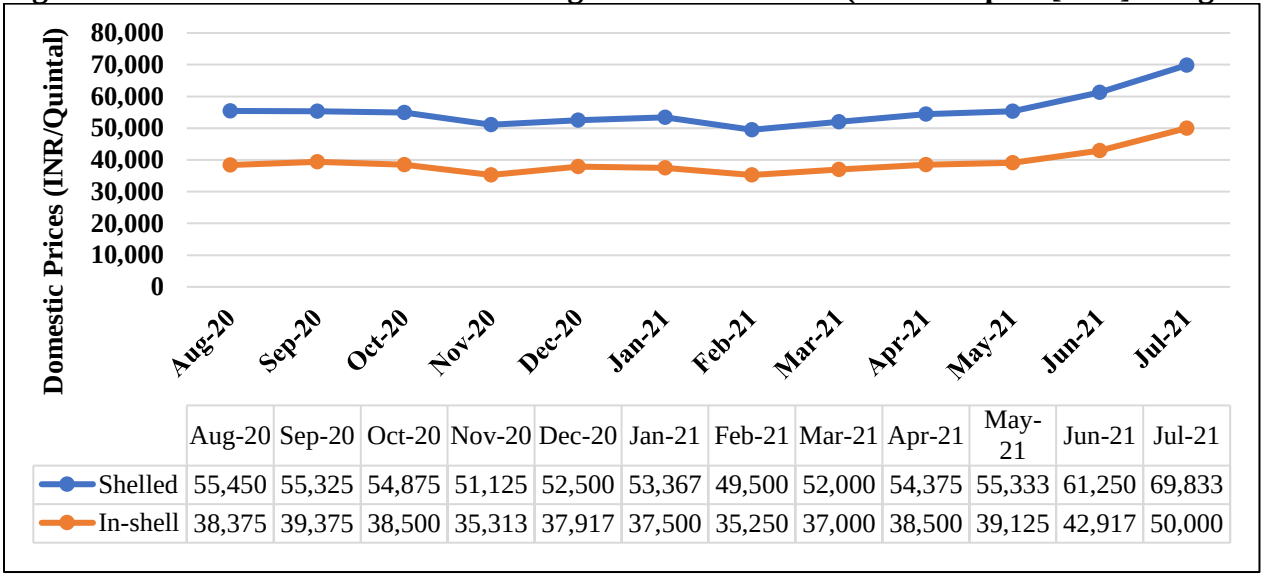
PRICES:

Market year 2020/2021 saw initial high demand, thanks to the combination of lower sales prices and shipping delays. Beginning in August 2020, shelled almond prices were 20 percent lower ($759/MT) compared to the same period last year ($944/MT). By October 2020, supplies tightened over delayed shipments. However, domestic prices stabilized following a deluge of delayed shipments arriving almost simultaneously – a tidal wave of almonds hitting India's shores.

Strong demand at the onset of the season helped many businesses reduce their liquidity, recovering from COVID-19 induced losses incurred in March-June 2020. With relatively slowing demand and lower supplies, prices dipped between seven to 10 percent from November 2020 onward (figure 1).

[1] During the height of the COVID-19 second wave (May 2021), the Indian government recommended a COVID-19 recovery diet. The diet includes almonds due to the perceived health benefits. See, Hindustan Times (May 8, 2021).
[2] *Ayurveda* is a traditional Hindu system of medicine. It is based on the idea of balance in bodily systems, utilizing holistic diet and herbal treatments.

Figure 1. India: Domestic Almond Average Wholesale Prices (Indian rupees [INR]/Kilogram)



	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21
Shelled	55,450	55,325	54,875	51,125	52,500	53,367	49,500	52,000	54,375	55,333	61,250	69,833
In-shell	38,375	39,375	38,500	35,313	37,917	37,500	35,250	37,000	38,500	39,125	42,917	50,000

Source: FAS New Delhi office research, International Fruits and Nuts Organization, New Delhi

In March 2021, almond prices again rose as the COVID-19 second wave led to renewed nationwide lockdowns. The second wave undermined almond sales, weaking demand for the season's new California-origin crop. Prices commenced an upward march, climbing 26 percent between May-July 2021. By August prices spike, hitting the $1,194/MT (India rupees (INR) 87,300/MT) mark for shelled almonds and $845/MT (INR 61,800/MT) for in-shell.[3] Indian buyers are now waiting on the September shipments anticipating a new price correction.

Industry sources are already reporting somewhat smaller kernel sizes in the initial shipments, but the expectation is that almond quality should improve with successive consignments. Market sentiment is expected to improve from October 2021 onwards as shipment transits and delays better.

TRADE:

FAS New Delhi forecasts India's MY 2021/2022 almond imports at 125,000 MT, 18 percent below the MY 2020/2021 estimates. Post is revising the MY 2020/2021 import figures upward to 152,500 MT based on new trade estimates. Between August 2020 and May 2021, almond imports soared by 61 percent.

U.S.-origin almonds account for 87 percent of India's total import volume in MY 2020/2021, followed by Australian almonds in a distant second place with seven percent market share (table 2). Almond imports from the United States and Australia are typically in-shell, of the nonpareil or Carmel varieties, and are shelled locally (i.e., machine-cracked and hand sorted). Most other origins supply primarily shelled almonds. Packaged almonds account for about 10-12 percent of retail sales.

Global shipping challenges including port delays and congestions, longer transit times, and container shortages are decimating Indian importers' stocks. In some instances, consignment delays (some over a

[3] $1.00 = INR 73.08 (September 2021).

month), are impacting Indian buyers' cash flows and the product's market availability. These shipping challenges are likely to continue in the upcoming market year.

Table 2. India: Commodity, Almond, Import Trade Matrix MY 2020/2021

Partner Country	In-shell	Shelled	Total Kernel	% Share
World	224,635	6,527	141,308	-
United States	204,686	693	123,505	87
Australia	15,502	0	9,301	7
Afghanistan	1,896	2,577	3,715	3
UAE	317	1,475	1,665	1
Iran	8	1,196	1,201	1
Canada	1,163	20	718	1
Syria	0	449	449	0
Hong Kong	653	18	410	0
Singapore	163	0	98	0
Turkey	0	63	63	0
United Kingdom	102	0	61	0
Vietnam	61	2	39	0
Pakistan	46	4	32	0
Sri Lanka	36	0	22	0
Uzbekistan	1	0	1	0

Source: Trade Data Monitor, FAS New Delhi office research.

India's almond exports, at 200 MT in MY 2021/2022 are negligible. Exports in the 2020/2021 included shipments to the United Arab Emirates (UAE), Sri Lanka, and the United Kingdom (UK) (table 3).

Table 3. India: Commodity, Almond, Export Trade Matrix MY 2020/2021

Partner Country	In-shell	Shelled	Total Kernel	% Share
World	102	93	154	-
UAE	63	5	43	28
Sri Lanka	2	23	24	16
United Kingdom	1	12	13	8
Kenya	0	11	11	7
Bhutan	2	8	9	6
Saudi Arabia	12	0	7	5
Singapore	0	7	7	5
Maldives	7	2	6	4
Nepal	1	5	6	4
Australia	8	0	5	3
Mauritius	0	4	4	3
Nigeria	0	2	2	1
New Zealand	0	2	2	1
Hong Kong	0	2	2	1
Iran	0	1	1	1

Note: For all almond trade tables, in-shell almonds are converted to shelled basis by multiplying by a factor of 0.6. Trade data in the table is for the August 2020-May 2021 period.
Source: Trade Data Monitor, FAS New Delhi office research.

POLICY:

India does not set quantitative restrictions on almond imports. U.S.-origin almonds face retaliatory tariffs of $0.56 per kilogram (kg) (INR 41/kg) for in-shell and $1.64 per kg (INR 120/kilogram) for shelled.

Table 4. India: Almonds, Tariffs

Commodity HS Code	Description	Applied Basic Duty Rate	Social Welfare Surcharge
0802.11.00	Almonds In-shell	INR 35/kg	10 percent
0802.12.00	Almonds Shelled	INR 100/kg	Non applicable

Source: FAS New Delhi office research

India's non-tariff barriers include narrow almond kernel standards prescribed by the Food Safety and Standards Authority of India (FSSAI). Industry sources indicate that the almond kernels standards are too restrictive to be widely applied across multiple commercial grades. Proposed quality/grade factors pertain to commercial contracts, these should not form the basis for import or retail controls.

Traders sustain that there is a need for flexibility in grades to account for varying commercial situations, including varietal differences, crop quality variability, and pricing differentials, as opposed to physical parameters such as damage and the presence of foreign material.[4]

[4] GAIN-INDIA - IN2020-0103 – India Almond Kernel Standards and other Various Food Products Published in the Indian Gazette.

WALNUTS, IN-SHELL BASIS

Table 5. India: Commodity, Walnuts, Production, Supply and Distribution (PSD)						
(Area in Hectares, Quantity in Metric Tons and Trees in Thousands)						
Walnuts, In-Shell Basis	**2019/20**		**2020/21**		**2021/22**	
Market Begin Year	**Sept-19**		**Sept-20**		**Sept-21**	
India	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Beginning Stocks	14400	14400	14400	14600	0	15800
Production	35000	35000	35000	35000	0	36000
Imports	30000	30000	35000	36000	0	34000
Total Supply	79400	79400	84400	85600	0	85800
Exports	3200	3000	4000	3800	0	4200
Domestic Consumption	61800	61800	66400	66000	0	66000
Ending Stocks	14400	14600	14000	15800	0	15600
Total Distribution	79400	79400	84400	85600	0	85800

PRODUCTION:

FAS New Delhi forecasts India's MY 2021/2022 (September-August) walnut production at 36,000 MT (in-shell basis), up three percent over last year. Indian walnut production is cyclical, and yields can vary by almost 20 percent depending on weather conditions at the time of blossom and harvest.

Walnuts are grown as a plantation crop in the northwestern Himalayan belt, extending through India's northeastern region. Production is concentrated to Jammu and Kashmir. Popular varieties include *Lake English, Drainovsky, Opex Caulchry*, which combined account for 90 percent of the overall production area. However, Himachal Pradesh (*Gobind, Eureka, Placentia, Wilson*); Uttarakhand (*Chakrata* varietals); and the northeastern states of Sikkim and Arunachal Pradesh do contribute limited volumes.

India's walnuts come in various sizes and with varying characteristics. These are sorted into paper-shelled, thin-shelled, medium-shelled, and hard-shelled categories. The walnut harvest typically occurs from late August through September. In 2021, the Kashmiri government established three walnut nurseries which produced around 20,000 walnut seedlings for propagation (see, Kashmir Reader).

India's walnut production lacks advanced horticultural practices that are often found in other walnut growing countries. India does not engage in high-density planting, improved orchard management practices, stable yields, faster fruiting periods, nor has access to modern post-harvest infrastructure facilities. In Jammu and Kashmir, India's primary production area, walnut trees are largely cultivated in an unorganized manner. Most of the trees are 40 years old; requiring a 15-year gestation period.[5]

[5] In the United States, the typical time from a sapling to the adult tree stage can take five to seven years.

Harvesting walnuts remains labor intensive. The COVID-19 national lockdown measures exacerbated labor costs, with many migrant workers forced to return to their home states. Sources indicate that higher yielding varietals, using high-quality grafted plants, are needed to increase domestic production.

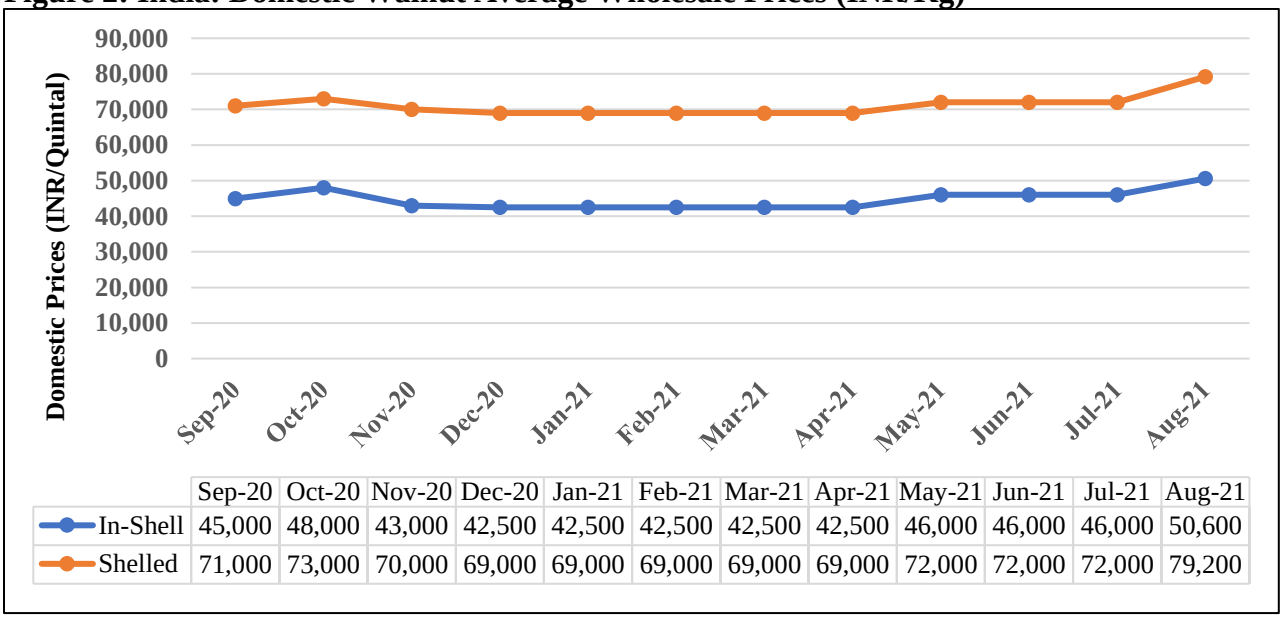
CONSUMPTION:

FAS New Delhi forecasts MY 2021/2022 Indian walnut consumption to remain flat at 66,000 metric tons. Post is revising India's MY 2020/2021 consumption to 66,000 MT, some 6,000 MT above the previous estimate. Indian consumers demand walnuts due to the nut's perceived health benefits and improved packaging (i.e., vacuum-packed bags) that supports year-round consumption. Much like with almonds, traditional and modern retail stores along with eCommerce is spurring on greater consumer demand. Walnuts remain popular with consumers, who perceive the nut having significant health benefits (e.g., cholesterol reducer, diabetes risk abatement, and improved brain function). Walnut kernels are rich in proteins, healthy fats, minerals, and vitamin-B.

About 70-75 percent of Indian walnuts are utilized domestically, with more than half of consumption occurring during the festive (October-November) months and winter season. Industry sources estimate that 17 percent of walnuts are used in food processing, with an additional four percent utilized in the personal care industry. The HRI sector uses walnuts as a key food ingredient, including in bakeries and the manufacture of traditional Indian sweets.

PRICES:

Figure 2: India: Domestic Walnut Average Wholesale Prices (INR/Kg)



	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21
In-Shell	45,000	48,000	43,000	42,500	42,500	42,500	42,500	42,500	46,000	46,000	46,000	50,600
Shelled	71,000	73,000	70,000	69,000	69,000	69,000	69,000	69,000	72,000	72,000	72,000	79,200

Source: FAS New Delhi research, domestic trade sources.

The MY 2020/2021 domestic walnut season kicked off with excellent demand and high prices. By December 2020, a price correction occurs as U.S.- and Chilean-origin imports make their landfall. Sources report quality concerns with imported products – specifically less desirable darker colored walnuts from California. While traders hold that color does not affect product quality, Indian consumers

favor lighter-colored walnut kernels. Domestic prices witnessed a drop in February 2021, as a result slower demand and market oversupply. Demand started recovering in May along with prices (figure 2).

Prices will likely stay high for most of MY 2021/2022. Lower production coming from California, along with uncertainty with what will happen next with Afghanistan's trade in the near-term following the Taliban's seizure of the state, will keep prices elevated. Domestic average prices as of August 31, 2021, are $1,084/MT (INR 79,200/MT) for shelled walnuts and $692/MT (INR 50,600/MT) for in-shell.

TRADE:

FAS New Delhi forecasts MY 2021/22 Indian walnut imports at 34,000 MT, six percent below the MY 2020/2021 figure. This decline is anticipated as both high domestic prices and trade uncertainty from Afghanistan, the fifth largest exporter of walnuts to India in MY 2020/2021, are likely to reduce consumption. Post is revising its import estimates for MY 2019/2020 to 30,000 MT and MY 2020/2021 to 36,000 MT based on the latest trade data. From September 2020 to May 2021, the United States remained India's main supplier with 55 percent market share, followed by Chile with 26 percent.

India is primarily an in-shell walnut market. Sources indicate that India's in-shell walnut imports grew 83 percent in September 2020-May 2021 (table 6), while shelled walnut imports declined by 25 percent.

Table 6. India: Commodity, Walnut, Import Trade Matrix 2020/2021

Partner Country	In-Shell	Shelled	Total Kernel	% Share
World	26,869	3,110	34,146	-
United States	16,287	1,003	18,634	55
Chile	7,884	468	8,979	26
United Arab Emirates	2,330	218	2,840	8
Vietnam	0	592	1,385	4
Afghanistan	133	498	1,298	4
Turkey	0	196	459	1
Sri Lanka	0	58	136	0
Iran	40	38	129	0
Canada	80	0	80	0
Australia	77	0	77	0
China	8	22	59	0
Georgia	0	16	37	0
Spain	20	0	20	0
Singapore	10	0	10	0

Note: For walnut trade tables, shelled walnuts are converted to in-shell basis by multiplying by a factor of 2.34. Trade data in the table is for September 2020-May 2021 period.
Source: Trade Data Monitor, FAS New Delhi research.

FAS New Delhi forecasts MY 2020/2021 Indian walnuts exports at 4,200 MT, up 11 percent from the previous market year. Post is revising its export estimate for MY 2019/2020 to 3,000 MT and MY 2020/2021 to 3,800 MT based on the latest trade data. In MY 2020/2021, India increased walnut export volumes to its traditional markets in the UAE, UK, Saudi Arabia, and Germany (table 7).

Over 95 percent of India's walnut exports are shelled kernels in vacuum packs, with 35-40 percent classified as "light halves," 35-40 percent "amber halves/light broken," and the remaining balance as "amber halves." Market sources report that Indian walnuts are competitively priced against those of the United States, Chile, Turkey, and China.

Table 7. India: Commodity, Walnut, Export Trade Matrix 2020/2021

Partner Country	In-Shell	Shelled	Total Kernel	% Share
World	412	818	2,326	-
United Arab Emirates	220	156	585	25
United Kingdom	0	207	484	21
Saudi Arabia	20	135	336	14
Germany	0	133	311	13
France	0	117	274	12
Spain	120	0	120	5
New Zealand	0	32	75	3
Turkey	40	0	40	2
Netherlands	0	13	30	1
Norway	0	13	30	1
Angola	0	10	23	1
Nepal	9	0	9	0
Kenya	0	1	2	0
South Africa	1	0	1	0

Source: Trade Data Monitor, FAS New Delhi research.

POLICY:

India's Open General License program permits walnut imports without quantitative restrictions. Both in-shell and shelled walnut imports are subject to a 100 percent tariff (effective February 2020). India is applying a retaliatory tariff on U.S.-origin in-shell walnuts at 20 percent above the applied BCD of 100 percent. However, California walnuts exports remain strong due to high consumer demand.

Table 8. India: Walnuts, Tariffs

Commodity HS Code	Description	Applied Basic Duty Rate	Social Welfare Surcharge
0802.31.00	Walnuts In-Shell	100 Percent	Not Applicable
0802.32.00	Walnuts Shelled	100 Percent	Not Applicable

Note: The SWS of ten percent on the BCD exempts goods falling under HS codes 0802.31.00 and 0802.32.00.

On July 30, 2021, the FSSAI published the Food Safety and Standards (Food Product Standards and Food Additives) Third Amendment Regulations (2021) which cites the final standards for walnut kernels with an implementation date of February 1, 2022 (see, GAIN-INDIA - IN2021-0097 India's FSSAI Issues Final Standards Walnut Kernels and Other Various Food Products). India's walnut kernel standards apply to fresh products and includes a 15 percent permissible variation for color uniformity. The FSSAI also changed the damage limit from two to four percent based on the number of damaged units, using a percent-by-mass parameter.

PISTACHIOS, IN-SHELL BASIS

Table 9. India: Commodity, Pistachios, Production, Supply and Distribution (PSD)						
(Area in Hectares, Quantity in Metric Tons, and Trees in Thousands)						
Pistachios, In-Shell Basis	**2019/20**		**2020/21**		**2021/22**	
Market Begin Year	**Sept-19**		**Sept-20**		**Sept-21**	
India	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Beginning Stocks	0	0	0	0	0	0
Production	0	0	0	0	0	0
Imports	20900	20900	25000	28000	0	31000
Total Supply	20900	20900	25000	28000	0	31000
Exports	0	100	0	70	0	100
Domestic Consumption	20900	20800	25000	27930	0	30900
Ending Stocks	0	0	0	0	0	0
Total Distribution	20900	20900	25000	28000	0	31000

PRODUCTION:

There is no commercial production of pistachios in India. Limited, unorganized production is confined to the Union Territory of Jammu and Kashmir.

CONSUMPTION:

FAS New Delhi forecasts India's MY 2021/2022 (September-August) pistachio consumption at 30,900 MT, 11 percent above the current year estimate. India is traditionally a market for in-shell pistachios, with peak demand occurring from October through February. While there is some nominal demand throughout the year, sales typically increase during the Indian festive and wedding seasons. Pistachios are typically sold through retail and wholesale channels. Organized retail outlets, along with online stores, have also increased their market presence to cater to growing pistachio demand. Sources indicate that India's market for pistachios may reach 50,000 MT by MY 2024/2025.

The Indian consumer traditionally has preferred Iran- and Afghanistan-origin pistachios. This preference derives from consumers' familiarity with the taste, texture, color, and shape of the tree nut. Conversely, U.S.-origin pistachios are relatively different in taste, have a distinct greenish tint, and are larger in size with a different texture. Popular Iranian varieties include *Akbari, Kalleh, Fandoghi* and *Ahmad Aghaei*, while California's U.S. grade 21-25 No. 1 pistachios is the preferred American variety.

Pistachios from Iran and Afghanistan have tapped successfully into the largely unorganized Indian traditional sweets (*mithai*) sector primarily due to cheaper pricing despite inconsistent product quality (i.e., broken/chipped kernels). The traditional Indian sweets market readily absorbs lower quality

pistachios as a food ingredient.[6] California pistachios command a premium due to consistent quality, size, and shape. The consumption of pistachios as a snacking nut is limited to affluent consumers, or about two-to-three percent of India's population.[7] Preferential pricing and mass-marketing activities can help build consumer awareness and demand for higher quality California pistachios.

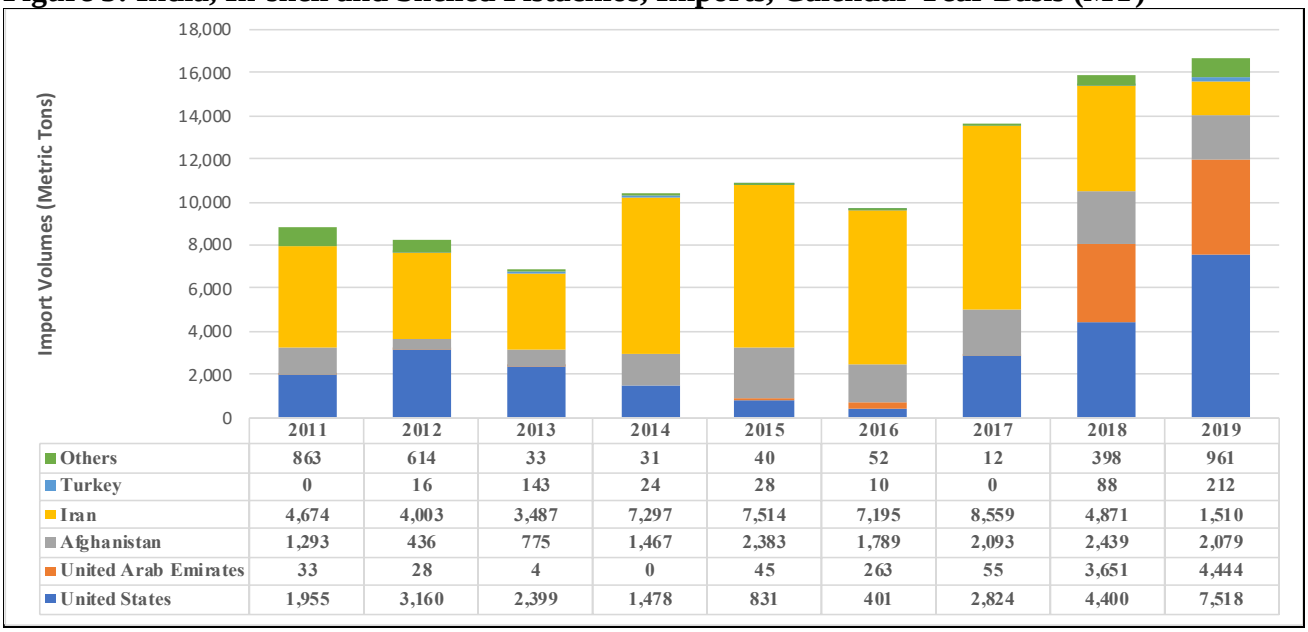
PRICE:

During MY 2020/2021, domestic prices for in-shell pistachios ranged between $9.50 to $14.00/ kg (INR 700 to 1,000/kg), and shelled pistachios $14.00 to $22.00/kg (INR 1,000 to 1,600/kg). Higher quality California pistachios retail between $10.50 to $12.00/kg. The first half of MY 2020/2021 was difficult for Indian buyers, as they struggled with excessive inventories at the onset of the season due to the national COVID lockdown measures of March-June 2020. The situation this market year has improved, due to stabilized supply chains and pricing. Typically, profit margins for pistachios range between three to five percent for importers.

TRADE:

FAS New Delhi forecasts India's MY 2021/2022 pistachio imports at 31,000 MT, 11 percent above MY 2020/2021. From September 2020 to May 2021, the UAE was the largest supplier of pistachios to India, followed by Afghanistan, the United States, and Hong Kong (table 10). Neither the UAE, nor Hong Kong produce pistachios, and are instead transshipping products from other origins, primarily from the United States. Historically, the United States, Iran, Afghanistan, and Turkey have been the largest suppliers of pistachios to India (figure 3).

Figure 3: India, In-shell and Shelled Pistachios, Imports, Calendar Year Basis (MT)



	2011	2012	2013	2014	2015	2016	2017	2018	2019
Others	863	614	33	31	40	52	12	398	961
Turkey	0	16	143	24	28	10	0	88	212
Iran	4,674	4,003	3,487	7,297	7,514	7,195	8,559	4,871	1,510
Afghanistan	1,293	436	775	1,467	2,383	1,789	2,093	2,439	2,079
United Arab Emirates	33	28	4	0	45	263	55	3,651	4,444
United States	1,955	3,160	2,399	1,478	831	401	2,824	4,400	7,518

Source: United Nations COMTRADE Database.

[6] The *mithai* (Indian sweets) sector is massive, valued at approximately $6 billion, of which the packaged segment is valued at $478 million (see, PFNDAI).

[7] India's population at present exceeds 1.33 billion people (Central Intelligence Agency, July 2021 estimate).

Shipment transit delays have been affecting Indian pistachio importers. According to sources, some importers continue to await pistachio containers that were intended to arrive in June 2021. Indian exports of pistachios for MY 2021/2022 are forecasted at 100 MT and will continue to remain negligible for the foreseeable future (table 11).

Table 10. India: Commodity, Pistachios, Import Trade Matrix 2020/2021

Partner Country	In-Shell	Shelled	Total Kernel	% Share
World	14,508	5,738	25,984	-
United Arab Emirates	9,492	2,443	14,378	55
Iran	3,894	1,187	6,268	24
Afghanistan	0	1,841	3,682	14
United States	957	248	1453	6
Hong Kong	131	0	131	1
Turkey	32	20	72	0
Qatar	2	0	2	0

Source: Trade Data Monitor, FAS New Delhi office research.

Table 11. India: Commodity, Pistachios, Export Trade Matrix 2020/2021

Partner Country	In-Shell	Shelled	Total Kernel	% Share
World	40	8	56	-
Germany	23	0	23	41
Sri Lanka	12	3	18	32
United Arab Emirates	2	0	2	4
Bangladesh	0	1	2	4
Hong Kong	0	1	2	4
Kenya	0	1	2	4
Bhutan	1	0	1	2

Note: For pistachio trade tables, shelled pistachios are converted to an in-shell basis by multiplying by a factor of 2.0. Trade data is for the September 2020-May 2021 period.
Source: Trade Data Monitor, FAS New Delhi office research.

India levies a 10 percent BCD on raw pistachios (in-shell and shelled), and 30 percent on roasted pistachios. Additionally, a Goods and Services Tax of 12 percent is applied on the customs and freight value, along with a Social Welfare Surcharge of 10 percent of the customs duty.

Attachments:

No Attachments