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Report Highlights:

The COVID-19 pandemic severely impacted India's hospitality sector, which is expected take another year to reach pre-COVID conditions and sales. Nonetheless, the sector is undergoing a rapid recovery thanks to growing domestic travel and a rise in restaurant dining and catered events. Contacts report that rising vaccinations, waning government restrictions, and more workers returning to the office will allow the Indian hospitality sector to fully recover in 2022. Opportunities for U.S. exporters exist in consumer-oriented products, especially high-value food products such as tree nuts, fresh fruit, distilled spirits, condiments, and processed foods.

Executive Summary:

India is the second most populated country in the world with a population of 1.39 billion, equivalent to almost 18 percent of the total world population. The median age in India is 28.4 years and over 50 percent of its population is below the age of 25 and more than 65 percent is below 35. India is a middle-income developing market economy and is expected to become world's third largest economy over the next 10-15 years. As COVID-19 cases decline, the country's economy is expected to recover dramatically. According to the [United Nations Conference on Trade and Development \(UNCTAD\)](#) report, India's GDP growth rate is expected to reach 7.2 percent in 2021 and 10.1 percent in 2022, higher than initial growth projections.

Food processors, importers, distributors, wholesalers, retailers, food service operators, hotels, restaurants, cloud kitchens, cafes/bars, home delivery restaurants, and QSRs are all part of a massive agribusiness sector. Apart from being a large food- producer/exporter, India imported \$23.8 billion of bulk, intermediate, consumer oriented, and agricultural related products in 2020.

Imports of Consumer-Oriented Products:

Imports of consumer-oriented foods, led by tree nuts, spices, processed and fresh fruits, are among the fastest growing segments of imported agricultural products. In 2020, India imported USD \$5.14 billion worth of consumer-oriented products, 19 percent of which came from the United States. The market for imported foods is growing thanks to increased demand from millennials, affluent professional, brand-oriented importers, modern retailers, e-retailers, and food service entities.

Although most imported foods (tree nuts, fruits, and processed products) are directed towards retail channels, there is significant opportunity for these products in the HRI sector, whose menus demand the use of high-quality imported ingredients. The majority of Indian four- and five-star hotel chains house specialty restaurants serving authentic global cuisines (Chinese, Japanese, Italian, Mexican, etc.) which require imported food ingredients and beverages to meet quality and taste standards. Many five-star hotels across India have their central purchasing departments procure imported tree nuts, meats, cheese, alcoholic beverages, fresh fruits and consumer-oriented products through wholesale markets or importers. Interestingly, chefs and bar managers are increasingly driving the selection of imported ingredients through food trade shows and direct outreach to suppliers.

While opportunities for imported foods are improving in the HRI sector, there remain challenges such as high tariffs, ongoing import restrictions, price sensitivity, and strong competition from its domestic industry.

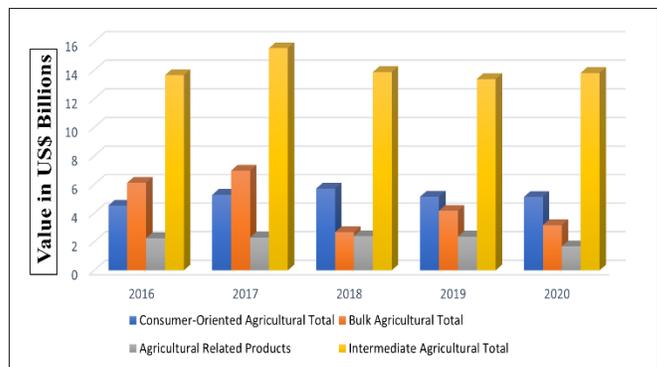


Figure 01: Indian Agricultural Imports from All Sources

Source: Trade data monitor

Food Service, Hotel Restaurant & Institutional:

The Indian food service market is valued at U.S. \$63.71 billion and is expected to reach \$95.75 billion by 2025, achieving a CAGR of 10.3 percent in 2012-2025. Rapid urbanization, an expanding youth population, rising disposable incomes, improved lifestyles, changing habits, and interest in foreign cuisines are key factors contributing to the growth of this sector in

addition to tourism and business travel. The sector is divided into two segments with the organized segment (standalone, QSR's, and chain restaurants) with a market share of 35 percent and the unorganized segment at 65 percent. There is strong interest from international food service companies, especially QSRs, to enter Indian market and these firms are actively working towards launching innovative menus suitable for local tastes.

The Indian hotel, restaurant, and institutional (HRI) service sector is valued at over \$250 billion, contributing nearly 10 percent to the country's GDP and 43 million jobs. Despite the pandemic, the hotel sector has opened 5,000 new rooms in FY 2020-21, demonstrating a recovery is underway.

Quick Facts Calendar Year 2020

Imports of Consumer-Oriented Products: US \$5.14 billion

List of Top Import Growth Products in India:

- Tree Nuts (Almonds, Pistachios, and Walnuts)
- Fresh Fruits (Apples, Pears, Grapes, Non-Local/Seasonal Fruit)
- Dairy Products
- Food Preparations
- Processed Fruits
- Distilled Spirits
- Sauces, Condiments and Vinegar
- Cocoa and Cocoa Preparations

Food Industry by Channels (U.S. billion) 2020:

Food Industry Output	\$358 billion (2018)
Food Exports	\$40 billion
Food Imports	\$24 billion
Retail	\$500 billion
Food Service	\$64 billion
Wet Market/Food Stalls/Street Karts	Unknown

Top Indian Hotel Chains (Five Star and Above):

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

Top American Hotel Chains in India:

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

GDP/Population (2020):

- Population (billions): 1.39 billion
- GDP (billions USD): \$3.05 trillion (nominal)
- GDP per capita (USD): \$2,227 (nominal)

Sources: Trade Data Monitor and Annual Survey of Industries

SWOT Analysis:

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

SECTION I: MARKET SUMMARY

General Economy and Policy Environment

India is Asia's third largest economy behind China and Japan with a projected growth rate of 7.2 percent in 2021. Due to an unprecedented nationwide lockdown as a result of COVID-19, India's economy contracted by seven percent in 2020. However, India's economy is on the path of recovery in 2021 and 2022, which will make it one of the fastest growing middle-income developing market economies next year.¹ While the Government of India (GOI) continues to make improvements to facilitate the ease of doing business (India is currently ranked at 63 out of 190 countries in the World Bank's 2020 Ease of Doing Business Report), it continues to raise tariffs for imported food and agricultural commodities.

India continues to maintain a surplus in agricultural trade. In 2020, India's food and agricultural exports grew to \$39 billion 2020, an increase of 13 percent from 2016. Meanwhile, India's 2020 agricultural and related product imports totaled \$23.8 billion, a decline of 11 percent compared to 2016.² Consumer-oriented foods remain among the fastest growing segments of imported agricultural products and reached \$5.1 billion in 2020. Total agriculture and related product imports from the United States reached \$1.82 billion in 2020. The United States remains India's largest supplier of consumer-oriented food products, led by tree nuts, specifically in-shell almonds.

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

Beginning in April 2021, India experienced significant economic and social challenges due to the second COVID-19 wave. In response, the GOI instituted an array of lockdown restrictions, which distressed an already damaged HRI industry. Due to the second wave, 20-25 percent of India's 150,000 branded hotels are at risk of permanent closure due to the economic slowdown.³ Nationwide, the hotel sector accounts for about 13 percent of employment, and approximately 70 percent of that workforce lost their jobs due to the second wave. Additionally, India's luxury hotels endured significant losses with a drastically scaled-back room rates due to limited domestic travel.

Second Wave Impact on the HRI Sector

- Most states including Delhi/National Capital Region, Maharashtra, Uttar Pradesh, Haryana, Rajasthan, Tamil Nadu, and Karnataka imposed a partial lockdown with strict curfews, or a complete lockdown until early July.
- Curfews and weekend lockdowns shortened business hours for hotels, retail stores and restaurants, making it impossible to operate without delivery/pick-up infrastructure in place.
- E-commerce faced a severe workforce crisis, especially delivery workers. Major online grocery delivery companies such as Amazon, Big Basket, Flipkart, and Grofers were unable to provide typical, on-time services during the second wave.⁴ Companies were forced to pay higher wages to delivery workers due to the elevated health risk.
- Severe labor shortages in the hotel sector, just as the industry began rehiring employees in

¹ Source: Business Standard. [India economy to grow at 7.2% in 2021 but could decelerate next year: UN](#). September 16, 2021.

² Source: Trade Data Monitor

³ Source: Duetsche Welle, [COVID: India's luxury hotels take a massive beating](#). July 7, 2021.

⁴ In India (Tier I and II cities), the typical period of ordering groceries to delivery is two hours.

early 2021 following the first COVID-19 wave. State-specific lockdowns also prevented meaningful reemployment.

- According to an estimate made by the Federation of Hotel and Restaurant Associations of India, 50 percent of restaurants will remain closed even after the easing of COVID-19 restrictions.⁵

Other Factors Impacting the HRI Sector

- Continued high tariffs on select food products, import restrictions and strong competition from the domestic industry also remain barriers for imported food products.
- The global container shortage and severe port congestions have contributed to significant supply chain disruptions. Industry sources note that various food industries with weekly commodity imports faced serious delays, resulting in various container backloads and month-long quotas arriving at once.
- Reduced international and domestic tourism resulted in lower market penetration for the traditionally tourist-heavy Indian states such as Punjab, Rajasthan, Madhya Pradesh, Kerala, and Goa.
- India's "Self-Reliant India" (Atmanirbhar Bharat) policy, and its related "Make in India" campaign emphasizing local sourcing for ingredients coupled with high price sensitivity all pose significant challenges for imported food products.

The Way Ahead

Although the COVID-19 pandemic created massive challenges to India's economy, there is a positive economic outlook that should benefit U.S. agricultural trade. The country's burgeoning middle-income class and young population will continue to support improved consumer spending. According to United Nations projections, India will continue to have one of the youngest populations in the world through 2030. Other contributing factors include improved living standards, rising disposable incomes, e-commerce expansion, the growing ease of food and consumer goods deliveries, and continued exposure to international and U.S. foods. Since 2019, over 46 percent of India's 1.37 billion population has access to the internet, which has enabled consumers to explore a wide range of foods, eating habits, and cultures previously not experienced.

As consumer consumption patterns continue to change, new technologies and mobile-based applications remain a key technology to source fresh, ready-to-eat foods. Additionally, consumers have shifted toward healthier-eating habits and perceived health foods to boost their immunity systems to protect themselves from COVID-19 and other diseases.⁶ As such, Indian consumers have increased their consumption of healthy foods, including tree nuts (almonds, walnuts, pistachios) and fresh fruits such as apples and blueberries, which will provide various opportunities for U.S. exporters. Local consumers have also increased demand for vegetarian and plant-based vegan foods in an effort to adopt healthy eating habits.

North India Trends

In August 2021, FAS India conducted market research in northern India including Rajasthan, Uttar

⁵ Source: The News Minute. [How the second wave has impacted an already fragile restaurant industry](#). June 9, 2021. Another similar report suggests that one in four restaurants in metro areas have permanently closed due to the pandemic.

⁶ Source: Economic Times. [Indians wish to prioritize eating healthy in 2021, says survey by Habbitt](#). January 14, 2021.

Pradesh, Punjab, and West Bengal. Industry resources reported that luxury hotels like Marriott, Hyatt, IHCL (Taj Hotel), and ITC in Tier I and Tier II cities like Kolkata, Chandigarh, Jaipur, and Lucknow reported significantly higher occupancy rates in July 2021 compared to the previous year and reached an approximate 80 percent average of the pre-COVID levels, along with 60-70 percent footfall (consumer traffic) in their in-house restaurants. The rebound in consumer spending can be attributed to the lower number of registered COVID-19 cases in northern India following the second wave, and the concurrent relaxation of various non-essential service restrictions, including the HRI sector. Further, the recent phenomena of “revenge traveling” has made its mark, where a segment of local, well-traveled consumers have accumulated greater disposable income and were anxious to leave their homes. In retail, the demand for U.S. food products has steadily increased for sauces and condiments, tree nuts, and fresh and dry fruits, following similar trends found in other Indian regions.

Tourism

Over the last decade, India has strengthened its position as a key tourist destination. According to the 2019 World Economic Forum, India ranked 34th on world travel and tourism competitiveness.⁷ Prior to the pandemic, India would average approximately 15 million tourists a year (Table 1). However, since March 2020, travel to India for tourism and most other short-term purposes is still not permitted. However, the Indian government may begin reissuing visas for foreign tourists due to the reduction in COVID-19 cases and may offer no-cost visas to the first 500,000 applicants.⁸

If international tourism is permitted again, the outlook for imported food and beverages within the tourism sector looks very positive. Despite a highly price sensitive sector, the tourist industry is willing to procure a diverse range of international food and beverage products for their clientele in its four- and five-star hotels and in-house specialty restaurants. Some of these products are unavailable in India and must be imported, including certain wines and spirits, dairy products, meat, seafood, fresh and dried fruits, frozen food products, sauces, condiments, and sauces.

Table 1. India: Key Indicators of the Travel and Tourism Industry	
International Tourist Annual Arrival	15,542,900 persons
International Tourist Inbound Receipts	USD \$27.4 million
Average Receipt per Arrival	USD \$452 per person
Travel and Tourism Industry GDP (% of total)	USD \$96.4 million (3.6 percent)

Source: World Tourism Organization and World Travel and Tourism Council 2019.

SECTION II: MARKET ENTRY ROADMAP

Entry Strategy

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

Can your product come into India and the local laws?

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

⁷ See: World Economic Forum, [Travel & Tourism Competitiveness Report](#) 2019.

⁸ Source: Economic Times, [Foreign tourists may be allowed to visit India soon](#). September 19, 2021.

- Review [FAS GAIN](#) policy and market reports, including specific commodity information on custom duties or sanitary requirements.
- Consider engaging a market research firm to assist with market entry, better understand the trade challenges and opportunities, and navigate the complex regulatory environment.

Find the Right Partner

- Identify a reliable importer/distributor who services the food retail sector.
- Avoid conflicts of interest – i.e., a partner who can ensure that all channels are followed within Indian laws.
- Consider whether participating in an Indian trade show or collaborating/participating in USDA endorsed promotional activities would be effective in finding a dependable importer/distributor/partner.

Secure Payment Terms

- Until establishing a successful working relationship, U.S. companies or exporters may wish to consider vehicles such as an irrevocable Letter of Credit, advance payment, or payment at sight.
- FAS India offices do not have the authority to mediate contractual disputes or serve as a collection agent when differences over payment or other commercial issues arise. For information about local legal services, refer to GAIN Report [IN6155](#).

Market Structure and Distribution Channels

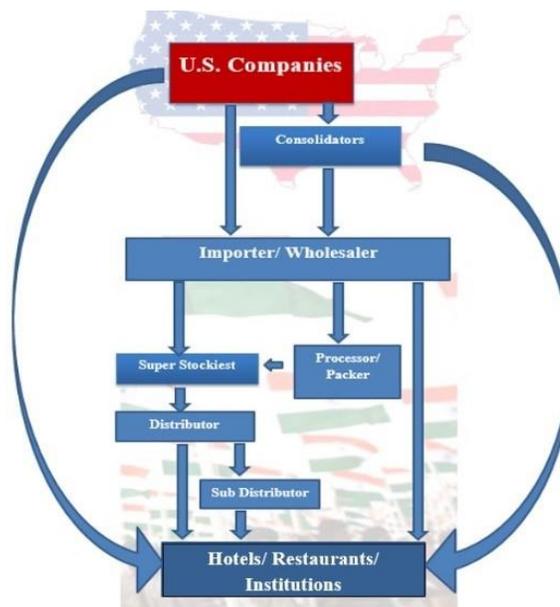


Figure 02: Distribution Channels

Consumer attitudes are shifting toward quality and healthier eating habits, propelled in part by the pandemic. Established economic trends including greater household income and increased tourism

have resulted in an Indian population willing to try new and innovative food and beverage products. However, highly complex regulatory requirements, recurrent food labeling laws, continued long-term rupee depreciation, and the lack of cold chain in select areas continue to prevent large-scale market growth.

Sub-Sector Profiles

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

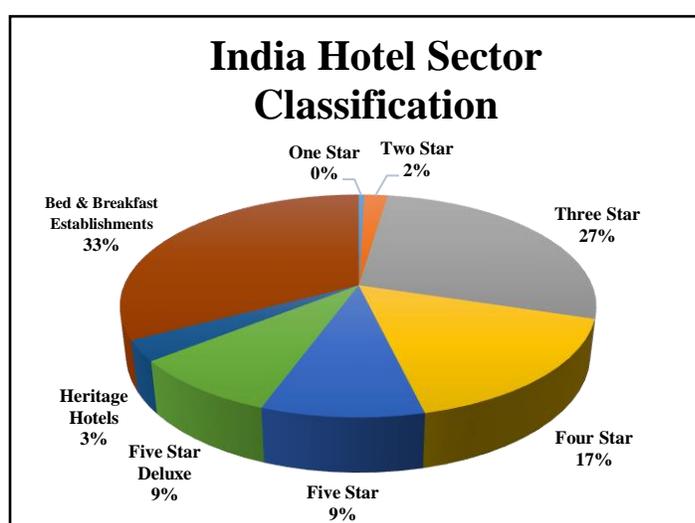


Figure 03: Classification of Indian Hotels

Source: Ministry of Tourism, Government of India

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

Restaurants: A large percentage of the restaurant sector in India is “unorganized” consisting of small restaurants and street-side stalls. According to the Federation of Hotels and Restaurant Associations of India, approximately 1,137 restaurants are in the “organized” or modern sector, defined as restaurants with more than twenty seats and a restaurant menu. Within this organized restaurant sector, there are an estimated 63 foreign restaurant brands across India.⁹ The Indian foodservice delivery sector has grown to \$5.2 billion in FY 2020 and is expected to expand to \$13 billion by FY 2023.¹⁰ In addition, the Indian cloud kitchen market is also expected to grow fivefold from \$400 million in 2019 to \$2 billion in 2024. Hyperlocal delivery and cloud kitchens have also played a vital role and sustained most of the restaurants and hotels during the first and

⁹ See: GAIN [IN7160](#).

¹⁰ Source: Kuckreja, Samir, and Reid, Jasper, 2021. [India Food Service Delivery Report 2021 Summary](#).

second COVID-19 pandemic waves.¹¹

Institutional: The institutional food service sector is traditionally comprised of catering services for events, the Indian armed services, railways, shipping industry, airlines, hospitals, schools, government meal programs, prisons, and offices. Food costs are a major consideration, and most food and beverage procurement requirements are purchased through local importers or distributors rather than directly from the product origin. COVID-19’s impact on the institutional sector was severe. However, certain traditional institutional events and practices are returning, such as in-person meetings, sporting events, conferences, expositions, and other business events. India’s domestic airline industry, which was completely shut down during the first COVID-19 wave, has exhibited tremendous recovery in 2021.

SECTION III: COMPETITION

High import duties, labeling requirements, import restrictions and the depreciating rupee are major points of deliberation for Indian businesses who import foods and beverages. India’s domestic industry remains the primary competitor for U.S. foods and beverages within the HRI sector. In addition, many third-country competitors enjoy seasonal as well as freight and preferential trade advantages over the United States due to their proximity to India and lower prices.

Table 2. India: Competition in Major Product Categories

Product Category	Total Imports (\$ Million) CY 2020	Major Supply Sources	Strengths of Key International Suppliers	Advantages (A) and Disadvantages (D) of Local Suppliers
Animal or Vegetable Oils, Fats and their products	10,598	Indonesia Argentina Ukraine Malaysia Russia	Major production hubs and competitive prices	Local production is inadequate, and more than 40 percent of total edible oil consumption is dependent on imports. (A)
Leguminous Vegetables, Dried Shelled/Pulses	1,563	Canada Myanmar Mozambique Tanzania Australia	Price competitiveness, freight advantage and the ability to produce specific varieties of pulses in demand in India.	Historically about 20 percent of the total consumption demand for pulses was met through imports. However, back-to-back record domestic harvests resulted in the GOI imposing severe import restrictions, including quantitative restrictions on imports of peas and other pulses, which have slowed down imports since 2018 (D).
Edible Fruits and Nuts; peel of citrus fruit or melons	3,189	USA Afghanistan UAE Tanzania Benin	Growing market demand, preference for specific quality, popular at certain holidays	Domestic production of some of the major fruits and nuts is insignificant (A)
Sugars and sugar confectionery	756	Brazil Germany Netherlands USA South Africa	Price competitiveness	India is a large producer, consumer and usually a net exporter of sugar (D)
Coffee, Tea, Mate, and Spices	797	Vietnam Indonesia Nepal Madagascar Sri Lanka	Price competitiveness and proximity to India	Most imports are for re-export
Dairy products: birds’ eggs; natural honey; edible products of animal origin	37	France New Zealand Germany Turkey Belgium	Price competitiveness, sanitary requirements	Domestic production is not keeping pace with demand (A). The Indian import protocol is very stringent and effectively prohibits imports of many products from the United States. (D)

¹¹ Source: HVS. [HVS Monday Musings: Growth of Cloud Kitchens in India](#). July 25, 2021.

Source: Trade Data Monitor

SECTION IV. BEST PRODUCT PROSPECTS:

Table 3A: Products Present in Market and have Good Sales Potential			
Product Types	Import Value (\$ Million) CY 2020	U.S. Market Share (%)	Impacting Factors
Almonds (Almonds, Fresh or Dried, In Shell and Fresh Or Dried, Shelled)	926	86.81	United States with 87.81 percent market share of imported almonds has a supplier advantage.
Chocolate & Cocoa Products	178	0.76	Strong preference for recognized brands. Competition from domestic & international suppliers.
Beverages, Spirits and Vinegar	641	47.68	Increased consumption and lack of domestic production.
Fresh Fruits (Primarily Apples)	200	20.17	Counter-season supplier advantage. Brand preference for U.S. apples.

Source: Trade Data Monitor

Table 3B: Products Not Present in Significant Quantities but have Good Sales Potential			
Product Types	Import Value (\$ Million) CY 2020	U.S. Market Share (%)	Limiting & Impacting Factors
Tree nuts (Except Almonds)	1,457	3.19	India imports a large variety of other types of tree nuts such as pistachios from Iran and other competing regions, thus limiting exports from the United States. Lack of awareness for tree nuts such as pistachios and pecans.
Leguminous Vegetables, Dried Shelled/Pulses	1,563	0.84	About 20 percent of India's total consumption demand for pulses previously was met through imports. However, back-to-back record domestic harvests in last two years has resulted in GOI imposing severe import restrictions, including quantitative restrictions on imports of peas and few other pulses have slowed down imports of pulses since 2017. But, India being a protein consuming country will always have a requirement for pulses, whose demand may not be always met by local production.
Sugars and sugar confectionery	756	3.06	India is a large producer, consumer, and exporter of sugar. Indian consumers consume many sweets, so innovative and new products in sugar confectionery are always preferred by consumers of all ages and class.
Fresh Fruits (Except Apples)	138	2.47	Seasonal availability of domestic fresh fruits and imports from other preferred destinations limit U.S. imports
Poultry Meat & Products. (ex. eggs)	0.3	36.63	Recently gained market access which offers a large opportunity for the US poultry industry.

Source: Trade Data Monitor

Table 4: India: Top Consumer-Oriented Product Imports					
Table 4A: Top Consumer-Oriented Products Imported from the World			Table 4B: Top Consumer-Oriented Products Imported from the United States		
Description	US Dollars (Millions)		Description	US Dollars (Millions)	
	2019	2020		2019	2020
Cashew Nuts, Fresh or Dried, In Shell	1,101	1,080	Almonds, Fresh or Dried, In Shell	701	797
Almonds, Fresh or Dried, In Shell	802	874	Apples, Fresh	59	40
Apples, Fresh	246	200	Walnuts, Fresh or Dried, In Shell	14	20
Dates, Fresh or Dried	163	226	Almonds, Fresh or Dried, Shelled	7	7
Pepper of Genus Piper, Neither Crushed nor Ground	93	85	Food Preparations: food flavoring material, soft drinks other than sharbat, custard powder, other diabetic foods	23	17
Others	2,744	2,674	Others	174	99
Total	5,149	5,139	Total	978	980

Source: Trade Data Monitor

Products Not Present Because They Face Significant Barriers:

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

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

SECTION V. POST CONTACT

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- [FAS India Exporter Guide](#)
- [FAS India Plant-based Meat Substitutes Market](#)
- [Food and Agricultural Trade Show Calendar 2021](#)

Attachments:

No Attachments