

Required Report: Required - Public Distribution

Date: January 04,2021

Report Number: IN2020-0204

Report Name: Exporter Guide

Country: India

Post: New Delhi

Report Category: Exporter Guide

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Report Highlights:

The COVID-19 pandemic and ensuing nationwide lockdown has impacted local demand for imported food and agricultural products. The pandemic has shifted consumer preferences towards healthy/mindful eating habits through the incorporation of immunity boosting, protein-rich, natural, vegan, and organic food products. This consumption shift along with a sharp increase in online shopping presents new opportunities for U.S. exporters. India is a rapidly growing market for imported food products but it remains a difficult market to navigate with high tariffs, a challenging regulatory environment, and competition from foreign and domestic suppliers.

QUICK FACTS

Summary: The COVID-19 pandemic negatively impacted country's economy this year. However, according to International Monetary Fund (IMF), the Indian economy is expected to recover by 8.8 percent in 2021. India's bulk, intermediate, consumer-oriented, and agricultural related imports have remained virtually unchanged from USD \$25.47 billion in 2015 to \$25.29 billion in 2019, while exports grew from \$35.20 billion to \$39.09 billion during the same period.

Figure 1: India: Agricultural Imports (2015-2018)

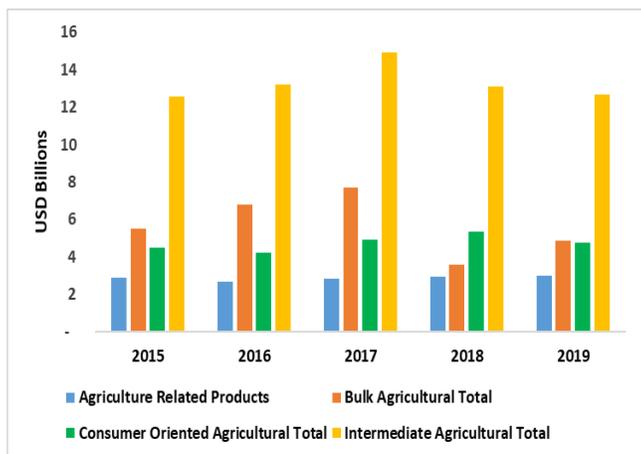
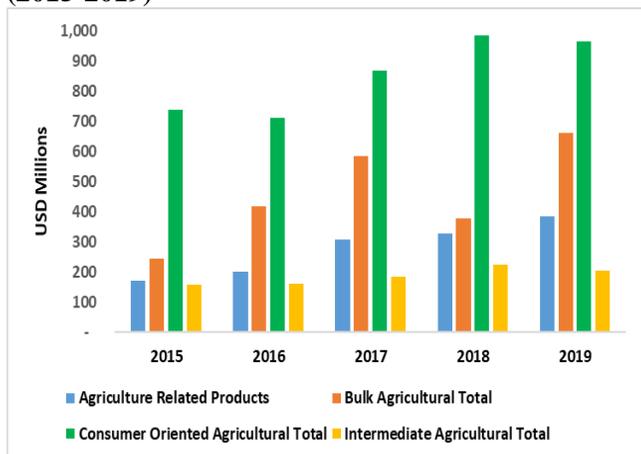


Figure 2: India: Imports from the United States (2015-2019)



Source: Trade Data Monitor

Total Agricultural Imports (USD billion) / U.S. market share in 2019	\$25.29/9 percent
Total Consumer Food Imports (USD billion) / U.S. market share in 2019	\$4.74/ 20 percent
Total Bulk Agricultural Imports (USD billion) / U.S. market share in 2019	\$4.86/14 percent

List of Top Agricultural Imports from the United States:

- **Bulk Agricultural:** Cotton, Pulses
- **Intermediate Agricultural:** Essential oils, Feed & Fodders NESOI, Vegetable Oils NESOI, Planting Seeds, Sugars & Sweeteners
- **Consumer-Oriented Agricultural:** Tree Nuts (Almonds), Fresh Fruits (Apples), Prepared Foods

SWOT ANALYSIS:

Strengths	Weaknesses
<ul style="list-style-type: none"> • Consistent supply, scalability of production. • U.S. products perceived as safe and high quality. • Diverse range of food and agricultural products. 	<ul style="list-style-type: none"> • Unwillingness of U.S. exporters to meet Indian importers' requirements (mixed/ consolidated shipments, changing product specifications to conform to Indian food laws, etc.). • Preferential trade agreements with competing countries that supply a similar range of products. • Lack of awareness about the range and value of U.S. products.
Opportunities	Threats
<ul style="list-style-type: none"> • Growth potential for imported ingredients and intermediate products. • Growing middle class and increased exposure to international products and western lifestyle. • Changing buying habits and a preference to purchase for quality over price. • Emerging consumer trends favor healthier, natural, and organic food options. • Increased presence of international tourists. • More foreign restaurants and brand franchises. 	<ul style="list-style-type: none"> • High tariffs, persistent sanitary and phyto-sanitary requirements that effectively prohibit or restrict imports, and competition from other countries. • Fluctuating value of the Indian Rupee against the US Dollar. • Stringent food regulations for biotech foods, ingredients, and certain food additives. • Competition from countries with geographical proximity and a freight advantage. • Product substitutes and competition from local and international suppliers. • U.S. exporters are not ready for consolidated/ small orders. • Labelling requirements.

SECTION I: MARKET SUMMARY

General Economy and Policy Environment:

While India's gross domestic product (GDP) contracted by 10.3 percent in 2020 due to COVID-19, the IMF expects the Indian economy to recover with 8.8 percent growth in 2021¹. As the world's second-most populous country, India is expected to overtake China by 2026 in population and will continue to grow through 2050. This growth is supporting the rise of a younger population (35 years old and below) that represents 65 percent of India's total population. This young population is composed of "globally-fluent," aspirational consumers who seek a greater range of premium food products that reflect their values. This consumer group will be key to sustained food import growth in India for the years to come.

According to the World Bank's [Doing Business 2020 Report](#), India improved its ease of doing business ranking to 63 (out of 190 countries). However, the imposition of high tariffs, recurrent policy changes, and new import requirements imposed by the Government of India (GOI) continue to challenge longstanding exporters of food and agricultural commodities to India, including the United States. U.S. agricultural exports to India have increased by 69 percent to \$2.2 billion in 2019 from \$1.3 billion in 2015.² This growth is fueled by increased demand for consumer-oriented foods by Indian consumers. In the past, high value food imports including tree nuts, fresh fruits, and packaged foods were mostly available only for the affluent, but this tendency has since shifted. Now, middle-class consumers are also purchasing high-value food products for their health benefits. Imported food products such tree nuts and dried fruits used to be consumed primarily during the local holiday season including Diwali (during October/November) Christmas, and New Year's Day, but these products are now consumed throughout the year.

The COVID-19 pandemic has significantly shifted consumer behavior and preferences. India's nationwide lockdown kept families at home, resulting in a surge in online grocery purchases through Indian e-retailers including Amazon India, Big Basket, and Grofers, among others. Like much of the world during the onset of the COVID-19 pandemic, Indian consumers engaged in stockpiling and impulse buying of health foods and immunity-boosting products. While food hoarding may have ended, impulse buying has remained high. According to local reports, the Indian e-grocery market is expected to expand from \$1.9 billion in 2019 to \$3 billion in CY 2020, and may exceed \$18 billion by 2024³.

SECTION II: EXPORTER BUSINESS TIPS

India is a potentially advantageous and diverse export market for U.S. food and agricultural goods. The COVID-19 pandemic has shifted price-sensitive Indian consumers hoping to boost their immune systems to more high-value food consumption habits. Social media, food influencers, and increased consumer awareness on food and health are the biggest contributors to shifting consumer demand toward high-value international foods like tree nuts, fresh fruits, confectionery goods, and other packaged products.

¹ IMF World Economic Outlook Reports - <https://www.imf.org/en/Publications/WEO/Issues/2020/09/30/world-economic-outlook-october-2020>

² Source: Trade Data Monitor

³ Mint: [How e-groceries have finally come of age](#)

India's food retail market is among the world's largest. Food retail has expanded at a fast pace, with an increase in the number of modern retail store chains such as Foodhall, Reliance Fresh, and Modern Bazaar, delivery apps like Zomato and Swiggy, the entry of convenience store chains and a growing e-retail business, which all supply premium and exotic gourmet food items. Many Indian consumers are now interested in trying new cuisines, different flavors, and better-quality food products. As such, Indian food importers are competing to access global supply chains to source high-quality food products and ingredients.

The Indian food service sector is also witnessing a major demand shift with a growing number of foreign nationals and international tourists, more multinational restaurant chains, and greater awareness of foreign cuisines. Moreover, Indian consumers with global exposure are willing to innovate and try new cuisines and culinary practices. However, the COVID-19 pandemic has forced the Indian foodservice sector to overhaul its logistics, delivery, and food procurement systems. As a result, more consumers are demanding high-quality gourmet food from home through delivery services, while maintaining high hygiene and cleanliness standards.

Entry Strategy:

Key factors to consider before entering the market:

- **Can your product come into India and comply with the local laws?**
 - ✓ Determine if your product has market access in Indian commerce.
 - ✓ Study India's varied laws and regulations, particularly those pertaining to foods and beverages.
 - ✓ Review FAS policy and market reports and consider engaging a market research firm to assist with opportunities and challenges.
- **Find the Right Partner**
 - ✓ Identify a reliable importer/distributor who services in the food retail sector.
 - ✓ Avoid conflicts of interest.
 - ✓ Consider whether participating in an Indian or regional trade show would be an effective means of identifying a key importer/distributors/partner ([USDA endorsed trade shows](#)).
 - ✓ Consider if collaborating/participating in USDA-endorsed promotional activities would be an effective way to create and/or increase market awareness and penetration.
- **Secure Payment Terms**
 - ✓ Until a successful working relationship is established, exporters may wish to consider vehicles such as an irrevocable Letter of Credit, advance payment, or payment at sight.

FAS India does not have the authority to mediate contractual disputes, or to serve as a collection agent when differences over payment or other commercial issues arise. For information about local legal services, please refer to GAIN report [IN 6155](#).

Distribution Channel	Margins
Clearing and forwarding agents	2-6 percent
Wholesalers	2-6 percent
Super Stockists	3-7 percent
Distributor	7-12 percent
Importers	5-35 percent
Retailer	15-60 percent

Source: USDA/FAS Analysis

Local Business Customs and Trends

Although Hindi is India’s national language, most Indian officials and businesspeople have an excellent command of English. Further, many Indian businesspeople have traveled internationally and are familiar with western culture. Note that the working cycle for most Indian businesses follows the United States with Saturday and Sunday taken off. Traditionally, business is not conducted on any religious and national holidays that are observed throughout India. Verify holiday information with the United States Embassy or Consulates before scheduling a visit ([U.S. Embassy and Consulate India Holiday Calendar](#)). Indian executives prefer late morning or afternoon appointments between 11:00 a.m. and 5:00 p.m.

India’s climate is often hot for most of the year; it is advisable to wear lightweight clothing to avoid discomfort. Men should wear a jacket and tie and women should wear corresponding attire when making official calls or attending formal occasions. Always present a business card when introducing yourself and refer to business contacts by their surname, rather than by their given name. Use courtesy titles such as “Mr.,” “Mrs.,” or “Ms.” Talking about your family and friends is an important part of establishing a relationship with those involved in the business process. Hospitality is also a key part of doing business in India. Most business discussions will not begin until chai (tea), coffee, or any soft drink are served, and until there has been some preliminary “small talk.”

Advertising and trade promotion in India are creative and well developed. Advertising through television is especially popular, and with the growth of cooking shows, there are often opportunities to co-brand or market products both indirect and direct with the shows or celebrity television chefs. India's digital and social media ebullience is well known, with 504 million active internet users, and 820 million people expected to own smartphones in the next two years. With increased access to internet and mobile technologies, companies can further use social media applications as a cost-effective and far-reaching marketing tool to create awareness and increase market penetration of new imported products⁴.

General Consumer Tastes and Preferences:

- The COVID-19 pandemic has changed local attitudes toward packaged food items, including instant/ready-to-eat products. This trend is notable among younger consumers along with urban,

⁴Mint: [India now has over 500 million active Internet users: IAMAI](#)

middle-class, and working-class consumer groups. Most packaged food items are sold in small containers to keep pricing low and to accommodate limited storage space.

- The pandemic has renewed interest in home cooked meals. Home-cooked foods including baked items are drawing significant attention on Indian social media, presenting an opportunity for exporters interested in introducing new baking ingredients to Indian consumers.
- More consumers are seeking for healthier lifestyles through the incorporation of natural and organic food options. Immunity boosting products like tree nuts and fresh fruits are also a top purchase priority for Indian consumers.
- The COVID-19 pandemic has increased demand for vegan and vegetarian food products due to its perceived health benefits. According to local reports, India will experience a major increase in the availability of “all vegan” food products, including vegan cheese, condiments (e.g. mayonnaise) and vegan meat replacements, within a few years.
- Although modern retail outlets are growing rapidly, most Indian consumers do their grocery shopping at small, neighborhood shops (known as *Kiranas* and similar to mom-and-pop stores) and pushcart vendors.
- Customers using e-retail and online food delivery apps exponentially grew during the nationwide COVID-19 lockdown. Consumers remain attracted to online food purchasing due to its reliability, speed, and safety.
- An estimated 30-35 percent of the Indian population remains vegetarian in accordance with the tenants of Hinduism. Most of the Indian population does not consume non-vegetarian food (i.e. chicken, lamb/mutton, etc.) during special days or religious observances. India’s large Muslim population (estimated at 201 million) does not consume pork and eats Halal.

SECTION III: IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

The Government of India’s Food Safety and Standards Authority of India (FSSAI) published the 2019 edition of the Manual for Food Imports that explains in detail the procedures and requirements to export food products to India. Please refer to [GAIN IN9074](#) for more information on the 2019 Edition of Food Imports Manual.

General Import and Inspection Procedures:

- Imported food products can be subject to multiple regulatory authorities that sometimes have overlapping responsibilities.
- Importers may need to have an import permit for some consumer-oriented food products that will subject the item to the Food Safety and Standards Authority of India (FSSAI) as well as Indian animal health or plant health scrutiny.
- Pre-Arrival Document Review (PADR) refers to the scrutiny of the documents submitted by the importer via their Customs House Agent (CHA) to authorized officers in advance, before the actual arrival of the consignment.
- Upon arrival of the consignment at the port, the CHA will file an integrated declaration form in the Customs Single Window Integration for Facilitating Trade (SWIFT)
- The CHA is required to furnish the following documents to the authorities for food and beverage products imported into India:
 - Bill of Lading

- Invoice
 - Packing List
 - Certificate of Origin
 - Health Certificate
 - Permits wherever applicable (Animal and Plant Quarantine)
 - Sanitary certificate
- Every imported food & beverage consignment should carry a label based on the requirements as specified in [Food Safety and Standards \(Packaging and Labelling\) Regulations, 2011](#) (Note: The labelling regulation has been revised and the draft regulation is out for public comments. The regulation will cover only labeling and display features, as packaging is now a separate regulation).
 - Upon clearance of the application, the applicant must pay the sampling fees for document revision, visual inspection, and product testing.
 - Customs authority, via its single window clearance system, also validates the declared value of the articles in the consignment.
 - Additional information on the import and inspection procedures is available on FSSAI’s website <https://www.fssai.gov.in>

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

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

India’s domestic industry remains the primary competitor for U.S. food, beverages and ingredients. In addition, many third-country competitors enjoy a freight and preferential trade advantage over the United States and can supply at lower costs.

Table 2. India: Top Consumer-Oriented Product Imports

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Table A: Top Consumer-Oriented Products Imported from the World			Table B: Top Consumer-Oriented Products Imported from the United States		
Description	USD (Millions)		Description	USD (Millions)	
	2018	2019		2018	2019
Cashew Nuts, Fresh or Dried, In Shell	\$1,704	\$1,101	Almonds, Fresh or Dried, In Shell	\$645	\$701
Almonds, Fresh or Dried, In Shell	\$763	\$802	Apples, Fresh	\$165	\$59
Apples, Fresh	\$304	\$246	Walnuts, Fresh or Dried, In Shell	\$24	\$14
Dates, Fresh or Dried	\$257	\$163	Almonds, Fresh or Dried, Shelled	\$12	\$7
Pepper of Genus Piper, Neither Crushed nor Ground	\$136	\$93	Food Preparations: food flavoring material, soft drinks other than sherbet, custard powder, other diabetic foods	\$22	\$23

Others	\$2,185	\$2,338	Others	\$117	\$163
Total	\$5,349	\$4,743	Total	\$985	\$967

Source: Trade Data Monitor and FAS India Analysis

Table 3. India: Products Present in Market and have Good Sales Potential			
Product Types	Import Value (\$ Million) CY 2019	U.S. Market Share (percent)	Impacting Factors
Almonds	\$849	83.38	<ul style="list-style-type: none"> • United States with almost 83 percent market share of imported almonds has a supplier advantage.
Chocolate & Cocoa Products	\$196	1.75	<ul style="list-style-type: none"> • Strong preference for recognized brands. • Competition from domestic & international suppliers.
Beverages, Spirits and Vinegar	\$838	35.90	<ul style="list-style-type: none"> • Increased consumption and lack of domestic production.
Fresh Fruits (Primarily Apples)	\$246	23.98	<ul style="list-style-type: none"> • Counter-season supplier advantage. • Brand preference for U.S. apples.

Source: Trade Data Monitor and FAS India Analysis

Table 4: Products Not Present in Significant Quantities but have Good Sales Potential			
Product Types	Import Value (\$ Million) CY 2019	U.S. Market Share (percentage)	Limiting & Impacting Factors
Tree nuts (Except Almonds)	\$1,449	5.57	India imports a large variety of other types of tree nuts such as pistachios from Iran, walnuts from Chile, and other competing regions in direct competition to the United States. Lack of awareness and less consumer recognition for tree nuts such as pistachios, high tariff rates for walnuts & almonds and higher prices for pecans are limiting factors.
Leguminous Vegetables, Dried Shelled/Pulses	\$1,549	2.53	About 20 percent of India's total consumption demand for pulses was previously met through imports. However, back-to-back record domestic harvests in the last two years has resulted in the GOI imposing import restrictions, such as increased tariffs and quantitative restrictions on pea and pulse imports, which have essentially stopped U.S. exports to the market. India being a plant protein consuming country will always have a requirement for pulses, whose demand may not be always met by local production.
Sugars and sugar confectionery	\$410	5.47	India is a large producer, consumer and exporter of sugar. However, Indians consume many sweets, so innovative and new products in sugar confectionery are always in demand by consumers of all ages and class.
Fresh Fruits (Except Apples)	\$160	3.66	Seasonal availability of domestic fresh fruits and imports from other preferred destinations limit U.S. imports.
Poultry	\$0.8	20.23	Recently gained market access, offers a large

Meat & Products. (ex. eggs)			opportunity for the US poultry industry. However, pricing, high tariffs and the regulatory environment may limit sales.
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Source: Trade Data Monitor and FAS India Analysis

Products Not Present Because They Face Significant Barriers:

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

Effective July 8, 2006, the Government of India's (GOI) Foreign Trade Policy (2004-2009) specified that all imports containing products of modern biotechnology must have prior approval from the Genetic Engineering Approval Committee (GEAC), Ministry of Environment and Forests. The policy also made a biotech declaration mandatory at the port of entry. Soybean oil and canola oil derived from select events are the only biotech food products currently approved for import. For more information on India's biotech import policy, please see: [IN2019-0109 Agricultural Biotechnology Annual 2020](#).

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Product Category	Total Imports (\$ Million) CY 2019	Major Suppliers	Strengths of Key International Suppliers	Advantages (A) and Disadvantages (D) of Local Suppliers
Animal or Vegetable Oils, Fats and their products	9,854	Indonesia Malaysia Argentina Ukraine Nepal	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	1,549	Canada Myanmar Tanzania Mozambique Brazil	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 in the last two years has 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	3,076	USA Afghanistan Benin UAE Côte d'Ivoire	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	410	Brazil South Africa Netherlands USA Germany	Price competitiveness	India is a large producer, consumer and usually a net exporter of sugar (D)
Coffee, Tea, Mate and Spices	725	Vietnam Indonesia	Price competitiveness and proximity to India	Most imports are for re-export

		Sri Lanka Nepal Afganistan		
Dairy; birds' eggs; natural honey; edible products of animal origin	35	France Germany Italy Denmark United Kingdom	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)

Source: Trade Data Monitor and FAS India Analysis

U.S. BASED STATE REGIONAL TRADE GROUPS (SRTGS) / COOPERATORS PROMOTING FOOD AND AGRICULTURAL COMMODITIES IN INDIA

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

USEFUL INDIAN AGENCIES OF THE CENTRAL GOVERNMENT

Indian Agencies	Website	Lead Role
Department of Animal Husbandry and Dairying (DAHD)	dahd.nic.in	Regulates imports of livestock and livestock products into India.
Department of Agriculture, Cooperation and Farmers Welfare	agricoop.nic.in	Regulates imports of plants and plant products into India.
Plant Quarantine Organization India (PPQ)	ppqs.gov.in	Inspection and regulation of the imports of plants and plant products.
Food Standards and Safety Authority of India (FSSAI)	https://www.fssai.gov.in/	Regulates manufacturing, processing, distribution, sale and import of food with the aim of ensuring safe and wholesome food for human consumption.
Ministry of Food Processing Industries, India (MoFPI)	https://mofpi.nic.in	Regulates and promotes the food processing sector in India.

LIST OF INDIAN TRADE ASSOCIATIONS

Indian Trade Association	Website
All India Food Processors Association (AIFPA)	http://www.aifpa.net/
American Chambers of Commerce and Industry (AMCHAM India)	http://www.amchamindia.com/
Associated Chambers of Commerce and Industry (ASSOCHAM)	http://www.assochem.org/
The Advertising Standards Council of India (ASCI)	https://ascionline.org/index.php/mission.html
Compound Livestock Feed Manufacturers Association (CLFMA)	http://www.clfmaofindia.org/
Confederation of Indian Trade and Industry (CII)	http://www.cii.in/
Council of Leather Exports (CLE)	http://www.leatherindia.org/
Federation of Hotels and Restaurants in India (FHRAI)	http://www.fhrai.com/
Forum of Indian Food Importers (FIFI)	http://www.fifi.in/
Federation of Indian Chambers of Commerce and Industry (FICCI)	http://www.ficci.com/
Indo-American Chambers of Commerce (IACC)	http://www.iaccindia.com/
Indian Dairy Association (IDA)	http://indairyasso.org/
Indian Importers Chambers of Commerce and Industry (IICCI)	https://www.indianimporterschambers.com/
Indian Sugar Mills Association (ISMA)	http://www.indiansugar.com/
National Restaurant Association of India (NRAI)	http://nrai.org/
Retailers Association of India (RAI)	http://www.rai.net.in/
The Solvent Extractors Association of India (SEA)	http://www.seaofindia.com/
United State India Business Council (USIBC)	https://www.usibc.com/

SECTION VI. POST CONTACT:

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Attachments:

No Attachments